



ATO Progresses with our Wishlist

ICB continues to be involved in collaboration with the ATO on a large number of their initiatives that directly impact our world.

ICB Fellow Member Darren McMahon recently attended an “Expert Panel Workshop” from early September 2017 on the work the ATO are undertaking. This includes information on the work that the ATO is undertaking to improve services and remedy the issues experienced by tax professionals and BAS agents.

The ATO Report as Follows...

It's commonly known that at the end of 2016 the ATO experienced an unprecedented IT hardware failure with consequential outages impacting many.

This disruption in our services, and some of the systems incidents since, not only impacted immediate systems availability and functionalities, but also caused us to defer the program of work we had been pursuing to improve services for tax professionals.

We acknowledge the disruptions caused by the outages to the tax professional community and your clients.

Up to 12 December 2016, we had been making good progress on the commitments the Commissioner had made in his address to the Tax Institute Conference in March 2016. We had actioned a work program to fix irritants and develop new platforms for better services. This work was paused while we undertook impact analysis and remediation action following the IT hardware failure as we needed to ensure we could deliver priority new policy implementation for government and Tax Time 2017.

We have actioned numerous measures over the last 12 months to improve the availability, performance, stability and resilience of our systems. And we will keep on with that work. In 2018, improving services for the Tax professionals is among our top four priorities for attention.

We stand by our commitment to ensure that you and your clients are not disadvantaged as a result of systems issues experienced in 2017.

Working Together

“What I see as our joint future – where the ATO and the tax profession are working together, to facilitate individual Australians and businesses through complex systems in order for them to meet their obligations.”

Chris Jordan, AO, Commissioner's address to the BDO Professional Practices Network – Business and Taxation Forum, October 2017.

We are committed to consulting with tax professionals on both day-to-day matters and the longer term future experience for the tax profession. This includes facilitating co-design and consultation opportunities on the development of products, systems, processes and services impacting tax professionals and your clients.

We'll continue to co-design products such as the portals over the coming months to achieve a service that suits the needs of tax professionals. This work will include extensive engagement and communication about upcoming changes so they have adequate time to provide feedback and be familiar with the new platform.

What We Have Done

We recognise how valuable the portals are to agents and we will continue to connect and consult with members of the profession.

We are listening to agents and are taking your issues seriously.

We are taking on board your feedback about irritants and suggestions for the future and looking at how we may be able to action these.

Understanding Your Business

We held a workshop with key Association representatives who have identified a list of issues affecting the profession and explained what success for the ATO would look like.

We have conducted over 200 visits to practitioners in their workplace to understand their experience first-hand.

We are committed to listening to agents through a variety of channels including surveys. We now have a baseline to work with and measure shift in experience.

Compensation information the ATO previously provided was technical in nature and difficult to understand. There was a lot of information, but required more clarity and instructions for agents to make informed decisions. Agents now have access to clear instructions to aid in deciding whether to claim compensation and how to claim compensation if required.

Implementing our Work for the Tax Profession

Work on improving digital services for agents has restarted. This work will include extensive consultation and co-design and provide visibility to tax professionals of upcoming changes so they have adequate time to provide feedback and familiarise themselves with the new platform. Some of these issues raised have been fixed, and we have plans in place to progressively fix the known irritants in the system. This includes work on Activity statement functionality, the Client communication list and myGov communication to name a few.

Completed Activity Statement Functionality

Issue: the Activity statement form had implementation issues, was missing functionality and communication to agents about the release of the new form was not fulsome.

Action: We've resolved the implementation issues and made improvements based on feedback and co-design with agents.

Fixes:

- Access and user permissions issues which meant some agents could not access the activity statement form. This was due to the new security framework that was implemented and has now been rectified.
- Rules alignment and form interface errors such as confirmation options not displaying.
- Document ID (DIN), BPAY details, GST accounting method and Receipt numbers being displayed on the screen and/or within an improved print option.
- Simplified the display and enhanced the print version of the form.

Client Communication List

Issue: When individuals linked ATO to their myGov, their correspondence was automatically sent to their myGov inbox, regardless of whether they have a registered agent. The Client communication list was intended to be delivered at the same time, to ensure agents had visibility of the correspondence we sent to a client's myGov inbox, however there was a delay in the implementation of the Client communication list.

Action: We have been improving the Client communication list following feedback from tax professionals. Latest fix was deployed at the end of September to address capacity issues in the document library which was impacting the Client communication list. Agents are reporting a 30% improvement in download times myGov

Issue: Individuals were unaware that by linking the ATO to their myGov account this would mean their agents wouldn't receive any correspondence. The correspondence sent still displayed the agent's address, so even if individuals looked at the correspondence, they presumed that the agent was still receiving correspondence, and they were not.

Action: We have included a disclaimer in myGov that informs users if they tick the 'receive communication via myGov inbox' that if they are represented by a tax professional, their agent will no longer receive ATO correspondence on their behalf.

Ongoing: More work being conducted on communication preference functionality. This will enable Agents to tell the ATO to send the client's communication to them even if the client has a myGov account linked to the ATO.

Work underway to progressively update the names of letters in the client communication list:

- to update the error messages in Practitioner Lodgement Service
- to update the Employer Contractor Decision tool

In Coming Months

We are focussed on the tax practitioner experience and ensuring that projects and services that impact the profession do so in a positive way and that we are working with the profession representatives to avoid any negative impacts. We will continue to:

- co-design our products and services over the coming months to suit the needs of agents. We'll do this through workshops, webcasts and discussions with agents as well as utilising feedback from the numerous sources agents are using to advise us of their concerns.
- visit agents to understand their business and support with new functionality e.g. improved ATO online services and the Practitioners Lodgement Service.
- continue to conduct the client experience survey monthly to monitor how agents rate their experience with the ATO.

Setting Up Working Group

After the success of this workshop we are setting up an ongoing working group to continue to work with tax professional associations and key representatives from the tax profession.

We will be inviting key tax professional representatives to be part of a working group who meets every 8–12 weeks. This group will work closely with the ATO representative to:

- understand the irritants
- prioritise the system upgrades and irritant fixes
- help us communicate to professional association members and the tax profession what we have done and what we are doing
- provide intelligence back from members or tax profession on what is working well, what needs work and any arising issues
- work on the future vision of the ATO Roadmap for the tax profession.

References

- ATO – PDF Version