

Step by step guide

Making Tax Digital: Setup Guide for Agents

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

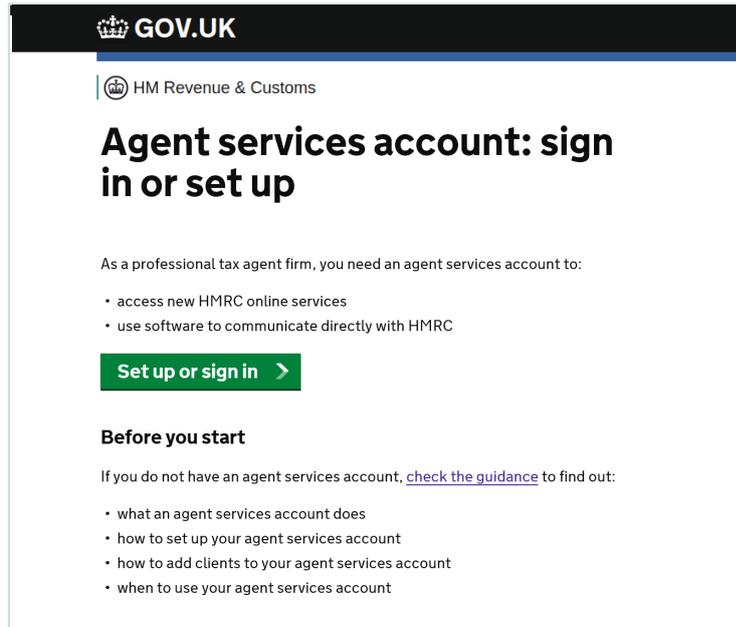


Step 1:

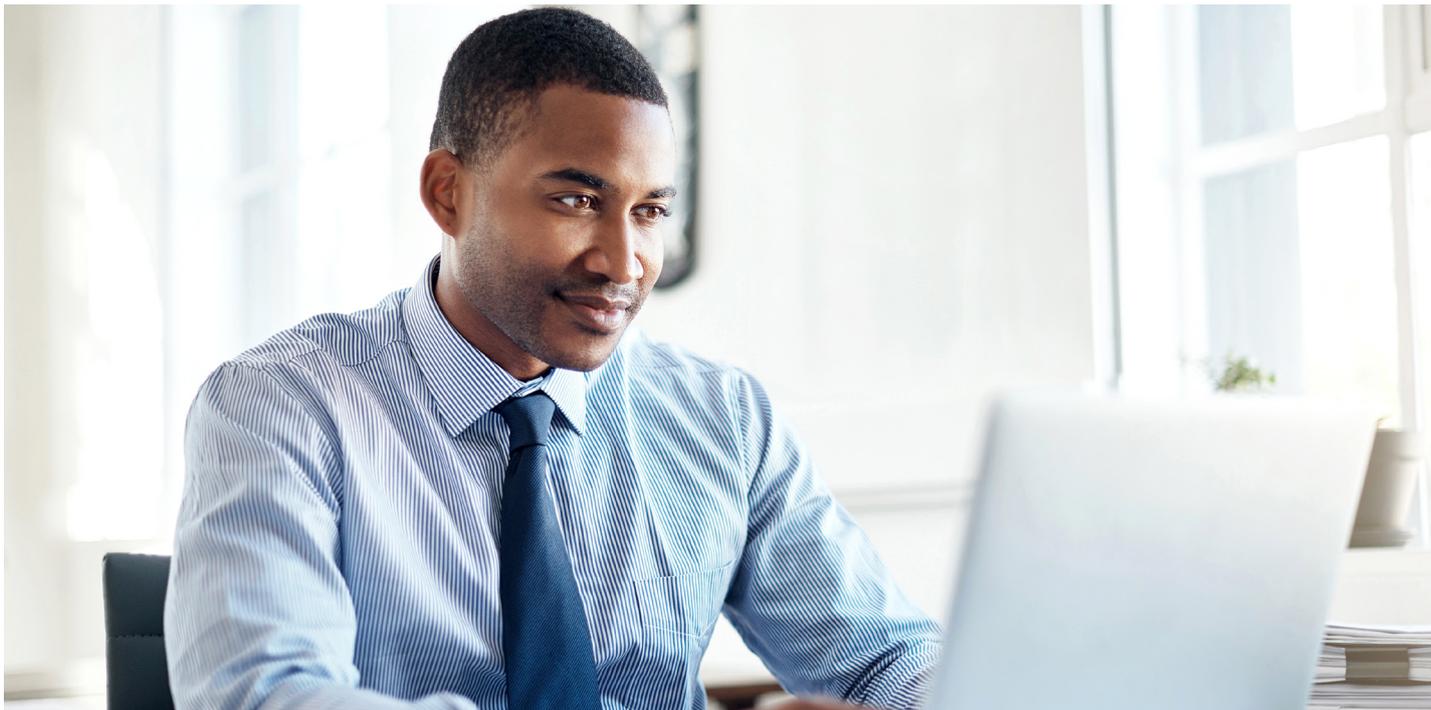
Registering on the HMRC Website

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 page for 'Agent services account: sign in or set up'. The page header includes the GOV.UK logo and 'HM Revenue & Customs'. 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 of reasons 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' lists links to guidance: '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 for HM Revenue & Customs. The page title is "Sign in". Below the title, there is a heading "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 located below the password field. 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 for HM Revenue & Customs. The heading is "Enter your business details". Below it, there is a section for "Your Self Assessment Unique Taxpayer Reference (UTR)" with the instruction "Enter the last 10 digits only. For example, 12345 67890" and an empty input field. A dropdown menu is open, showing "Where to find your Self Assessment UTR" with a link. Below this, there is a section for "Registered business postcode" with the instruction "This is the postcode of your registered business address" and an empty input field. 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 for HM Revenue & Customs. 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 located below the information. At the bottom, 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, there is the GOV.UK logo and 'HM Revenue & Customs'. The main heading is 'Add your agent business's details'. Below this, there are three input fields: 'Agent business name', 'Business email address', and 'Business telephone number'. A green 'Continue' button is located below the fields. At the bottom, there is a link that says 'Get help with this page.'

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

The screenshot shows a confirmation page titled 'Agent services account created'. It displays 'Your account number is: YARN0002147'. Below this, there 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 labeled 'Continue to your agent services account' is at the bottom. A link 'Get help with this page.' is also present.

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

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

- ▶ 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"

GOV.UK Agent Services account

BETA This is a new service

HM Revenue & Customs

Nick Screenshot Agency Ltd

Welcome to your Agent Services account

Your new Agent Services account will give your organisation access to a range of new HM Revenue & Customs digital services.

Services you might need

If your agency uses more than one Government Gateway you will need to copy your existing client relationships from each of your Government Gateway IDs into this account.

[Allow this account to access existing client relationships](#)

Manage your clients
[Ask a client to authorise you](#)

Your references
Account number: YARN0002147

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

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](#)

- ▶ 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 for 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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For more details or help with Making Tax Digital, call 0344 815 5550

Visit the MTD hub: iris.co.uk/mtd

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A person wearing a blue and white vertically striped shirt is shown from the side, leaning over a desk. Their hands are near a laptop, which is partially visible in the lower right corner. The background is a soft, out-of-focus office environment with light-colored walls and a desk.

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