

THE
Bookkeepers
SUMMIT 2011



**THE INSTITUTE
OF CERTIFIED
BOOKKEEPERS**

Agent Services

Why agents are important to HMRC

- 116,000 active agents in UK
- Agents represent some 8 million of our customers
- You help us get the job done !

Do it online

-  [Log in](#)
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Quick links

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Tax help for new & small businesses

Helpful videos & guides
And lots of other useful tax information

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News and updates

Top Stories and What's new
Latest News from HMRC

Budget 23 March 2011
Full details of the Chancellor's tax proposals

Employer PAYE Online filing news
The deadline for filing your Employer Annual Return online is 19 May

PAYE Tax Calculation (P800)
What to do if you receive a P800

Security advice
Protect yourself against online fraud, phishing scams and bogus callers

Service Availability & Issues
Find out current service availability and any issues we are experiencing

When and how to renew a tax credit claim? - more FAQs 



individuals & employees



employers



businesses & corporations

Practical support and access to in-depth guidance for tax professionals



Did you know...

From 1 April 2011...

You must file your clients' Company Tax Returns online and pay Corporation Tax electronically

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Tax agents and advisers

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You are here: [About Us](#)

HMRC News - Agents

The HM Revenue & Customs RSS feed is a quick and easy way to find out about recent changes to our Agents information.

[HMRC News - Agents](#)

HMRC News - Agents

[Updating Negligible Value List](#)

The Negligible Value List has been updated to end of April.

Last updated: Wed, 18 May 2011

[Customer Co-ordinator role for large partnerships](#)

HMRC is extending the Customer Co-ordinator role to many of their large partnership customers.

Last updated: Tue, 17 May 2011

[Tax Agents and Advisers: phone calls from Agent Account Managers](#)

Agent Account Managers (AAM) in HMRC are telephoning tax agents and advisers to explain what services the team provides and the benefits for agents and their clients. Agents can register for AAM services during the call.

Last updated: Tue, 17 May 2011

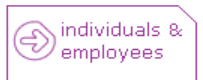
[High Net Worth Unit e-magazine \(PDF 442K\)](#)

HM Revenue & Customs High Net Worth Unit has launched a new e-magazine to give tax agents and advisers an insight into how the unit works and how they see it developing in the future.

Last updated: Mon, 16 May 2011

[Customs Information Paper \(11\) 44](#)

Extension of a derogation from the normal preferential rules of origin for certain fisheries products exported from Cape Verde which are released to free circulation in the EU during the period 1 January to 31 December 2011.



In this section

- Whats New
- Agents/advisers
- Charities
- Manuals
- Stamp Taxes
- VAT

What is RSS?

RSS stands for 'Really Simple Syndication' - it lets you have the latest news and new web content delivered directly to you. Instead of having to go to a website to find a new article or feature, you can use RSS to tell you. There is a growing trend to provide RSS feeds on websites for information such as news releases, events, jobs etc.

How can I get an RSS feed?

There are a number of steps you need to take to start using RSS feeds:

Step 1 - get a feed reader

You must have a feed reader to receive RSS feeds. There are a number of different feed readers available on the internet, many of them are free. Different feed readers work on different operating systems, so you will need to take this into account when you make your choice. Some web browsers already support RSS directly. These include Safari 1.2, Opera 8.5, Netscape 8.0. In the future Firefox 2.0 and Internet Explorer 7.0 should also offer integrated readers. There are also RSS specific browsers, such as - Deepnet Explorer and Maxthon.

Step 2 - subscribe to a feed

When you find a website with an RSS feed that you would like to add to your feed reader, you can subscribe to the RSS feeds in one of the following ways:

- Drag the URL of the RSS feed into your reader
- Cut and paste URL of the RSS feed into your reader

Can I stop it?

Yes, just go into your reader and simply delete the appropriate feed.

Using our Feeds

HM Revenue & Customs do not accept any liability for its RSS feeds.

Feedback

If you have any comments or suggestions for improvement, please [give us feedback](#).



News for tax professionals

Agent Update
HM Revenue & Customs

Keeping you informed

Introduction
Welcome to the HMRC Agent Update. This is a new online publication for HMRC agents and tax advisers. It provides the latest news, updates and guidance on HMRC services, processes and systems. It is designed to help you stay up-to-date with the latest tax news from HMRC.

This month's top articles
Budget 2010
HMRC's new online services
HMRC's new online services

HMRC Service
Organisations that are HMRC's customers, including HMRC's customers.

Contributors
HMRC's tax and customs professionals.

Agent Update

Employer Bulletin
HM Revenue & Customs

HMRC moves more of its business online

Employer Bulletin

Working Together
HM Revenue & Customs

Introduction

Welcome to the new Working Together (WT) publication. This is a new online publication for HMRC agents and tax advisers. It provides the latest news, updates and guidance on HMRC services, processes and systems. It is designed to help you stay up-to-date with the latest tax news from HMRC.

Introduction
Welcome to the new Working Together (WT) publication. This is a new online publication for HMRC agents and tax advisers. It provides the latest news, updates and guidance on HMRC services, processes and systems. It is designed to help you stay up-to-date with the latest tax news from HMRC.

Working Together

Register to receive Agent Update reminders

Welcome

Follow the links on this page to help you keep up-to-date with the latest tax news from HMRC

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- Updates to HMRC manuals
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HMRC training and events

- Events for agents and advisers

Working Together

Agents and HMRC working together May 2011 - Issue 43



Welcome

National

Local

Updates

Contacts

Introduction

Hello and welcome to issue 43 of Working Together.

In this edition we've included an article outlining the different approaches HMRC may take to collect any debts your clients may have incurred. Early contact with HMRC is essential and an agent's role as intermediary in the collection of outstanding liability is often invaluable in reaching a resolution. On page seven there's a link to the latest guidance which may help when completing your clients' expenses and benefits forms – this includes information on which form to use and when, along with a list of common errors to avoid when completing the forms.

If you have any comments on the Working Together (WT) programme, would like to raise an issue, or would like to know more about getting involved with your local group, please contact your professional representative (contact details are shown on the back page), or if you're not a member of one of the organisations listed, contact the HMRC representative.

[Find out more about the WT programme](#)

And finally, if you have any comments or suggestions about the layout or the content of the Working Together publication, please let me know – my contact details are on the back page.

Alison

Alison Bainbridge
Editor

Local

Concentrates on what's happening in, and being achieved by, the local WT groups.

National

Reports on how the WT Steering Group (WTSG), the National WT Team (NWTT) and HMRC business owners tackle the most significant and urgent issues that are identified through WT.

Updates

Provides updates on issues and signposts to recently published information on the HMRC website.

Contacts

Provides contact details of HMRC and your professional bodies representatives along with useful web links.

This edition includes:

- a [60 second interview](#) with Derek Allen who represents the Institute of Chartered Accountants of Scotland on the WTSG
- a summary of the top five open and closed issues from the NWTT issues register
- an article from Jill Springbett from the Institute of Chartered Accountants in England and Wales explaining how agents helped to develop the new partnership registration forms (SA400, 401 and 402)
- an update from the post working group about its review of how Self Assessment and PAYE employee post is dealt with

Welcome Contents Helpline numbers

Employer Bulletin

Your route to the latest in payroll news and views

February 2011 Issue 37



New Basic PAYE Tools available to download now

Agent Update

Agents and HMRC working together April - May 2011 - Issue 23



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Tax

HMRC Service

Consultations

Editorial

Keeping you informed

Introduction

Welcome to the 23rd edition of Agent Update. In this edition we feature details of the changes to various HMRC forms and links to publications that include the latest updates for employers, Working Together, pensions, trusts and estates, and VAT. Check out Business Link's new 'Contracts Finder' and please take time to give us your feedback on the new tax agents and advisers web pages - see the editorial section for details.

As ever, we recognise that not all topics will be relevant to you. By 'scanning' the brief introductions to each piece, you should be able to identify the topics that are relevant to you within a couple of minutes. You can then click on the link to view the full information.

Don't forget to register with us. You can now sign up for email reminders as each edition is published. To do so please use the link below.

[Sign up to receive email reminders for future issues of Agent Update](#)

Tax

Developments and changes to legislation and allowances relating to UK tax.

HMRC Service

Changes to HMRC services, upcoming HMRC events and guidance.

Consultations

Details of live consultations and response summaries.

This month's top articles

[VAT Returns](#)

Do you have a 'reasonable excuse' for submitting your return late?

[Filing and payment penalties](#)

The new penalty regime for late filing and late payment of Income Tax through Self Assessment was introduced in April 2011. Your clients who complete Self Assessment tax returns will shortly receive their 2010-11 notices and paper returns which will include information on the new penalty framework and how the penalties for those who file and pay late will significantly increase. A tax return filed six months late could attract a penalty of at least £1,300. HMRC will issue more guidance shortly.

[Agent Account Managers](#)

Over 700 client issues resolved and free learning events delivered to thousands of agents. Register now and find out what Agent Account Managers can do for you.

[Pre-return support for agents toolkits](#)

HMRC has published four more toolkits to make it easier for you to help your clients get their tax returns right. The toolkits will help reduce errors and cover: Income Tax losses, Capital Gains Tax for shares, company losses and chargeable gains for companies.

Section ends



News for tax professionals



Agent Update



Employer Bulletin



Working Together

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If you have a query for HM Revenue & Customs, please visit www.hmrc.gov.uk/comment



Agent Update

Thank you for your interest in Agent Update. You can find the current issue of Agent Update in the news section at www.hmrc.gov.uk/agents/news.htm

To register for reminders for future Agent Updates, please enter your details below:

Title:

First name:

Surname:

Job title:

Organisation/company name:

Email address:

By entering your email address, you are agreeing to receive email reminders for Agent Update. You can unsubscribe at any time by clicking the link at the bottom of the emails.

Tel (optional):

How did you hear about this registration page?

Which of the following accountancy representative bodies are you a member of, if any?

- ICAEW
- ICAS
- ACCA
- AAT
- CIOT
- ATT
- FSB
- ICPA



Practical support and access to in-depth guidance for tax professionals



Did you know...
From 1 April 2011...
You must file your clients' Company Tax Returns online and pay Corporation Tax electronically

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Agents and HMRC working together by HMRC

www.businesslink.gov.uk/taxforagents

Pro

Latest news, publications and details of events for tax professionals


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1 rating

tax agent, tax agents, tax news, tax help, tax advice,



Include "Get Widget" button



Three navigation buttons: 'individuals & employees', 'employers', and 'businesses & corporations'.

Tax agents and advisers

You are here: Home > Tax agents and advisers > Toolkits to help reduce errors

In this section: Toolkits to help reduce errors

Toolkits to help reduce errors

These toolkits provide guidance on areas of error that HM Revenue & Customs (HMRC) frequently see in returns and set out the steps that you can take to reduce those errors.

They should help you to:

- ensure that returns are completed correctly, minimising errors
- focus on the areas of possible error that HMRC consider key
- demonstrate reasonable care

The toolkits will be updated at least annually.

Follow the links below to access each of the available toolkits. The toolkits are available for download only.

To view these documents you need to use a PDF file viewer such as [Adobe Reader](#) which is available to download free of charge from the Adobe website.

Individuals, business and corporations

- [Capital Allowances for Plant and Machinery \(PDF 281K\)](#)
- [Capital Gains Tax for Land and Buildings \(PDF 337K\)](#)
- [Capital Gains Tax for Shares \(PDF 365K\)](#)
- [Capital v Revenue Expenditure \(PDF 242K\)](#)
- [Chargeable Gains for Companies \(PDF 410K\)](#)
- [Company Losses \(PDF 327K\)](#)
- [Directors' Loan Accounts \(PDF 216K\)](#)
- [Expenses and Benefits from Employment \(PDF 360K\)](#)
- [Income Tax Losses \(PDF 222K\)](#)
- [Marginal Small Companies' Relief \(PDF 192K\)](#)
- [National Insurance Contributions and Statutory Payments \(PDF 248K\)](#)
- [Private and Personal Expenditure \(PDF 254K\)](#)
- [Property Rental \(PDF 296K\)](#)
- [VAT Input Tax \(PDF 271K\)](#)
- [VAT Output Tax \(PDF 354K\)](#)
- [VAT Partial Exemption \(PDF 268K\)](#)

Trusts and Estates

- [Capital Gains Tax for Trusts and Estates \(supplement\) \(PDF 328K\)](#)
- [Inheritance Tax \(PDF 325K\)](#)
- [Trusts and Estates \(PDF 345K\)](#)

[Read more background information on these toolkits](#)

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Key tax deadlines for tax agents 2011-2012



This calendar should help you establish when your clients' key tax deadlines are, including the variable deadlines that you need to consider (see page 2). Agents and HMRC working together

Fixed dates Income Tax Employers

April

- 5** Last day of tax year (6 April 2011 – first day of new tax year).
- 19** Deadline for postal payment to reach HMRC Accounts Office for any outstanding non-electronic PAYE tax and Class 1 NICs for the tax year ending 5 April 2011.
- 21** Deadline for electronic payments to be cleared in HMRC bank account for any outstanding PAYE and Class 1 NICs for the tax year ending 5 April 2011.

May

- 19** Deadline for filing your Employer Annual Return (P35 and P149) for the tax year ending 5 April 2011.
- 31** Last date for giving a form P60 for 2010-11 to each relevant employee who was working for you on 5 April 2011.

June

No key deadlines for NICs, PAYE or Self Assessment.

July

- 5** Last date for agreeing your PAYE Settlement Agreement for 2010-11 (if any).
- 6** Deadline for submitting form 42 or other relevant form to report share-related benefits provided to employees.
- 6** Deadline for filing forms P9D, P11D, P11D(b), or substitutes for the tax year ending 5 April 2011.
- 6** Last date for giving a copy of the 2010-11 forms P9D, and forms P11D, or substitutes, for the tax year ending 5 April 2011 to reach your HMRC Tax Office.
- 19** Deadline for postal payment to reach HMRC Accounts Office for any outstanding Class 1A NICs for the tax year ending 5 April 2011.
- 22** This is the final date for electronic payments to be cleared in HMRC bank account for any outstanding Class 1A NICs for the tax year ending 5 April 2011.
- 31** Deadline for second Self Assessment payment on account for tax year ended 5 April 2011.

August

No key deadlines for NICs, PAYE or Self Assessment.

September

No key deadlines for NICs, PAYE or Self Assessment.

October

- 5** Deadline to notify chargeability for Income Tax/Capital Gains Tax for 2010-11. If not registered for Self Assessment or a penalty for failure to notify may apply. Complete form CWF1 for self-employment or form SA1 for non self-employed income.
- 31** Deadline for paper submission of Self Assessment tax return for tax year ended 5 April 2011.

November

No key deadlines for NICs, PAYE or Self Assessment.

December

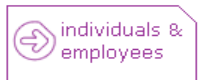
- 30** Deadline for online submission of Self Assessment tax return for tax year ended 5 April 2011 for HMRC to collect tax through client's PAYE code, where they owe less than £2,000.

January

- 31** Deadline for online submission of Self Assessment tax return for tax year ended 5 April 2011.
- 31** Deadline for paying Self Assessment 'balancing payment' for tax year ended 5 April 2011.
- 31** Deadline for first Self Assessment payment on account for tax year ended 5 April 2012.

March

No key deadlines for NICs, PAYE or Self Assessment.



Practical support and access to in-depth guidance for tax professionals



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Dedicated helplines and contacts for authorised agents

There are a number of ways agents and advisers can contact HM Revenue & Customs (HMRC) for transactions or to get help and support.

In most cases, you can contact HMRC by using the HMRC Online Services, by phone and in writing. In some cases you can also email your queries.

If you are an authorised agent, and you need to contact HMRC about a client's personal Self Assessment tax affairs, partnership matters, PAYE (Pay As You Earn) or tax credit claims, you can also use the Agent Dedicated or Priority Lines to save time.

This guide will show you how to perform the transaction you require, get the information you need, or find the quickest contact route if you need to get in touch with HMRC for more detailed queries. It also covers the benefits and availability of the Agent Priority and Dedicated Lines.

On this page:

- Personal Self Assessment or PAYE for individuals
 - Agent Dedicated and Agent Priority Lines**
 - PAYE for employers and Construction Industry Scheme
 - Corporation Tax queries
- VAT, Customs, Excise and International Trade queries
 - HMRC Online Services Helpdesks
 - Resolving problems or making complaints
 - Specialist HMRC departments and finding other contacts

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Personal Self Assessment or PAYE for individuals

If you're dealing with a client's personal tax affairs, such as Self Assessment for individuals or partnerships or individuals' PAYE (Pay As You Earn) matters, you can:

- use HMRC's Online Services for routine transactions (such as changing contact details, making payments or checking refunds)
- contact HMRC by phone
- contact HMRC in writing through the post

Using online services

Agent Dedicated & Priority Lines

- SA & PAYE - 0845 366 7855
- Tax Credits - 0845 300 3943

Agent Dedicated and Agent Priority Lines

Agent Dedicated Line for personal Self Assessment or PAYE for individuals queries

HMRC Taxes Contact Centres can deal with taxpayer-specific queries from authorised agents. By phone you can update or discuss your client's:

- personal details
- employment details
- personal allowances
- expenses
- payment notifications
- notifications of benefits in kind, other earnings or income
- amendments to Self Assessment tax returns
- request for repayments, reduce payments on account or collection of tax payable through a PAYE code

You can call the Contact Centre's Agent Dedicated Line on Tel 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. It's a good idea to use this helpline instead of the general number as it provides tax agents and advisers with a full and fast service.

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

Please remember that this service is for authorised agents only. If HMRC cannot verify that you are formally authorised to speak to them on your client's behalf, they will not be able to proceed with the call. For this reason, it's important that you don't give this number to your clients.

While HMRC can handle most general business, there are limits and specific exclusions to what they can do by phone.

[Read a summary of the business that HMRC can carry out by phone \(PDF 31K\)](#)

Agent Priority Line for tax credits

If you are handling tax credits issues on your clients' behalf, you can call the Agent Priority Line for tax credits on Tel 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.

Calls to this number will be routed to one Contact Centre site. When the call comes through to the Contact Centre, it is identified as an agent call and advisers will have the relevant guidance for verifying and dealing with agents to hand. This should ensure a more efficient service for you when managing your client's tax credits affairs.

[Tax credits guidance for tax agents and advisers](#)

[Top](#)

PAYE for employers and the Construction

Contacting the HM Revenue & Customs Income Tax Office by phone or in writing

The Income Tax Office at HM Revenue & Customs (HMRC) can accept most information the phone, but in certain circumstances you will need to write in. This table will help you decide how to contact HMRC.

If the reason for your call isn't listed, you will probably have to write in.

Please note that the Income Tax year runs from 6 April to 5 April. For some changes HMRC can only accept information about changes in this tax year or the previous tax year.

Personal details Payable order Employment details Claims to Personal Allowances Expenses Payments you make Benefits in kind	Earnings Other income Other Objection to coding out of non-PAYE income Self Assessment - amendments to return Self Assessment - starting and ending Self Assessment - payment
---	---

Personal details	Telephone	Writing
Changes to name, address, post code and telephone number	All	
Changes in personal circumstances such as marriage, civil partnerships, separation, divorce, date of birth, date of death	All	
Agent changes	An agent is no longer acting	You have a new agent

HMRC forms 64-8 and FBI 2

- Overview
- Agents codes and agent reference numbers
- Authorisation for matters except VAT or tax credits
- More than one agent acting for the same client
- Helping HMRC speed up the paper authorisation process

Business Payment Support Service

- Assists all businesses (large and small)
- Helped over 160,000 businesses in its first 15 months, re-scheduling more than £5 billion of tax.

Telephone - 0845 032 1435


[individuals & employees](#)

[employers](#)

[businesses & corporations](#)

News, updates and HMRC communications

In this section:

- Latest news for tax professionals
- Latest updates to manuals
- Agent publications and Employer Bulletin
- Get HMRC's tax agent widget for your blog or website
- Working Together with HMRC**

You are here: [Home](#) > [Tax agents and advisers](#) > [News, updates and HMRC communications](#) > [Working Together with HMRC](#)

Working Together with HMRC

[Working Together - get involved](#)

A partnership between HMRC and the main agent representative bodies to improve HMRC operations for the benefit of everyone

[Advice and support for agents - find an event near you](#)

Find an event near you to develop your expertise, including Employer Talk, Business Advice open days and Joint learning

[Consultative groups, forums and working parties](#)

Exchange views and ideas on how to improve the way HMRC works with taxpayers, businesses and agents

[Consultations and Better Regulation](#)

Current and closed consultations, reviews and projects designed to make regulation of the tax system more efficient

Do it online

- [Register for HMRC Online Services for agents](#)
- [Log in to HMRC Online Services](#)
- [Commercial software options](#)
- [Help for HMRC Online Services](#)
- [Online services demo](#)
- [Service availability](#)
- [Service issues](#)
- [Online security](#)

Tools

- [Toolkits to help reduce errors](#)
- [Agents' tax calendar](#)

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HMRC Learning Together events for tax agents and advisers

In this section:

Learning Together: training material and useful resources

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Learning Together: training material and useful resources

Learning Together videos

Follow the links below to view a video and transcript of an HM Revenue & Customs (HMRC) presentation on 'Penalties for inaccuracies in documents and returns'. The video runs for 20 minutes and covers:

- when a penalty is chargeable
- types of behaviours associated with the penalty regime
- prompted and unprompted disclosures
- reductions and quality of disclosures
- penalty calculations
- suspensions and appeals

[View HMRC's 'Penalties for inaccuracies in documents and returns' video \(Opens new window\)](#)

[Download a transcript of the HMRC 'Penalties for inaccuracies in documents and returns' video \(PDF 51K\)](#)

HMRC online learning for tax agents and advisers

HMRC produces learning modules to help their staff understand new legislation. After discussions with representative bodies, HMRC agreed to publish the learning modules for the compliance checks and new penalties legislation. Follow the link below to view these products.

Do it online

[PAYE Online for Agents](#)

[Self Assessment Online for Agents](#)

[File a VAT Return](#)

[Corporation Tax Online for Agents](#)

[Online services demo](#)

[Service availability](#)

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individuals & employees



employers



businesses & corporations

Contacting HM Revenue & Customs - agents and advisers

In this section:

Agent Account Managers (AAMs) in HM Revenue & Customs

You are here: [Home](#) > [Contacting HM Revenue & Customs - agents and advisers](#) > [Agent Account Managers \(AAMs\) in HM Revenue & Customs](#)

Agent Account Managers (AAMs) in HM Revenue & Customs

HM Revenue & Customs (HMRC) has set up a UK-wide team of Agent Account Managers (AAMs) to help tax agents and advisers deal with the department more effectively.

This guide explains what AAMs do, what services they provide, and how to contact them.

On this page:

- [Why HMRC introduced AAMs](#)
- [What AAMs can do for you](#)
- [Registering to use HMRC AAM services](#)
- [Resolving your client-specific problems](#)
- [HMRC educational events and products](#)
- [More useful links](#)

Why HMRC introduced AAMs

In 2007, following discussions with agent professional bodies, HMRC introduced AAMs as part of a pilot exercise. These AAMs acted as a single point of contact for a small number of agents in Edinburgh and Ipswich, providing help to resolve client-specific issues.

Following the success of the pilot, the AAM role has been successfully developed and tested. HMRC has now expanded the team to 40 officers based throughout the UK who will proactively

Do it online

- [PAYE Online for Agents](#)
- [Self Assessment Online for Agents](#)
- [File a VAT Return](#)
- [Corporation Tax Online for Agents](#)
- [Online services demo](#)
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See also

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- [Latest news for agents and advisers](#)
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Agent Account Manager (AAM) service - User Registration form

* indicates required information

About this form

Please complete this form to register for HM Revenue & Customs (HMRC) Agent Account Manager service. The information you provide will be used to help HMRC design new products for agents, inform you about the help they offer tax professionals, and evaluate the AAM service. HMRC will not use the information you provide for any other purpose, including HMRC compliance and risk assessment work.

Part 1 - About you

Title: ?

Last name: *

First name(s): *

Email address: * ?

Contact telephone number: * ?

Agent code(s) if appropriate: ?

When handling other people's tax affairs, on average, how often have you contacted HMRC - in writing or by phone - in the last 12 months? Please tick only **one** checkbox below.

- Daily
- Weekly
- Monthly
- Less often

Which HMRC business areas do you deal with on behalf of your clients? Please tick the relevant checkbox(es) below.

Agents' Issue Resolution Service

*indicates required information

About this form

Tax agents and advisers who have registered to use the HM Revenue & Customs (HMRC) Agent Account Manager (AAM) service can use this form to escalate client-specific issues or problems, where all other contact methods have failed. After you've submitted this form, an AAM will contact you to verify your identity and explain what happens next.

Please submit a separate form for each client and include only one issue per form.

Before you begin

AAMs are an escalation point within HMRC for issues that you have not been able to resolve through normal HMRC channels. The AAM will only be able to help you after you've tried to resolve the issue using other methods.

Please tick both checkboxes below to confirm that you've completed these actions. Please ensure you check the HMRC website for up-to-date information on any HMRC service issues before submitting this form.

Checked the HMRC website

Contacted HMRC by telephone

If you've previously contacted HMRC in writing about this issue, please enter the HMRC office you dealt with and any contact name(s) there, in the box below.

HMRC office and contact name(s):

About you

Title: *

Last name: *

First name(s): *

Contact telephone number: *

Email address: *

Agent code (if appropriate):

About your client

Client's name: *

Client's address line 1: *

Client's address line 2: *

Client's address line 3:

Postcode: *

Client's HMRC reference number: *

Request HMRC speakers for agent events and meetings

*indicates required information

About this form

This form is for tax agents and advisers who have registered to use the HM Revenue & Customs (HMRC) Agent Account Manager (AAM) service and would like to request an HMRC speaker for their agent led events or meetings. Once the form has been submitted, an AAM will contact you to verify your identity and discuss your requirements.

About you

Title: * ?

Last name: *

First name(s): *

Email address: *

Contact telephone number: * ?

Event/meeting details

Date of your event/meeting: * ?
dd/mm/yyyy

Location of your event/meeting: * ?

Region of your event/meeting: * ?

Please tick the appropriate checkbox below to indicate your preferred time slot.

10.00 am to 12.00 pm

12.00 pm to 2.00 pm

2.00 pm to 4.00 pm

Feedback - Agent Account Manager (AAM) Issue Resolution

*indicates required information

About this form

HM Revenue & Customs (HMRC) values your feedback and would like to know what you think of the AAM Issue Resolution Service. Completing this feedback form should only take five minutes.

An email address is required to acknowledge that HM Revenue & Customs (HMRC) has received the information you have given on this form. If you would prefer not to receive an acknowledgment, please use the following email address in this field - no.acknowledge@aam.gov.uk

Email address: *

Feedback

Please tick one checkbox for each of the questions below.

How easy was it to find the Issue Resolution form?

- Very easy
- Easy
- Neither easy or difficult
- Difficult
- Very difficult

How do you feel about the length of time it took to complete the Issue Resolution form?

- About right
- Too long

How satisfied were you with the AAM Issue Resolution response times?

- Very satisfied
- Satisfied
- Neither satisfied or dissatisfied

Any questions ?

Thank you

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