



HM Revenue
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Making Tax Digital (MTD)-VAT End-to-End (E2E) Customer Journeys v5.0

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*Please do not issue externally without permission from Rob Speksnijder

*This document will be updated monthly. Please note that some screenshots may become outdated between versions of this document as design work continues

Making Tax Digital

Contents

- Introduction
- Vision
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- Customer journeys
 - Timetable for lifting signup restrictions
 - Journeys
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Vision

Vision

Making Tax Digital (MTD) is a key part of the government's plans to make it easier for businesses to get their tax right first time and keep on top of their tax affairs.

Every business now has their own digital tax account, and the functionality is being regularly expanded and improved. HMRC's ambition is to become one of the most digitally advanced tax administrations in the world, modernising the tax system to make it more effective, more efficient, and easier for customers to comply with their tax obligations.

Keeping records digitally and providing updates to HMRC direct from the software will reduce the amount of avoidable errors businesses currently make (and the cost, uncertainty and worry they face when HMRC is forced to intervene to put things right). This streamlined digital experience will integrate tax into day-to-day business record-keeping, giving businesses confidence that they have got it right and provide them with a view of their tax position in-year.

Timetable

MTD for VAT will be mandatory for businesses whose taxable turnover is above the VAT registration threshold (currently £85,000) from 1 April 2019. It will remain voluntary for VAT registered businesses below the VAT threshold until 2020 in any event.



Vision

Foundations

- Better use of information - customers should not have to give HMRC information that it already has, or that it is able to get from elsewhere (for instance from employers, banks, building societies and other government departments). Digital tax accounts for all, and open APIs, will mean that customers can use their chosen software to check the information that HMRC holds about them at any time to ensure that it is complete and correct; HMRC will use this information to tailor the service it provides for customers.
- Tax in real time - Our customers should not have to wait long periods know how much tax they may have to pay. HMRC will collect and process information affecting tax as close to real time as possible to:
 - help prevent errors
 - stop tax due or repayments owed building up.
- Interacting digitally with customers - Our customers (and their agents) will be able to interact with HMRC digitally and at a time to suit them. Their digital accounts will present them with an increasingly personalised picture of their tax affairs, with prompts, advice and support through webchat and secure messaging. Digital record keeping software will be linked directly to HMRC systems, allowing customers to send and receive information directly from their software, with nudges and prompts built-in to help them get their tax right.



High level design

- 98% of current VAT returns are submitted digitally (either directly by the business or by their agent), the vast majority using HMRC's online portal.
- MTD requires businesses to record business transactions digitally, and in real time (or as close as possible). This will be underpinned by a requirement for subscribed businesses to send a summary of those records (a VAT Return) that will be generated and sent to HMRC using software or an app. Most businesses submit a VAT return on a quarterly basis, but some businesses currently file VAT Returns on a monthly or annual basis and this will continue under MTD.
- The digital record must include the following detail of each transaction:
 - amount
 - date
 - category

There is no obligation to make and store images of invoices and receipts digitally.

Example customer software journeys

<https://www.gov.uk/government/publications/vat-notice-70022-making-tax-digital-for-vat/vat-notice-70022-making-tax-digital-for-vat>

- MTD-compatible software will use the VAT (MTD) API to supply the VAT Return data to HMRC. HMRC doesn't plan to produce its own digital tools and will not endorse any such products produced by anyone else. But we will work closely with and support you to design and develop digital tools that will enable HMRC's customers to comply quickly, easily and securely with their obligations to account for tax digitally. Supporting this key functionality are a range of additional service elements, including Registration, Subscription, Authorisation and Payments. You can find more details on how these align in The Customer Journey section.





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Customer journeys

MTD-VAT E2E customer journeys
(focusing mainly on Controlled Go-Live journeys)

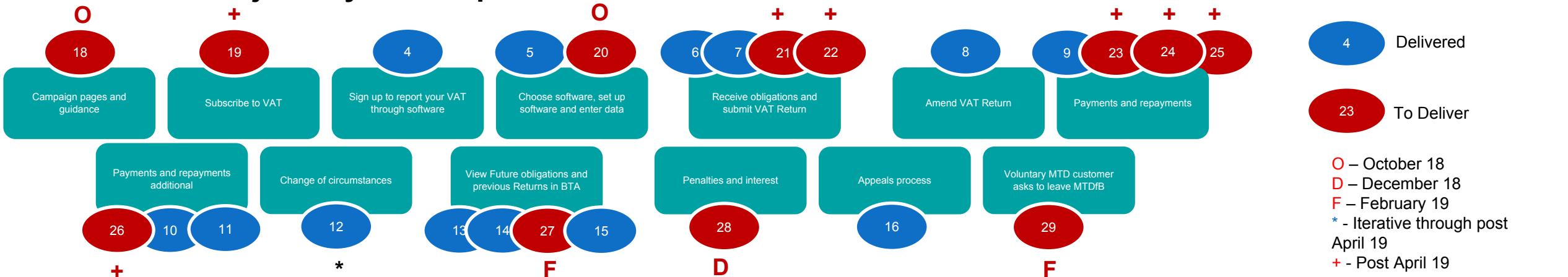
Introduction

- This document is primarily to help software vendors/designers understand how their software will interact with HMRC systems and what it will need to do.
- Additionally, it covers elements of the service delivered by HMRC to show how the E2E service works in totality.
- Product owners and business analysts can also use this document to further their understanding of MTD.



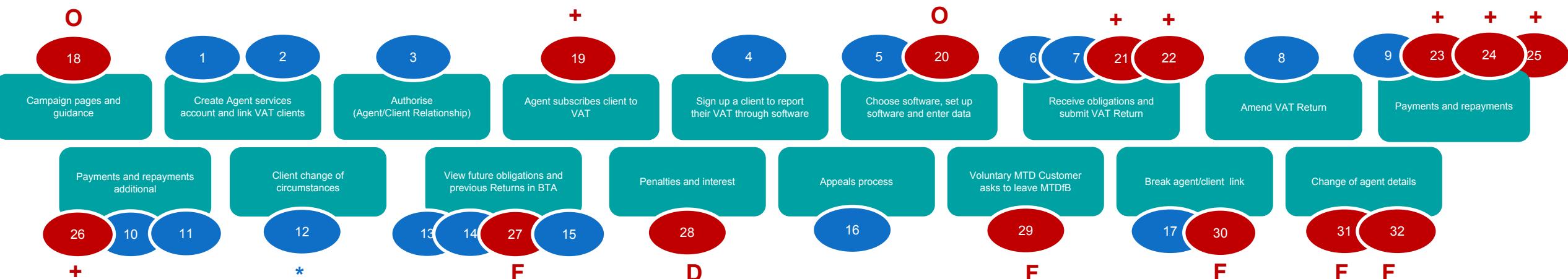
Business E2E journey roadmap

MTD VAT E2E



Agent E2E journey roadmap

MTD VAT E2E



1. Create an Agent services account
2. Link existing clients to your account
3. Agent services get authority from new clients (UI)
4. Customer/agent signs up to MTD
5. Customer/agent links software to HMRC via OAuth
6. Customer/agent retrieves obligations in software
7. Customer/agent submits VAT Return with declaration in software
8. Customer/agent amends previously submitted data (BAU Process)
9. Customer sets up, views, cancel, amends or makes a payment by Direct Debit

10. Customer makes a payment (other types)
11. Customer receives a repayment
12. Customer/agent notifies change of circumstances
13. Customer can view previous returns in BTA
14. Customer can view when their next return is due in BTA
15. Customer can view when their next payment is due in BTA
16. Appeals process (BAU Process)
17. Agent services VAT client led Deauthorisation

18. GOV.UK guidance available
19. Subscription service available for businesses and agents
20. Choose software GOV.UK page available
21. Obligation Reminders
22. Voluntary Supplementary Data
23. Request a VAT Refund
24. Voluntary Payments
25. Repayment Tracker
26. Payment Reminders

27. View and Change to non-MTD and former MTD customers
28. Customer/agent can see interest and penalties in BTA
29. Voluntary MTD Customer/agent asks to leave MTDFB
30. Agent led Deauthorisation
31. Agent leaves Agent Services
32. Update Agency designatory details



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VAT agent E2E journey roadmap

1 - Create an Agent services account

1

Create an Agent services account

An agent must create an Agent services account and connect it to their accounting software. The creation of the account is a one-off process that an agent firm must do to enable its staff to access Making Tax Digital through this one account and act for their clients.

The user journey is a web screen journey, accessible from accounting software or from GOV.UK. The user will:

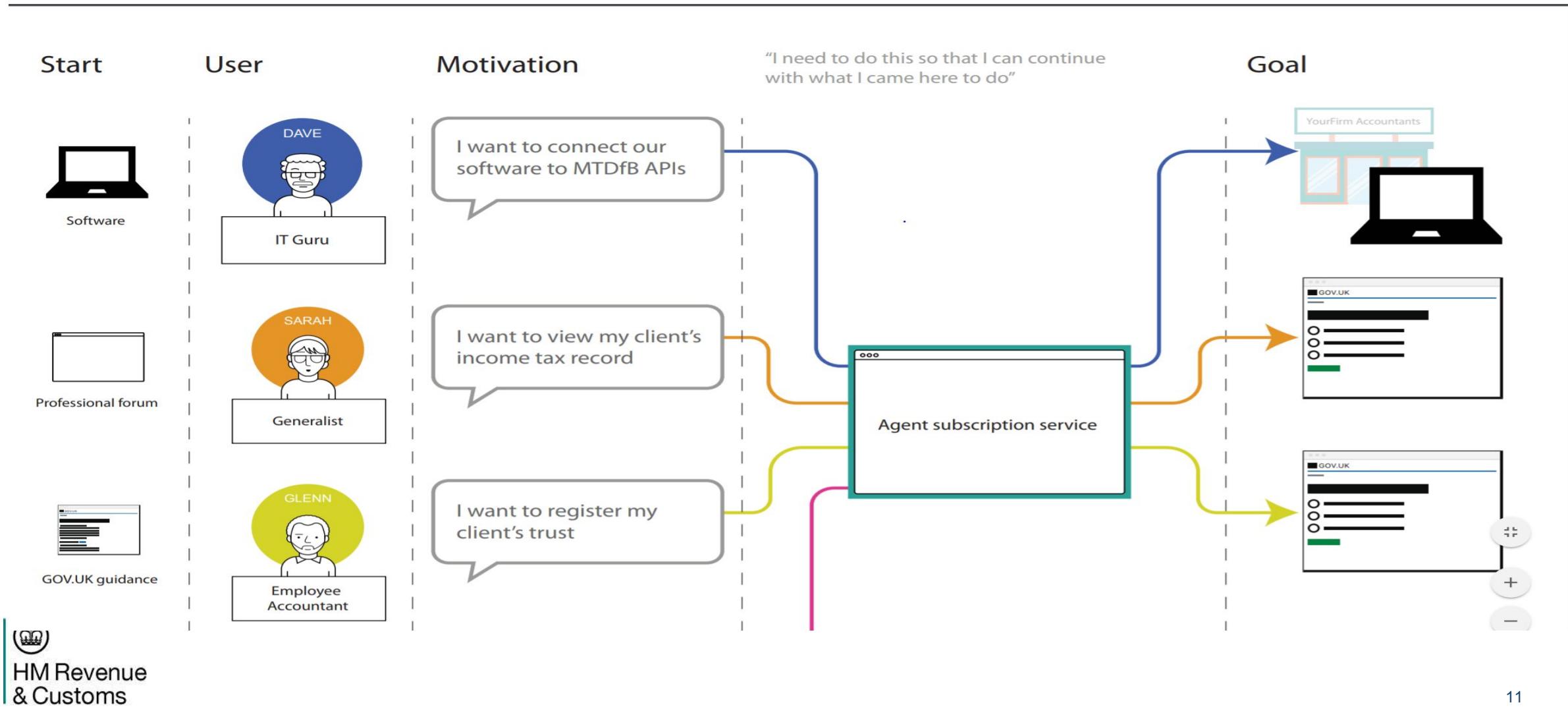
- create a new Government Gateway (GGW) ID which will be the firm's new GGW ID and password. **This will become an agent firm's user ID and password that will be used to access all new HMRC services via accounting software**
- give information about the agent firm, which is held by HMRC
- receive an agent reference number, which is the number that all existing and new clients are assigned



VAT agent E2E journey roadmap

1

Create an Agent services account



VAT agent E2E journey roadmap

1

Create an Agent services account

Live page <https://www.gov.uk/guidance/get-an-hmrc-agent-services-account>

The screenshot shows a 'BETA' service notice at the top. Below it, the HM Revenue & Customs logo is displayed. The main heading is 'Agent services account: sign in or set up'. A subtext explains that as a professional tax agent firm, you need an agent services account to access new HMRC online services and use software to communicate directly with HMRC. A green button labeled 'Set up or sign in >' is visible. A 'Before you start' section follows, with a note about checking guidance for account basics. At the bottom, there's a link to get help with the page.

BETA This is a new service – your [feedback](#) will help us to improve it.

HM Revenue & Customs

Agent services account: sign in or set up

As a professional tax agent firm, you need an agent services account to:

- access new HMRC online services
- use software to communicate directly with HMRC

[Set up or sign in >](#)

Before you start

If you do not have an agent services account, [check the guidance](#) to find out:

- what an agent services account does
- how to set up your agent services account
- how to add clients to your agent services account
- when to use your agent services account

[Get help with this page.](#)





Create an Agent services account

Sign in

Enter your Government Gateway credentials to sign in. You received these when you created your HMRC online account.

User ID

Password

Sign in

Problems signing in

[Don't have a Government Gateway account](#)

[Forgotten user ID](#)

[Forgotten password](#)

[Forgotten user ID and password](#)

[Chat to an HMRC advisor online.](#)



VAT agent E2E journey roadmap

1

Create an Agent services account

ALPHA This is a new service – your [feedback](#) will help us to improve it.



What type of business are you?

- Sole trader
- Limited company
- Partnership
- Limited liability partnership (LLP)

▼ [My business type is not listed here](#)

You can only create an agent services account if your business is a sole trader, limited company, partnership or limited liability partnership.

[Finish and sign out](#)

[Continue](#)

[Get help with this page.](#)



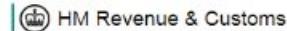
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VAT agent E2E journey roadmap

1

Create an Agent services account

ALPHA This is a new service – your [feedback](#) will help us to improve it.



[◀ Back](#)

Enter your business details

Your Self Assessment Unique Taxpayer Reference (UTR)

Enter the last 10 digits only. For example, 12345 67890

[▼ Where to find your Self Assessment UTR](#)

You'll [find your UTR](#) (opens in a new window or tab) on the letter HMRC sent you when you registered for Self Assessment. It's a 10-digit number, sometimes with a letter 'K' on the end.

Registered business postcode

This is the postcode of your registered business address

[Continue](#)

[Get help with this page.](#)



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Create an Agent services account

ALPHA This is a new service – your [feedback](#) will help us to improve it.

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[◀ Back](#)

Is this your business?

ABC Accountants
98 High Street
Anytown
West Sussex
AA1 1AA

These are the details we hold for Unique Taxpayer Reference (UTR) **1234567890**. You will be able to change these details in a moment for your agent services account.

Yes
 No - I want to enter a different UTR

Continue



VAT agent E2E journey roadmap

1 Create an Agent services account

ALPHA This is a new service – your [feedback](#) will help us to improve it.

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[◀ Back](#)

Check your details before creating your account

These are the business details we will use for your agent services account.

Your business name will be the name shown to clients. We need your business address to check your details. We will only use your email address to contact you about your agent services account.

Business name	ABC Accountants	Change
Business address	98 High Street Anytown West Sussex AA1 1AA	Change
Business email address	email@company.com	Change

By setting up this account, you confirm that, to the best of your knowledge, the details you provided are correct.

Confirm details and create account





Create an Agent services account

ALPHA This is a new service – your [feedback](#) will help us to improve it.

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You need a new Government Gateway agent account

You cannot use your current Government Gateway account to create an agent services account.

You will need to create a new Government Gateway agent account. You can do this now.

[Create a Government Gateway account](#)





Create an Agent services account

ALPHA This is a new service – your [feedback](#) will help us to improve it.

 HM Revenue & Customs

You need a new Government Gateway agent account

You cannot use your current Government Gateway account to create an agent services account.

You will need to create a new Government Gateway agent account. You can do this now.

[Create a Government Gateway account](#)



VAT agent E2E journey roadmap

1

Create an Agent services account

ALPHA This is a new service – your [feedback](#) will help us to improve it.

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Agent services account created

Your account reference number
XARN-123-4567

What you can do next

Make a note of your account reference number **XARN-123-4567**. You will need this if you are not able to access your agent services account.

[Check the guidance](#) to find out how to:

- sign in to your agent services account
- use new HMRC services on behalf of your clients

[Go to your agent services account](#)

[Get help with this page.](#)



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VAT agent E2E journey roadmap

1

Create an Agent services account

The screenshot shows a web interface for creating an Agent services account. At the top, there's a dark header bar with a blue navigation bar below it containing 'Account home' and 'Sign out'. The main area has a title 'CT AGENT 110' and an account number 'WARN0000839'. Below this, a section titled 'Your clients' contains two boxes: 'Agent services' (describing access for authorised clients) and 'Client authorisations' (describing how to manage client authorisations). At the bottom, there's a 'Get help with this page' link and a 'BETA' notice: 'This is a new service - your [feedback](#) will help us to improve it.'

Account home

Sign out

CT AGENT 110

Account number: WARN0000839

Your clients

Agent services

Access services for clients that have already authorised you to act on their behalf.

View a client's PAYE Income record

Client authorisations

Start a new authorisation request or add existing clients to your account.

Ask a client to authorise you

Link your existing client authorisations to this account

Get help with this page

BETA This is a new service - your [feedback](#) will help us to improve it.





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VAT agent E2E journey roadmap

2 - Link existing clients to your account



Link existing clients to your account

After an agent creates an agent service account, they link their existing VAT clients to the account. When a client subscribes to MTD, the agent can.

- view the client's data
- submit updates to HMRC

The agent's user journey linking their existing VAT clients to the agent services account is via web screens. The agent will sign in with each GGW ID that is currently used to access HMRC online services. If an agent currently has ten GGW ID's they must do this ten times.

HMRC encourage vendors to ensure their agent customers are aware of the service and give links to more information.



2

Link existing clients to your account

The screenshot shows a GOV.UK page titled "Agent services account". The main heading is "Link your current Self Assessment and VAT clients to your agent services account". Below this, there's a section titled "What you need to know" which includes instructions for linking clients through software. A "Before you start" section provides specific requirements, such as having a UTR and Government Gateway login details. At the bottom, there's a "Sign in with another account" button and a link to "Get help with this task".



VAT agent E2E journey roadmap

2

Link existing clients to your account

Sign in

Enter your Government Gateway credentials to sign in. You received these when you created your HMRC online account.

User ID

Password

Sign in

Problems signing in

[Don't have a Government Gateway account](#)
[Forgotten user ID](#)
[Forgotten password](#)
[Forgotten user ID and password](#)



Link existing clients to your account

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Account linked

Your Government Gateway account is now linked to your agent services account

What you can do next

Your agent services account can now access your current client relationships linked to this Government Gateway account.

So if your clients are signed up to report their income and expenses, or their VAT returns, through software, you can now:

- use software to access information about these clients
- act on your client's behalf for these services without having to ask for their authorisation again

You will still need to use your software or Government Gateway accounts to manage your client lists.

If you use more than one Government Gateway account

You will need to repeat this process for each Government Gateway account your business uses.

Sign in using a different Government Gateway account to start linking it to your agent services account.

[Sign in to link another account](#)

[Finish and sign out](#)





VAT agent E2E journey roadmap

3 - Agent services get authority from new clients (UI)

3 Agent services get authority from new clients (UI)

After a firm has created a new Agent services account, they must get authority from each new client they want to represent for MTD. This works by allowing an agent to send a digital request to their client. The client can accept or reject the request digitally.

To add a client:

1. The agent:
 - a. clicks the link for adding a client
 - b. inputs the client's information
 - c. sends a direct request to the client.
2. The client:
 - a. accesses a digital service, where they
 - b. accept or reject the request
3. The agent is updated with the client's response. If the client accepts HMRC discloses the client's MTDFB-VAT data to the agency.



VAT agent E2E journey roadmap

3 Agent services get authority from new clients (UI)

The screenshot shows the GOV.UK Agent services account interface. At the top, there is a navigation bar with the GOV.UK logo, the account name "Agent services account", a "Sign out" link, and a "Account home" link. Below the navigation bar, the account name "CT AGENT 110" and account number "WARN0000839" are displayed. The main content area is divided into two sections: "Your clients" and "CT AGENT 110's account".

Your clients

- Agent services**: Access services for clients that have already authorised you to act on their behalf.
 - [View a client's PAYE income record](#)
- Client authorisations**: Start a new authorisation request or add existing clients to your account.
 - [Ask a client to authorise you](#)
 - [Link your existing client authorisations to this account](#)

CT AGENT 110's account

- Manage your account**: Allow other users in your organisation to access this agent services account, or restrict their access.
 - [Manage user access to your agent services account](#)

[Get help with this page.](#)

BETA This is a new service - your [feedback](#) will help us to improve it.





Agent services get authority from new clients (UI)



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[◀ Back](#)

What type of client do you need authorisation from?



Individual



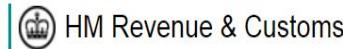
Organisation

[Continue](#)



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3 Agent services get authority from new clients (UI)



[◀ Back](#)

What do you want the client to authorise you to do?

- Report their income or expenses through software
- Report their VAT returns through software

[Continue](#)

► [Can't see the option you're looking for?](#)



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3 Agent services get authority from new clients (UI)



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[◀ Back](#)

What is your client's VAT registration number?

This is the 9-digit number they received when they registered for VAT.

For example, 123456789

Continue



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Agent services get authority from new clients (UI)



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[◀ Back](#)

What is your client's VAT registration date?

This will help us match their details against information we hold.

For example, 31 8 15

Day Month Year

<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------

[Continue](#)



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VAT agent E2E journey roadmap

3 Agent services get authority from new clients (UI)

Send your client this link

<http://tax.service.gov.uk/agent-services/invitation/238712387163>

What to do next

You must **share this unique link** with your client and they must respond by 02 February 2018.

Copy and paste the link into an email. If your client does not respond in time, you will need to request authorisation again and send them the new link.

This is the only way your client can authorise you. **HMRC will not share the link for you.**

[Return to your account](#)

[Is there anything wrong with this page?](#)

BETA We are still working to improve this website, [tell us what you think](#)



3 Agent services get authority from new clients (UI)

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Accept or decline a tax agent's request for authorisation

You need to authorise your tax agent if you want them to report your VAT returns through software.

You will need to create or use a Government Gateway account for an organisation to continue.

What this means

The tax agent who sent you the request will have access to your VAT information through software. Sometimes HMRC will contact you as well as the agent, or instead of them.

[Accept invitation](#)

[Decline invitation](#)



3 Agent services get authority from new clients (UI)



Sign in

Enter your Government Gateway credentials to sign in. You received these when you created your HMRC online account.

User ID

Password

Sign in

Problems signing in

[Trying to file Self Assessment using GOV.UK Verify?](#)

[Don't have a Government Gateway account](#)

[Forgotten user ID](#)

[Forgotten password](#)

[Forgotten user ID and password](#)

[Get help from HMRC's automated assistant ↗](#)





Agent services get authority from new clients (UI)

Confirm your identity

We just need to confirm who you are

We're going to ask you some security questions based on information HMRC hold on you.

This is to help protect your data.

[Continue](#)

[Report a problem](#)

Tell us about a problem you've encountered or something that needs to improve.





Agent services get authority from new clients (UI)



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Agency Name wants to represent you to HMRC

Would you like Already Subscribed Agency to report your VAT returns through software?

Yes

No

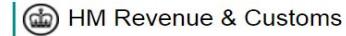
Continue



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Agent services get authority from new clients (UI)



Confirm that you understand

By accepting the invitation, you are agreeing that Agency Name will:

- use accounting software that supports Making Tax Digital to record your sales and purchases, then to submit your VAT returns
- submit each VAT return within one calendar month and 7 days from the end of your accounting period
- tell HMRC if you stop trading and then submit your final VAT return
- tell HMRC if you want to leave this trial

I understand Agency Name will be granted access to my VAT information

[Authorise tax agent](#)





Agent services get authority from new clients (UI)



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**Agent authorisation
complete**

What this means

Agency Name is now confirmed as your tax agent for reporting your VAT returns through software.

[Continue to your tax account](#)



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VAT business/agent E2E journey roadmap

- 4 - Customer/Agent signs up to MTD
- 4a - Agent signs up a Sole Trader
- 4b - A Sole Trader signs up



Customer/Agent signs up to MTD

In April 2018 we delivered the sign-up service that enables existing VAT users to move to the MTD service. A user who wants to use the MTD service for VAT must sign up before first use, even if they have already signed up for MTD for income tax.

Agents can sign up an existing client's business. However, the creation of the agent account which is a one-off process must be completed to enable an agent firm to sign up their clients.

We will develop supporting content that allows a customer to identify whether they need to:

- register for tax and then sign up for MTD
- sign up only.

After a customer signs up they are informed of their update obligations.

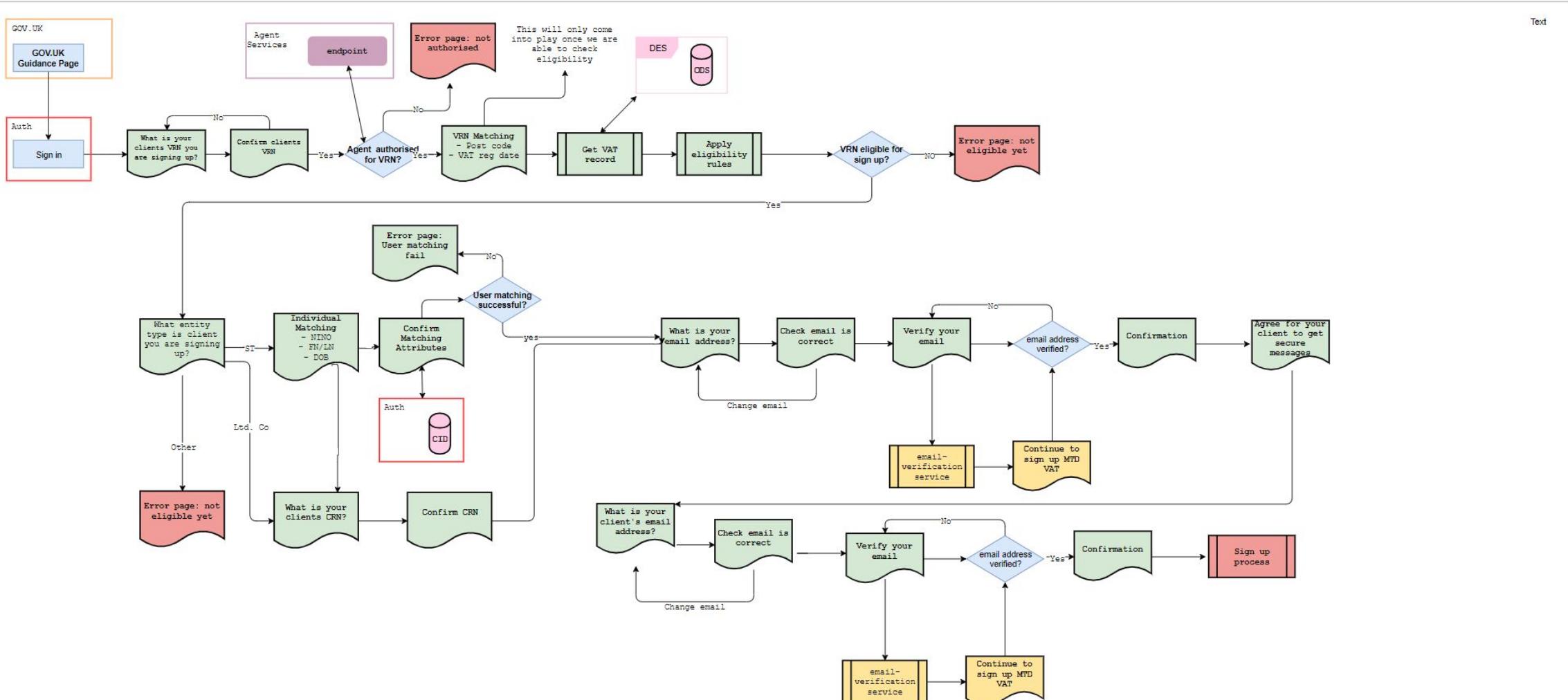
The sign-up service requests minimal information from the customer such as e-mail address. It reuses information provided as part of identity checking.

HMRC will enable customers to register and sign up through GOV.UK. Developers can link to the service from their software.



VAT business/agent E2E journey roadmap

4 Customer/Agent signs up to MTD



VAT business/agent E2E journey roadmap



Customer/Agent signs up to MTD

Sign in

Enter your Government Gateway credentials to sign in. You received these when you created your HMRC online account.

User ID

Password

Sign in

Problems signing in

[Don't have a Government Gateway account](#)
[Forgotten user ID](#)
[Forgotten password](#)
[Forgotten user ID and password](#)



VAT business/agent E2E journey roadmap

4a

Agent signs up a Sole Trader

The screenshot shows a web page with the GOV.UK logo at the top left. The main title is "Use software to submit your client's VAT Returns". A blue banner at the top says "BETA This is a new service - your [feedback](#) will help us to improve it." Below this, the HM Revenue & Customs logo is shown. The main content area has a large heading "You can't use this service yet" and the text "To use this service, you need to [set up an agent services account](#)". At the bottom left is a green "Sign out" button, and at the bottom right is a link "Get help with this page".

This error message is displayed if the Agent has not yet created their agent account.



VAT business/agent E2E journey roadmap

4a

Agent signs up a Sole Trader

What is your client's VAT number?

This is the 9-digit number they received when they registered for VAT.

For example, 123456789

Continue

[Get help with this page.](#)



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VAT business/agent E2E journey roadmap

4a Agent signs up a Sole Trader

The screenshot shows a GOV.UK page titled "Use software to submit your VAT returns". A blue banner at the top left says "ALPHA This is a new service – your [feedback](#) will help us to improve it." Below the banner, there's a link "[◀ Back](#)". The main content area has a heading "Your client can't use this service yet" and the text "This service is only available to some limited companies and sole traders. You'll be able to sign up your client for this service by April 2019." At the bottom left is a green "Sign out" button.





Agent signs up a Sole Trader

What type of business is your client registered as?

- Sole trader
- Limited company
- Other

Continue



VAT business/agent E2E journey roadmap

4a Agent signs up a Sole Trader

Enter your client's details

We will attempt to match these details against information we currently hold.

First name

Last name

National Insurance number

For example, 'QQ 12 34 56 C'.

Date of birth

For example, 10 12 1990

Day Month Year

<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------

Continue



VAT business/agent E2E journey roadmap

4a Agent signs up a Sole Trader

 GOV.UK Use software to submit your client's VAT Returns [Sign out](#)

ALPHA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

What is your email address?

We will only send you an email to let you know if your client can join the trial.

For example, me@me.com

[Continue](#)

[Get help with this page.](#)



VAT business/agent E2E journey roadmap

4a Agent signs up a Sole Trader

The screenshot shows a web page with a dark header. On the left is the GOV.UK logo. In the center, it says "Use software to submit your client's VAT Returns". On the right, there is a "Sign out" link. Below the header, a blue bar contains the word "ALPHA" followed by the text "This is a new service – your [feedback](#) will help us to improve it.". A "Back" link is visible. The main content area has a heading "Confirm your email address" and displays the email address "me@me.com". A green "Confirm" button is present. Below the button are links for "Change email address" and "Get help with this page."

GOV.UK

Use software to submit your client's VAT Returns

Sign out

ALPHA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Confirm your email address

me@me.com

[Confirm](#)

[Change email address](#)

[Get help with this page.](#)



VAT business/agent E2E journey roadmap

4a Agent signs up a Sole Trader This is only done once



ALPHA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Verify your email address

We have sent an email to me@me.com. Click on the link in the email to verify your email address.

You can [change your email address](#) if it is not correct.

► [I did not get an email](#)

[Get help with this page.](#)



VAT business/agent E2E journey roadmap

4a Agent signs up a Sole Trader



Use software to submit your client's VAT Returns

ALPHA This is a new service – your [feedback](#) will help us to improve it.

You have verified your email address

You need to continue to sign up your client. We will send you a confirmation message after you sign up this client.

[Continue](#)

[Get help with this page.](#)



VAT business/agent E2E journey roadmap

4a Agent signs up a Sole Trader

GOV.UK

Use software to submit your client's VAT Returns

ALPHA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Agree for your client to get secure messages from HMRC

To join this trial, your client must agree to get secure messages instead of letters.

When your client has a new message about VAT in their business tax account, we will send an email notification to let them know.

Your client will need to sign in to their business tax account to read their secure messages.

[Agree](#)

[Sign out](#)

[Get help with this page.](#)



VAT business/agent E2E journey roadmap

4a

Agent signs up a Sole Trader

What is your client's email address?

For example, me@me.com

Continue

[Get help with this page.](#)



HM Revenue
& Customs

VAT business/agent E2E journey roadmap

4a

Agent signs up a Sole Trader

Check your client's email address

Email address

[Confirm and continue](#)

[Change email address](#)

[Get help with this page.](#)



HM Revenue
& Customs

VAT business/agent E2E journey roadmap

4a

Agent signs up a Sole Trader

We've sent your client an email

We've sent an email to . Your client needs to click on the link in the email to verify their email address.

They need to verify their email address to get VAT emails from HMRC.

[Continue](#)

[Get help with this page.](#)



VAT business/agent E2E journey roadmap

4a Agent signs up a Sole Trader

Terms of participation

By taking part in this trial, you agree that either you or your client will:

- use accounting software that supports Making Tax Digital to record your client's sales and purchases, then to submit their VAT Returns
- submit each VAT Return within one calendar month and 7 days from the end of your accounting period
- tell HMRC if your client stops trading and then submit their final VAT Return
- tell HMRC if your client wants to leave this trial

These terms aren't contractual and your client can leave the trial at any time.

[Accept and continue](#)

[Get help with this page.](#)



VAT business/agent E2E journey roadmap

4a Agent signs up a Sole Trader

 GOV.UK Use software to submit your client's VAT Returns

ALPHA This is a new service – your [feedback](#) will help us to improve it.

We have received your client's information

What happens next

As this service is currently a trial, it is only available to some limited companies, sole traders and partnerships.

You must tell your client if they can take part in the trial.

1. We will let you know whether your client can take part in this trial, usually within 24 hours.
2. [Choose relevant third party software \(opens in a new window\)](#). If your client will use software, it is important they choose a package that can interact with yours.
3. Allow your software to submit VAT Returns to HMRC. You might need to sign in with your Government Gateway details.
4. Use software to record your client's sales and purchases.
5. Submit your client's VAT Returns before their deadlines.

Your client can view their VAT Return deadlines in their accounting software or business tax account.

[Sign up another client](#)

[Sign out](#)

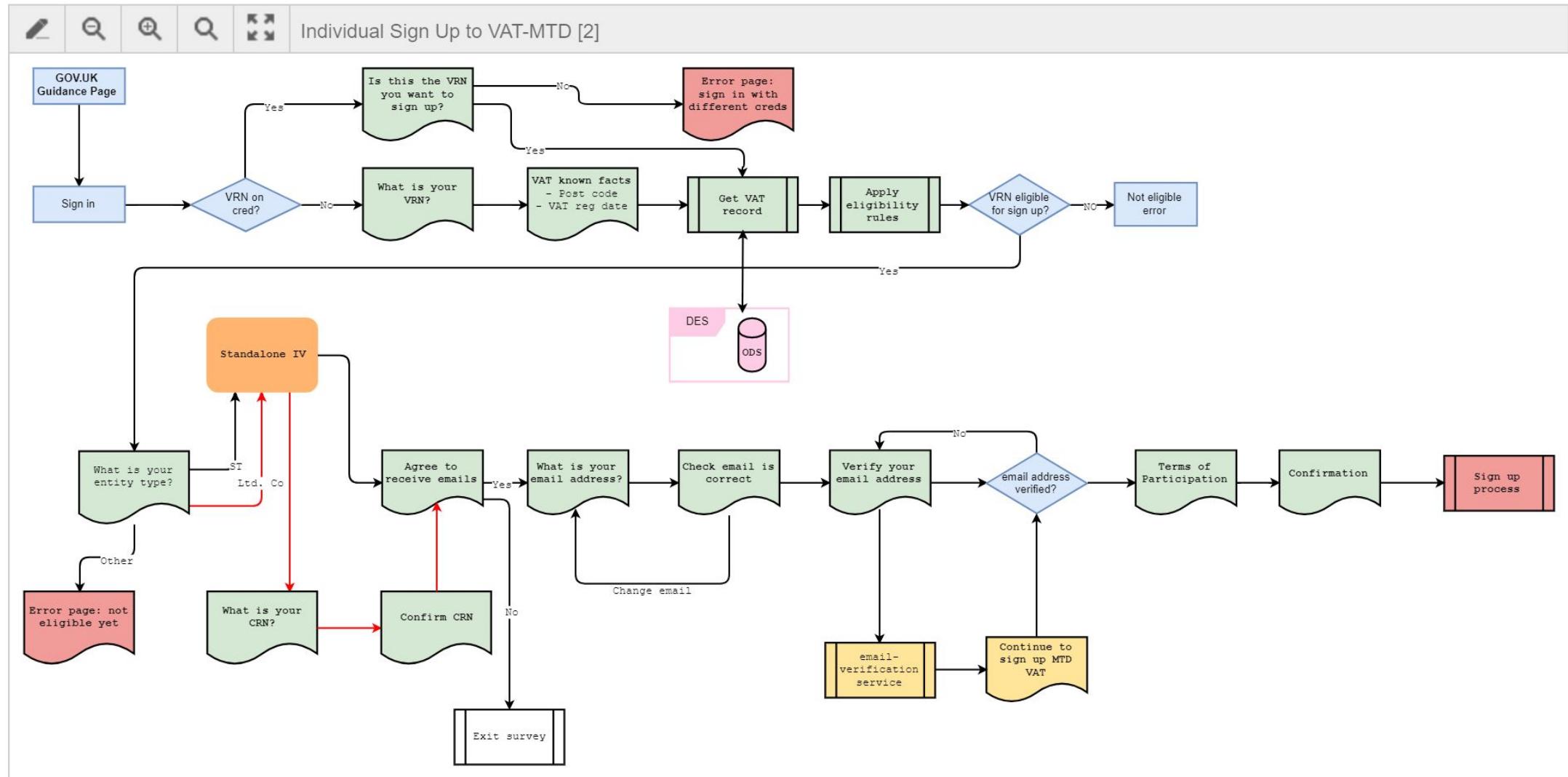
Please Note: The link to 'Choose accounting software' will remain inactive until the point of leaving CGL



VAT business/agent E2E journey roadmap

4b

A Sole Trader signs up



VAT business/agent E2E journey roadmap

4b

A Sole Trader signs up

Sign in

Enter your Government Gateway credentials to sign in. You received these when you created your HMRC online account.

User ID

Password

Sign in

Problems signing in

[Don't have a Government Gateway account](#)
[Forgotten user ID](#)
[Forgotten password](#)
[Forgotten user ID and password](#)



VAT business/agent E2E journey roadmap

4b

A Sole Trader signs up

The screenshot shows a web page from the GOV.UK website. At the top left is the GOV.UK logo. To its right, the text "Use software to submit your VAT returns" is displayed. Below this, a blue bar contains the word "ALPHA" followed by the text "This is a new service – your [feedback](#) will help us to improve it." A "Back" link is located just below the alpha bar. The main content area features a large heading "You can't use this service yet". Below this, two lines of text explain the service's availability: "This service is only available to some limited companies and sole traders." and "You'll be able to sign up for this service by April 2019." At the bottom left of the content area is a green "Sign out" button.



VAT business/agent E2E journey roadmap

4b

A Sole Trader signs up

 GOV.UK Use software to submit your VAT Returns Sign out

ALPHA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Do you have more than one VAT registered business?

Yes No

Continue



4b

A Sole Trader signs up

What type of business are you registered as?



Sole trader



Limited company



Other

Continue



VAT business/agent E2E journey roadmap

4b

A Sole Trader signs up

If you have previously filed on line using this Government Gateway credential you will not see this.

Confirm your identity

We just need to confirm who you are

We're going to ask you some security questions based on information HMRC hold on you.

This is to help protect your data.

Continue



VAT business/agent E2E journey roadmap

4b

A Sole Trader signs up

Confirm your identity

Enter your details

First name

Last name

Date of birth
For example, 31 3 1980
Day Month Year

National Insurance number
It's on your National Insurance card, benefit letter, payslip or P60.
For example, 'QQ 12 34 56 C'.

Continue

Confirm your identity

Choose a way for us to identify you

We'll ask you some security questions that relate to your:

Passport
 P60
 Payslips
 Tax credit payments

Continue

[I don't have that information](#)

Confirm your identity

Do you have a valid UK passport?

Yes
 No

Continue

Confirm your identity

Your UK passport

Enter your details **exactly** as they appear on your passport.

[Where to find these details on your passport](#)

Passport number
Your passport number contains 9 numbers and no letters.

Surname
Exactly as it appears on your passport.

Given names
Enter all given names, as they appear on your passport.

Expiry date of your passport
For example, 1 FEB 2018
Day Month Year

Continue

[I don't have that information](#)



VAT business/agent E2E journey roadmap

4b

A Sole Trader signs up

 GOV.UK Use software to submit your VAT Returns Sign out

ALPHA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Confirm your details

First name	Alex
Last name	Fisher
Date of birth	12 December 1990
National Insurance number	

[These details are not correct](#)

[Continue](#)

If you have previously filed online using this Government Gateway credential you arrive here



VAT business/agent E2E journey roadmap

4b

A Sole Trader signs up

Agree to get emails instead of letters

When you have a new message about VAT in your HMRC account, we'll send you an email to let you know.

You'll need to sign in to your account to read the message.

[Agree and continue](#)

[Sign out](#)

[Get help with this page.](#)



VAT business/agent E2E journey roadmap

4b

A Sole Trader signs up

What is your email address?

For example, me@me.com

Continue

[Get help with this page.](#)



HM Revenue
& Customs

VAT business/agent E2E journey roadmap

4b

A Sole Trader signs up

Check your email address

Email address

[Confirm and continue](#)

[Change email address](#)

[Get help with this page.](#)



VAT business/agent E2E journey roadmap

4b

A Sole Trader signs up

Verify your email address

We've sent an email to . Click on the link in the email to verify your email address.

[Get help with this page.](#)



VAT business/agent E2E journey roadmap

4b

A Sole Trader signs up

You've verified your email address

You'll now receive messages and email notifications from HMRC.

[Continue to sign up](#)

[Get help with this page.](#)



HM Revenue
& Customs

VAT business/agent E2E journey roadmap

4b

A Sole Trader signs up

Terms of participation

By taking part in this trial, you agree to:

- use accounting software that supports Making Tax Digital to record your sales and purchases, then to submit your VAT returns
- submit each VAT return within one calendar month and 7 days from the end of your accounting period
- authorise any third party you use (such as your accountant) and be responsible for any information they give to HMRC on your behalf
- tell HMRC if you stop trading and then submit your final VAT return
- tell HMRC if you want to leave this trial

These terms aren't contractual and you can stop taking part in the trial at any time.

[Accept and continue](#)

[Get help with this page.](#)



VAT business/agent E2E journey roadmap

4b

A Sole Trader signs up

We've received your information

What happens next

We'll let you know whether you can use software to submit your VAT Returns, usually within 24 hours.

After your application is approved

1. [Choose accounting software that supports this service](#) if you haven't already.
2. Sign in to the software with your Government Gateway details and authorise it to interact with HMRC.
3. Add any sales and purchases that you've already received or paid out.
4. Record your future sales and purchases using the software.
5. Submit your VAT Returns before your deadlines.

You can view your VAT Return deadlines in your accounting software or [business tax account](#).

[Sign out](#)

[Get help with this page.](#)

Please Note: The link to 'Choose accounting software' will remain inactive until the point of leaving CGL





VAT business/agent E2E journey roadmap

5 - Customer/Agents links software to HMRC via OAuth



Customers/agents links software to HMRC via OAuth

Users of software that connects to the HMRC Developer Hub APIs must give their software permission to interact with their data and HMRC. Please note this can be done before or after a customer has signed up for the MTD VAT service.

The software user grants the software the authority to interact with HMRC on their behalf - for a set of functions or 'API scopes'.

The software must include each scope for which the user must grant permission the authorise call. This is explained in the authorisation section of the Developer Hub:

<https://developer.service.hmrc.gov.uk/api-documentation/docs/authorisation>

If the user grants permission, the software receives an authorisation code that can be used to gain an OAuth access token for that user and a refresh token. The access token expires periodically and must be refreshed. After 18 months the access token fully expires and the end user must grant authority again.

For an Agent, when connecting software to HMRC, the new GGW user Agent ID which was generated as part of the agent services account journey will be the GGW user Agent ID which needs to be connected. If another ID is attempted to be logged in with, an error message will be presented to the user.

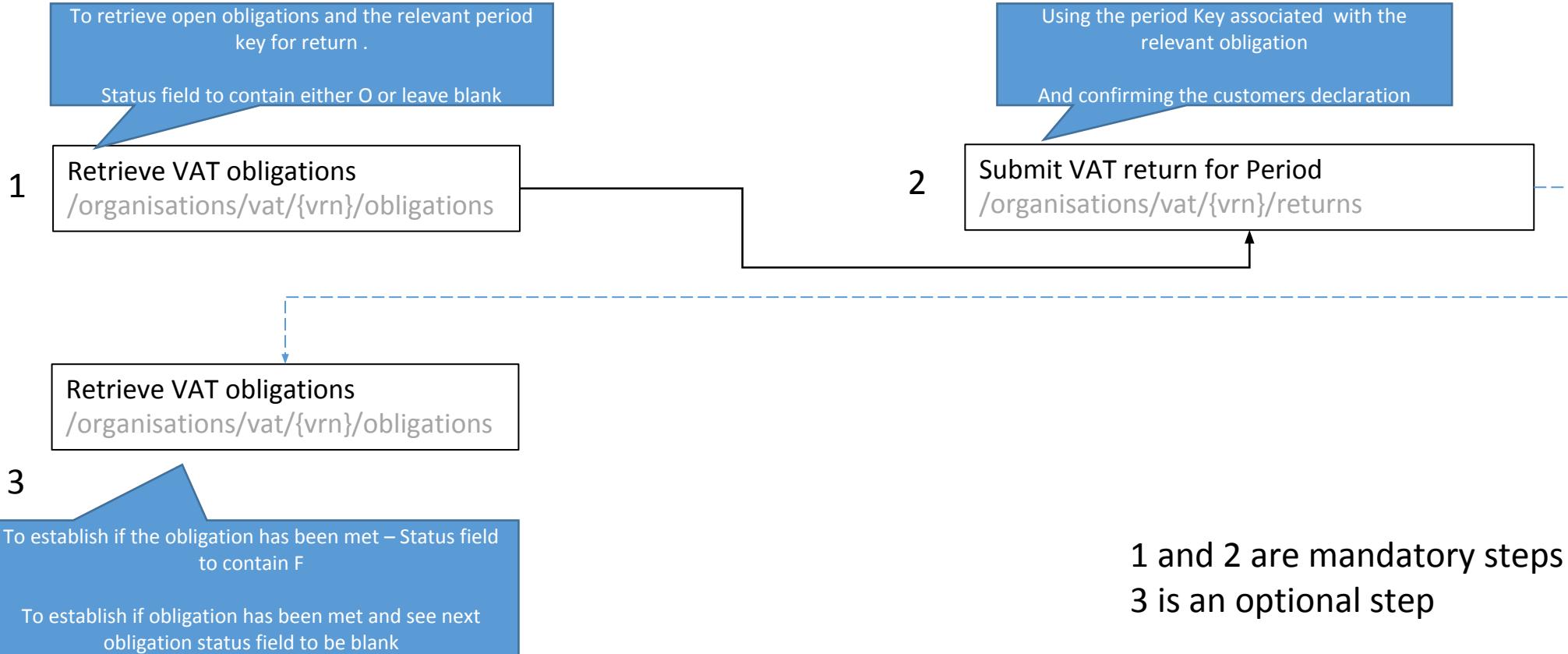




VAT business/agent E2E journey roadmap

- 6 - Customer/agent retrieves obligations in software
- 7 - Customer/agent submits VAT return with declaration, in software

VAT API sequence to submit a return



VAT business/agent E2E journey roadmap

6

Customer/Agent retrieves obligations in software

This API allows software to search for obligations based on a date range (start and end) and a status (open O, fulfilled F, or all) of the obligations.

If the status is

- fulfilled (F), the received date is included
- Open (O), the due date is used
- If status field is left blank then you will get both open and fulfilled obligations returned

It also gives the relevant periodKey associated with that specific obligation.

A new obligation is generated on the first day of the period, whether the previous obligation has been fulfilled or not. Software will be able to search for previous open and/or fulfilled obligations but will only be able to call the next obligation.

Note: MTD-VAT will be supporting more customer types throughout controlled go live and as they come on board this endpoint will return obligation information for customers that are on monthly, annual and other non standard staggers.

Note Period Keys **should not** be shown to the customer, these are for software use to ensure the return is recorded against the correct obligation

Example format Period keys for stagger types

Monthly

18AD	30.04.2018
18AE	31.05.2018
18AF	30.06.2018

Quarterly

18A1	30.04.2018
18A2	31.07.2018
18A3	31.10.2018
18A4	31.01.2019

Note we have not yet configured annual period keys as annual accounting is not in scope for MVP.

The Period key is the ID code for the period that this obligation belongs to. The format is a string of four alphanumeric characters. Occasionally for special periods, the format includes a # symbol (e.g. #001), which must be URL-encoded. In these occasions the period key will need to be URL-encoded. For example 18AD, 18A1, #001



VAT Business/Agent E2E Journey Roadmap

7

Customer/Agent submits VAT return with declaration in software

This is the only post endpoint. The data items required are the same as the current 9 Box return. The period key that is relevant to the obligation needs to be provided as part of the return.

HMRC also requires software to show their customers a declaration that they must confirm before the return is sent to HMRC, confirmation that this has been done is reflected by the “finalised” true. The return will not be accepted without this.

Declaration text to be used if businesses make the submission;

When you submit this VAT information you are making a legal declaration that the information is true and complete. A false declaration can result in prosecution.

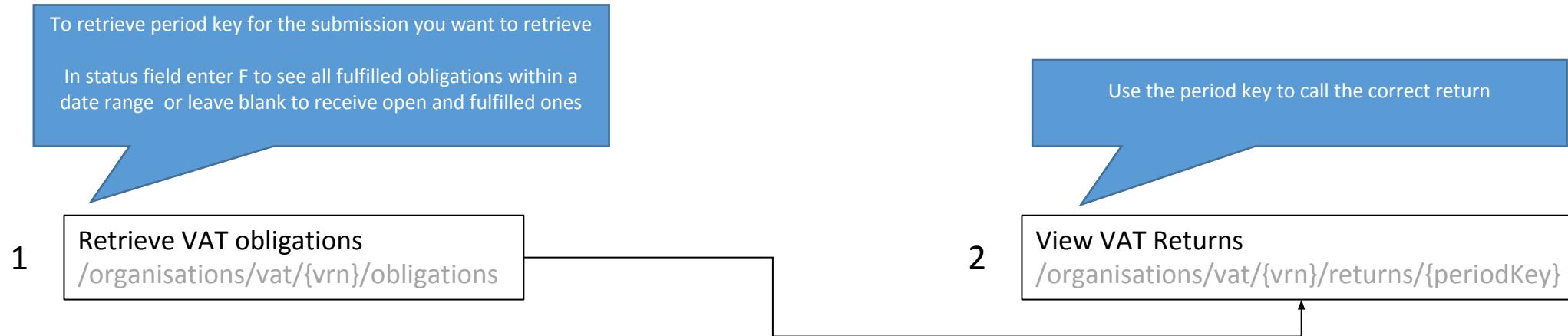
Declaration text to be used if only Agents make the submission;

I confirm that my client has received a copy of the information contained in this return and approved the information as being correct and complete to the best of their knowledge and belief.

```
"periodKey": "#001",
"vatDueSales": 100.00,
"vatDueAcquisitions": 100.00,
"totalVatDue": 200,
"vatReclaimedCurrPeriod": 100.00,
"netVatDue": 100,
"totalValueSalesExVAT": 500,
"totalValuePurchasesExVAT": 500,
"totalValueGoodsSuppliedExVAT": 500,
"totalAcquisitionsExVAT": 500,
"finalised": true
```



VAT API sequence to View a previously submitted return



I have not included example for liabilities and payments as they are straightforward GET calls with no other dependencies and are optional



9 Customer/agents - View previously submitted data in software

Software will be able to retrieve any return that has been submitted up to four years previously.

To get this information the periodKey for the relevant return is required.

You will not be able to retrieve returns filed before joining MTD through the API's.

```
"periodKey": "#001",
"vatDueSales": 100.00,
"vatDueAcquisitions": 100.00,
"totalVatDue": 200,
"vatReclaimedCurrPeriod": 100.00,
"netVatDue": 100,
"totalValueSalesExVAT": 500,
"totalValuePurchasesExVAT": 500,
"totalValueGoodsSuppliedExVAT": 500,
"totalAcquisitionsExVAT": 500
```





VAT business/agent E2E journey roadmap

8 - Customer/agent amends previously submitted data



Customers/agent amends previously submitted data

The current process for correcting errors on a submitted VAT Return remains.

- If the net value of the errors is below £10,000, or between £10,000 and £50,000 and does not exceed 1% of the box 6 amount, the user can adjust their current VAT Return (method 1)
- If the net value of the errors is greater than that, the user must notify HMRC in writing with full details of the errors (method 2)

A user can choose to use method 2 and notify HMRC separately in any case.

Please ensure customers are made aware of these methods.





VAT business/agent E2E journey roadmap

9 - Customer sets up, views, cancels, amends or makes a payment by Direct Debit

VAT business/agent E2E journey roadmap

9

Customer sets up, views, cancels, amends or makes a payment by Direct Debit

HMRC would like vendors to present messages to business users at key points in their journey that give them the option to make payments.

There are multiple ways to pay a VAT bill, listed on GOV.UK at [Pay your VAT bill](#), each taking different amounts of time to clear. HMRC advise vendors in their messaging to ask customers to visit that link so the customer can make a payment in the method that best suits them and in time to meet the deadline.

With the arrival of MTD-VAT the contents of this GOV.UK page are subject to change. Likewise the URL may change in which case we will update the link above.

For businesses to see previous payments they've made to HMRC, we would like vendors to show messages at key points in their journey that encourage them to visit their Business Tax Account (login page is <https://www.tax.service.gov.uk/gg/sign-in?continue=/business-account>)

Using their Business Tax Account customers can:

- check any VAT Direct Debit arrangements they have with HMRC
- make changes, or cancel their Direct Debit
- set up a new Direct Debit instruction
- make a corporate credit or debit card payment

This page will also provide details of HMRC's bank account for customers wanting to pay by Bacs, CHAPS or by faster payments



VAT business E2E journey roadmap

9

Customer sets up Direct Debit

GOV.UK Business tax account Sign out

Please help us improve our service Enter our survey

BETA This is a new service – your [feedback](#) will help us to improve it.

HM Revenue & Customs

Business tax account Your VAT details What you owe

What you owe

£1,220
due by 30 August 2018
a VAT officer's investigation showed you underpaid by this amount [Pay now](#)

£5,000
due by 19 July 2018
a VAT officer's investigation showed you underpaid by this amount [Pay now](#)

£244
due by 19 July 2018
a VAT officer's investigation showed you underpaid by this amount [Pay now](#)

£3,000,000
due by 7 June 2018
for the period 1 April to 30 April 2018 [Pay now](#) [View return](#)

£9,799.80
due by 7 April 2018 **OVERDUE**
for the period 1 February to 28 February 2018 [Pay now](#) [View return](#)

£20,000
due by 7 December 2017 **OVERDUE**
for the period 1 August to 31 October 2017 [Pay now](#) [View return](#)

£20,000
due by 7 September 2017 **OVERDUE**
for the period 1 May to 31 July 2017 [Pay now](#) [View return](#)

Payments can take up to 5 days to process.

Direct debits
You can [set up a direct debit](#) to pay your VAT Returns.

▶ [What I owe is incorrect or missing](#)

GOV.UK Business tax account Sign out

BETA This is a new service – your [feedback](#) will help us to improve it.

◀ Back

Choose a way to pay your VAT return

- Direct Debit
- Bank transfer
- Debit or corporate credit card

▶ [Other ways to pay](#)

[Continue](#)

[Get help with this page](#)



BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Enter account details to set up your Direct Debit

Name on the account

Sort code

Account number

Are you the only person required to authorise a Direct Debit account?

Yes No

[Continue](#)

[Get help with this page](#)



Business tax account

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Check your Direct Debit details are correct

Account name

[Change](#)

Sort code

Account number

Payments will appear on your bank statement as 'HMRC E VAT DDS'

► [You are covered by the Direct Debit Guarantee](#)

[Confirm](#)

[Get help with this page](#)

VAT business E2E journey roadmap

9

Customer sets up Direct Debit



Business tax account

Sign out

BETA This is a new service – your [feedback](#) will help us to improve it.

Direct Debit successful

Reference 999984111

We have sent you a confirmation email with details of the date of your first payment.

What happens next

Your payments for your VAT Return will be taken automatically by Direct Debit. We will give you advance notice of your payment 2 days before it is taken from your account.

You can view your Direct Debit details immediately on your [VAT Tax Account](#).

Contact us about your Direct Debit

Call 0300 200 3700 and quote your reference.

[Print this page](#)

[Return to your VAT details](#)

VAT business E2E journey roadmap

9

Customer views Direct Debit

The screenshot shows two pages from the GOV.UK Business tax account. The left page displays the amount owed (£1224) and payment options (Pay now, View return). A box highlights the 'Direct debits' section, which contains a link to view details. The right page shows a summary of the Direct Debit setup, listing the account name (A. N. Other), sort code (12 32 67), and account number (****5678). It also includes links to return to VAT details, cancel or amend the direct debit, and get help.

Business tax account

BETA This is a new service – your [feedback](#) will help us to improve it.

HM Revenue & Customs

[Business tax account](#) > [Your VAT details](#) > What you owe

What you owe

£1224

due by 7 May 2018
for the period 1 Jan to 31 Mar 2018

[Pay now](#)
[View return](#)

Direct debits
You can [view your direct debit details](#).

▼ [What I owe is incorrect or missing](#)

If what you owe is incorrect, check if you can [correct errors on your VAT Return](#) (opens in a new tab).

After you have submitted a return, it can take 24 hours for what you owe to show here. You can still [make a payment](#) (opens in a new tab).

Business tax account

BETA This is a new service – your [feedback](#) will help us to improve it.

[Back](#)

A Direct Debit is set up for your VAT Return

We will collect your VAT Return payment from this account.

Account name	A. N. Other
Sort code	12 32 67
Account number	****5678

[Return to your VAT details](#)

[Cancel or amend my Direct Debit](#)

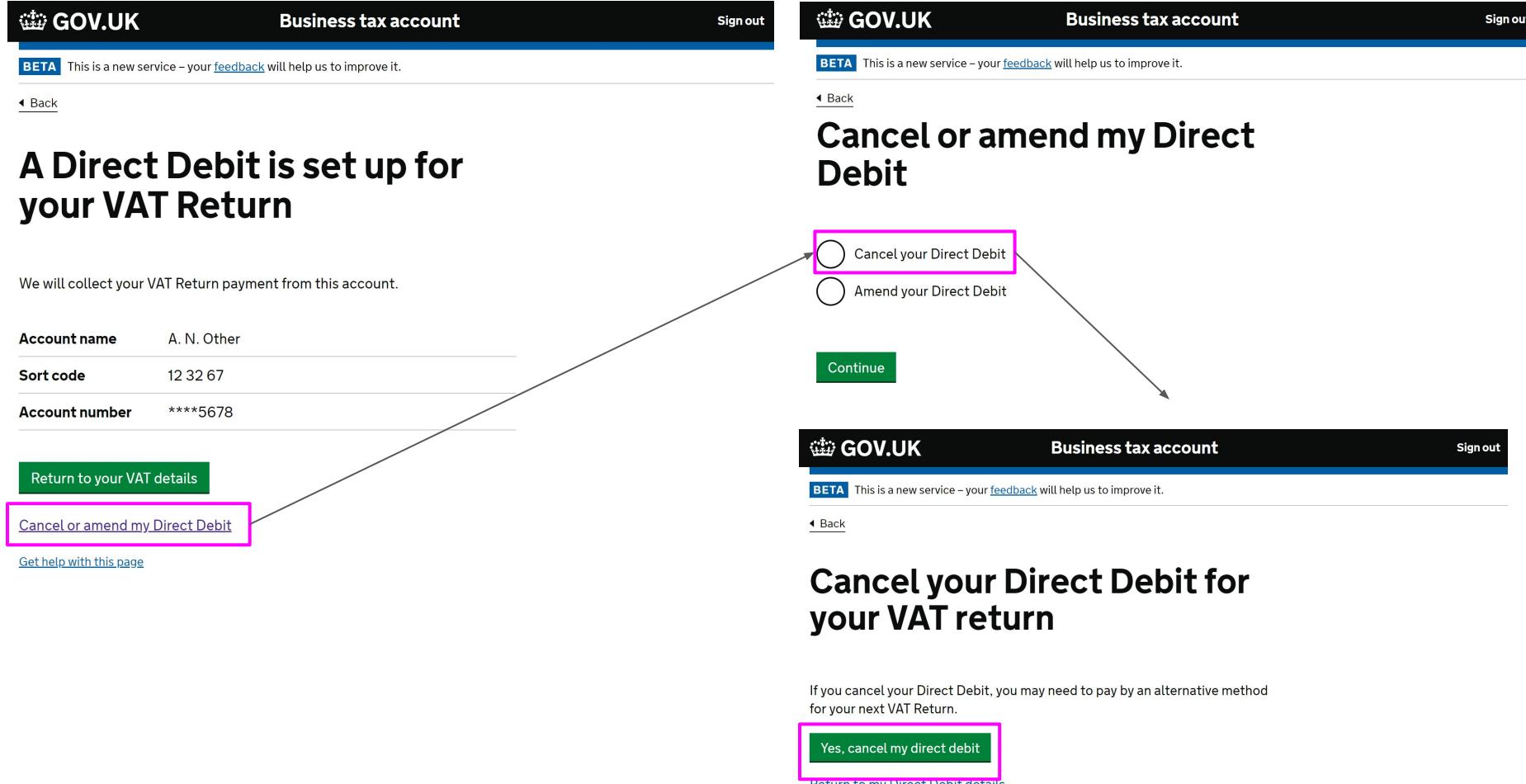
[Get help with this page](#)



VAT business E2E journey roadmap

9

Customer cancels Direct Debit



VAT business E2E journey roadmap

9

Customer cancels Direct Debit

The screenshot shows a GOV.UK Business tax account interface. At the top, there's a navigation bar with the GOV.UK logo, 'Business tax account', and a 'Sign out' link. A blue banner at the top states 'BETA This is a new service – your [feedback](#) will help us to improve it.' Below this, a large teal box displays the message 'Direct Debit cancelled'. Underneath, there's a section titled 'What happens next' with the text 'We have sent you a confirmation email.' Another section titled 'Contact us about your Direct Debit' includes the text 'If you have any questions on your Direct Debit cancellation, call us on 0300 200 3700.' At the bottom, there are links for 'Print this page' and 'Return to your VAT details'.



VAT business E2E journey roadmap

9

Customer amend Direct Debit

 GOV.UK Business tax account Sign out

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

A Direct Debit is set up for your VAT Return

We will collect your VAT Return payment from this account.

Account name	A. N. Other
Sort code	12 32 67
Account number	****5678

[Return to your VAT details](#)

[Cancel or amend my Direct Debit](#)

[Get help with this page](#)

 GOV.UK Business tax account Sign out

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Cancel or amend my Direct Debit

Cancel your Direct Debit
 Amend your Direct Debit

[Continue](#)

VAT business E2E journey roadmap

9

Customer amend Direct Debit

GOV.UK Business tax account Sign out

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Amend your Direct Debit details for your VAT return

Name on the account

Sort code

Account number

Are you the only person required to authorise a Direct Debit from this account?
 Yes No

[Continue](#)

[Get help with this page](#)

GOV.UK Business tax account Sign out

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Check your Direct Debit details are correct

Account name [Change](#)
Sort code
Account number

Payments will appear on your bank statement as 'HMRC E VAT DDS'
► [You are covered by the Direct Debit Guarantee](#)

[Confirm](#)

[Get help with this page](#)



VAT business E2E journey roadmap

9

Customer makes a payment by Direct Debit

The screenshot shows a GOV.UK Business tax account page. At the top, there's a blue header bar with the GOV.UK logo, the text 'Business tax account', and a 'Sign out' link. Below the header, a blue banner says 'BETA This is a new service – your [feedback](#) will help us to improve it.' The main content area has a teal background. It displays the message 'Direct Debit successful' in large white text, followed by 'Your direct debit has been amended' and a prominent reference number 'Reference 999984111'.

We have sent you a confirmation email with details of the date of your first payment.

What happens next

Your payments for your VAT Return will be taken automatically by Direct Debit. We will give you advance notice of your payment 2 days before it is taken from your account.

You can view your Direct Debit details immediately on your [VAT Tax Account](#).

Contact us about your Direct Debit

Call 0300 200 3700 and quote your reference.

[Print this page](#)

[Return to your VAT details](#)

[Get help with this page](#)



HM Revenue
& Customs



VAT business/agent E2E journey roadmap

10 - Customer/Agent makes a payment (other types)

10

Customer/agent makes a payment (other types)

HMRC would like vendors to present messages to business users at key points in their journey that give them the option to make payments.

There are multiple ways to pay a VAT bill, listed at [Pay your VAT bill](#) page of GOV.UK, each taking different amounts of time to clear. HMRC advise vendors in their messaging to ask customers to visit that link so the customer can make a payment in the method that best suits them and in time to meet the deadline.

With the arrival of MTD-VAT the contents of this GOV.UK page are subject to change. Likewise the URL may change in which case we will update the link above.

For a Business to see previous payments that they've made to HMRC, we would like vendors to show messages at key points in their journey that encourage them to visit their Business Tax Account (login page is <https://www.tax.service.gov.uk/gg/sign-in?continue=/business-account>).

Using the Business Tax Account, customers can:

- check any VAT Direct Debit arrangements they may have with HMRC
- make changes, or cancel their Direct Debit
- set up a new Direct Debit agreement
- make a corporate credit or debit card payment

This page will also give details of HMRC's bank account for customers wanting to pay by Bacs, CHAPS or by faster payments





VAT business/agent E2E journey roadmap

11 - Customer/agents receives a repayment

VAT business/agent E2E journey roadmap

11

Customer/agents receives a repayment

HMRC would like vendors to present messages to business users at key points in their journey that give them the option to make payments.

There are multiple ways to pay a VAT bill, listed on the [Pay your VAT bill](#) page of GOV.UK. HMRC advise vendors in their messaging to ask customers to visit that link so the customer can make a payment in the method that best suits them.

With the arrival of MTD-VAT the contents of this GOV.UK page are subject to change. Likewise the URL may change in which case we will update the link above.

For a Business to see previous payments they've made to HMRC, we would like vendors to show messages at key points in their journey that encourage them to visit their Business Tax Account.(login page is <https://www.tax.service.gov.uk/gg/sign-in?continue=/business-account>).

Using their Business Tax Account, customers can:

- check any VAT Direct Debit arrangements they may have with HMRC
- make changes, or cancel their Direct Debit
- set up a new Direct Debit agreement
- make a corporate credit or debit card payment

This page will also give details of HMRC's bank account for customers wanting to pay by Bacs, CHAPS or by faster payments





VAT business/agent E2E journey roadmap

12 - Customer/agent notifies change of circumstances

12

Customers/agents notifies change of circumstances

HMRC would like vendors to present messages to business users regularly to remind them to check and update their details with HMRC.

They will be able to do that by visiting their Business Tax Account. The login page is <https://www.tax.service.gov.uk/gg/sign-in?continue=/business-account>, and by visiting that link businesses will be able to update a range of information, including addresses, telephone numbers, e-mail and business type.

Until MTD-VAT goes into Live service there will be a manual process in place whereby a customer can contact HMRC directly for a manual change to be made to their details.

For exiting controlled go live functionality will be available for customers to make the most regular changes with more functionality being added up until go live early 2019.



VAT business/agent E2E journey roadmap

12

Customers/agents notifies change of circumstances

GOV.UK Business tax account Sign out

Help HMRC work better
People like you are helping us improve. [Sign up to test our latest work \(opens in a new tab\)](#). [Close](#)

BETA This is a new service – your [feedback](#) will help us to improve it.

HM Revenue & Customs

[Business tax account](#) > Your VAT details

Betty Jones

Your VAT details

VAT registration number (VRN): 999984111

Next payment due	Next return due
7 May 2018	7 August 2018
Check what you owe	View return deadlines

[Payment history](#) [Submitted returns](#)

Check the payments you have made or received. Check the returns you have sent us.

[Update your VAT details](#)

Tell us about changes to your business or VAT Returns.

[Clear data](#)

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VAT business/agent E2E journey roadmap

12

Customers/agents notifies change of circumstances

GOV.UK Business tax account Sign out

ALPHA This is a new service – your [feedback](#) will help us to improve it.

[Business tax account](#) > [Your VAT details](#) > [Change of business details](#)

Your VAT details

Change of business details

Business name	ABC Digital Ltd	Change
Business address	30 Romford Road Wellington Telford Shropshire TF1 4ER United Kingdom	Change
Bank account for repayments only	Account number ****1234 Sort code 12****	Change
VAT Return dates	January, April, July and October	Change

[Clear data](#)

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Customers/agents notifies change of circumstances



ALPHA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Choose the new VAT Return dates

The VAT Return dates are currently January, April, July and October

- February, May, August and November
- March, June, September and December
- Every month

[Continue](#)



HM Revenue & Customs

[Clear data](#)

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Customers/agents notifies change of circumstances

GOV.UK

Business tax account

Sign out

ALPHA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Confirm the new VAT Return dates

The new VAT Return dates are February, May, August and November

[Change the VAT Return dates](#)

By confirming this change, you agree that the information you have given is complete and correct.

[Confirm and continue](#)

[Clear data](#)

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HM Revenue & Customs

VAT business/agent E2E journey roadmap

12

Customers/agents notifies change of circumstances

GOV.UK

Business tax account

Sign out

ALPHA This is a new service – your [feedback](#) will help us to improve it.

We have received the new VAT Return dates

What happens next

We will send a confirmation letter. This usually takes 2 working days.

The business must submit this period's return before following the new VAT Return dates

Finish



HM Revenue
& Customs

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VAT business/agent E2E journey roadmap

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Customers/agents notifies change of circumstances

GOV.UK Business tax account Sign out

ALPHA This is a new service – your [feedback](#) will help us to improve it.

Business tax account > Your VAT details > Change of business details

Your VAT details

Change of business details

About the business

Business name	ABC Digital Ltd	Change
Principal place of business	3 Romford Road Wellington Telford Shropshire TF1 4ER	Pending
Bank account for repayments only	Account number ****1234 Sort code 12****	Change
VAT Return dates	February, May, August and November	Pending

Contact details

Email address	john.b@abcdigital.com	Change
Correspondence address	5 Romford Road Wellington Telford Shropshire TF1 4ER United Kingdom	Change

Your registration

Status	Registered	Deregister
--------	------------	----------------------------

[Clear data](#)

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Customers/agents notifies change of circumstances

GOV.UK Business tax account Sign out

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◀ Back

What is the new 'principal place of business'?

This is where ABC DIGITAL LIMITED does most of its work.

If this is in different locations, use the address where it keeps its business records. This could a home address.

Property name or number
For example, The Mill, Flat A

Postcode
For example, ZZ1 1TA

[The address does not have a post code](#)

[Find address](#)

[Clear data](#)

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Customers/agents notifies change of circumstances

GOV.UK

Business tax account

Sign out

ALPHA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Confirm the new principal place of business

5 Romford Road
Wellington
Telford
Shropshire
TF1 4ER
United Kingdom

[Edit address](#)

By confirming this change, you agree that the information you have given is complete and correct.

[Confirm and continue](#)



HM Revenue & Customs

[Clear data](#)

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VAT business/agent E2E journey roadmap

12

Customers/agents notifies change of circumstances

GOV.UK Business tax account Sign out

ALPHA This is a new service – your [feedback](#) will help us to improve it.

[Back](#)

Select the new address

- 1 Romford Road, Wellington, Telford, TF1 4ER
- 2 Romford Road, Wellington, Telford, TF1 4ER
- 3 Romford Road, Wellington, Telford, TF1 4ER
- 4 Romford Road, Wellington, Telford, TF1 4ER
- 5 Romford Road, Wellington, Telford, TF1 4ER
- 6 Romford Road, Wellington, Telford, TF1 4ER
- 7 Romford Road, Wellington, Telford, TF1 4ER
- 8 Romford Road, Wellington, Telford, TF1 4ER
- 9 Romford Road, Wellington, Telford, TF1 4ER
- 10 Romford Road, Wellington, Telford, TF1 4ER
- 11 Romford Road, Wellington, Telford, TF1 4ER
- 12 Romford Road, Wellington, Telford, TF1 4ER
- 13 Romford Road, Wellington, Telford, TF1 4ER
- 14 Romford Road, Wellington, Telford, TF1 4ER
- 15 Romford Road, Wellington, Telford, TF1 4ER

[Continue](#)

[Enter address manually](#)

12

Customers/agents notifies change of circumstances



ALPHA This is a new service – your [feedback](#) will help us to improve it.

We have received the new principal place of business

You can also [change your correspondence address](#).

What happens next

We will send a confirmation letter. This usually takes 2 working days.

You will need to change the business address for other taxes separately.

[Finish](#)



HM Revenue
& Customs

[Clear data](#)

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VAT business/agent E2E journey roadmap

12

Customers/agents notifies change of circumstances

GOV.UK Business tax account Sign out

ALPHA This is a new service – your [feedback](#) will help us to improve it.

[Business tax account](#) > [Your VAT details](#) > [Change of business details](#)

Your VAT details

Change of business details

About the business

Business name	ABC Digital Ltd	Change
Principal place of business	5 Romford Road Wellington Telford Shropshire TF14ER	Pending
Bank account for repayments only	Account number ****1234 Sort code 12****	Change
VAT Return dates	January, April, July and October	Change

Contact details

Email address	john.b@abcdigital.com	Change
Correspondence address	5 Romford Road Wellington Telford Shropshire TF14ER United Kingdom	Change

Your registration

Status	Registered	Deregister
--------	------------	----------------------------

[Clear data](#)

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Customers/agents notifies change of circumstances

GOV.UK Business tax account Sign out

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Enter the new bank details

This bank account is for repayments only

Name on the account

Sort code

Account number

[Continue](#)

[Clear data](#)

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Customers/agents notifies change of circumstances

GOV.UK

Business tax account

Sign out

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Enter the new bank details

This bank account is for repayments only

Name on the account

Joe Bloggs

Sort code

20 20 10

Account number

0123456789

[Continue](#)



HM Revenue
& Customs

[Clear data](#)

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Customers/agents notifies change of circumstances

GOV.UK

Business tax account

Sign out

BETA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Confirm the new bank details

Account name	Joe Bloggs
Sort code	20-20-10
Account number	0123456789

[Change](#)

By confirming this change, you agree the the information you have given is complete and correct.

[Confirm and continue](#)

 HM Revenue & Customs

[Clear data](#)

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VAT business/agent E2E journey roadmap

12

Customers/agents notifies change of circumstances



Business tax account

Sign out

BETA This is a new service – your [feedback](#) will help us to improve it.

We have received the new bank details for repayments

What happens next

If this change is accepted, we will usually update your details within 2 working days.

Finish



HM Revenue
& Customs

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Customers/agents notifies change of circumstances

The screenshot shows a dark-themed GOV.UK website header with the 'GOV.UK' logo, 'Business tax account' title, and 'Sign out' link. Below the header, a blue bar displays the text 'ALPHA This is a new service – your [feedback](#) will help us to improve it.' A back navigation link '[◀ Back](#)' is visible. The main content area has a heading 'Change the business name' and a sub-section stating 'The business name is currently ABC Digital Ltd.'. It explains that users will be taken to Companies House to change the name, which will automatically update with HMRC. It also details the cost of changing the name and provides a link to continue to Companies House.

GOV.UK

Business tax account

Sign out

ALPHA This is a new service – your [feedback](#) will help us to improve it.

[◀ Back](#)

Change the business name

The business name is currently **ABC Digital Ltd.**

You will be taken to Companies House to change it. The business name will automatically update with HMRC too.

Changing the business name costs:

- £8 to update within 2 working days
- £30 to update on the same day

Companies House will send you an email notification, a secure message and a new certificate when the details have changed.

[Continue to Companies House \(opens in new tab\)](#)





VAT business/agent E2E journey roadmap

- 13 - Customer can view previous returns in BTA
- 14 - Customer can view when their next return is due in BTA
- 15 - Customer can view when their next payment is due, along with the ability to make payments via BTA

VAT business E2E journey roadmap

- 13 **Customers can view previous returns in BTA**
- 14 **Customer can view when their next return is due in BTA**
- 15 **Customer can view when their next payment is due, along with the ability to make payments via BTA**

Businesses may wish to view information in relation to their VAT. A user may also like assurance, which may help them when managing their tax affairs. This will also include viewing their previous updates that HMRC have received.

HMRC encourage vendors to make these features within their software products. Vendors can also direct users to visit their Business Tax Account, the login page attached below:

<https://www.tax.service.gov.uk/gg/sign-in?continue=/business-account>.

From April 2018, if a user has volunteered for pilot and signed up for MTD, they will have the option to use and view information within their Business Tax Account. This will include information such as: viewing their return, payment obligations and the option to link off from their Business Tax Account and make an online card payment.



VAT business E2E journey roadmap

13

Customers can view previous returns in BTA

Sign in

Enter Government Gateway credentials to sign in. You received these when you created your HMRC online account.

User ID

Password

Sign in

Problems signing in

[Don't have a Government Gateway account](#)
[Forgotten user ID](#)
[Forgotten password](#)
[Forgotten user ID and password](#)



VAT business E2E journey roadmap

13

Customers can view previous returns in BTA

Betty Jones

VAT

VAT registration number (VRN): 999984111

Next payment due	Next return due
7 May 2018	7 August 2018
Check what you owe	View return deadlines

[View VAT certificate \(opens in a new tab\)](#)

See your business information and other details.

[Submitted returns](#)

Check the returns you've sent us.



VAT business E2E journey roadmap

13

Customers can view previous returns in BTA

Submitted returns

[2018](#) [Previous returns](#)

2018 returns

You haven't submitted any returns for 2018 yet. You must use accounting software to submit your returns.



VAT business E2E journey roadmap

14

Customer can view when their next return is due in BTA

Betty Jones

VAT

VAT registration number (VRN): 999984111

Next payment due
7 May 2018
[Check what you owe](#)

Next return due
7 August 2018
[View return deadlines](#)

[View VAT certificate \(opens in a new tab\)](#)

Submitted returns
Check the returns you've sent us.

See your business information and other details.



VAT business E2E journey roadmap

14

Customer can view when their next return is due in BTA

Return deadlines

Use your accounting software to submit a return by:

7 August 2018

for the period 1 April to 31 June 2018

▼ [How to submit a return](#)

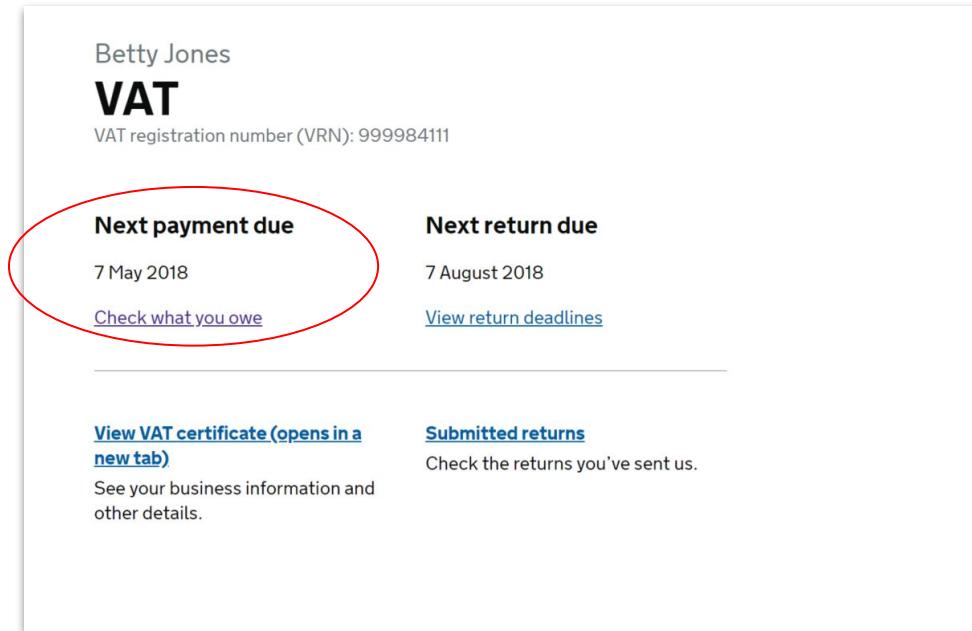
1. [Choose accounting software that supports this service \(opens in a new tab\)](#) if you haven't already.
2. Keep your VAT records in your accounting software.
3. Submit any VAT Returns before your deadlines.



VAT business E2E journey roadmap

15

Customer can view when their next payment is due, along with the ability to make payments via BTA



VAT business E2E journey roadmap

15

Customer can view when their next payment is due, along with the ability to make payments via BTA

What you owe

£1224
due by 7 May 2018
for the period 1 January to 31 March 2018

[Pay now](#)
[View return](#)

Your payment could take up to 5 days to process. You'll be fined if it's late.

Direct debits
If you've already set up a direct debit, you don't need to pay now. You can [view your direct debits](#) if you're not sure.

► [What I owe is incorrect or missing](#)





VAT business/agent E2E journey roadmap

16 - Appeals process (BAU Process)

16

Appeals process (BAU Process)

The existing process for Appeals will remain in place. A customer may contact HMRC if they have a query about a tax decision. If they don't understand the decision they can also get advice from HMRC or professional help.





HM Revenue
& Customs

VAT agent E2E journey roadmap

17 - Agent Services VAT client led de-authorisation

Agent Services VAT client led de-authorisation



Client only de authorisation

Sign in

Enter your Government Gateway credentials to sign in. You received these when you created your HMRC online account.

User ID

Password

Sign in

Problems signing in

[Trying to file Self Assessment using GOV.UK Verify?](#)

[Don't have a Government Gateway account](#)

[Forgotten user ID](#)

[Forgotten password](#)

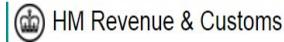
[Forgotten user ID and password](#)

[Get help from HMRC's automated assistant ↗](#)



HM Revenue
& Customs

Agent Services VAT client led de-authorisation



Manage your tax agents

Authorised agents

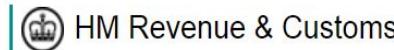
Agency name	Viewable services	Actions
Agency Name	Income record	Remove authorisation
Agency Name	Report VAT returns through software	Remove authorisation

[Get help with this page.](#)



17

Agent Services VAT client led de-authorisation



HM Revenue & Customs

Remove authorisation for Agency Name

If you remove your authorisation, Already Subscribed Agency will not longer be able to report your VAT returns through software.

Are you sure you want to remove authorisation for Agency Name?

Yes

No

Continue



HM Revenue
& Customs

Agent Services VAT client led de-authorisation



HM Revenue & Customs

Already Subscribed Agency can no longer report your VAT returns through software

If you want to allow Already Subscribed Agency to report your VAT returns through software, ask them to send you a new authorisation request.

Continue



HM Revenue
& Customs



HM Revenue
& Customs

VAT business/agent E2E journey roadmap

18 - GOV.UK guidance available

18

GOV.UK guidance available

We continue to use GOV.UK as our main way to guide users about government services and information, although we will not publish guidance about how to join the VAT pilot until we exit the controlled go live period of the pilot and enter public beta. Initially, the guidance will:

- signpost a few more detailed, task-based content pages on GOV.UK starting with:
 - = an overview of MTD
 - = choose software page
 - = sign up
- help build awareness about what MTD means for users and agents
- signpost the route for customer support (See Customer Support Model section for further details), including how vendors can contact HMRC teams
- manage users' concerns if not eligible yet, or there's no legal requirement for them yet.
- help us (HMRC) manage the messages users need to know over coming months and years - who is eligible, why signing up early might help you, when this will become mandatory and so on.

As we make more functionality live, we'll add more task-based guidance onto GOV.UK to ensure that users can continue their journey. For example, 'Sign up to report VAT through software' 'Choose software' and so on.

As MTD becomes more mainstream, we will reduce campaign content and presence.

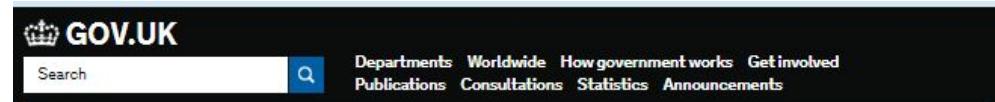
We would like your package to make users aware of the links to the guidance detailed above if they are interested in the service.



VAT business/agent E2E journey roadmap

18

GOV.UK guidance available



[Home](#) > [Money](#) > [Business tax](#) > [VAT](#) > [VAT returns](#)

Guidance

Use software to submit your VAT Returns

If you submit VAT Returns for a limited company or you are a sole trader, you may be able to join the Making Tax Digital pilot for VAT.

Published 19 September 2018
Last updated 1 October 2018 — [see all updates](#)

Contents

- Who can use this service
- How it works
- Sign up for the pilot
- If you need help with your software

Related content

[VAT returns](#)

HMRC is changing the way you submit your VAT Returns. From April 2019, most VAT registered businesses with a turnover above £85,000 must use Making Tax Digital compatible software to keep their records and submit their VAT Returns.

Instead of waiting until then, you can get compatible software now and try this new way of submitting your returns so you're ready when the changes come in. By signing up to HMRC's secure service, you're helping test a new way of working as part of the Making Tax Digital pilot.

Who can use this service

You may qualify for the pilot if you use a standard accounting period, you are up to date with your VAT, and you:



HM Revenue & Customs

GOV.UK guidance available

Who can use this service

You may qualify for the pilot if you use a standard accounting period, you are up to date with your VAT, and you:

- are a sole trader
- currently submit the VAT Return for a limited company

You will not be able to take part in the pilot at the moment if you:

- are a trust or charity
- are part of a VAT group or VAT Division
- trade with the EU
- are based overseas
- are a partnership
- submit annual returns
- make VAT payments on account

This pilot will be opened to more businesses. Check back regularly to see if it has been extended to include you.

How it works

If you qualify you can [choose the right software for you](#). If you already use software, check with your provider to see if you can use it with this pilot. You might want to use more than one product, provided they link together digitally.

Then you can:

- sign up for the Making Tax Digital pilot
- use software to keep your business records, prepare your next VAT Return, and submit it to HMRC

You can still choose to:

- get your agent to submit your VAT Returns
- view your next VAT Return deadline in your Business Tax Account



18

GOV.UK guidance available

Sign up for the pilot

You'll need to have:

- the Government Gateway details you use to submit your VAT Returns online
- your VAT registration number

You may also be asked to confirm your details.

[Sign up >](#)

If you need help with your software

Check with your software provider if you need help, for example with keeping your sales and purchase records, or submitting your VAT Returns.

If you have another query about the Making Tax Digital pilot for VAT, [contact HMRC](#).

Published 19 September 2018
Last updated 1 October 2018

[↑ Contents](#)





VAT business/agent E2E journey roadmap

19 - Subscription service available for businesses and agents

19

Subscription service available for businesses and agents

Post April 2019 we will deliver a Subscription (formerly known as VAT Registration) service that will allow businesses new to VAT to subscribe and at the same time as they sign up to MTD.

Until this service is delivered, new customers will need to subscribe for VAT using the existing service, then navigate to the sign up service and complete that journey.

The service will request information about the business and the person running it. Following successful subscription the customer will be informed of their Return deadlines.

Agents must already be subscribed with HMRC's Agent Services in order to access the new VAT subscription service on behalf of clients.





VAT business/agent E2E journey roadmap

20 - Choose software GOV.UK page available

20

Choose software GOV.UK page available

HMRC will publish a list of software that is MTD-compatible on GOV.UK so that businesses and agents can choose the right software for them

See an example of this format being used for MTD Income Tax:

<https://www.gov.uk/guidance/software-for-sending-income-tax-updates>.

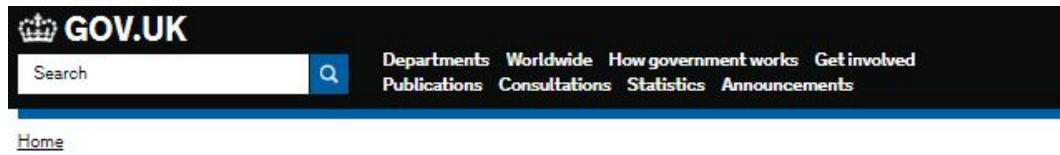
HMRC is considering the design of this page (an early draft can be found on the next slide), working with the software industry.

HMRC requires that each package made available to customers complies with the Terms of Use <https://developer.service.hmrc.gov.uk/api-documentation/docs/terms-of-use> which have to be accepted by software developers before production credentials are issued.



20

Choose software GOV.UK page available



Guidance

Find software suppliers for sending VAT Returns and Income Tax updates

Find out which software packages support the Making Tax Digital pilots.

Published 1 October 2018
Last updated 1 October 2018 — [see all updates](#)

Contents

- [Overview](#)
- [Software providers](#)

Overview

If you sign up to the Making Tax Digital pilot you'll need software packages that, depending on your needs, let you:

- [send Income Tax updates](#)
- [submit VAT Returns] (this will link to new business guide)

If you're an [agent firm](#) and you sign clients up to the pilots you'll need one that lets you send these to HMRC on their behalf.

You'll need this software to keep records of income and expenses for Income Tax, or sales and purchases for VAT. If you're already using software to keep records, check with your provider when the software will be ready to allow you to send updates and submit returns to HMRC throughout the year.



Choose software GOV.UK page available

Software providers

More providers and software will be available and added to the alphabetical lists below as the Making Tax Digital pilots progress.

Find compatible software for:

- [both Income Tax and VAT](#)
- [Income Tax only](#)
- [VAT only](#)

Compatible software for both Income Tax and VAT

Software provider	Who can use this	Feature(s)
A-Test	Agents and businesses	Digital record keeping Updates to HMRC for self-employment Updates to HMRC for UK property (excluding furnished holiday lettings) Tax estimates from HMRC based on provided updates
Xylophone	Businesses	Digital record keeping Updates to HMRC for self-employment Updates to HMRC for UK property (excluding furnished holiday lettings) Tax estimates from HMRC based on provided updates

Compatible software for Income Tax only

Software provider	Who can use this	Feature(s)
Absolute	Agents and businesses	Digital record keeping Updates to HMRC for self-employment Updates to HMRC for UK property (excluding furnished holiday lettings) Tax estimates from HMRC based on provided updates
Forbes	Agents and businesses	Digital record keeping Updates to HMRC for self-employment Updates to HMRC for UK property (excluding furnished holiday lettings) Tax estimates from HMRC based on provided updates
IRIS	Agents	Digital record keeping Updates to HMRC for self-employment Updates to HMRC for UK property (excluding furnished holiday lettings) Tax estimates from HMRC based on provided updates



20

Choose software GOV.UK page available

Rhino	Businesses	Digital record keeping Updates to HMRC for self-employment Updates to HMRC for UK property (excluding furnished holiday lettings) Tax estimates from HMRC based on provided updates
-----------------------	-------------------	--

Compatible software for VAT only

Software provider	Who can use this	Feature(s)
B-Test	Agents	Digital record keeping Updates to HMRC for self-employment Updates to HMRC for UK property (excluding furnished holiday lettings) Tax estimates from HMRC based on provided updates
C-Test	Agents and businesses	Digital record keeping Updates to HMRC for self-employment Updates to HMRC for UK property (excluding furnished holiday lettings) Tax estimates from HMRC based on provided updates

HMRC does not recommend or endorse any one product or software provider and is not responsible for any problems you have with software.

Published 1 October 2018
Last updated 1 October 2018

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HM Revenue
& Customs

VAT business/agent E2E journey roadmap

21 - Obligation Reminders

21

Obligation Reminders

Content TBC



HM Revenue
& Customs



HM Revenue
& Customs

VAT business/agent E2E journey roadmap

22 - Voluntary Supplementary Data

22

Voluntary Supplementary Data

Content TBC



HM Revenue
& Customs



HM Revenue
& Customs

VAT business/agent E2E journey roadmap

23 - Request a VAT Refund

23 Request a VAT Refund

Content TBC





VAT business/agent E2E journey roadmap

24 - Voluntary payments

24

Voluntary Payments

Content TBC



HM Revenue
& Customs



HM Revenue
& Customs

VAT business/agent E2E journey roadmap

25 - Repayment Tracker

25

Repayment Tracker

Content TBC



HM Revenue
& Customs



VAT business/agent E2E journey roadmap

26 - Payment Reminders

26

Payment Reminders

Content TBC



HM Revenue
& Customs



VAT business/agent E2E journey roadmap

27 - View and Change to non-MTD and former MTD
customers

²⁷ **View and Change to non-MTD and former MTD customers**

Content TBC





VAT business/agent E2E journey roadmap

28 - Customer/agent can see interest and penalties in BTA

28

Customer/agent can see interest and penalties

Existing penalties and notification methods will remain in place for service users;

- Late registration - Factsheet CC/FS11
- Late Filing - VAT Notice 700/50
- Late Payment - VAT Notice 700/50
- Inaccuracy penalties - Factsheet CC/FS7
- Wrongdoing penalty - Factsheet CC/FS12
- Retention of records - VAT Notice 700/21
- Breaches of regulations - VAT Notice 700/21
- Default interest - VAT Notice 700/43





VAT business/agent E2E journey roadmap

29 - Voluntary MTD Customer/agent asks to leave MTdFb
VAT

29 Voluntary MTD Customer/agent asks to leave MTdFb

Initially there is a manual process in place whereby a Customer/Agent can contact the HMRC helpline to notify their requirement to unsubscribe from the service.

In the event that the customer continues to be VAT registered, if necessary VAT returns can be submitted manually.

In time the manual process will be replaced by a user interface.





VAT business/agent E2E journey roadmap

30 - Agent led De-authorisation

30

Agent led De-authorisation

Content TBC





VAT agent E2E journey roadmap

31 - Agent leaves Agent Services

31

Agent leaves Agent services

This will initially be the usual process, which can be used to remove the agent reference number and Government Gateway (GGW) enrolment (HMRC-AS-AGENTS).

The scenario where this is needed is when an agency firm ceases trading.

If an agency no longer wants to participate in MTD, they can stop using their GGW ID.

We are currently working to include a UI for this journey as part of the wider change of circumstances solution.





HM Revenue
& Customs

VAT agent E2E journey roadmap

32 - Update Agency designatory details



Update Agency designatory details

Content TBC





HM Revenue
& Customs

Customer support model

Customer support model

We are developing a Customer Support Model which will help guide HMRC Customers to the most appropriate support. This may be provided by HMRC or the software vendor depending on the issue. HMRC support will be provided through a variety of channels and options for seeking advice and support:

We wish to work with software vendors to provide a comprehensive support package that covers software usage, online access and technical issues, as well as straightforward tax queries

Customers will be signposted to self-help through a suite of guidance products such as videos, webinars and e- learning, which is aimed at specific stages of the MTD journey. We will develop the content as we add new functionality.

A new dedicated team of advisers has been created to offer telephony and webchat support for MTD. The team can currently be contacted via the HMRC 'Contact Us' page. We will be developing new signposting on Gov.UK which will focus on digital and webchat support channels. This guidance will be updated as the model develops.



MTDfB Customer Support Model

The Customer Support Model guides HMRC customers to the most appropriate support. This may be provided by HMRC or the software vendor depending on the issue.

- The support offering for software vendors includes guidance on GOV.UK and 1-2-1 support via the Software Developer Support Team SDST.
- Support for clients from third party software providers.
- The support offering for customers with general enquiries about Making Tax Digital includes one to many support via self serve products available on GOV.UK, guidance, videos, webinars) and links to MTD Customer Support Teams.
- Customers are able to contact the Digital Customer Support Team get help with this page' links of the MTD user interface screens.
- Customers can contact our MTD Customer Support Team

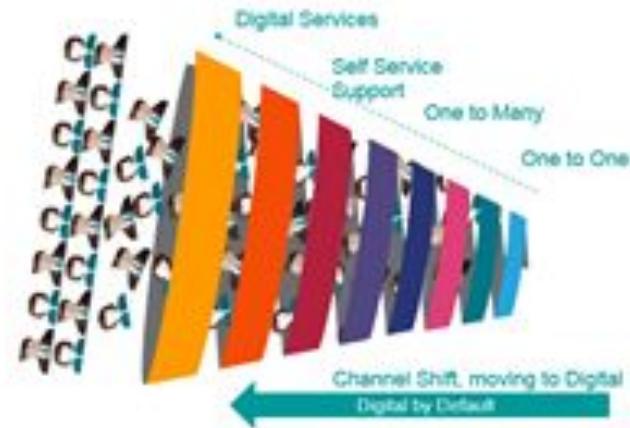


Operational Customer Support Model

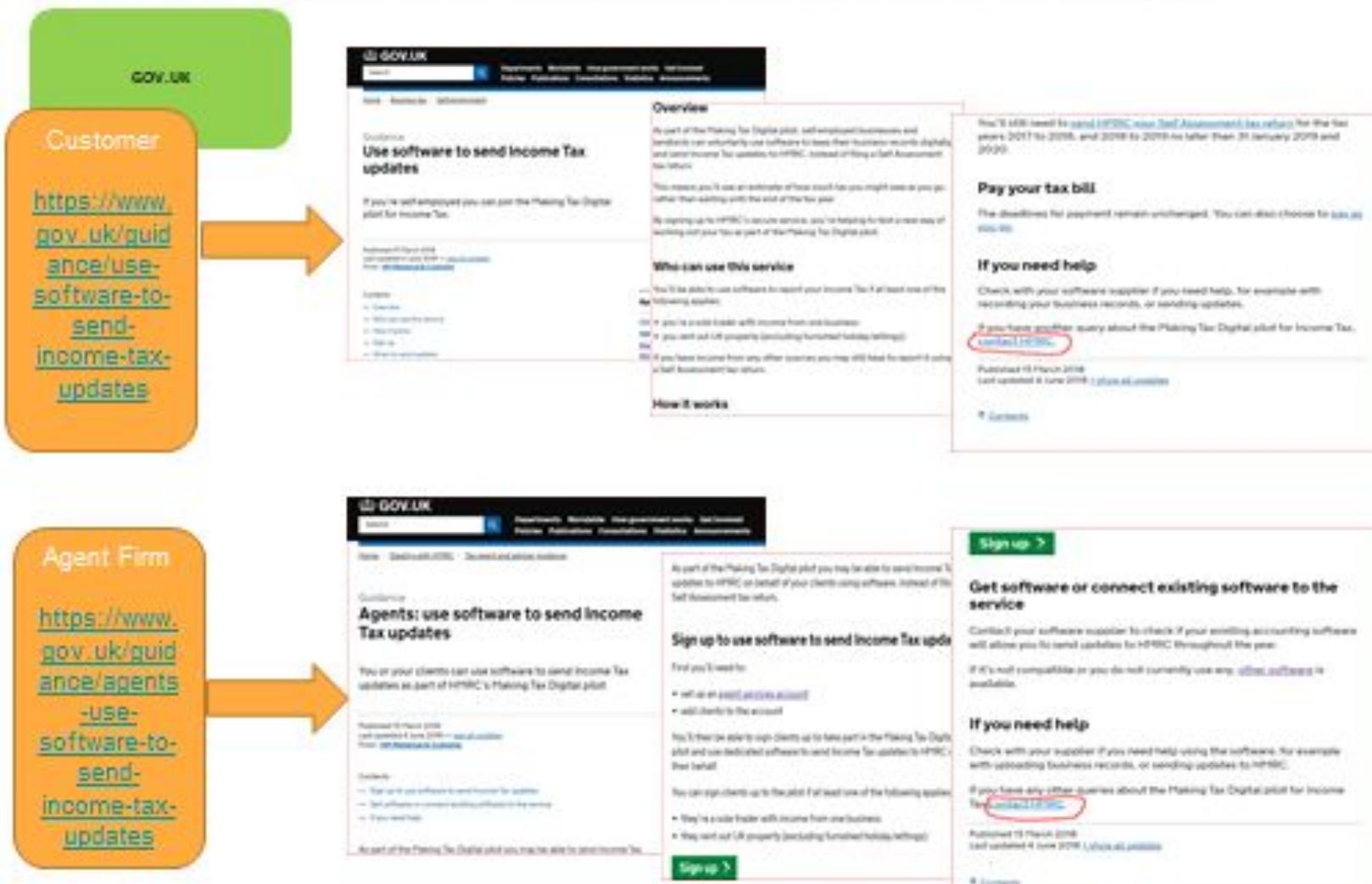
It is the support given to customers to enable them to fulfil their obligations with HMRC

It includes:

- all touch points that Customer Support Teams and operational colleagues have in the end to end customer journeys (e.g. telephony, webchat, deskpro enquiries, transaction processing, complaints)
- proactive and reactive contact
- Access, capability (AD & NES), exemptions)
- upstream compliance
- Security



GOV.UK Income tax guidance & sign up to ITSA



VAT pages will be available on exit from CGL



Self serve products on GOV.UK

gov.uk

@ July 2018

ITSA	https://www.gov.uk/guidance/get-an-hmrc-agent-services-account	Guidance & Set up or Sign in, links to contact HMRC
ITSA	https://www.gov.uk/guidance/software-for-sending-income-tax-updates	Software options
ITSA & VAT	https://www.gov.uk/guidance/help-and-support-for-making-tax-digital	Webinars & Videos
ITSA & VAT	https://www.gov.uk/government/publications/making-tax-digital-for-business-stakeholder-communications-pack	Guidance and FAQ's
VAT	https://www.gov.uk/government/publications/software-suppliers-supporting-making-tax-digital-for-vat	Software options
VAT	https://www.gov.uk/government/publications/vat-notice-70022-making-tax-digital-for-vat	VAT Notice

Will update as new products become available

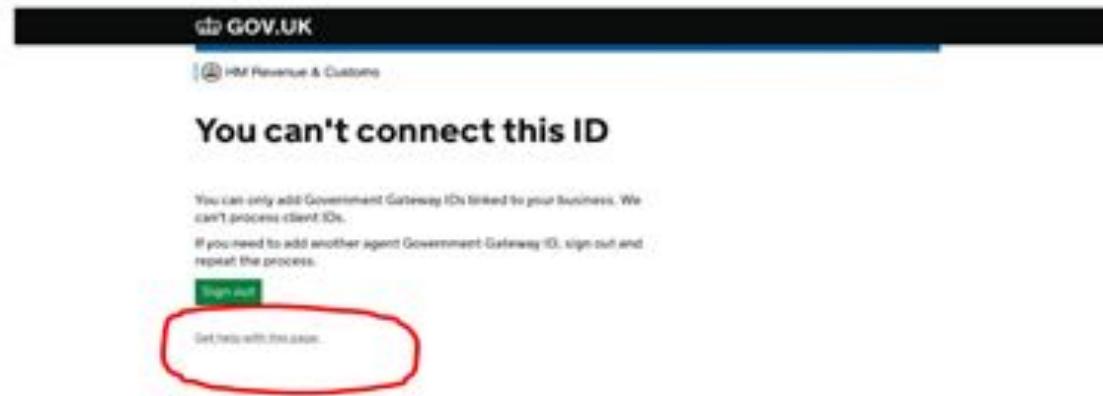


Digital Customer Support - Access to Deskpro

VAT Agent E2E Journey Roadmap

3 Error pages - Agent Services VAT Mapping

URL: /agent-mapping/not-enrolled



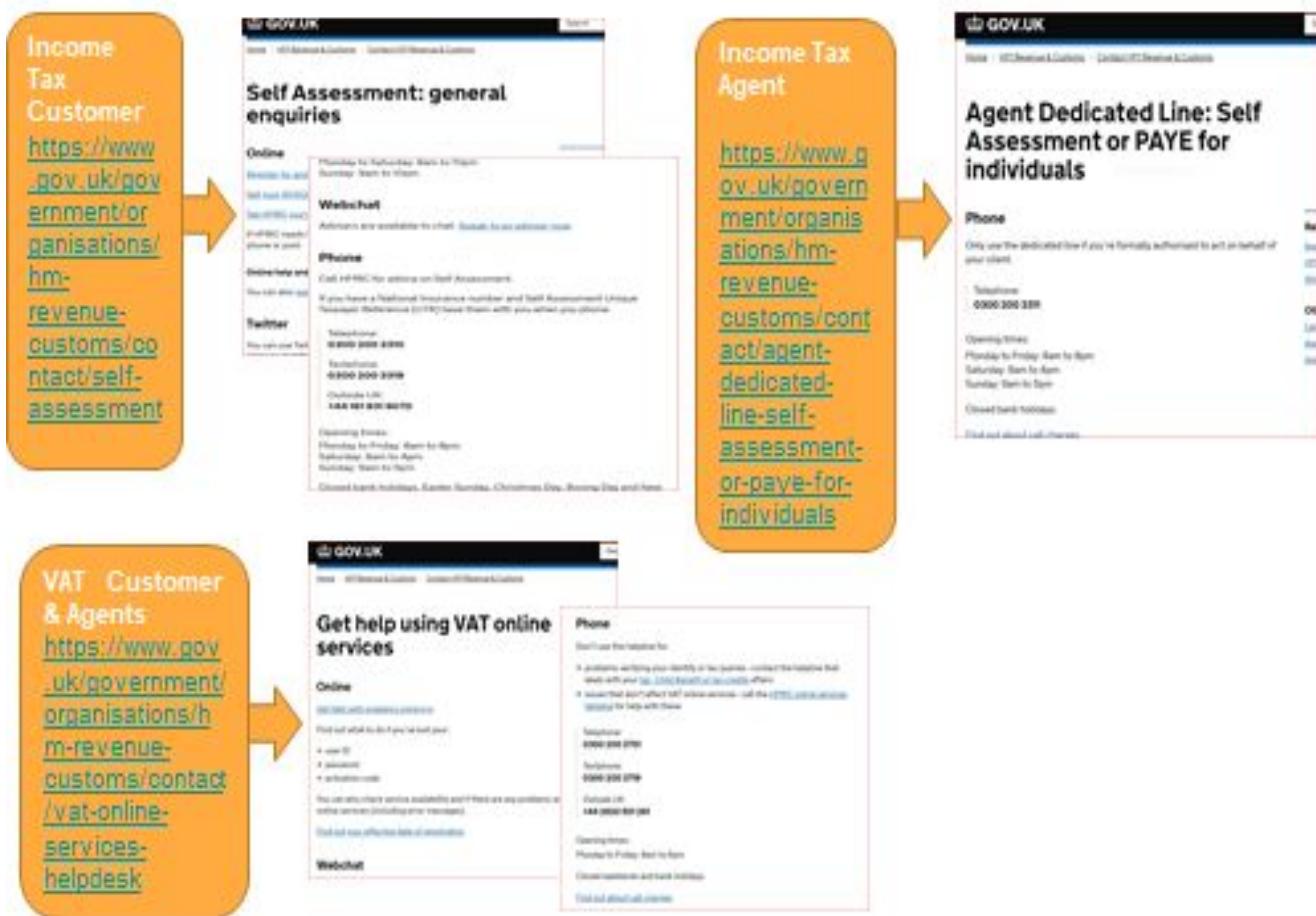
1. User tries to log in to mapping using a government gateway credential without the agent affinity group
2. User tries to log in to mapping using a government gateway credential that hasn't has an SA Agent Code enrolled to it
3. User enters incorrect log in details



27



HMRC Contact channels



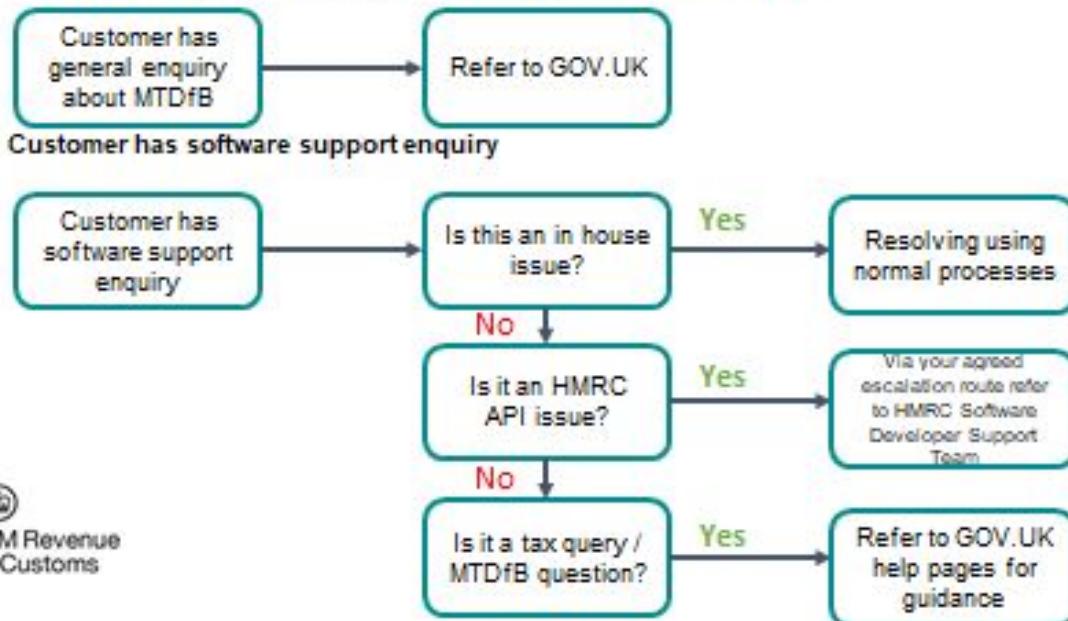
Extract from Software Vendor guide

The Customer Support Model guides HMRC Customers to the most appropriate support. This may be provided by HMRC or the software vendor depending on the issue.

The support offering for ITSA customers includes guidance on GOV.UK, support links on all HMRC UI pages, webchat, and telephony support.

Three live service customer journeys have been highlighted below as illustrative examples of typical support requests. For testing services HMRC will directly support you and customers through the process

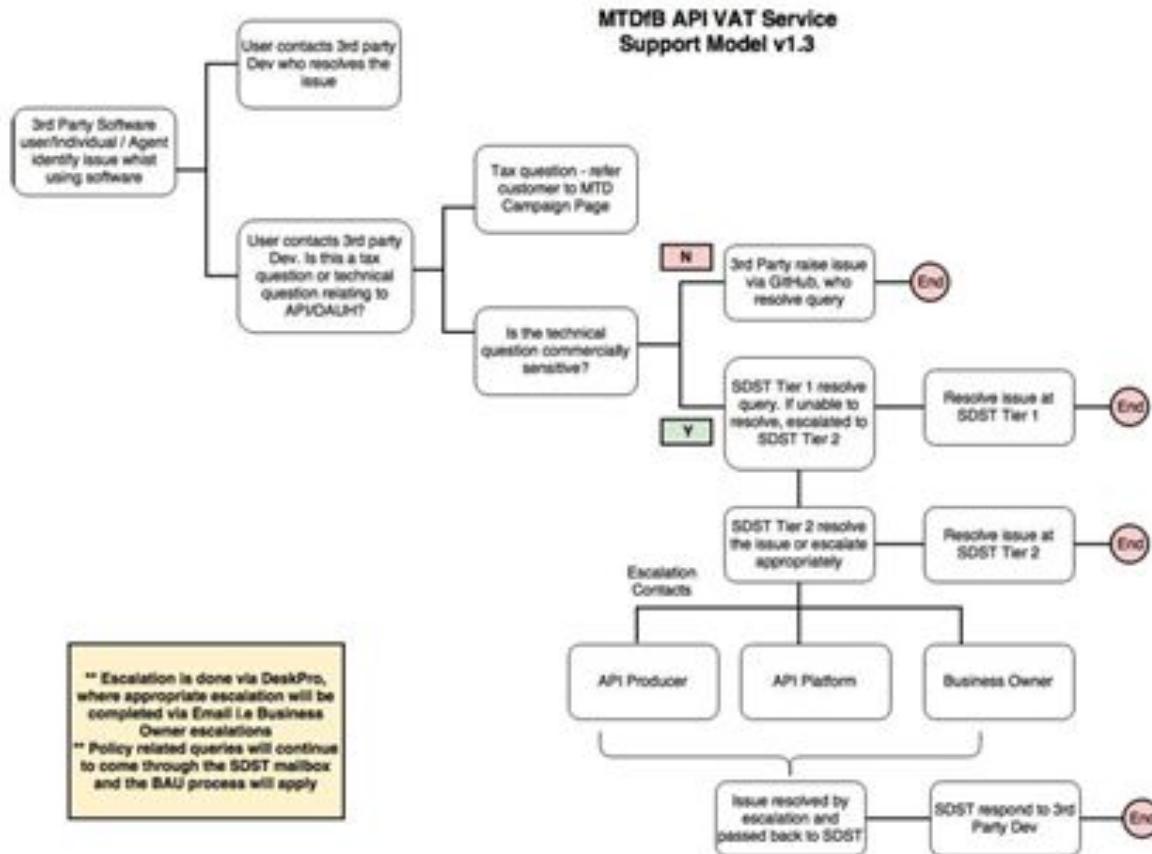
Customer has general enquiry about Making Tax Digital for Business



HM Revenue
& Customs

API Support Model - MTDfB

This is the agreed support model for MTDfB suite of APIs.





HM Revenue
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Please contact us with any queries...

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