



Step by step guide

Making Tax Digital:

Setting up an Agent Services Account



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Why you should set up an account

As a professional tax agent firm you need an agent services account to access new HMRC online services and use software to communicate directly with HMRC.

You can use an Agent Services Account to act on behalf of your clients to:

- submit VAT Returns as part of HMRC's Making Tax Digital pilot
- change your clients' business details for VAT
- send Income Tax updates as part of HMRC's Making Tax Digital pilot
- register a trust online
- register an estate online for someone who has died

You need to be the person responsible for your agent firm's tax or administrative matters. The account gives you administrative control over your agent firm accessing new HMRC online services.



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What you need beforehand

You'll need your Unique Taxpayer Reference (UTR). This will be your:

- Corporation Tax or company UTR for a limited company
- Partnership UTR for an partnership or limited liability partnership
- individual Self-Assessment UTR for a sole trader

You'll also need:

- the postcode associated with that reference.
- your money laundering supervisor details, including:
 - your supervisory body's name
 - your membership number
 - the date your membership expires



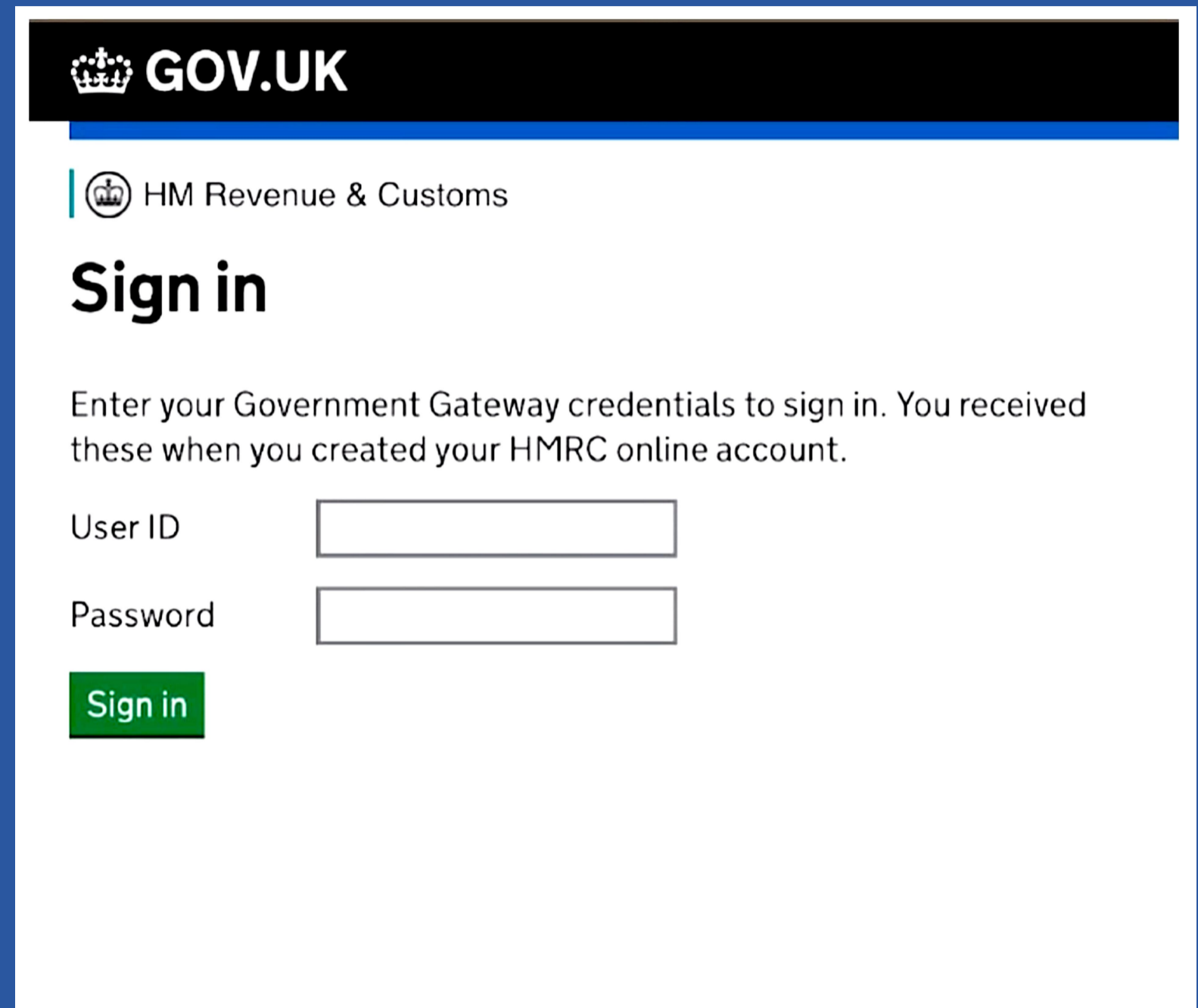
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Setting up your Agent Services

To create an agent services account, you'll need the Government Gateway user ID and password you currently use to access other HMRC online services for agents.

You need to be the person responsible for your agent firm's tax or administrative matters. The account gives you administrative control over your agent firm accessing new HMRC online services.

You'll get a new agent Government Gateway user ID and password when you create an agent services account. You'll need this user ID to access new HMRC online services even if you already use a different one for other activities.



GOV.UK

HM Revenue & Customs

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](#)



2. Enter your business type.

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ALPHA 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)

[▶ My business type is not listed here](#)


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3. Enter your Corporation Tax or company Unique Taxpayer

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Enter your business details

Corporation Tax or company Unique Taxpayer Reference (UTR)
Enter the last 10 digits only. For example, 12345 67890

▼ [Where to find your Corporation Tax or company UTR](#)


You can usually find your Corporation Tax or company UTR in the header of letters from HM Revenue & Customs (HMRC), next to headings such as 'Tax Reference', 'UTR' or 'Official Use'.

Registered business postcode
This is the postcode of your registered business address


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4. Confirm your business details

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Is this your business?

ABC Accountants


98 High Street
Anytown
West Sussex
AA1 1AA

These are the details we hold for Unique Taxpayer Reference (UTR)
1234567890. 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


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5. Enter your business details

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English | [Cymraeg](#)

Enter your details

Full name

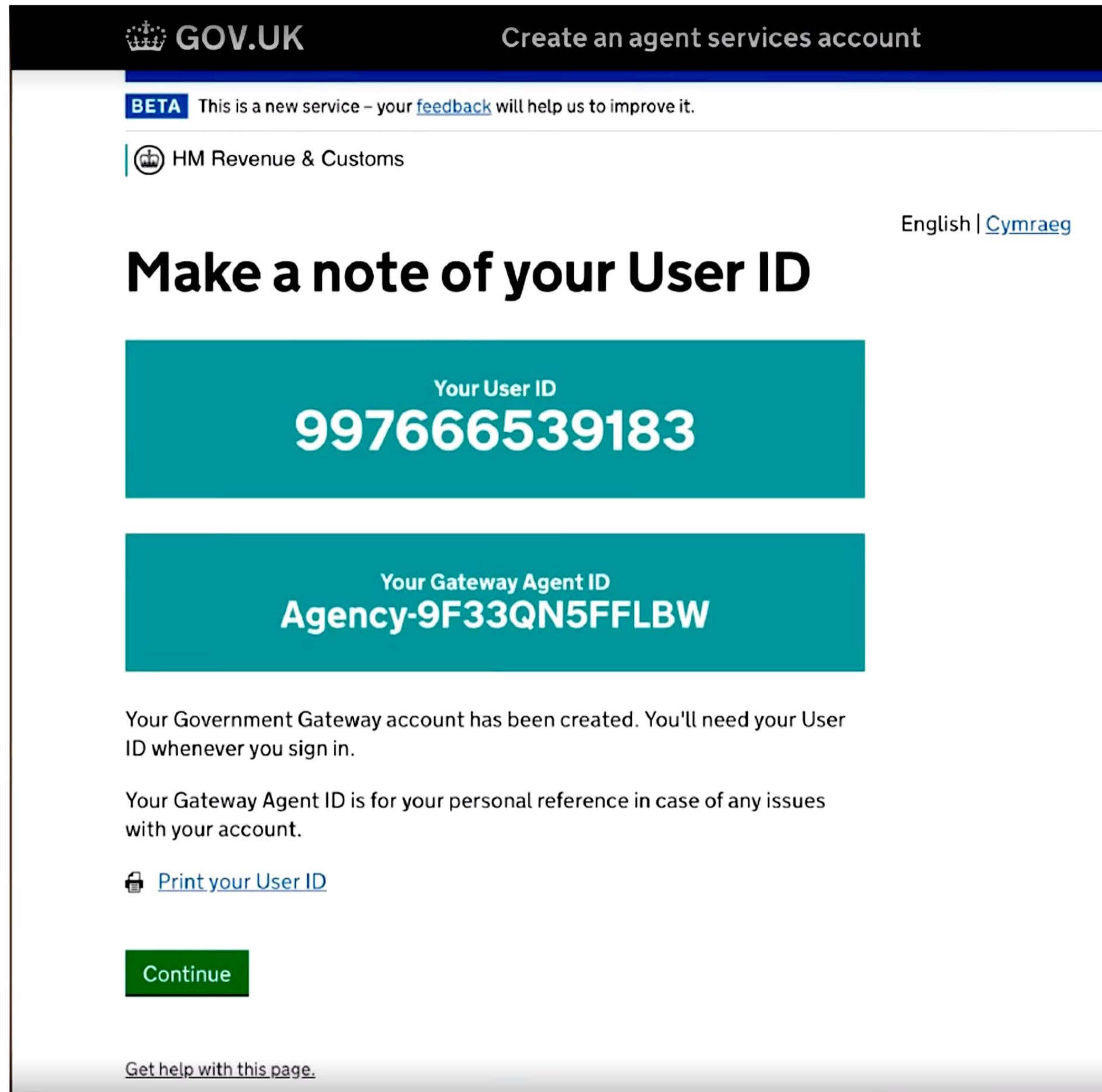
Name of Organisation

Email address
We need this so we can send you your sign in details if you lose them

Create your password

Confirm your password

6. Make a note of your User ID



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Make a note of your User ID

Your User ID
997666539183

Your Gateway Agent ID
Agency-9F33QN5FFLBW

Your Government Gateway account has been created. You'll need your User ID whenever you sign in.


Your Gateway Agent ID is for your personal reference in case of any issues with your account.

[Print your User ID](#)


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7. Check your business details before creating the account

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Check your details before creating your account

These are the business details we will use for your agent services account.

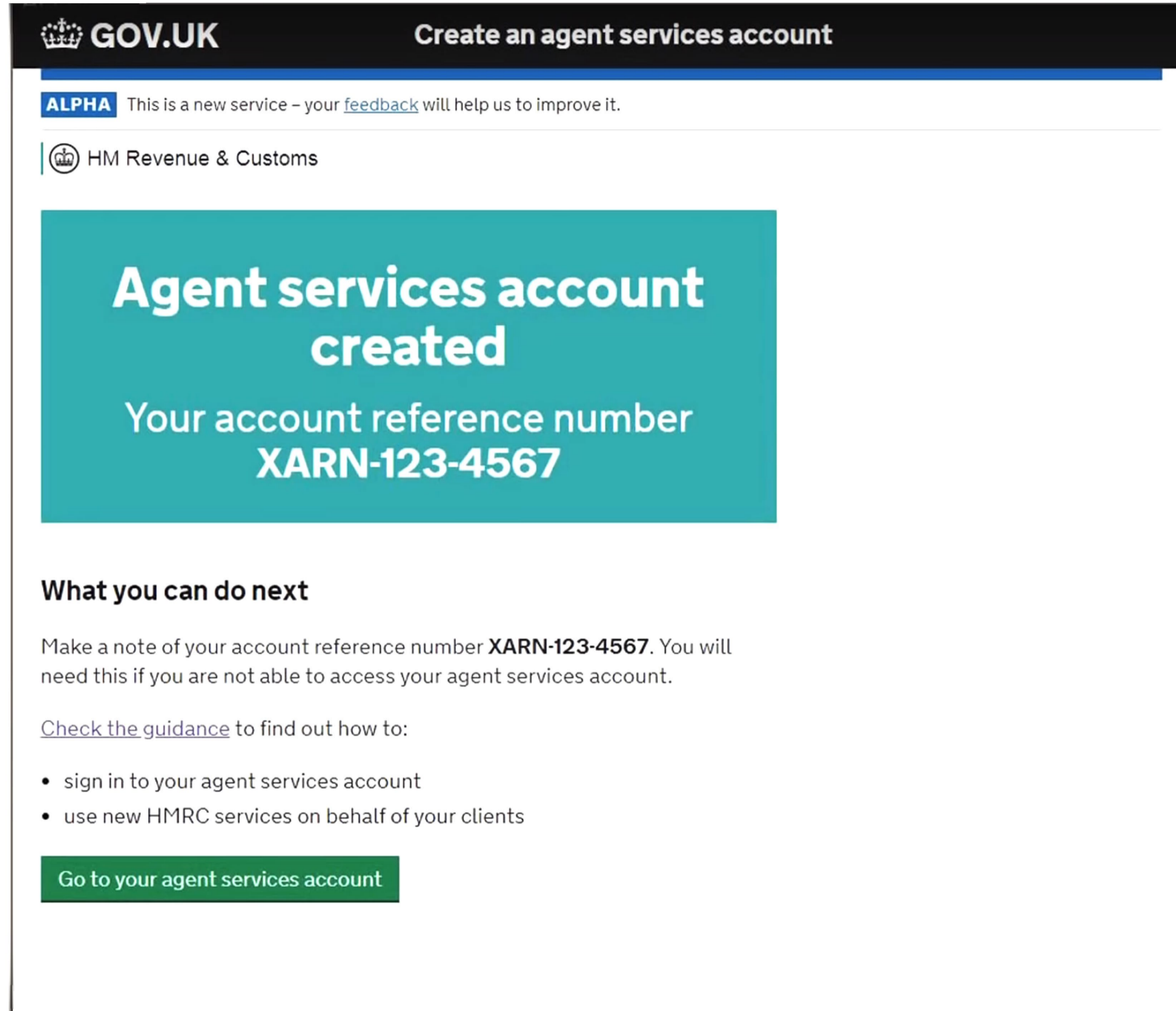
Your business name will be the name shown to clients. We need your business address to check your details. We will only use your email address to contact you about your agent services account.

Business name	ABC Accountants	Change
Business address	98 High Street Anytown West Sussex AA1 1AA	Change
Business email address	email@company.com	Change

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](#)

8. Make a note of your Account Reference Number (ARN)



The screenshot shows the GOV.UK website interface for creating an agent services account. At the top, the GOV.UK logo and the title 'Create an agent services account' are visible. Below the header, there is a blue bar with the text 'ALPHA This is a new service – your [feedback](#) will help us to improve it.' The main content area features the HM Revenue & Customs logo and a large teal box with the following text: 'Agent services account created' and 'Your account reference number XARN-123-4567'. Below this, a section titled 'What you can do next' provides instructions: 'Make a note of your account reference number **XARN-123-4567**. You will need this if you are not able to access your agent services account.' It also includes a link to 'Check the guidance to find out how to:' followed by a bulleted list: '• sign in to your agent services account' and '• use new HMRC services on behalf of your clients'. At the bottom of the section, there is a green button labeled 'Go to your agent services account'.

Source: <https://www.gov.uk/guidance/get-an-hmrc-agent-services-account>

How can QXAS help with Making Tax Digital?

Our trained MTD experts will help you prepare for Making Tax Digital in advance of April 2019. Take our free **30-minute consultation** to receive a customised action plan with next steps for your accountancy practice.

Visit: qxas.co.uk/services/making-tax-digital-outsourcing

Call: +44 845 838 2452

Email: qxas@qxglobalgroup.com

Twitter: <https://twitter.com/QXASLtd>



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