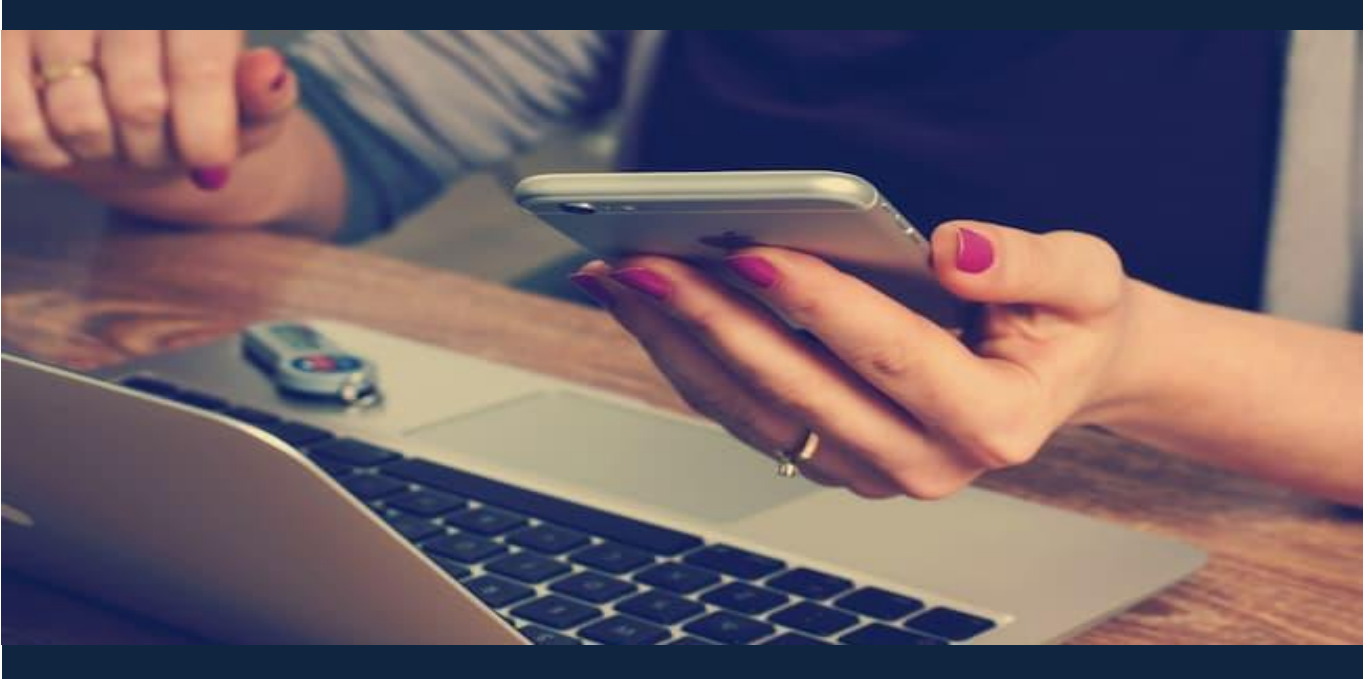


Broadcast

01753 888211
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Individual callers to some HMRC helplines from mobile phones may find that rather than speaking with an adviser they are now sent an SMS text message directing them to online services and guidance.

Key dates

Since 19 January 2023, HMRC have been trialling sending an SMS text message response to some callers to their income tax helpline

This note explains how calls will be routed and outlines concerns raised by the Tax Faculty of the Institute of Chartered Accountants in England and Wales (ICAEW).

Routing calls

Where an individual caller calls the helpline from a mobile phone, the call will be dealt with in one of the following ways:

- the caller will be sent an SMS text message that directs them to online help and guidance of relevance to the key words used by the caller to describe the reason for their call. The call will be disconnected automatically after the caller has been told that an SMS text message has been sent;
- the caller will be given the option of receiving an SMS text message directing them to online help or continuing to speak to an adviser;
- the caller will be placed on hold for an adviser to deal with their call.

The way in which the call is handled will depend on the key words used by the caller when describing the reason why they are calling.

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Key words

An SMS will be sent where the following 'key words' are used by the caller:

- find your unique taxpayer reference;
- help registering for HMRC online services;
- lost or forgotten online service password or user ID;
- registering for self-assessment;
- whether they need to complete a self-assessment tax return;
- requests for income tax or employment history;
- lost National Insurance number;
- confirmation of National Insurance number; or
- help completing their tax return.

The caller may or may not be given the option to hold for an adviser.

Agent dedicated line

The ICAEW have been assured by HMRC that SMS text message responses will not be used on the Agent dedicated line. Agents will continue to be able to speak to an adviser.

Is the text genuine?

HMRC publish guidance on their website to help individuals to determine whether texts and other contact from HMRC is genuine. The guidance is available on the Gov.uk website at www.gov.uk/government/collections/check-a-list-of-genuine-hmrc-contacts

Concerns

While the Tax Faculty of the ICAEW welcome the use of innovative approaches by HMRC to solving their customer service problem, they have expressed concern that callers may find themselves stuck in a 'loop of doom', receiving repeated text messages without being able to reach an adviser to discuss their problem and to get the help that they need.

HMRC believe that their technology is sufficiently robust to recognise when a response by SMS text message is appropriate. However, this has yet to be proved by the trial. The current technology does not identify repeat callers (although this may be available in the future), nor can it tell whether the call has been made from a basic mobile phone without internet capabilities.

HMRC has advised that callers who need to call back after being sent a SMS text message response may need to word their query differently to avoid being sent another text. Alternatively, the caller can call back from a landline as SMS text messages are only sent to callers from mobile phones.

The danger is that callers who are unable to access an adviser may become frustrated and simply give up with their issue unresolved.

Please call us on **01753 888211** or email info@nhllp.com if you need help with any of the issues raised in this Broadcast. We would be happy to help.