



# Institute of Certified Bookkeepers

## Making you Count

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## Bookkeepers helping Bookkeepers helping Business

November 2017

Welcome to ICB's November 2017 Newsletter.



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#### ICB Membership Statistics

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## Additional Information for Members Only

In this month's [Members Newsletter](#) you will find the following additional information:

### Important News

- ICB Members Meeting 2018 – Get Involved
- Optimal Outcomes for the Tax Professional, for Taxpayers, for the ATO
- What is Health and Well-Being About?

### Best Practice Bookkeeping

- Auto-Entry in Software – New Resource
- Description Fields or Not
- Abandonment of Employment – New Resource
- Annual Shut-Down Guide – Part 2
- STP – The Employer's Obligations – New Info Sheet

### The BAS Agent World

- GST on Low Value Imported Goods
- Taxable Sales – Updated Resource

### Other Things Happening in the World

- The New AUSKey – Trusted Digital Identity Framework
- Doing Business in the UK
- TPB Consultative Forum Communique

### From the ICB

- 2018 Fellow Membership Nominations – Now Open!
- ICB Speaks to Ministers about STP – The Next Phase
- November 2017 eBrief for your Clients and Business

### ICB Conference 2018



#### **Open to Non-Members and Student Bookings from 21 January**

“Bookkeeping 2018” delivers insights and training in the matters that are imposed into your world. Bookkeepers are at the forefront of businesses, ensuring compliance with the law, whilst providing efficient business solutions to drive success. The 2018 Conference is about developing your knowledge and skills to be the professional Certified Bookkeeper!

2017 has been a dramatic whirlwind of government liaison and initiatives that directly impact how you do bookkeeping and business from now on. The ICB 2018 Conference will draw on topics such as the development of processes to combat cyber security threats and data breaches (e.g. two-factor authentication). In addition, ICB will discuss the final implementation and operating impact of Single Touch Payroll (with the design process completed, we can now instruct you on how to apply it). The 2018 Conference will also include the ATO Operational Framework, the DTA’s Trusted Digital Identity Framework, and the AG’s Anti-Money Laundering.

Interact with presenters and ask your questions throughout the day using the ICB Conference app.

#### **Indicative Agenda to be Confirmed**

**Host:** *Amanda Linton*, Certified Bookkeeper, CEO and Director of ICB

**Keynote:** *Matthew Addison*, Executive Director of ICB

#### **Including:**

- The Big Picture: The impact of what is happening around you
- Data Security, Cyber Security, Software Security, 2FA: How to manage these security developments
- The Definitive Guide on How to Implement Single Touch Payroll: For businesses and clients
- Anti-Money Laundering: It is progressing, but how will it affect you?

#### **Technical Bookkeeping**

How to implement technical bookkeeping changes. Join Chris McComb and the team as we present solutions and “how to” guidance on today’s bookkeeping issues.

#### **Government in the Firing Line (TBC)**

- Fair Work: Our aim is to bring Fair Work Ombudsman into the discussion
- TPB: Their impact during 2017 and moving forward
- ATO: Raising the standards for BAS Agents

#### **ICB Members Interaction**

- Final ratification of the 2018 governance changes
- Awarding Fellow Membership
- Recognition of 5 and 10 year members
- Providing an opportunity for your reflection and input into the ICB year that was and the years to follow

## Registration Details

9:00am for 9:30am start until 4:00pm

- Earn 5.5 hours of CPE for ICB and 4.5 for TPB purposes

### Members Book Now!

Bookings are restricted to **ICB Members (Affiliate and above)** until 21st January, 2018

Early Bird Pricing (until 21st January 2018)	
Full Member (excludes Student Members)	\$275.00
Prices (after 21st January 2018)	
Full Member	\$330.00
Student Member	\$330.00
Non Member	\$495.00

To register for the 2018 Conference, please click the location you wish to attend:

**Please Note:** Sydney and Melbourne offer a choice of two dates.

<b>Hobart</b> 28 February, 2018	<b>Sydney</b> 6 March, 2018 <b>OR</b> 7 March, 2018	<b>Brisbane</b> 13 March, 2018
<b>Cairns</b> 14 March, 2018	<b>Darwin</b> 15 March, 2018	<b>Adelaide</b> 20 March, 2018
<b>Canberra</b> 21 March, 2018	<b>Perth</b> 22 March, 2018	<b>Melbourne</b> 27 March, 2018 <b>OR</b> 28 March, 2018

## Presenters

**ICB Team:** Matthew Addison, Amanda Linton, Rick Van Dyk, Chris McComb, John Birse, Pauline Walton, as well as a panel of bookkeepers.

Partner Supporters and Sponsors including MYOB, Reckon, Xero, GovReports, Intuit QuickBooks, Workforce Guardian, Insurance Made Easy among others are engaged to attend the 2018 Conference. The 2018 Conference partners are being selected as providers of solutions that will be directly related to processes and concepts presented to you.

## Members' Meeting

The ICB Members' Meeting will be incorporated in each of the 9 locations. We will present an update on the Bookkeeping Profession and ICB's contribution to the development of the community. All meeting material (the finances, the operations report, the accomplishments, and the future) will be made available prior to the 2018 Conference for clarification and acceptance on the day.

The 2018 Conference series will finalise member consultation, feedback and decisions on the Governance changes proposed by the Directors.

Members are invited to submit any items for discussion at the meeting to [Celina@icb.org.au](mailto:Celina@icb.org.au)

## Dietary Requirements

Tea and coffee on arrival, morning tea, lunch and afternoon tea provided.

All special dietary requirements **must** be provided at the time of making your booking.

All venues require 14 days notice.

**If you have any further enquiries, please do not hesitate to contact us.**

## ICB Annual Survey 2017 - Have Your Say!

ICB Annual Survey 2017

*It is that time of the year where you get to have your say in our ICB Annual Survey!*

Every year ICB releases this survey to get your feedback, your input and knowledge to help us help you.

The survey will take approximately 20 minutes to complete and covers the many aspects of being a bookkeeper to running a bookkeeping business. Every answer is important and pertinent.

**This survey is open to all bookkeepers!**

You do not have to be an ICB Member, so be sure to pass the link on to colleagues, employees, or even your accountant. Best of all, everything you say is entirely confidential.

BUT, the survey will only be available for a limited time, so be sure to get in early to be included on shaping how ICB continues to raise the bar to help you.

**Take the ICB Annual Survey and get involved today!**

The results from this independent survey are provided to government bodies, software companies and the education sector, helping them to understand the reality of the bookkeeping profession.

Results from the survey will be published early 2018. You can access the previous year's survey results [here](#). If you experience any problems accessing the survey, please contact us at [admin@icb.org.au](mailto:admin@icb.org.au).

[Click here to access the survey](#)



## Best Practice Bookkeeping

### ICB Presents STP at ATO Forum

ICB presented with the ATO STP project team at the first STP Employer Engagement Forum.

The ATO report it was a great success.

The highlights of the STP Employer Engagement Forum included:

- ATO and industry professionals spoke to **120** large employers about preparing for STP in 2018;
- It was the major online external audience with **4,083** views (estimated as at today);
- We received the biggest social engagement to date, with **820** online comments and questions from large employers, professional associations and associations.

The overall feedback being received from both the ATO and the industry have been positive.

If you would like to view the event at any time, it will be available via the link: [Single Touch Payroll Employer Engagement Forum](#)

For all current resources and knowledge on STP go to: [www.icb.org.au/stp](http://www.icb.org.au/stp)



## Agent-Assessed Deferrals

Through recent changes when applying for a deferred lodgement this now means the payment is also deferred. In unforeseen circumstances, such as serious illness, impeded access to records or any cause that can be deemed exceptional, an Agent Assessed deferral lodgement application can be submitted. When the approved assessed agent deferral request is received, this will extend the payment due date to the deferred lodgement date.

### For BAS Agents

The Agent Assessed deferral application can be used in conjunction with:

- Monthly and quarterly activity statements; with the exception of the PAYG and GST instalment notices form, R, S and T or annual PAYG instalment notice form;
- The Annual GST return; and
- Annual PAYG payment summary statement.

### Timeframes

The ability to defer lodgement has specific timeframes allowed, which is dependent on the type of obligation.

The allowed timeframes are:

- Annual: 28 Days
- Quarterly: 21 Days
- Monthly: 14 Days

Should a longer deferral be required, an ATO assessed deferral request must be lodged. This is due within three business days after the lodgement date.

The deferral application is submitted via the BAS Agent Portal by attaching an Excel formatted copy to the message. Multiple clients can be listed on a single form, however separate deferral applications will need to be lodged.

It can take up to 28 days during peak lodgement times to receive a response. Notifications will be received through the BAS Agent Portal, with the new deferred due dates being displayed on:

- The BAS Agent Portal
- ELS Client List.

For any declined applications, this notification will be also received through the BAS Agent Portal.

### Reference

- [ATO – Agent Assessed Deferrals](#)

# Continued Professional Education

## Continuing Professional Education

ICB Events and Webinars	Classroom	Online
<p>ICB Technical Webinar - All Things Employment - Ending Employment Online, 5th December, 2017</p> <p>ICB Conference 2018 Multi-locations, Multi-date</p> <p><b>Note:</b> Webinars are recorded and available for members to listen to in your own time in the <a href="#">ICB Webinar Library</a></p> 	<p>Xero Accounting &amp; Xero Payroll Multi-locations, Multi-dates</p> <p>MYOB Bookkeeping Multi-locations, Multi-dates</p> <p>Foundations of Payroll Multi-locations, Multi-dates</p> <p>Budgeting and Cashflows on Calxa Perth, Multi-dates</p> <p>Budgets and Cashflow Management Perth, Multi-dates</p> <p>Understanding Financial Reports - including Non Reporting entities Perth, Multi-dates</p> 	<p>Excel Training Courses Excel Courses, Multi-dates</p> <p>MYOB Training Courses MYOB Courses, Multi-dates</p> <p>Xero Training Courses Xero Courses, Multi-dates</p> <p>Quickbooks Online Product Update Webinars Webinar, Online, Multi-dates</p> <p>ACNC Webinars Webinar, Online, Multi-date</p> 

# ICB Network Meetings

## Upcoming Network Meetings

<b>Webinars</b>				
Online TBC				
<b>ACT</b>				
Canberra - Northside 13th December, 2017	Canberra - Phillip 12th December, 2017			
<b>NSW</b>				
Albury 1st December, 2017	Ballina 8th December, 2017	Balmain 4th December, 2017	Bathurst 20th February, 2018	Bella Vista TBC
Bellingen TBC	Blue Mountains 11th December, 2017	Brookvale 11th December, 2017	Central Coast TBC 2017	Dubbo 4th December, 2017
Hawkesbury Region TBC 2018	Hills Districts 13th December, 2017	Hornsby 14th December, 2017	Lower North Shore TBC 2018	Moorebank 6th December, 2017
Newcastle TBC 2018	Newport 12th December, 2017	Orange 23rd March, 2018	Port Macquarie 12th December, 2017	Randwick - Bondi TBC
Southern Highlands 11th December, 2017	Shoalhaven 4th December, 2017	Sutherland 13th December, 2017	Tweed Coast 13th December, 2017	Wollongong TBC 2018
<b>NT</b>				
Darwin 11th December, 2017				
<b>Queensland</b>				
Atherton Tablelands TBC 2018	Brisbane Central 14th December, 2017	Brisbane North 12th December, 2017	Brisbane South 12th December, 2017	Bundaberg TBC 2017
Burpengary 6th December, 2017	Cairns 15th December, 2017	Dalby 30th November, 2017	Gold Coast - AM 12th December, 2017	Gold Coast - PM 12th December, 2017
Hervey Bay TBC 2018	Ipswich 23rd January, 2018	Logan 13th December, 2017	Moreton Bay 11th December, 2017	North Sunshine Coast 8th December, 2017
Port Douglas 19th January, 2018	South Sunshine Coast 14th December, 2017	Toowoomba 15th December, 2017	Townsville 8th December, 2017	
<b>South Australia</b>				
Adelaide West 15th December, 2017	Mt Barker 19th December, 2017	Para Hills 18th January, 2018	South Adelaide 7th December, 2017	Unley 18th January, 2018
<b>Tasmania</b>				
Hobart 1st December, 2017	Launceston 13th December, 2017			
<b>Victoria</b>				
Brunswick TBC 2018	Bulleen 12th December, 2017	Burwood 6th December, 2017	Chadstone 11th December, 2017	Cobram TBC
Craigieburn TBC 2018	Docklands 8th December, 2017	Echuca 8th December, 2017	Frankston 7th December, 2017	Geelong 12th December, 2017
Lilydale TBC 2018	Macedon Ranges 12th December, 2017	Melbourne CBD TBC	Mordialloc 12th December, 2017	Mornington 19th January, 2018
Mt Waverley 12th December, 2017	Narre Warren 12th December, 2017	Point Cook 8th December, 2017	Sale 7th December, 2017	Warragul 8th December, 2017
Yarra Valley 8th December, 2017				
<b>Western Australia</b>				
Broome TBC 2018	Bunbury TBC 2018	Busselton 1st December, 2017	Cockburn Central 13th December, 2017	Geraldton TBC 2018
Joondalup TBC 2018	Kalgoorlie TBC 2018	Melville 13th December, 2017	Noranda 13th December, 2017	Northam 29th January, 2018
Welshpool TBC 2018				

## November 2017 Question of the Month: Distillers and Excise Tax

This month's question for you all to debate at your network meeting is:

Recently took on a new client that is a boutique Gin distiller and is unclear on how to treat this with regard to excise tax. This is not WET, so how is this done?



[Let us know your thoughts here](#)

## October 2017 Answer of the Month: Casual to Part-Time

Last Month we Asked You:

Does a Casual employee have to change to a Part-Time employment if it has been offered to them and they do not want to?

### ICB's Response:

In short – No.

Any change in employment must be by mutual consent and the employee cannot be coerced to change if they do not wish to.

Often a casual role will be at a higher rate, and while it does forego the leave entitlements, the difference in pay this can be a preference. By changing to part-time, the employee will go onto a lower rate but with the inclusion of leave entitlements.

While this would vary per case, the allure of casual employment comes with the flexibility of hours, even if the role is a long term casual. This can be favoured for those with external and fluctuating commitments, such as families and children.

Some may not wish to change for these reasons and are not required to change.

### References

- [ICB – Casual Employees](#)
- [ICB – Employment Status](#)

## From ICB Support

ICB Support love hearing from you:

“Great webinar! As a single parent, attending the monthly meetings is an impossibility – however this has definitely changed my mind in keeping up to date. I love to be informed and read as much as time allows with a small child, but I am won over by the Webinar.

It started on time – tick.

The material was easy to follow and user friendly – tick.

The time passed very quickly – tick.

Thank you!”

### How to Register for an ICB Webinar

Below are some step-by-step instructions to help you register for our upcoming webinars.

ICB offer an exciting range of webinars and it provides you with an easy way to gain insight, information and training in the comfort of your own home.

Follow these simple steps:

- Log on to ICB.org.au.
- Log into your account by entering your user name and password.
- Select the tab “Professional Development”.
- Click on “Continued Professional Education” – which appears directly beneath the tab title.
- Look through the webinar list and select the one that you would like to attend. (When a webinar has more than one date, simply select the date that suits you the best).
- Click on the “Register” button to that webinar.
- This will take you into another screen that will provide further details about the webinar.
- Click “Add to Basket”
- Then a “Check Out” button will appear. Click on this.
- A new screen will come up summarising the webinar and how many attendees. This will always be defaulted to one, being you.
- On the left hand side near the bottom, there is a tick box that will require your attention. It starts with “I have read...” Click on this box.
- Then click “Check out” on the right hand side of the screen.
- You are now booked for the webinar!

You will receive an email confirming your position has been booked in the webinar with a *link to connect into the webinar* on the date/time that it is running.

Then add this to your personal calendar, compile any questions you may have and get excited about attending.

## Other Things Happening in the World

### Fair Work Breaches and Court Cases

#### Penalised for Sham Courier Contracts

##### The Case

The Fair Work Ombudsman has secured a total of \$72,000 in penalties against two companies after deliberate sham contracting activity resulted in a bicycle courier in Melbourne being underpaid more than \$7000.

Z Transport Pty Ltd and another company, Boxbay Pty Ltd, have each been penalised \$36,000 in the Federal Circuit Court in Melbourne. Z Transport is owned by Vincent John Smits of Victoria while Boxbay is owned by Peter Maurice Fitzgerald of Queensland.

Z Transport specialises in delivering products for various clients and Boxbay provides services, including labour, to Z Transport pursuant to an agreement between the companies. The Fair Work Ombudsman investigated the companies after a bicycle courier, aged in his late 20s, lodged a complaint.

Fair Work Inspectors found that the courier was treated as a contractor, despite Z Transport and Boxbay being aware that his correct classification was as an employee.

The courier was paid a low contract rate based on the jobs he performed – but as an employee, he was entitled to receive employee entitlements under the Road Transport and Distribution Award, including minimum wages and leave entitlements.

This resulted in the courier being underpaid \$7641 between February and November, 2013.

The Fair Work Ombudsman subsequently commenced legal action and Boxbay admitted in Court that it contravened sham contracting laws when it engaged the courier as a contractor to perform duties for Z Transport.

Z Transport admitted being involved in that contravention.

Boxbay also admitted underpaying the courier and contravening pay slip laws, and Z Transport admitted being involved in those contraventions.

The courier gave evidence that the underpayment had made it difficult for him to live week to week and resulted in him incurring significant credit card debt to cover everyday living expenses.

He was back-paid shortly after the Fair Work Ombudsman commenced legal action.

## The Judgment

In his judgment, Judge Grant Riethmuller found that the contraventions were deliberate because in 2012, the Fair Work Ombudsman had provided Z Transport and Boxbay with “significant material” explaining that the correct classification for their bicycle couriers was as employees, not contractors.

“I am persuaded that the contravention in this case was deliberate and made in circumstances where the true position had clearly been provided to the respondents by the FWO in 2012,” Riethmuller said. “This is not a case where the events that transpired occurred either by accident, error, negligence or even recklessness.”

Acting Fair Work Ombudsman, Kristen Hannah, says the Agency has a low tolerance for employers who engage in sham contracting arrangements.

“Disguising an employment relationship by unlawfully classifying workers as independent contractors is a devious way to avoid providing employees with their correct entitlements,” Hannah said. “Employers ought to be warned that they cannot simply ignore our advice. We have a range of materials available in multiple languages and a dedicated small business helpline.”

## Reference

- [ICB – Fair Work Ombudsman Case Studies](#)
- [Inside Small Business – Two businesses penalised for sham courier contracts](#)

## From the ICB

### ICB in the Media

ICB has been busy, spreading the word for Bookkeepers on interesting topics

- [ICB quoted in Accountant’s Daily](#) –
  - ▶ [‘Clear message’ to accounting firms with first-of-its-kind penalty](#)
  - ▶ [‘Why should it take 20 days?’: payment times changes gets mixed response](#)
- [Inside Small Business article](#) –
  - ▶ [BAS agents and Fair Work advice](#)

## What’s New this Month from ICB

New and updated resources for November 2017

- [WET \(Wine Equalisation Tax\)](#)

Other news for November 2017

- [STP Employer Engagement Forum](#)
- [QuickBooks Online Product Update](#)
- [STP Nearly Ready for Business](#)
- [Drop in BAS Agent knockbacks](#)

[Click here to view the latest news for the month.](#)

[ICB Q&A Space](#) – You can check out all the latest threads here.

Feel free to ask your questions regarding any issue you may be having or if you require clarification, we are here to help.

The [Latest Updates](#) lists all the topics in order of replies.



# How to Win the Holiday Battle as a Small-Business Owner

*Andrew Spring, Inside Small Business*

As the holiday season quickly approaches, many small businesses find themselves under increased pressure due to increased competition, staff holidays, supplier shut down periods, cashflow headaches, and unforeseen outgoings.



With studies showing that 60 per cent of businesses fail in the first year, Christmas can be incredibly testing for SMEs and it can either make or break a business. To add to the stress, research also reveals uncharacteristically low business expectations for Q4 2017, despite businesses usually heading into the fourth period with high hopes.

We see first-hand the pressures that business owners face at this time of year. The holiday season can take its toll, both financially and emotionally but there are simple steps that can be taken to not only survive but thrive throughout the festive season. The key is to set realistic expectations on the businesses performance, and then to plan for the unexpected in any event.

### Six survival tips for the festive season

1. **Collect your dues:** Make a note of your clients who are sitting on outstanding invoices and deal with late payers so you can get that cash in your bank account before the holidays. Don't be afraid to pick up the phone and politely yet firmly request payment.
2. **Declutter:** Avoid paying interest on stale inventory or hoarding last season's stock by selling it at a discounted price to get it out the door. Even if you move it at cost or for a loss, liquidating is a lot better than keeping your money tied up.
3. **Shut up shop:** If most of your clients are shutting up shop for a week or two, it might be financially sensible for you to follow suit, or at least maintain skeleton staff. There's no point incurring the costs required to keep your business operating if times are quiet.
4. **Tighten your belt:** In the lead up to the new year, take a close look at your business expenses and your debt to see how you can manage your money more wisely. Due to the seasonal impact on trading for most businesses, this is the most important time to understand your cash-flow. Understanding your fixed and variable costs will allow you to adequately provide for any slow-down in trading.
5. **Recharge the batteries:** Burning out isn't going to help your business. Scheduling a bit of downtime can do you and your staff the world of good by helping to clear your head. Use the time to think about what you want to achieve in 2018 and set the foundations for a plan on how you hope to get there.
6. **Have a contingency plan:** Before you close the door and head off on your break, have a contingency plan in place in case of events such as client emergencies, power outages or IT failures. Planning ahead will ensure a restful, well deserved break.

Businesses who have concerns about managing the requirements of the holiday period should seek professional help as soon as possible. Options do exist and it's important to explore them. Put simply, it's important to speak with your advisers – accountants, legal representatives or an insolvency specialist – before it's too late.

*Andrew Spring, Partner, Jirsch Sutherland*

## Upgrade Your Software Or Else...

It can be a constant battle when considering whether to upgrade the business's software to the current version.

### Is There a Choice?

Browser-based software is typically different as the provider (Xero, Intuit QBO, MYOB Essentials and Reckon One) pushes the latest version onto the business as there is no option in the way that it is provided.

There have been some feature improvements/upgrades provided by the browser-based programs that do not "turn on" until the user accepts the change. This usually is the exception.

Desktop or premises-based (in-house server-based programs) will advise of an upgrade. This will require action to download and then install the change at a time that it suits the business.

Whether it is a new feature that has to be bought before it turns on in the browser-based environment, or when it is a paid for upgrade to the Desktop version, the business needs to consider the additional cost verses the benefits or potentially enhanced business process.

### Upgrade for Efficiency

In our view, we are in an era of technology change such that every business should embrace the current technology to enable the best and most efficient business processes.

- Government is on a "digital first" strategy.
- The ATO has been and remains on a "digital by default" strategy.
- Single Touch Payroll requires a digital solution, so every employer is going to need to embrace current technology.

Current technology solutions, although still very much evolving towards our "utopia", provides far better business processing techniques than we have ever had before.

### The Dilemma for Software: *Change is Hard*

The software companies have their own dilemma of trying to evaluate which new technology initiative they should prioritise.

They are "informed" by the government's initiatives that can sometimes enforce changes in the programs, and changes to the way the programs interact with government.

They are juxtaposed in that enforcing modification on their customer base (i.e. their users) can cause conflict.

*"We don't tend to like change. We don't like our screens changing, we don't like more clicks to do something. We know how to do it the old way and that is comfortable."*

VS

*"There are far better ways to do things that save time but are also a sign of the times and technology changing."*

### Change is the Only Certainty

The ATO are going to impose a series of technology changes on every piece of software that continues to hold sensitive data or interacts with the ATO in submitting data (i.e. single touch payroll, TFN Declarations, BAS or receiving data (prefill of the BAS when that comes in), validation of employee details, and so forth.

- Multifactor Authentication at the point of logging into the program ([refer to the article from the ICB October Newsletter](#))
- Encryption of all sensitive data

The new National Payments Platform is going to provide a platform to enable technology providers to integrate day-to-day software closely with payment exchange gateways, even more so than the integrated payment systems in place and developing today.

## So Where to With Our Businesses?

We need to find those ways to motivate our business owners to embrace the current technology and allow us to use the efficient tools it provides.

We need to move beyond – say MYOB Classic. We need to consider using those features in software that are made available. Optional tools, such as 2FA in MYOB and Xero, have a very low take-up rate.

## Software Companies Between a Rock and a Hard Place

MYOB have recently responded to some commentary about their journey to encourage clients to embrace the current versions.

“We will continue to encourage clients to move to the latest version of their software. In fact, in many cases, it does not actually cost anything to do so. The latest version provides users with the benefits of online accounting, data security with 2FA, better integration, workflows and general features and functionality. It is also the way legislation is moving with recent government announcements including Single Touch Payroll.

In order to ensure that clients are receiving the best value from their software, we made some changes to the confirmation process. We want to encourage a discussion around any perceived barriers. We realise that our communication could have been clearer and we're sorry if this has caused alarm.”

## What if customers do not want to upgrade?

Any customers who decline or are unable to upgrade will still be able use v19.8 AccountRight Standard, albeit at a slightly higher subscription rate.

## References

- [ICB – Multifactor Authentication](#)

## QuickBooks Online Product Update Webinars

Join us for a 1 hour update on the latest features in QuickBooks Online Accountant and QuickBooks Online to help you save time in 2018!

We'll cover:

- new ways work with your clients and team
- new tools to analyse business income and expenditure
- new reports to understand GST obligations better
- better ways to invoice and purchase in instalments
- improvements that can give you back valuable time in your day!

There are two sessions to choose from:

- [6 December 2017, 12:30pm – 1:30pm](#)
- [12 December 2017, 10:00am – 11:00am](#)

We look forward to seeing you online. And if you need more information, call the team on 1800 618 521.



## ATO Improvements

Since 2015 the ATO have been implementing the blueprint for change.

The idea behind this was to capitalise on the tax and super systems information received through ongoing consultation, co-design with the community, and provide clarity on what the ATO intends to achieve through improved services.

“Our blueprint for reinvention reflects what the community wants from the ATO – the kind of experience they want to have when they participate in the tax and super systems.” – Chris Jordan AO, Commissioner of Taxation

### Future Focus

The focus is to continue building on:

- improving clients' experience of the tax and super systems.
- promoting fairness and transparency.
- building partnerships and enhancing the existing.
- continuing to culturally be centred on expertise and integrity as well as contemporary service.

The specifics of this focus include:

- Australian Environment – rapidly changing community expectations, digital economy and design, social media and globalisation.
- Tax Administration Paradigm – creating better efficiency with self-assessment and basing this on the integrated digital solutions as well as having better relationships.
- Attitude to Administration – aligning to community expectations and ensuring that tax-payers pay the correct amount.
- Business Design focus – nurture the willing participation through creating ease in achieving the right things and difficult not to.
- Compliance focus – by increasing the voluntary compliance.
- Style of workplace – creating active and enabled networks of teams and individuals.

### What we have been doing

Recent areas of focus are derived from what we have told the ATO are important:

- Fixing the basics
- Addressing irritants
- Expanding the range of online services
- Providing certainty

### When it comes to BAS Agents

The ATO are intending on improving the experience received using the tax and superannuation systems. This is being derived from feedback that has been received. While some of the goals will occur in the near future, there are others that will take longer to implement. However, the purpose is to ensure that every year matters and there are obvious improvement programs being delivered.

More on the ATO's Improvement Program:

[Every year counts timeline for tax agents and BAS agents \(403KB PDF\)](#)

Some of the key initiatives that are in the process of being delivered include:

- Being aware of the changes that are occurring and having the opportunity to get involved.
- Testing the simpler BAS to assist in reducing your client's GST record keeping.
- Better communication and providing the opportunity to talk more with ATO staff through increasing the amount of open forums, online forums and professional associations.

Additionally, there is the opportunity to become involved in the consultation and co-design in the following areas of:

- New credentials – the option to access online services more securely.
- The delivery of tax and superannuation services which includes the “Working Together Framework and the Partnership Relationship Model”
- Providing input through professional association representation or a collaboration website.

The ATO's aim is to continue to build on the successes and lessons to date, and their transformation for the long term – this is to deliver on the directions of reinventing the ATO Blueprint.

## References

- [ATO – Blueprint Addendum](#)
- [ATO – Program Blueprint](#)
- [ATO – Making Every Year Count](#)

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## 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](#)

## ATO Portal Maintenance

See [this link for scheduled times](#) for the full guide to system maintenance and issues.

The portals will be unavailable at the following times for scheduled system maintenance.

### Planned System Maintenance

Start Time	End Time
Saturday 2 December 2017 – 9.00pm EDT	Sunday 3 December 2017 – 9.00am EDT
Friday 8 December 2017 – 10.30pm EDT	Monday 11 December 2017 – 7.00am EDT
Saturday 16 December 2017 – 11.30pm EDT	Sunday 17 December 2017 – 7.00am EDT
Saturday 6 January 2018 – 9.00pm EDT	Sunday 7 January 2018 – 9.00am EDT
Saturday 13 January 2018 – 11.30pm EDT	Sunday 14 January 2018 – 7.00am EDT
Saturday 20 January 2018 – 11.30pm EDT	Sunday 21 January 2018 – 7.00am EDT
Thursday 25 January 2018 – 11.30pm EDT	Monday 29 January 2018 – 7.00am EDT

For more details regarding BAS Agent portal maintenance, [click here](#).

## ICB Membership Statistics

**5,476 Members** at 31 October 2017

3,887 Members maintain Fellow, Member, Associate, Affiliate and Educator Membership. ICB also has 18 Accredited Training Provider Members and 1,571 Student Members.

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