




# **Making Tax Digital – your Agent Services Account**



HM Revenue  
& Customs




# Agent Services Account



Agent services account

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.](#)



# Sign in



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

English | [Cymraeg](#)

## Sign in using Government Gateway

Government Gateway user ID  
This could be up to 12 characters.

Password

Sign in

[Create sign in details](#)

### Problems signing in

[I have forgotten my password](#)


[I have forgotten my Government Gateway user ID](#)



# Different journeys


- Depending on the type of business you are, you will see slightly different versions of the next slides.
- Core information remains the same, but you will be asked about things directly related to your category.

# Business type (Partnership route):

 **GOV.UK**

Create an agent services account

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

 HM Revenue & Customs

## What type of business are you?

☐ Sole trader

☐ Limited company


☐ Partnership


☐ Limited liability partnership (LLP)

☐ None of these types of business

[Continue](#)


[Clear data](#)

 **OGL** All content is available under the [Open Government Licence v3.0](#), except where otherwise stated

  
© Crown copyright

# Enter your business details

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

 HM Revenue & Customs

[◀ Back](#)

## Enter your business details

This will help us match your details against information we currently hold.

Partnership Unique Taxpayer Reference (UTR)

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

► [Where to find your partnership UTR](#)

Registered business postcode

This is the postcode of your registered business address

Continue

[Get help with this page.](#)

[Cookies](#) [Privacy policy](#) [Terms and conditions](#) [Help using GOV.UK](#)


**OGL** All content is available under the [Open Government Licence v3.0](#), except where otherwise stated



© Crown Copyright




# Confirm agency details

 **GOV.UK**

Create an agent services account

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

 HM Revenue & Customs

[◀ Back](#)

## Is this your business?

**Org 109**  
Address Line 1 109  
Address Line 2 109  
Address Line 3 109  
Address Line 4 109  
TF3 4ER

These are the details we hold for Unique Taxpayer Reference (UTR)  
**22205 18109**. 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**


[Get help with this page.](#)

[Cookies](#) [Privacy policy](#) [Terms and conditions](#) [Help using GOV.UK](#)

**OGL** All content is available under the [Open Government Licence v3.0](#), except where otherwise stated


  
© Crown Copyright

# Anti money laundering compliance details

 **GOV.UK**

Create an agent services account

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

 HM Revenue & Customs

[◀ Back](#)

## Money laundering compliance details

You must be registered with a money laundering supervisory body before you can create an agent services account.

**Name of money laundering supervisory body**


**Membership number**


**When does your membership expire?**  
For example, 31 03 2019

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

[Get help with this page.](#)


[Cookies](#) [Privacy policy](#) [Terms and conditions](#) [Help using GOV.UK](#)

 All content is available under the [Open Government Licence v3.0](#), except where otherwise stated


  
© Crown Copyright



# Create a new Government Gateway user ID

 Create an agent services account

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


 HM Revenue & Customs

## Create a new Government Gateway user ID

You will need this user ID to sign in to your new agent services account.

Continue

[Clear data](#)

  
© Crown copyright

**OGL** All content is available under the [Open Government Licence v2.0](#), except where otherwise stated



# What is your email address



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

English | [Cymraeg](#)

## What is your email address?

We will send you a code to confirm your email address.

Email address

☐

This email address is correct

Continue

[Get help with this page](#)

[Cookies](#) [Privacy notice](#) [Terms and conditions](#)

**OGL** All content is available under the [Open Government Licence v3.0](#), except where otherwise stated



© Crown copyright

# Enter code received



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

[Back](#)

English | [Cymraeg](#)

## Enter the code

We have sent a code to **boney.saju@digital.hmrc.gov.uk**

Code

For example, CF-DNCLRK

CF-

[I have not got the email](#)

[Confirm](#)

[Get help with this page](#)

[Cookies](#) [Privacy notice](#) [Terms and conditions](#)

**OGL** All content is available under the [Open Government Licence v3.0](#), except where otherwise stated



© Crown copyright



# Confirmation of email



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

English | [Cymraeg](#)

## Email address confirmed

Continue

[Get help with this page](#)

[Cookies](#) [Privacy notice](#) [Terms and conditions](#)

**OGL** All content is available under the [Open Government Licence v3.0](#), except where otherwise stated



© Crown copyright



# Name



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

English | [Cymraeg](#)

## What is your full name?

Full name

Continue

[Get help with this page](#)

[Cookies](#) [Privacy notice](#) [Terms and conditions](#)


**OGL** All content is available under the [Open Government Licence v3.0](#), except where otherwise stated



© Crown copyright



# Create password



BETA

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

[Back](#)

English | [Cymraeg](#)

## Create a password

Your password must:

- be between 8 and 12 characters
- have at least one number (0 to 9)
- have at least one letter
- not contain special characters

Password

Confirm your password

Continue

[Get help with this page](#)


[Cookies](#)

[Privacy notice](#)

[Terms and conditions](#)

OGL

All content is available under the [Open Government Licence v3.0](#), except where otherwise stated



© Crown copyright



# Set up recovery



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

English | [Cymraeg](#)

## Set up recovery for your sign in details

You need to set up a recovery word so that you can get back into Government Gateway if you forget your password.

[Continue](#)

[Get help with this page](#)

[Cookies](#) [Privacy notice](#) [Terms and conditions](#)

**OGL** All content is available under the [Open Government Licence v3.0](#), except where otherwise stated



© Crown copyright



# Set up recovery word

## Set up a recovery word

Make a note of this word in case you need it in the future.

The word must:

- be between 6 and 12 characters
- not contain spaces or special characters
- not contain numbers

Recovery word

[Continue](#)

[Get help with this page](#)

[Cookies](#) [Privacy notice](#) [Terms and conditions](#)

**OGL** All content is available under the [Open Government Licence v3.0](#), except where otherwise stated



© Crown copyright



# New ASA credentials

**Your Government Gateway  
user ID is:**

**11 32 39 04 93 94**

We have sent it to **boney.saju@digital.hmrc.gov.uk**

You will need this user ID and your password every time you sign in to Government Gateway.

[Continue](#)

[Get help with this page](#)

[Cookies](#) [Privacy notice](#) [Terms and conditions](#)

**OGL** All content is available under the [Open Government Licence v3.0](#), except where otherwise stated




© Crown copyright



# Type of account



 HM Revenue & Customs

English | [Cymraeg](#)

## Choose the type of account you need

- ☐ **Individual**  
Includes personal tax account, tax credits, Self Assessment and Child Benefit
- ☐ **Organisation**  
Includes limited companies, partnerships and charities
- ☐ **Agent**  
Includes accountants acting on behalf of clients, payroll bureau and bookkeepers

[Continue](#)

[Get help with this page.](#)

[Cookies](#) [Privacy policy](#) [Terms and conditions](#) [Help using GOV.UK](#)

**OGI** All content is available under the [Open Government Licence v3.0](#), except where otherwise stated




© Crown Copyright



# Name of organisation



 HM Revenue & Customs

English | [Cymraeg](#)

## Enter the name of the organisation

Organisation name

Continue

[Get help with this page.](#)

[Cookies](#) [Privacy policy](#) [Terms and conditions](#) [Help using GOV.UK](#)

**OGL** All content is available under the [Open Government Licence v3.0](#), except where otherwise stated




© Crown Copyright



# Agent ID



 HM Revenue & Customs

English | [Cymraeg](#)

**Your Agent ID is**  
Testingagenc-2W3VJMW78DR7


 [Print this page](#)

You need to keep a record of your Agent ID.

[Continue](#)

[Get help with this page.](#)

[Cookies](#) [Privacy policy](#) [Terms and conditions](#) [Help using GOV.UK](#)

 All content is available under the [Open Government Licence v3.0](#), except where otherwise stated



© Crown Copyright



# Check details

Create an agent services account

BETA

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

HM Revenue & Customs

## 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	Org 109	<a href="#">Change</a>
Business address	Address Line 1 109 Address Line 2 109 Address Line 3 109 Address Line 4 109 TF3 4ER	<a href="#">Change</a>
Business email address	test@test.com	<a href="#">Change</a>
Money laundering compliance details and expiry date	Chartered Institute of Management Accountants (CIMA) 4567890 11 11 2019	<a href="#">Change</a>

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

[Get help with this page.](#)

[Cookies](#)

[Privacy policy](#)

[Terms and conditions](#)

[Help using GOV.UK](#)

OGL

All content is available under the [Open Government Licence v3.0](#), except where otherwise stated

© Crown Copyright




# Agent services account created



Create an agent services account

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

 HM Revenue & Customs

## Agent services account created

Your account reference number  
**PARN-000-2857**

### What you can do next

Make a note of your account reference number **PARN-000-2857**. 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.](#)

[Cookies](#) [Privacy policy](#) [Terms and conditions](#) [Help using GOV.UK](#)

**OGL** All content is available under the [Open Government Licence v3.0](#), except where otherwise stated



© Crown Copyright



# Moving on to linking clients

- Save / screenshot all the credentials you have been sent.
- The Agent Services Account is now live.
- We can start linking clients.
- Go to search box on GOV.UK and type in  
Sign in to your agent services account

# Sign in screen

Guidance

## Sign in to your agent services account

Sign in to your agent services account if you're a tax agent.

Published 8 February 2019  
From: [HM Revenue & Customs](#)

Find out [what services you can access with an agent services account](#).

Online services may be slow during busy times. Check if there are any [problems with this service](#).

**Sign in now** ➔

### Before you start

You'll need the Government Gateway user ID and password you got when you registered for agent services. If you do not have one, you can [create an agent services account](#).

You need to use a different Government Gateway user ID and password for [HMRC online services for agents](#).

Published 8 February 2019

### Explore the topic

[Tax agent and adviser guidance](#)

#### Related content

- [Link clients to your agent services account](#)
- [Sign up for Making Tax Digital for VAT](#)
- [Create an agent services account](#)
- [Making Tax Digital for VAT as an agent: step by step](#)

#### Detailed guidance

- [Create an agent services account](#)

#### Collection

- [HMRC services for tax agents](#)
- [Making Tax Digital for VAT](#)





# Starting to map credentials

The screenshot shows the 'Agent services account' page for 'YourFirm Ltd' on the GOV.UK website. The page has a black header with the GOV.UK logo and the account name. Below the header, there's a navigation bar with links for 'Account home', 'Get help', 'Your account', and 'Sign out'. A blue 'BETA' badge is present, along with a message: 'This is a new service – your [feedback](#) will help us to improve it.'

## YourFirm Ltd

Account number: XARN-123-4567

### 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 copy your existing client authorisations to your account.

[Ask a client to authorise you](#)

[Copy your existing Self Assessment and VAT client authorisations to this account](#)

[View your linked accounts](#)

### YourFirm Ltd's account

#### Manage your account

Allow other users in your organisation to access this agent services account, or restrict their access.


[Add a new user](#)

[Manage user access to this account](#)

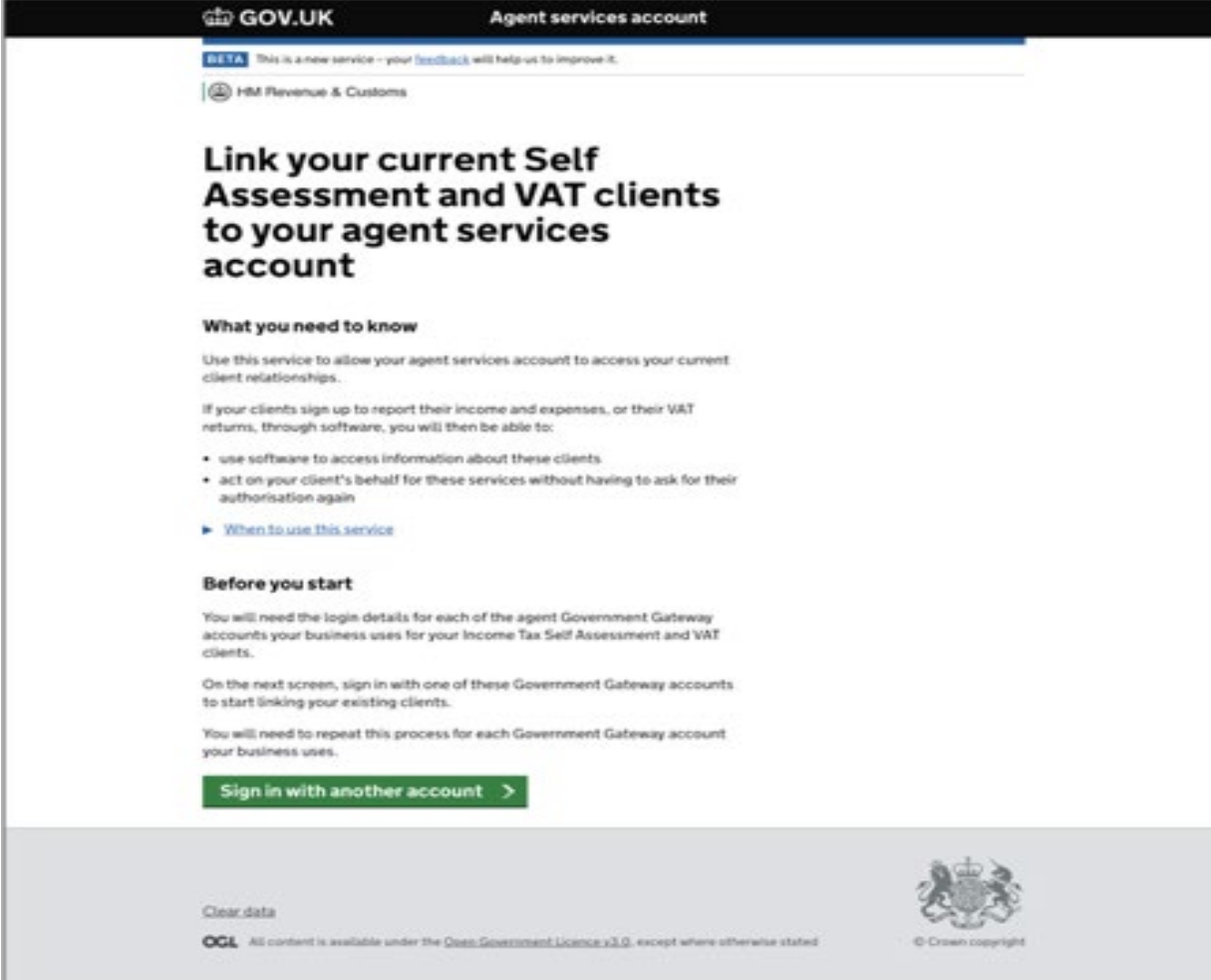
[Get help with this page.](#)

[Clear data](#)

**OGL** All content is available under the [Open Government Licence v2.0](#), except where otherwise stated

 © Crown copyright

# Mapping start page



The screenshot shows the 'Agent services account' page on GOV.UK. At the top, there's a black header with the GOV.UK logo and 'Agent services account'. Below this is a blue banner with 'BETA' and a message about feedback. The main heading is 'Link your current Self Assessment and VAT clients to your agent services account'. Underneath, there's a section 'What you need to know' explaining the service's purpose and listing two bullet points: using software to access client information and acting on their behalf. A link 'When to use this service' is provided. The 'Before you start' section explains the need for Government Gateway login details and provides instructions on how to proceed. A green button 'Sign in with another account' is visible. The footer contains a 'Clear data' link, OGL license information, the Royal Coat of Arms, and '© Crown copyright'.

GOV.UK Agent services account

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

HM Revenue & Customs

## Link your current Self Assessment and VAT clients to your agent services account

### What you need to know

Use this service to allow your agent services account to access your current client relationships.

If your clients sign up to report their income and expenses, or their VAT returns, through software, you will then be able to:

- 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

[▶ When to use this service](#)

### Before you start

You will need the login details for each of the agent Government Gateway accounts your business uses for your Income Tax Self Assessment and VAT clients.


On the next screen, sign in with one of these Government Gateway accounts to start linking your existing clients.

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

[Sign in with another account >](#)


[Clear data](#)

OGL All content is available under the [Open Government Licence v3.0](#), except where otherwise stated


 © Crown copyright



# Link your current clients

Agent services account

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

 HM Revenue & Customs


## Link your current Self Assessment and VAT clients to your agent services account

You need to sign in to your agent services account to use this service.

Sign in >

[Clear data](#)

**OGL** All content is available under the [Open Government Licence v3.0](#), except where otherwise stated



© Crown copyright



# Sign in using Government Gateway



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

English | [Cymraeg](#)

## Sign in using Government Gateway

Government Gateway user ID  
This could be up to 12 characters.

Password

Sign in

[Create sign in details](#)


### Problems signing in

[I have forgotten my password](#)


[I have forgotten my Government Gateway user ID](#)



# Account link completed

 **Agent services account**

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

 HM Revenue & Customs

## Account linked

Your Government Gateway user ID  
**889027689761**  
is now linked to this 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](#)

[Clear data](#)

**OGL** All content is available under the [Open Government Licence v3.0](#), except where otherwise stated



© Crown copyright