



HM Revenue  
& Customs

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Dear Harriett,

Thank you for your letter about the HMRC pilot of a seasonal model for our Self-Assessment (SA) helpline.

The adoption of digital and assisted-digital services is central to HMRC's vision to be a trusted and modern tax authority. We are working hard at extending and improving our online services, which will enable customers to self-serve at times and in ways that are convenient for them. Many customers already successfully use our digital services, both to find answers to their queries and to transact with us. Customer satisfaction scores are significantly higher for our digital services than for our traditional phone and post services.

It is vital that those customers that can go online do so. This not only enables us to be more efficient and productive with our available resources, but also ensures that phone services are available for customers with the most complex queries or who are unable to access our digital services.

We have, in recent months, undertaken a number of changes to support our customers to become aware of, and make the most of, our digital service. From our analysis, we know that 97% of SA customers file their returns online, and up to two-thirds of all calls to the SA Helpline are about matters which could be dealt with digitally, either by consulting online guidance, using our digital assistant or by going to the customer's own online tax account or the HMRC App.

We also know that SA demand is seasonal: the SA helpline receives far fewer calls over the summer, with calls around 50 per cent higher between January and April compared with June to August. SA queries during the summer tend to be less

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complex than those received later in the year and relatively non-urgent compared with calls to some of our other helplines.

The decision to pilot a seasonal telephony model for SA was taken based on this insight, and on the need to improve overall customer service levels. This is also set against the context of the challenging level of efficiencies required by our Spending Review 2021 settlement. This challenge has been subject to further pressure from inflation and policy decisions, directly impacting the number of taxpayers, and the number with more complex affairs, that we have to serve.

We recognise that this pilot will test a significant change in our services and will need careful monitoring, but our analysis shows that we should be able to handle the vast majority of SA queries over the summer through our digital service, backed up with a webchat adviser service. We will evaluate how our customers respond to this digital shift and use this experience to improve SA and other services in the future.

My answers to the specific questions posed by the Committee are as follows:

1. Monthly usage statistics for the SA helpline are published on the following link: HMRC quarterly performance updates - GOV.UK ([www.gov.uk](http://www.gov.uk)).
2. We did not consult external organisations prior to this announcement. We have been clear on our long-term direction of greater use of digital and self-service channels and have been talking to stakeholders about the challenges we face. Moreover, this is a pilot and we will learn lessons and gather feedback from customers and external bodies as part of this work.
3. To evaluate the success of the pilot, we need to understand both the numbers of customers seeking support through digital channels and their satisfaction with the support offered. The longer-term effects of the changes will also be analysed. Our aim is to offer the best possible customer experience at the most efficient cost to the taxpayer. Data collected during the pilot period will allow us to assess how the SA service is used, any impacts on other lines and services, customer feedback, and customer behaviour. This will include monitoring any additional contact through other HMRC telephone lines and via post.
4. We will evaluate the numbers of customers using digital services to self-serve, including Personal Tax accounts and the HMRC app. We will also track contact via HMRC webchat and the resolution rate of these interactions. We will continue to publish customer satisfaction scores and will use these as part of our evaluation. We will consider feedback from customers on their experience of the digital support model, including what more they might want from HMRC in order to continue to use digital services for SA in the future. We will use all the information to make a final assessment of the pilot and any decisions on the future support model in early 2024. We will publish an evaluation report and share this with the Committee early next year.

5. When the SA line reopens, we will monitor the number and the nature of telephone queries and will also consider contact through other telephony lines, postal contact, and debt levels. Our analysis will include evaluating the degree to which customers may have delayed contact until the telephone service is reopened. This information will be included in the evaluation mentioned above.
6. Throughout the pilot period, we will continue to prioritise the needs of our most vulnerable customers and to support customers to access our digital services. Customers can ring or webchat with our Online Support Helpdesk to get help with digital services.

Anyone who needs extra support if their health condition or personal circumstances make it difficult for them to contact HMRC, can access a phone or video appointment with our Extra Support team. They can ask their advisor when they call any HMRC helpline or use the Extra Support team webchat service.

7. We will monitor service levels closely throughout the trial and will continually strive to adapt and improve the service as new evidence emerges. If it becomes clear that the trial is not working as expected, we can reopen the line.
8. I can reassure the Committee that this pilot is not related to our flexible working policies in any way. No fewer people will be employed answering enquiries and processing customers' tax affairs, no staff will be working fewer hours, and nobody will be doing less. The staff who would have been on this phone line will be working in other customer service roles during the pilot.
9. We are making this change to test our ambitions to support our customers through digital channels, to improve our services and our productivity. It will free up around 350 advisers to support more urgent enquiries and to keep our post up to date, reducing the need for progress chasing calls. This can help ensure more people who need to speak to an adviser can do so. At the same time, we must encourage those able to use HMRC's digital services to do so.

Yours sincerely,



**Angela MacDonald**  
**DEPUTY CHIEF EXECUTIVE AND SECOND PERMANENT SECRETARY**