

Temporary closure of HMRC self-assessment helpline - where to get help

Synopsis: HMRC is currently redirecting self-assessment queries from its helpline to its digital services. The Association of Taxation Technicians (ATT) has published some useful advice on how an individual can get support from HMRC with their personal tax affairs in the meantime.

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The helpline will re-open on 4 September 2023, so that helpline support will be available in the five-month period running up to the SA deadline on 31 January 2024.

Callers to the self-assessment helpline now hear a recorded message explaining the temporary closure. If they listen past the messages, they will reach an automated assistant which can help direct them to guidance for simple queries. This may be easier for some taxpayers to use than webchat, at least for simple issues. However, its range of answers is limited, and it will often simply refer callers to digital channels.

Digital channels

Webchat

In the first instance, taxpayers are advised to use [HMRC's online digital assistant](#). The automated assistant (or chatbot) will try and find relevant guidance, but if it cannot work out what the taxpayer is looking for, they should be offered the option to deal with a real person at HMRC via webchat instead. It is also possible to request a conversation with a real person, if the chatbot is struggling to deal with the question.

Based on the ATT's testing of the service, there is likely to be a queue to be connected with an HMRC adviser, but if they can get through, the ATT has been assured that webchat will provide a comprehensive range of support services.

The ATT says that it encourages anyone using webchat to make use of the "save chat" function so they have a record of the conversation, and to complete the feedback questions at the end of a chat session so that HMRC is provided with taxpayers' experiences of the service.

Other services

During the closure of the self-assessment helpline, 'self-serve' facilities include the [Personal Tax Account](#), and the [HMRC App](#). These digital resources allow an individual to carry out basic tasks such as checking tax codes, their national insurance history and making income tax payments.

Non-digital options

If taxpayers are not able to use digital services, they should be able to get assistance from the [Extra Support team](#). HMRC have advised that this team can be accessed by calling [another HMRC helpline](#) and explaining that they need help with self-assessment and are either digitally excluded or require extra support. If the individual rings the (temporarily closed) self-assessment line for help because they are struggling to manage their affairs online, at the time of writing, the automated assistant appears to be unable to recognise the concept of digitally excluded taxpayers based on some common-sense test phrases used.

The ATT says that it remains concerned that HMRC is not fully supporting this population, not least given that HMRC self-assessment call centre staff are trained to identify callers requiring extra support, rather than relying on the caller themselves to state this.

In addition, HMRC has a narrow definition of ‘digitally excluded’ which includes those who are unable to access online services due to age, disability, location or religious beliefs, but there is also a larger group who may be online for parts of their life, but find the internet difficult to use and would feel more confident talking to a person.

Other phonelines

For anyone requiring a [paper tax return](#), the helpline to request a blank return to be sent by post remains open.

Bereavement

The [helpline for those dealing with bereavement and deceased estates](#) (0300 200 3300) remains open, and will recognise relevant trigger words such as “bereavement” to enable callers to speak to an adviser.

31 July issues

Many self-assessment taxpayers will have an instalment of tax to pay by 31 July 2023. Anyone missing this deadline by 30 days or more will incur penalties. If there is any question of disputing a penalty, taxpayers will have to use the HMRC webchat facilities to explain their circumstances, which is not ideal. Penalties can also be appealed by post, but does risk experiencing postal processing delays, during which further penalties may accrue.

HMRC has also confirmed that the inability to access a helpline will not be considered a “reasonable excuse” if appealing any penalties received.

Anyone with a payment due on 31 July whose income for the tax year to 5 April 2023 was lower than the previous year can potentially apply to reduce their July payment on account. The best way to do this is to file the 2022/23 tax return before 31 July, but it is possible to reduce the amount payable even if the tax return itself isn’t ready to file.

Taxpayers should be able to do this via their Personal Tax Account without needing to speak to anyone but, again, webchat will be the fallback if any difficulties arise.

An alternative contact method for payment on account reductions is by post, but the risk of processing delays before 31 July may make this option impractical.

Storing up problems?

The above range of digital and non-digital services will provide some support for taxpayers whilst HMRC's self-assessment phonelines are closed. However, the ATT remains concerned that the three-month closure of that helpline will put people off filing their tax returns over the summer. This may lead to a backlog later in the year, and more pressure on HMRC to catch up with queries before the 31 January 2024 tax return deadline.

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