

Contact Centre helplines – a guide for agents

Number to call

Authorised agents with queries on clients' Self-Assessment or individual PAYE enquiries should call the Agent Dedicated Line (ADL) on **0845 366 7855**.

This line is open from 8.00 am to 8.00 pm Monday to Friday and 8.00 am to 4.00 pm on Saturday.

When you call the Agent Dedicated Line, your call will be:

- given priority and answered faster
- put through to an adviser who has at least 12 months experience
- transferred to technicians if necessary to ensure your query is answered wherever possible during your first call

This line is for authorised agents only; if we can't verify that you are formally authorised to speak to us on your client's behalf, we will not be able to proceed with the call. For this reason, it is important you don't give this number to your clients or use this number to call about your own tax affairs.

Agent Priority Line for tax credits

If you are handling tax credit issues on your clients' behalf, you can call the Agent Priority Line for tax credits on **0845 300 3943**. This line is open from 8.00 am to 8.00 pm Monday to Friday and 8.00 am to 4.00 pm on Saturday. This line is for agents only.

Best time to call / times to avoid

- Most lines of business are at their busiest on Mondays and on days following Bank Holidays, so avoid calling on these days when possible.
- We generally have more call handling capacity between 10 am and 11:30 am when staff resource is higher and call volumes tend to settle down.
- In the afternoon you may find it easier to contact us between 14:30 pm and 16:30 pm.
- P800 – tax calculations are issued in the period June to August; we may not be able to answer your call as quickly as we would like during this period as our Taxes advisers may be providing flexible support to the Tax Credit line.

Avoidable calls?

Although we welcome your call the following lists the most frequent occasions when a call could be avoided:

- **Calling the ADL for client information that we would expect the client to be able to provide**, such as employment data, pay and tax details, return information and so on. This occupies advisers who could otherwise be helping with queries where the agent is unable to get the answer elsewhere.
- **Progress chasing SA repayments** – the timescale we generally give for receiving a repayment is 14 working days, so please avoid calling to check progress before that date.
- **Progress chasing calls** - you can use our new post tracker for an update on when you can expect to receive a reply at <http://www.hmrc.gov.uk/tools/progress-tool/index.htm>. This includes 64-8s.

- **Breakdown of clients code numbers, which can be viewed online.** Some agents may be unaware of this, but the facility to view the form P2 – *notice of coding* online went live on 11 October 2011. You can view any P2s that have been issued since that date but still need to call us for the information if the P2 was issued before 11 October 2011. You can find more information on how to register for this service at <http://www.hmrc.gov.uk/agents/online/services.htm>
- **SA110 Tax Calculation Summary box 7 and 8 – underpaid tax included in your tax code.** Enquiries are often received in January around the SA deadline. You should be able to find this information from your client's P2.
- **Complaints that you have not been sent a copy of a client's tax code (form P2)** – you should have been made aware a year ago that a copy is no longer sent to agents as they can be viewed online.
- **Calls about CT or other areas with a specialist office that are not handled by the Taxes helpline.** We can only give you the appropriate telephone number to call to connect with the correct section. You can find a list of the numbers to call online at: <http://www.hmrc.gov.uk/agents/contacting-effective.htm>
- **Calls for clients where no authority is held or has been completed (64-8 - third party authorisations).** The easiest way to set up and manage your client authorisations is to use HMRC Online Services. This saves you and your client from having to complete paper forms and makes it easier for you to manage authorisations for all your clients online. You can find information on how to register for online services at: <http://www.hmrc.gov.uk/agents/authorisation/online.htm>
You can find the latest end to end process turnaround time for paper 64-8's at <http://www.hmrc.gov.uk/tools/progress-tool/index.htm> This is not an estimate of how long it takes HMRC to process your application, but an estimate of how long you should allow after posting your form to HMRC for your authorisation / application to become effective. We are unable to answer any specific enquiries from you regarding your client until this process is complete.
- **'Does my client need a Return?'** When your client is likely to owe tax on income other than employed earnings or pensions and you do not want that tax collected through your client's code number, you tick box 3, page TR5 of the SA return. This makes sure a return is automatically issued to your client the following year and in these cases we always need the return completing. It is an area that agents should be aware of and would help reduce numerous calls if a note had been kept that this box on the return had been completed.
- **Where the query cannot be dealt with by telephone.** That is where we have no mandate to process cases over the phone and in cases where HMRC has to be notified in writing. We are currently looking at what information we can accept over the phone and aim to enable a significant shift in business by telephone during this financial year. A list of the common areas that should be put in writing are included below.
- **Setting up PAYE schemes, or self employment records** are not appropriate for Taxes Contact Centre; agents need to phone the Employers helpline / Newly self employed line.
- **Calling the ADL about your own tax affairs.** You must use the general Taxes helpline for this.

SA Return amendments accepted by phone

(Amendment must normally be made within 12 months of the return filing date):

- Personal Allowance – amendment to date of birth.
- Married Couples Allowance – amendment to date of marriage / Civil Partnership, date of birth, transfer of allowances.

- Blind Persons Allowance – amendment to blind person’s relief entry.
- Correction of personal or employment/pension details. Note amendments to the tax figure are needed in writing.
- Fixed or Flat Rate expenses – 2008-9 and later years.
- Job expenses (limit £1,000) where entitlement has been established in principle for 2008-9 onwards. First time notifications must be made in writing and if we have sent a form P87, this must be completed regardless of the amount of expenses claimed.
- Subscriptions to professional bodies for 2008-9 onwards. Claims in excess of £2,500 must be made in writing.
- Benefits in Kind for 2008-9 onwards. Depending on the nature of the benefit we may ask you to put the details in writing.
- Interest received.

Enquiries needed in writing

The following lists the most common scenarios where we have to ask you to put your enquiry in writing:

- SA return amendments not listed above. All amendments to partnership pages are needed in writing.
- Claims for Overpayment relief.
- Penalty appeals.
- At the moment the first request for code NT must be in writing; no action can be taken from a telephone call.
- Certificate Of Residency – individuals can apply online at: <http://www.hmrc.gov.uk/international/personal.htm> or the request must be made in writing.
- If we send a payable order to an agent but there are no details of the client it relates to we are unable to resolve this on the phone and need the agent to write in.
- If a client has ceased self employment the date must be shown on the relevant return. This will prevent future returns being issued.