



Outsourcing That Works: How Corient Solved a VAT Processing Crisis

Highlights

- 1 Cut VAT query volume by over 60% through intelligent process redesign
- 2 Accelerated VAT filing timelines with seamless data access and fewer follow-ups
- 3 Elevated client satisfaction with proactive communication and reliable compliance
- 4 Strengthened cash flow visibility for clients via timely and accurate submissions

Introduction

In today's **financial management and regulatory compliance world**, **efficient VAT (Value Added Tax) processing** is crucial for businesses to operate smoothly. This case study follows the journey of a financial services company that faced significant hurdles in managing VAT filings. With the support of Corient, they overcame these challenges and enhanced operational efficiency and client relationships.



The Initial Problem: What Went Wrong?

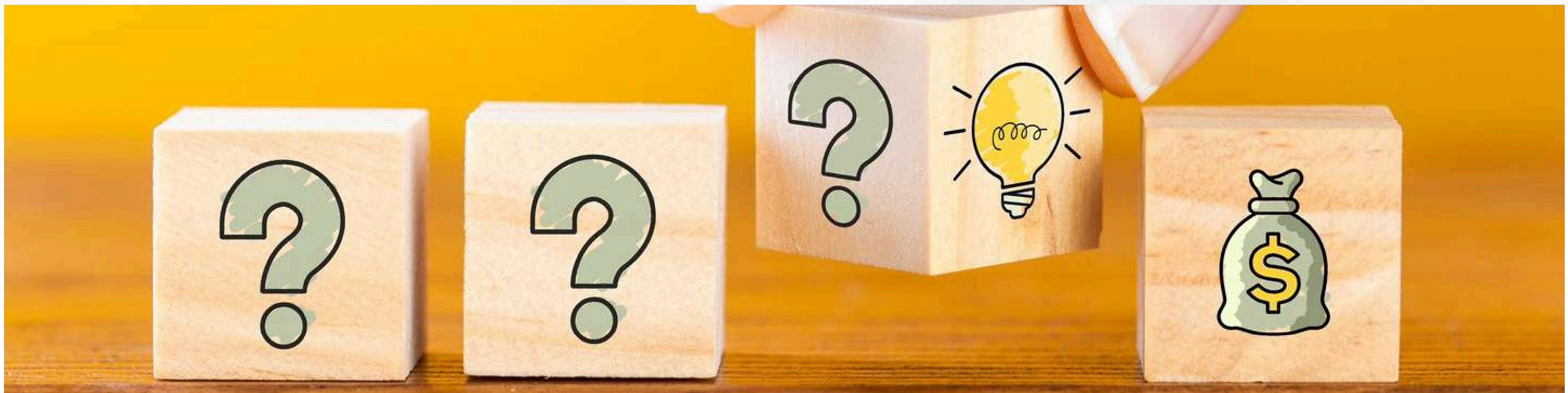
The company struggled with a **high volume of VAT-related queries**. Clients were either unresponsive or delayed in providing **necessary documentation**, creating bottlenecks in the **VAT input claim process**. These delays risked **late VAT filings** and higher tax liabilities, straining the firm's workflow and client satisfaction.

Corient's First Solution: The Fix

The firm decided to collaborate with **Corient's bookkeeping outsourcing services to tackle the situation**. Corient implemented the following improvements:

- **Minimised client queries** by extracting data directly from Amazon and online sales channels.
- **Verified clients' VAT statuses** to ensure accurate processing tailored to business types.
- **Streamlined invoice management**, especially for clients without VAT obligations.

This first step reduced delays but introduced a **new challenge**.



The New Problem: A Surprise Roadblock

Despite streamlining operations, **submission delays persisted**. The issue? Many clients still failed to provide complete or consistent documents, particularly for cases where **VAT registration was not applicable**. It became evident that more profound operational changes were needed to resolve the bottlenecks fully.

Corient's Second Solution: Fixing the New Problem

Step 1 – Pre-Onboarding Documentation Checklist

Corient developed a checklist to gather all essential client credentials at the start—**VAT certificates, invoices, portal access**, and business status—minimising back-and-forth communication later.

Step 2 – Revised Decision-Making Matrix

Internal VAT decision frameworks were revised to **reflect standard client profiles**, allowing quicker internal resolutions and fewer raised queries.

Step 3 – Client Education Campaigns

Email templates and follow-ups were updated to explain **why documentation was required**, encouraging faster and more accurate client responses.

Step 4 – Direct Platform Access

By obtaining direct access to **client sales platforms and invoice portals**, the team bypassed the need to request client data, improving **efficiency and accuracy**.

Step 5 – Ongoing Policy Review

VAT processing policies were dynamic, with scheduled reviews incorporating **new business scenarios or client requirements**.

These steps and support from Corient's **VAT outsourcing services** dramatically transformed the workflow.

OUTCOME



The Final Outcome: A Success Story

The changes delivered exceptional results:

- **Query volumes decreased by over 60%**
- **Turnaround time for VAT filings improved by 40%**
- Clients expressed increased trust and satisfaction, reporting improved **cash flow predictability** and **regulatory confidence**.

What the Client Said



"With Corient's systems in place, we no longer worry about chasing clients for information. Their support has elevated our service standards across the board."

Key Takeaways: Why This Matters for Businesses

- **Structured onboarding** reduces downstream issues
- **Client training** improves document quality and response time
- **Policy updates** ensure adaptability in a changing tax landscape

When operations are simplified, trust grows—and so does your business.



Restoring Access and Accuracy: A NEST Pension Account Case Study

Highlights

- 1 Regained access to locked **NEST pension** account
- 2 Corrected **nine months of pension** contribution errors
- 3 Overcame **third-party access barriers** with strategic coordination
- 4 Ensured **long-term compliance** and control for the client

Introduction

Handling **payroll transitions** in sensitive situations demands a balance of precision and empathy. When access to a **NEST pension account** was lost following the account holder's passing, the client turned to **Corient** for support in regaining control and correcting **previously misfiled contributions**.



The Initial Problem: What Went Wrong?

The pension account was initially registered under a family member who had passed away. As a result, the client was locked out of the account and **could not manage or correct contributions** made between **July 2023 and March 2024**. Despite eventually regaining access, the contributions submitted during this period were **inaccurate**, requiring immediate intervention.

Corient's First Solution: The Fix

Corient, experienced in payroll outsourcing, took the first steps by:

- **Contact NEST** support to outline the situation and request next steps.
- I advised the client to **contact NEST directly**, providing her relative's personal information and proof of relationship, to verify access rights.

While this initiated progress, new challenges emerged that halted full resolution.



The New Problem: A Surprise Roadblock

Corient could not make account changes due to a **lack of delegate access**, and NEST support would not release information without direct client verification. This **verification barrier** slowed the correction process, creating another layer of complexity.

Corient's Second Solution: Fixing the New Problem

To navigate these barriers, Corient implemented a **structured plan**:

Step 1 – Acknowledgement as Third-Party Support

Corient requested that NEST **log the issue on the client's account**, officially recognising our involvement.

Step 2 – Guided Verification

We coached the client on exactly what NEST needed: **personal details**, identification, and **proof of relationship**.

Step 3 – Client Follow-Through

The client contacted NEST, **completed verification**, and successfully regained account access.

Step 4 – Credential Sharing for Action

With access restored, the client provided Corient with **secure credentials** for account management.

Step 5 – Pension Record Correction

Corient updated and corrected the **erroneous contributions** from July 2023 to March 2024, restoring full compliance.

Dedicated **payroll services** and constant client coordination made this multi-step resolution possible.

OUTCOME



The Final Outcome: A Success Story

The outcome was both professional and personal:

- **Full access restored** to the NEST pension account
- **All historical errors corrected** with up-to-date records
- **Confidence restored** in the accuracy and control of future contributions

What the Client Said



"Thanks to Corient, a difficult situation became manageable. Their clarity, structure, and patience helped me confidently resolve a complex pension issue."

Key Takeaways: Why This Matters for Businesses

- Account access issues require both **technical and human support**
- Proper **documentation processes** are vital in sensitive transitions
- **Outsourced payroll services** can ensure continuity even in personal crises

Even the most complex payroll problems can be resolved when trust meets expertise.

How Corient Resolved a Payroll Discrepancy with HMRC: Accurate Salary Reporting and Tax Compliance

Highlights

- 1 **Corrected salary discrepancies** on the HMRC portal
- 2 **Resolved tax code confusion** for two employees
- 3 **Accurately reprocessed Year-To-Date (YTD) figures**
- 4 **Implemented long-term payroll safeguards**

Introduction

Even a tiny payroll error can trigger **significant compliance challenges**. In this instance, two employees faced **tax complications** due to salary mismatches on HMRC's portal. With the support of **Corient's payroll outsourcing expertise**, the issue was swiftly addressed and resolved, setting a benchmark for **payroll accuracy and reliability**.



The Initial Problem: What Went Wrong?

Despite submitting salaries correctly, two employees—**Sabina Ng and Rachel Ng** (mother and daughter)—faced a serious issue: **Sabina's salary of £2,500** was mistakenly reported under Rachel's HMRC record, which should have only shown £500. This led to **inflated income figures, unjustified tax deductions, and frequent tax code adjustments**, leaving both employees distressed.

Corient's First Solution: The Fix

The issue stemmed from **a change in reference numbers** introduced in **April 2023**. To correct this:

- Corient planned **reprocessing both employees' YTD figures** using **HMRC's Basic PAYE Tools**.
- The goal was to **resubmit the correct salary data** separately to rectify the misreporting.

This solution was sound, but met with an **unexpected complication**.



The New Problem: A Surprise Roadblock

When contacting HMRC for assistance:

- **No employee-specific details were disclosed** due to privacy restrictions.
- The HMRC advisor was **unfamiliar with this payroll error**, which was delaying progress.

Without proper access or support, resolving the case became more complex than anticipated.

Corient's Second Solution: Fixing the New Problem

To overcome this barrier, Corient executed a strategic five-step plan:

Step 1: Direct Employee Engagement

A **Zoom meeting** was scheduled with one of the affected employees to obtain **authorisation to speak with HMRC** on her behalf.

Step 2: Authorised Contact with HMRC

Once authorised, Corient contacted **HMRC's Employees Helpline**, providing a full explanation of the payroll issue.

Step 3: Identify the Root Cause

HMRC confirmed that the **reference number change in April 2023** caused the mismatch in recorded salaries.

Step 4: Separate Reprocessing of YTD Data

Using **Basic PAYE Tools**, Corient **reprocessed and submitted corrected salary details** for both individuals.

Step 5: Creating New Records

At the start of the new financial year, Corient made both employee **leavers** and established **new payroll records** to prevent future errors.

The company ensured long-term compliance and clarity by relying on expert **payroll outsourcing** services.

OUTCOME



The Final Outcome: A Success Story

- **YTD discrepancies were eliminated**
- **New records prevented further complications**
- **Employee tax code issues were resolved**, restoring peace of mind

What the Client Said



"Thanks to Corient's proactive guidance, we resolved a confusing and frustrating issue. Their clear steps and quick action made all the difference."

Key Takeaways: Why This Matters for Businesses

- **Reference changes must be monitored to prevent misreporting**
- **Timely payroll corrections** can save employees from financial stress
- **Professional support** simplifies HMRC compliance

When payroll is accurate, everything else falls into place.