Granular Permissions or Access Groups

Background – what is granular permission or access groups

There is no functionality in the Agents Services Account (ASA) that allows agents to control who in their agencies can access client information. Currently all staff within a practice have access to all client records and tax services if they know the right client identifiers. For agencies with high profile clients', they may want to restrict who has access to their records for confidentiality reasons.

As a result of feedback from agents, HMRC are developing functionality to help agents manage access.

Who is it for?

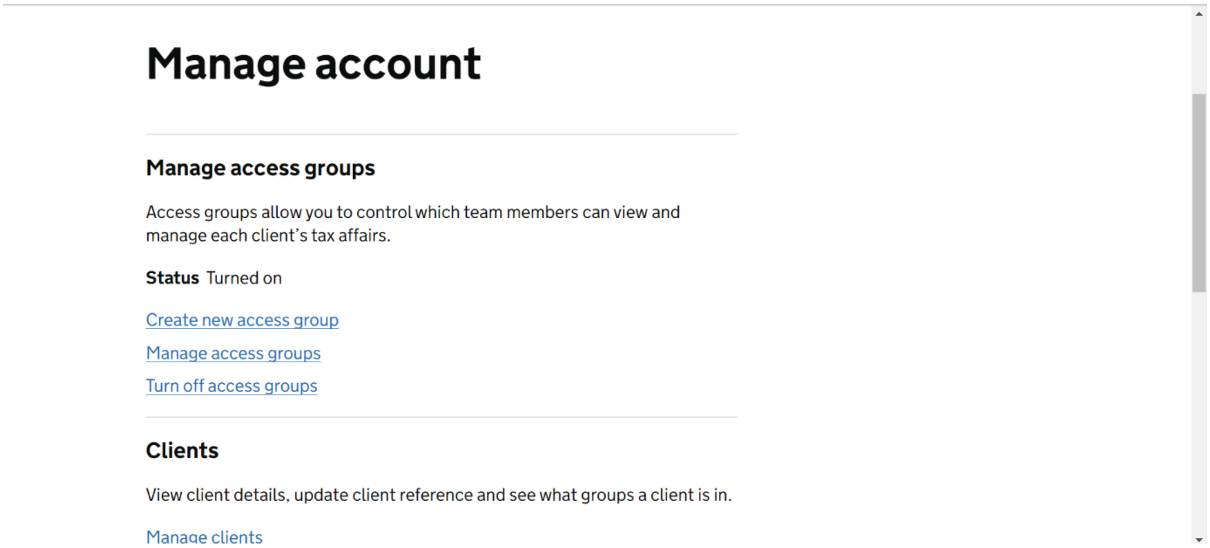
The functionality is aimed at agents with up to 1000 clients.

It is not currently available to larger agencies. We do not recommend agents with over 1000 clients to use this feature due to problems you'll experience with the user interface and potential issues retrieving your client data. We are exploring what could be possible, but we are juggling lots of constraints (mainly financial and time).

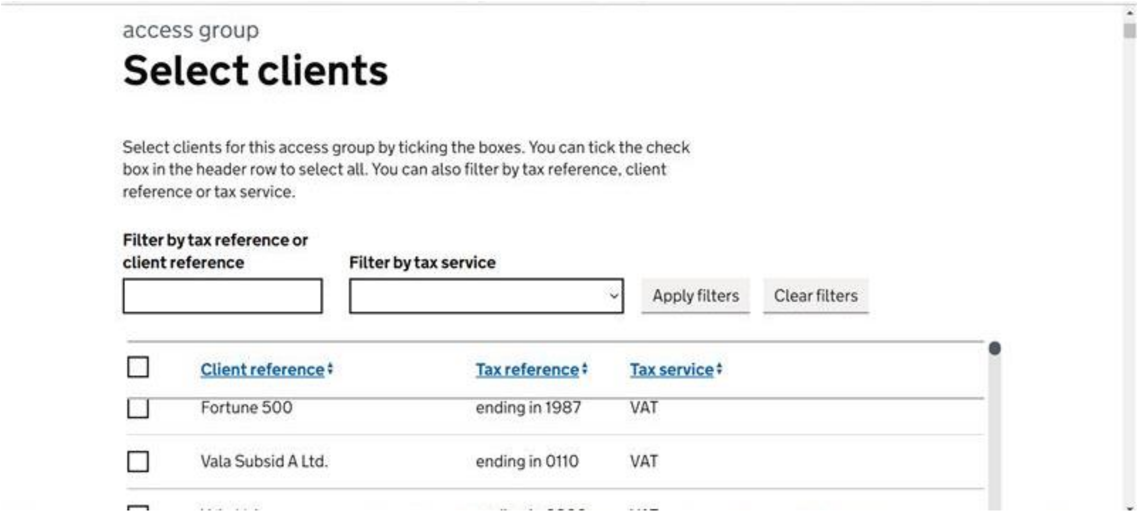
What will it do?

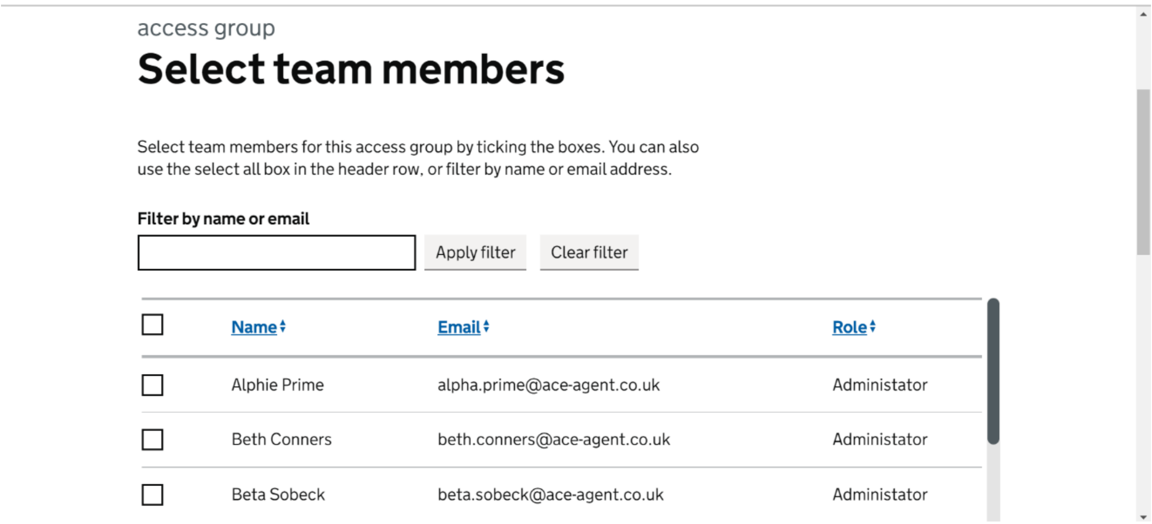
The functionality will allow agents to control who can access client records.

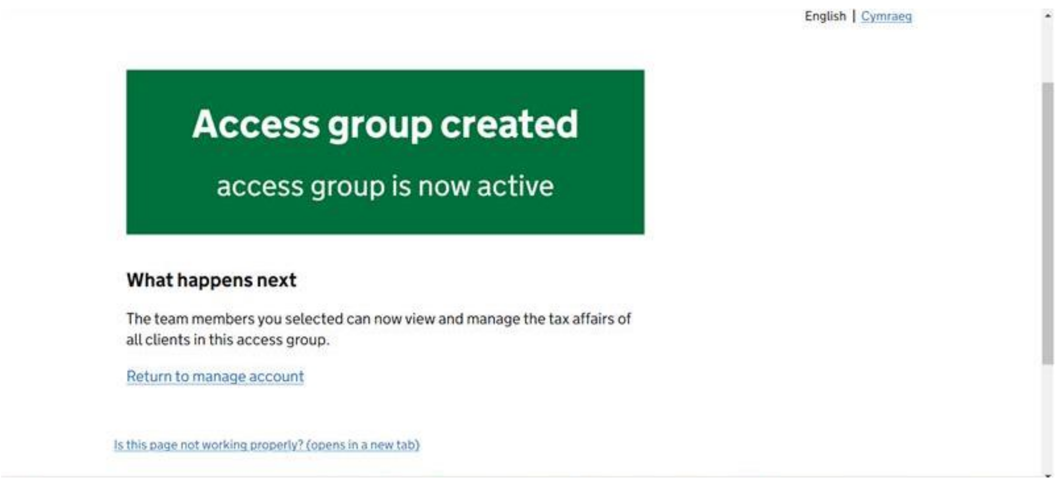
Only administrators will have access to this new feature from the 'Manage Account' section on the ASA home page once you've logged in.



Administrators within a practice will have the ability to create access groups. They will then be able to select and add team members and clients to the same group. Only team members in that group can access the clients added to that group.







Clients can be searched and filtered by their name, tax reference and tax service. [Screenshots]

If agencies **do not** want to use this functionality, they can simply not turn the feature on. It only comes into effect once it turned on. [screenshots]

What it will not do?

The functionality allows agents to control who in their agency has access to client records which will allow them to make changes, save and submit.

It does not allow them to restrict the permissions any further where some employees can have read only access, edit only or submit only.

User research and testing

We have consulted several agents to gather requirements and are testing this new feature with tax agents of varying size and feedback so far has been positive.

What if I do not want to use it?

This feature will be delivered in the Agent Services Account turned off. If you do not want to use this functionality there are no actions for you and you can continue to use the Agent Services Account in the same way.

If at any time you do wish to use the functionality you can simply go into 'Manage your account' at the top of the ASA homepage and turn the feature on.

What if I change my mind and I no longer want to use the feature?

You can turn this feature on and off at any time.

If you choose to turn this feature off after you have created any groups, these groups will be saved so that when you turn the feature back on all groups will still be there.

What if this feature is accidentally turned on or off?

If this feature is accidentally turned on and no groups have been created the ASA will continue to work in the same way it does now, where employees can still access all client records. The only difference is that the pages in 'Manage your account' will look different and the screens you would normally see won't be there. You will be able to turn it back off again.

If this feature is accidentally turned off and you have created groups controlling employee access to client records, you will be able to turn the feature back on. Any groups you created will still be there, as long as you completed creating them. Any assigned employees and clients will also still be there.

If you accidentally turn the feature off and have not completed creating groups or assigning employees or clients to them then the groups will be lost.

Help and support

Guidance will be available in the help and guidance pages from the Agent Services Account homepage.

What do I need to do now?

Identify who the administrators are in your practice.

When will it be available?

The plan is to release the functionality to a small number of agents at first, as part of a private beta to test everything is working as it should. If successful, it will be rolled out to the wider agent community shortly after.