Step guide to resolving queries for registered tax and BAS agents

Australian Government
Australian Taxation Office

What support or information are you seeking?

STEP 1 Self-serve options

Resolve your issue quickly and easily using our self-serve options!

24/7 access
Access the self-serve options anytime!

I want information about **Tax Professionals**

Visit the **Tax Professionals** home page on ato.gov.au

Visit **Tax Professionals** for more information on:

- preparing and lodging
Lodgment deferrals and due dates
- support and communication resources to help you interact with the ATO, and keep up to date with the lates news
- managing your practice, the records you need to keep, your obligations and how to contact the ATO
- how to pay the ATO, including payment options and plans, and if your client has a tax debt, the arrangements you can make on their behalf
- how interest and penalties apply to late or unpaid debts and lodgments

You can also watch Tax Professional webinars and videos on ATOtv.

I am seeking **support for my practice**

Visit the **Support** pages on ato.gov.au

Visit **Support for your practice** for information on the support options available during difficult times, including:

- Lodgment program
- natural disaster support
- payment and debt support
- data and cyber security support
- Tax or BAS agent passes away

See also:

- How to report known or suspected fraud, tax Crime or illegal behaviour
- Identity security & scams, or visit individuals and tax professionals data breach guidance where you or your client's personal information has been lost or stolen
- ATO Advice & Guidance for a range of products to help you understand how the law may apply to you

I want to access my **clients information, and other digital services**

Log on to one of the ATO's **Digital Services**

Visit **Digital Services** for a list of all the digital platforms available to you.

Log on to:

- Online Services for Agents (OSfA) to access a range of client information and services

See also:

- Tax agent or BAS agent Online Services Guide to work out how best to complete your query or transaction online
- Practitioner Lodgment Service (PLS) for a list of checks you need to make when using the service

I want to be notified of, or need help troubleshooting a **system-related issue**

Visit the **Systems Advice & Alert** pages on ato.gov.au

Visit **System Advice & Alerts** for information about the availability and performance of the ATO systems.

See also:

- ATO Public Dashboards for the latest system status
- Troubleshooting for Businesses and Tax Practitioners for known issues, and updates on the availability of ATO systems
- System Maintenance for information about planned ATO systems maintenance windows and how to be alerted

Want the latest news and updates delivered to you directly, as soon as it's published? Subscribe to our newsletter, RSS news feeds and email subscriptions.

Did you know?

If the bank account details are left off a tax return, any refund for your client will be issued as a cheque.
Receiving payments electronically is faster and more secure than cheques. To ensure your clients' refunds are deposited directly into their nominated accounts, be sure to include their current bank account details when lodging on their behalf.

You can help prevent processing delays of your clients tax returns by ensuring:

- The correct form and Subject/Topic is used when completing a mail message
- All original tax returns are completed via the appropriate systems
- Accurate bank account details are added to each and every lodgment
- **NO** duplicate tax returns are lodged for the same year (if you wish to make a correction, request an amendment)

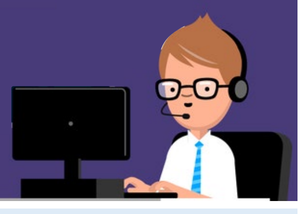
Lodging activity statements online is quick, easy and secure.
Change your client's activity statement to electronic through your PLS software or OSfA, to help reduce our carbon footprint and to provide your clients a more contemporary method of managing their activity statements.

STEP 2 Tax & BAS Agent Phone Service

Call us if you are **unable** to resolve your issue using the self-serve options.

STOP! Before you phone us, please be aware that **the ATO have seen an increase in call volumes over the last few years, resulting in longer wait times. We highly encourage you to use our self-serve options wherever possible.**

The ATO's registered agent phone lines operate Monday to Friday, excluding public holidays. Refer to the Registered agent phone services guide to find the best way to complete your query.



STEP 3 Tax Practitioner Assistance (TPA)

TPA can help you resolve client specific or practice management issues that you have **NOT** been able to resolve through our other existing channels.

Last resort
Only request TPA if other existing channels were unsuccessful

How to request Tax Practitioner Assistance

STOP! Before you request Tax Practitioner Assistance, have you tried to resolve your issue via the self-serve options, or the Tax and BAS Agent Phone Service? Remember that Tax Practitioner Assistance is **NOT** designed to be your first point of contact on a matter.

STEP 1 **Download a copy of the Tax Practitioner Assistance Form (PDF, 204KB) and complete ALL mandatory fields.**

STEP 2 **All TPA requests must be submitted through Practice mail via the Online Services for Agents (OSfA).**
Select the following when completing your submission:

- **Practice mail topic:** General questions, problems, and help
- **Subject:** Submit Tax Practitioner Assistance Request Form

Don't forget to attach your request form to the Practice mail message and ensure all mandatory fields are completed.

! Your request will be **REJECTED** if you have not included all required information.

STEP 3 You will receive a Receipt ID as acknowledgement of your request – you can use this Receipt ID to seek a progress update on your request.

Last Modified **November 2023**