HM Revenue & Customs

Briefing Note - September 2014

Agent Online Self Serve and the Agents Strategy

Throughout the summer the Agent Online Self Serve (AOSS) project team has been conducting interviews (doing user research) with agents to inform the initial design and development of an alpha prototype. Here's an update on this work and our progress with the developing Agents Strategy.

Agent Online Self Serve

Availability of the new AOSS Service

We want to enable agents to use the new service as quickly as possible whilst we continue to test and improve its functionality. Our current thinking is that we will:

- Design AOSS so that agents will be able to access the new services using their Government Gateway credentials; and
- Provide a first service for testing with a small number of agent volunteers (known as a private beta release) that will enable agents to view liabilities and payments information for their employer PAYE clients.

We are developing our new digital services using 'Agile' methodology – the cross-government method of IT development that builds iteratively and puts user needs at its core - and these changes to our original plans have been made as a result of what agents have told us during user research and usability testing.

Listening to Feedback

Users (businesses and agents) told us that using identity assurance with authority management (for organisations and agents) to verify the identity of their firm was a convoluted process with too many steps, which wouldn't work if we wanted to get agents up and running on the new service as quickly as possible.

A number of agents also told us during testing that the ability to view liabilities and payments for their employer PAYE clients was really important to them, particularly since the introduction of Real Time Information (RTI) reporting.

Timescales
The exploratory ‘alpha’ phase for AOSS is expected to continue until mid/end October and we are still aiming to deliver the initial ‘private beta’ service referred to above by the end of the year.

We then expect to gradually ramp up the service and introduce it to more users (through what’s known as a public beta release) during 2015.

For the public beta release our aim is to provide:

- a new digital agents’ registration service;
- a new end to end digital authorisation process to make it easier for agents to let us know when they take on a new client; and
- a personalised agents’ “homepage” that will enable agents to view and manage their clients’ tax affairs in one place

Cleansing and Validating Client Lists
It’s really important that the new service contains accurate and up to date information about agents and their clients. As part of the transition to the new service HMRC will therefore be asking agents to check and cleanse their client lists.

We’ll work with agents’ representative bodies to find the best way to do this and we’re committed to making the transition as seamless as possible and to minimising any disruption to agents’ business.

It’s envisaged that, at full roll-out, all agents will have access to AOSS provided they have completed their data cleanse.

Third Party Software
We know that many agents use third party software so we will be working with software providers on the production of Application Programme Interfaces (API’s) to ensure that their products are compatible with (and can support) the new agents’ service. We’ll provide these to agents who use their own in-house products too.

Agents using Third Party Software will not be included in the initial (private beta) testing.

Agents Strategy
We are thinking about the way we will work with agents in future. We want to make the advancements in digital services work for our customers, and we know they can help us to improve speed of response and the desire to get certainty as soon as possible once a tax return has been filed.

Changes in the commercial market, evolving business expectations and the growth of software and virtual products for agents provide an opportunity for considering how we should work together in a new digital environment.

Our approach is that all digital services will be designed with agents as end users and we will work with them to continue to promote voluntary compliance.

We are developing options to:

- Work with agents to improve accuracy of returns before they are filed. At full roll-out, all agents will have access to AOSS (provided that they have completed their data cleanse) where they can view transactions, payments and liabilities etc. Those who meet higher-quality standards can be given access to enhanced services.
- Test compliance activity with agents. This includes testing risk triggers in third party software. This will help us to understand whether sharing triggers produces positive behaviour change and supports agents and taxpayers to get their returns right first time. We are also piloting transparent benchmarking to understand whether communicating benchmarks to a sector and informing them how similar businesses are performing, can help them get their return right.