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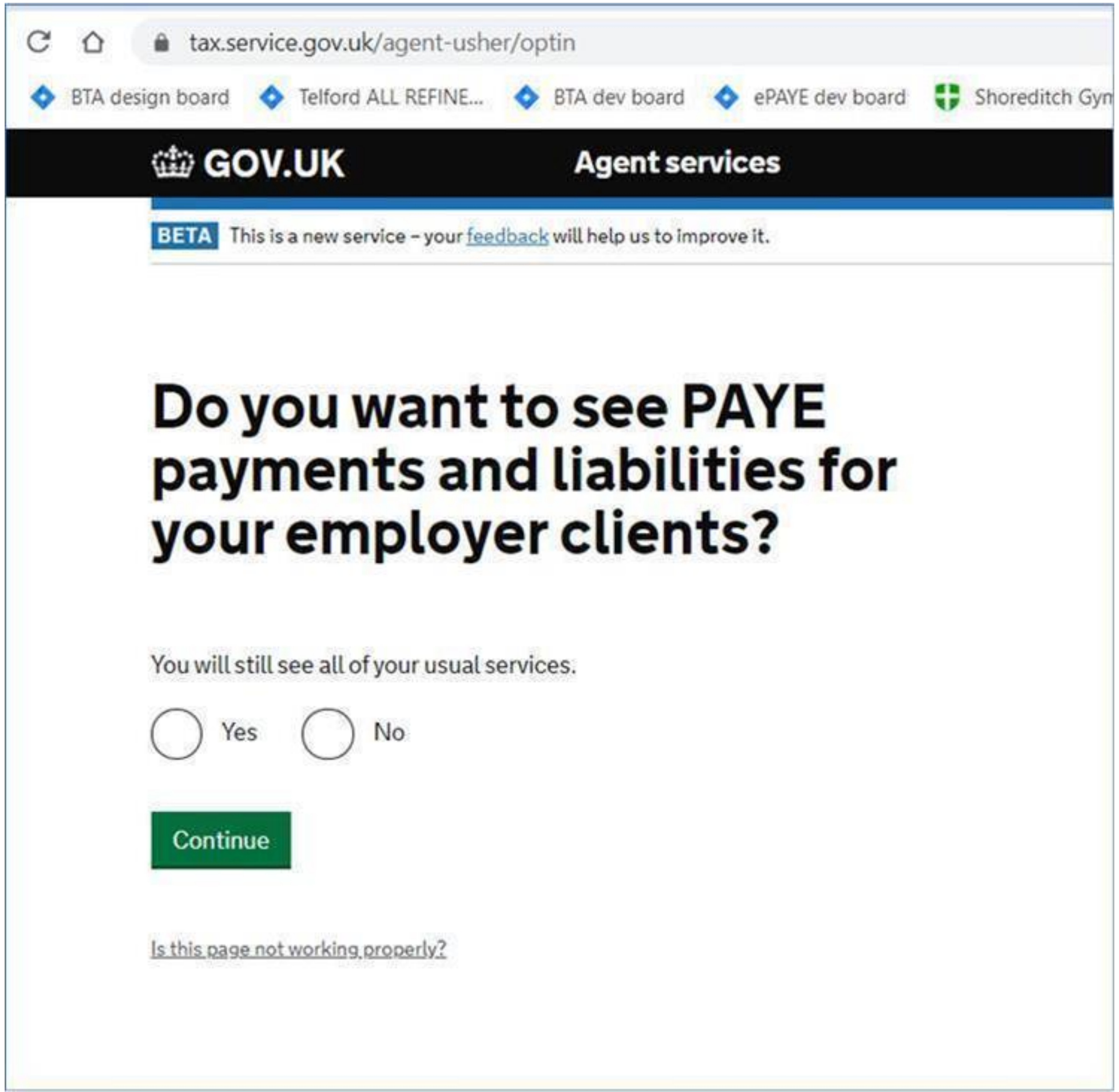
PAYE online for Agents
Liabilities and Payments viewer

Jacky Hanley

The advert is the entry point to the service …



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Who can opt in to see the liabilities and payments data? (1)

An agent can opt in if they see the advert

The advert is shown to agents who meet **all** the following criteria

1. The agent's Government Gateway account must be that of "Administrator" - not "Assistant (now called Standard User)"
2. The user ID and password that they log in with must have the PAYE online for agents' enrolment
3. The agent must have at least 1 employer client
4. The agent must have fewer than XXX employer clients (value presently set at 500)
5. The Government Gateway identifier must be included on a list that was last updated in October 2018
6. The daily cap hasn't been met. (This restricts the number of agents who can opt in on any given day. Currently set to 700 per day)

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Who can opt in to see the liabilities and payments data? (2)

More detail on Points 1 and 5

1. The agent's Government Gateway account must be that of "Administrator" - not "Assistant (now called Standard User)"

We will be asking ADDAG for their view on the proposal that we should remove this constraint. (This change is subject to obtaining funding)

5. The Government Gateway identifier must be included on a list that was last updated in October 2018

This list was the mechanism for ascertaining how many clients were linked to the agents Gateway account. It used to be updated weekly (so was very accurate) but hasn't been updated since October 2018. This means that agents that started acting for employers in the last 3 years currently don't see the advert. And when, in bullet 4, we say that the value is presently set at 500, that means the number of clients on that list is 500 or fewer. Clearly, some firms have grown since then, and some have fewer clients now.

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New employer client list

Once an agent has opted in to see the liabilities and payments data they will be presented with a new-look client list

Clients only appear on this list if

- HMRC has received an FBI2 only, or
- HMRC has received an FBI2 and a 64-8, or
- Agent has used Online agent Authorisation (in the portal) to get authorised

A 64-8 alone is not enough in the employer space to get access to any data online

The client list currently requires users to confirm that they still act for each client. This is burdensome, and especially so for larger agents.

We hope to remove that requirement – but not yet known how soon that can be achieved

Rather than wait, we will make the service available to larger agents – but some agents may choose to not use it

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User Research

- 4 agents kindly took part in the testing 2 weeks ago.
- Purpose was to understand whether the client list is usable for larger agents
- Agents desire for access to the data outweighed the irritation of some grit in the service
- There are improvements that should be made to the client list – specifically around removing the ‘Confirm’ process - and we will seek funding, but there are no certainties

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Rollout plan

Proposal is to

1. Extend to agents with 1000 of fewer employer clients - Tuesday 28 September
2. Extend to agents with 2000 employer clients – Tuesday 5 October
3. Remove size limit and allow any agents on “that list” to opt in - Tuesday 12 October
4. Remove use of “the list” so that any agent with employer clients can opt in – Tuesday 19 October (this *may* be delayed if it needs extra funding)

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Gov.uk information vs User guide

- GDS are unwilling to publish information about the agents' service while not all agents can opt in

- GDS also wont show screen grabs

- Because there are 6 new screens, we have produced a pdf user guide (2MB file size) to highlight what data can be found on each screen. Professional bodies may wish to share this with members
    - The liabilities and payments data is drawn direct from the IT system (ETMP) – it reflects the truth according to ETMP, although that may not be the same as an agent's expectations
    - The screens that agents see are the same as employers see; HMRC staff do not have access to the these screens

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