

Step by step guide

Making Tax Digital: Setup Guide for Agents

Our guide to setting up as an agent on the
HMRC Government Gateway

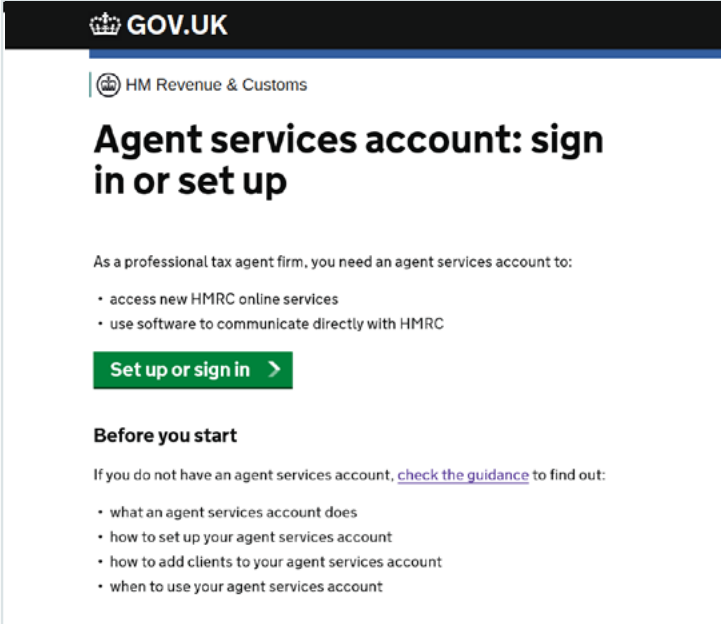


Step 1:

Registering on the HMRC Website

Agents (anyone representing a number of clients) must register for an agents services account, this is done via a web journey on the GOV. UK webpages here: <https://www.gov.uk/guidance/get-an-hmrc-agent-services-account>

This new Agents Services Account will be your new government gateway User ID and Password to be used to access all new HMRC services including MTD. Having these new credentials does not invalidate your existing credentials and they can continue to be used for filing tax returns etc.



The screenshot shows the GOV.UK website header with the HM Revenue & Customs logo. The main heading is 'Agent services account: sign in or set up'. Below this, it states: 'As a professional tax agent firm, you need an agent services account to:'. A list follows: '• access new HMRC online services' and '• use software to communicate directly with HMRC'. A green button with white text says 'Set up or sign in >'. Below that, a section titled 'Before you start' says: 'If you do not have an agent services account, [check the guidance](#) to find out:'. A list follows: '• what an agent services account does', '• how to set up your agent services account', '• how to add clients to your agent services account', and '• when to use your agent services account'.



As part of this registration you will be required to::

- ▶ 1. Sign in using your current user credentials

The screenshot shows the GOV.UK Sign in page. At the top is the GOV.UK logo and the HM Revenue & Customs logo. The heading is "Sign in". Below it, a message says: "Enter your Government Gateway credentials to sign in. You received these when you created your HMRC online account." There are two input fields: "User ID" with the value "800835981796" and "Password" with masked characters "*****". A green "Sign in" button is below the fields. Underneath, there is a section titled "Problems signing in" with several links: "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", and "Get help from HMRC's automated assistant".

- ▶ 2. Enter your UTR or Corporation Tax reference and postcode

The screenshot shows the GOV.UK "Enter your business details" page. It features the GOV.UK and HM Revenue & Customs logos. The heading is "Enter your business details". A message asks for the "Your Self Assessment Unique Taxpayer Reference (UTR)" and instructs to "Enter the last 10 digits only. For example, 12345 67890". There is an empty input box. Below this is a section titled "Where to find your Self Assessment UTR" with a link that says "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." Further down, it asks for the "Registered business postcode" with the instruction "This is the postcode of your registered business address" and an empty input box. A green "Continue" button is at the bottom.

- ▶ 3. Confirm that the correct business is displayed

The screenshot shows the GOV.UK account setup confirmation page. It features the GOV.UK and HM Revenue & Customs logos. The heading is "You are setting up an account for:". Below this, there are three rows of information: "Name" with the value "YourFirm Accountants Ltd.", "Postcode" with the value "IP23 8TY", and "UTR" with the value "CT-1234567890". A green "Continue" button is at the bottom. Below the button, there is a link that says "This information is incorrect".

▶ 4. Enter your details

The screenshot shows the 'Add your agent business's details' form. At the top is the GOV.UK logo and 'HM Revenue & Customs'. The title is 'Add your agent business's details'. Below the title are three input fields: 'Agent business name', 'Business email address', and 'Business telephone number'. A green 'Continue' button is at the bottom. A link 'Get help with this page.' is at the very bottom.

▶ 5. Make a note of your new User ID and Gateway Agent ID

The screenshot shows the 'Agent services account created' confirmation page. At the top is the GOV.UK logo and 'HM Revenue & Customs'. The title is 'Agent services account created'. Below the title, it says 'Your account number is:' followed by the number 'YARN0002147' in a grey box. Below this is a message: 'You must save this number for your agency's records. You'll need it later. HMRC won't show you this number again.' A green button 'Continue to your agent services account' is at the bottom. A link 'Get help with this page.' is at the very bottom.

▶ 6. Add your agency address by entering the House name or number and postcode

The screenshot shows the 'Add your Agency Address' form. At the top is the GOV.UK logo and 'HM Revenue & Customs'. The title is 'Add your Agency Address'. Below the title are two input fields: 'Building name or number (optional)' with the example 'For example, The Mill, Flat A or 37b' and 'UK postcode' with the example 'For example, ZZ1 1TA'. A green 'Search Address' button is at the bottom. A link 'The address doesn't have a UK postcode' is at the very bottom.

- 7. Confirm your details are correct

Check your details and create your account

Agency details

Agency name: YourFirm Accountants Ltd
Email address: sam@yourfirm.com

Change

Agency address

10 King Road
Ipswich
Suffolk
IP23 8TY

Change

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

Create account

- 8. Make a note of your ARN

You've successfully created an Agent services account for YourFirm Accountants Ltd.

Your account number is:
ARN-HD12345

You must save this number for your agency's records. You'll need it later. HMRC won't show you this number again.

Continue to your Agent services account



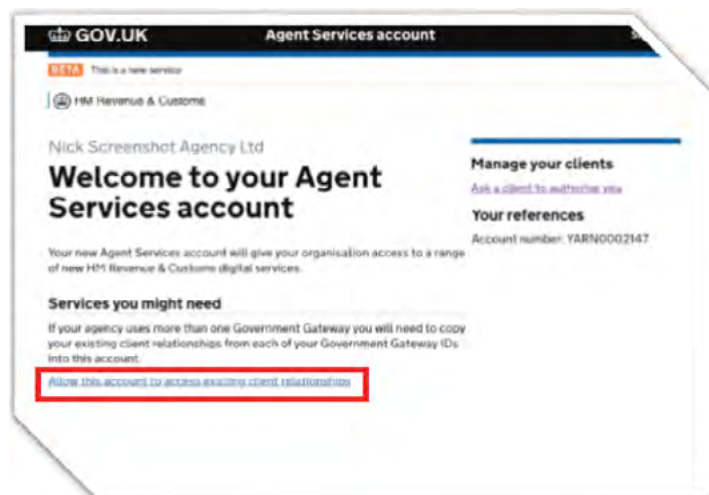
Step 2...

Step 2:

Connecting your Agent Services Account with your client relationships.

Once you have your new account you will be able to link your existing client relationships for both VAT and Income Tax to these new credentials, again it will not remove the client authorisation from your existing credentials. This mapping process is carried out in the same government web screens and is currently not possible via software.

- ▶ 1. In the Agents Service Account; select the link "Allow this account to access existing client relationships"



- ▶ 2. Enter your User ID and Password (the old ones, not the new one created above)

A screenshot of the 'Sign in' page. The heading is 'Sign in'. Below it, it says 'Enter your Government Gateway credentials to sign in. You received these when you created your HMRC online account.' There are two input fields: 'User ID' and 'Password'. Below the fields is a green 'Sign in' button. At the bottom, there is a section 'Problems signing in' with links for 'Don't have a Government Gateway account', 'Forgotten user ID', 'Forgotten password', and 'Forgotten user ID and password'.

- ▶ 3. Enter your new ARN received in the last step in the agents services account setup
- ▶ 4. Enter your UTR or Corporation Tax Reference
- ▶ 5. Click Connect

Connect to your Agent services account

Agent services account number
You got this when you created your new account, for example ARN-HDJ2123F

Self Assessment UTR or Corporation Tax reference

Connect

Step 3:

Registering clients for Making Tax Digital

Each business will need to register for MTD and this is again done via government web pages. Your clients can register themselves for MTD VAT and/or Income Tax or you can register them, but the process must be completed one client at a time, as their personal information must be entered as part of the registration.



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