



Australian Government
Australian Taxation Office

Tax Agent and BAS Agent Portals

2013/14 statistics on portal usage

Contact: silu@ato.gov.au

February 2015

Version 1.0 UNCLASSIFIED



About this document

This document provides statistical information on services used on the ATO's Tax Agent and BAS Agent Portals in the period from 1 July 2013 to 30 June 2014.

To facilitate the analysis of data and drawing of conclusions, the portal usage data has been mapped to the menu of services available on the Tax Agent Portal. Over the next pages services available on the Tax Agent Portal are explained and supported with usage statistics. High usage services* have been **highlighted** throughout the report.

Given the similarity of services offered via the Tax Agent and BAS Agent Portals, a single view of services available on the portals has been created. Where applicable, the usage statistics have been broken down to specify volumes of services used on the Tax Agent Portal and the BAS Agent Portal.

The next page provides a brief summary of key findings and identifies the top five services most frequently used on the portals in 2013/14. This is followed by the presentation of the portal usage data mapped to the portal menu. The final section of the report compares the portal usage data with the results from the online survey of Tax Agent and BAS Agent Portals users conducted by the ATO in September 2014 with the view to identify portal services considered to be of most value to portal users.

Feedback on this document can be provided to: silu@ato.gov.au

* Services where usage volume > 500,000

Approach

Two different approaches have been applied to collate the portal usage statistics. The data on **transactional** services, (such as lodgements, revisions, client detail updates) is based on the count of changes made to client accounts as a result of completed transactions, recorded in our enterprise systems. The data on **informational** services (such as viewing account balances or lists of accounts), which did not involve changes to client accounts, is based on the count of page hits.

This means that the data on informational services may be slightly augmented, when the user visited the same page multiple times while navigating through the portal site. Nevertheless, it is anticipated that the total volume of page hits should provide a reliable indication of the frequency of use of a particular informational service.

It should also be noted that due to limitations in obtaining data on informational services (page hits), the data on informational services is for the period 1 October 2013 to 30 September 2014 rather than the financial year 2013/14. However, given the data set covers a full year, it is anticipated to sufficiently serve the purpose of providing an insight into the portal usage and identifying the most frequently used informational services.



Disclaimer

The data in this report represents point in time (historical) information for two of many available service delivery channels. The ATO has taken care to ensure the information in this document is correct and as accurate as possible. The information represents past usage of the ATO Tax and BAS Agent Portals, which is not necessarily indicative of the future use of these services.



Summary of key findings

The top services most frequently used by the portal users in 2013/14 were:

1. Accessing **Single View of Accounts**: viewing client account lists (such as income tax, PAYG instalment, etc): **48,504,716** views in total.
2. Accessing **Account Transactions View**: viewing a list of itemised accounts with details of transactions and running balances: **35,827,027** views in total.
3. Accessing and **viewing Activity Statements**: **19,676,957** views in total.
4. **2013 Prefill Report**: downloading prefill data for income tax (current year): **12,616,196** downloads in total.
5. Accessing **Lodge List**: viewing client income tax lodgement details and history: **7,781,415** views in total.
6. Managing **Client Details**: updating client details such as client addresses, registration details, financial institution details and tax roles and obligations: **7,716,274** real-time interactions in total.

Of the above, the most frequently used services included:

- updating client postal addresses: 3,098,525 real-time interactions
- updating client details in relation to income tax: 2,978,580* real-time interactions

** numbers include adding and removing clients*

In total, there were **14,142,741** views/page hits associated with accessing and managing client details.

Other high volume informational and transactional services used on the portals in 2013/14 included:

- Accessing Payment Options: viewing payments and payment option details for clients: 5,004,492 views in total.
- Lodgement of Activity Statements: 4,172,471 real-time interactions.
- Accessing Notices of Assessments (NoA): 2,618,706 views and downloads in total.
- 2012 Prefill Reports for 2012 (previous year): 1,327,822 downloads.
- Authorisation Summaries: accessing and managing authorisations: 1,283,111 views, 382,128 real-time interactions.
- Non-lodgment advise for income tax (IT return not necessary): 925,887 real-time interactions.
- 2013 PAYG Instalment Reports (current year): 699,963 downloads.



- Start here
- Home
- Favourites
- Your details
- Your dealings**
- Reports
- Your clients
- Information
- Directory
- Add client
- Mail
- Online forms
- Online tools and calculators
- File transfer
- File status

Include static information only, setting up and updating favourites, customisation and displaying details of the tax agent.

Service name	TAP	BSP
Home page (hits)	49,684,075	963,125

TAP: Tax Agent Portal

BSP: Bas Agent Portal

This has not been highlighted as a high usage service as all entrants to the Portal land on this page.

Displays all dealings the **tax agent** has had with the ATO, for all clients and theirs status.

Service name (informational)	TAP	BSP
Status of enquiry – your dealings and client dealings	831,308	41,584

Details of dealings include :

- type of dealing ,for example Debt and Lodgement
- method of contact, for example Tax Agent Portal, outbound correspondence
- receipt number
- status (received, completed), and
- estimated date of completion.



- Start here
- Home
- Favourites
- Your details
- Your dealings
- Reports**
- Your clients
- Information
- Directory
- Add client
- Mail
- Online forms
- Online tools and calculators
- File transfer
- File status

List of on-demand and pre-generated downloadable reports available to the user.

Report name (transactional)	TAP	BSP	Rank (by volume)
Reports generated on demand			
Income tax lodgement status (current + previous 3 years)	95,351	-	7
Outstanding activity statements (current + previous 3 years)	44,325 (unable to split)		11
Pre-generated			
Client running balance	74,203 (unable to split)		8
Correspondence preference report	249	-	15
Family Trust elections and interposed entity elections	55,585	-	10
Mass marketed scheme investor lists	117	-	17
PAYG Instalments reports (2007 – 2012)	107,628	-	6
PAYG Instalment 2013	699,963	-	3
Pre-filled report 2007 – 2012	2,609,096	-	2
Pre-filled report 2013	12,616,196	-	1
Pre-filled report 2014 (data only for the period until 30 June 2013)	10,242	-	13
Senior Australians Tax Offset April 2002	228	-	16
Year to date excise revenue summary 2007 – 2013	285	-	14
Year to date interest summary 2007 – 2012	64,873	-	9
Year to date interest summary 2012/13	334,798	-	5
Year to date revenue product summary report 2007 – 2012	43,499	-	12
Year to date revenue product summary 2012/13	397,444	-	4

no longer available

Displays a summary of client reported obligations and calculated interest amounts



- Start here
- Home
- Favourites
- Your details
- Your dealings
- Reports
- Your clients
- Information**
- Directory
- Add client
- Mail
- Online forms
- Online tools and calculators
- File transfer
- File status

Search for clients using ABN/TFN.

Service name (informational)	TAP	BSP
Number of page hits (searches by ABN/TFN)	7,328,514	106,518



- Start here
- Home
- Favourites
- Your details
- Your dealings
- Reports
- Your clients
- Information
- Directory**
- Add client
- Mail
- Online forms
- Online tools and calculators
- File transfer
- File status

Allows user to retrieve a list of clients – different display options and views available. Allows user to set up search preferences.

Service name (informational)	TAP	BSP
Client details: input search parameters	11,311,735	835,039
Client details: results view	10,842,747	1,367,850



Start here
Home
Favourites
Your details
Your dealings
Reports
Your clients
Information
Directory
Authorisation Summary
Client accounts
Client details
Client dealings
Client preferences
Client reports
Lodgement status – income tax
Assessment notice – income tax
Activity Statement
Payment options
Add client
Mail
Online forms
Online tools and calculators
File transfer
File status

Displays the following options for a **specific client**:

Service name	TAP	BSP
Authorisation Summary <i>Add, remove or end authorisation or remove client – real-time interactions</i> <i>Number of page hits/views associated with accessing and managing authorisations</i>	382,128 (unable to split)	
Client accounts <i>View account/transaction lists/General Interest Charges (GIC) /refund and transfer requests and access to payment options</i> Include: <ul style="list-style-type: none"> • Single View of Accounts (<i>client accounts lists</i>) • Account Transactions (<i>list of itemised accounts with details of transactions and running balances</i>) • GIC (<i>viewing estimated and actual summaries, drilling down</i>) • Refund/Transfer Requests (<i>real-time transactions</i>) 	48,066,074 35,307,593 20,075 236,420	438,642 519,434 993 33,432
Client details <i>Access, update client details – real-time interactions</i> Updating Address Details Updating Registration details Updating Financial Institution details Updating Tax Roles (income tax, FBT, Super, etc)* <i>*may include adding new clients</i> Updating and adding Tax Types <i>Number of page hits/views associated with accessing and managing client details</i>	3,701,798 22,944 169,990 <u>3,412,894</u> 7,307,626 408,648 14,142,741	



Start here
Home
Favourites
Your details
Your dealings
Reports
Your clients
Information
Directory
Authorisation Summary
Client accounts
Client details
Client dealings
Client preferences
Client reports
Lodgement status – income tax
Assessment notice – income tax
Activity Statement
Payment options
Add client
Mail
Online forms
Online tools and calculators
File transfer
File status

Displays the following options for a **specific client** (cont.):

Service name	TAP	BSP
Client dealings <i>Shows all interactions with the ATO, on behalf of a specific client – similar to ‘Your dealings’</i>		n/a
Client preferences <i>Activity Statement delivery preference – real-time interactions</i> <i>Number of page hits/views associated with accessing Activity Statement delivery preferences</i>	20,712	461,752
Client reports <i>Allows the tax agent to view reports for a specific client by searching TFN or ABN</i>	See page 5 for break down	
Lodgement status – income tax <i>Display lodgement details for the current year and lodgement history for up to 3 years</i> Include: <ul style="list-style-type: none"> • Lodge List (view client income tax lodgement details and history) • Return not necessary (advice - real-time interactions) 	7,781,415 925,887	
Assessment notice – income tax <i>Views and downloads of Notices of Assessments (individual clients only)</i>	2,681,706	-
Activity Statement <i>Displays: a list of all activity statements to be lodged, a list of all activity statements that have been lodged, processed, cancelled or discontinued for the last two years</i>		
Lodgements Revisions <i>Viewing activity statement (any from list)</i>	3,696,361 543,923 18,754,095	476,110 31,098 922,862
Payment options <i>View payment details, displays payment options</i>	4,829,637	174,855



- Start here
- Home
- Favourites
- Your details
- Your dealings
- Reports
- Your clients
- Information
- Directory
- Add client**
- Mail
- Online forms
- Online tools and calculators
- File transfer
- File status

Allows user to add a client: individual or other entities

Service name	TAP
Adding client (contact add/detail add)	629,151*

**Note that this number may be underestimated, as there are several methods/pathways to add a new client on the portal. It is anticipated that some data relating to adding new clients may be captured in the real-time interactions reported under 'Client Details' (Updating Tax Roles). See page 8 of this document.*



- Start here
- Home
- Favourites
- Your details
- Your dealings
- Reports
- Your clients
- Information
- Directory
- Add client
- Mail**
- Online forms
- Online tools and calculators
- File transfer
- File status

Displays menu of secure messages by topic. Volumes below represent volumes sent to the ATO.

Secure message topic name	TAP	BSP	Rank (by volume)
Activity statements - <i>payments, due date extensions, lodgement, general interest charge, etc</i>	61,235	4,009	4
Debt and lodgement - <i>arrangements, remissions, balance enquiries, etc</i>	174,132	2,316	1
Registrations - <i>registration matters not covered by online processes, non-residents, consolidation, grouping, branching, etc</i>	15,195	390	5
GST - <i>deferral of GST, assistance in completing activity statements, grouping or consolidation enquiries, etc</i>	3,318	210	11
Income tax - <i>amendments, remissions, penalty or interest calculation, shortfall interest charge, etc</i>	98,216	-	2
Higher Education Loan Accounts (HELA) - <i>Higher Education Loan Program, Higher Education Contribution Scheme, etc</i>	307	-	13
PAYG instalments - <i>instalment rate enquiries, cycle change enquiries, etc</i>	3,790	142	10
Petroleum Resource Rent Tax - <i>general enquiries</i>	10	-	16
General questions/problems/help - <i>appointment of public officer, review of decisions, etc</i>	4,568	135	8
Statement requests/account details - <i>credit, debit balance, penalty or interest calculations</i>	3,850	99	9
Superannuation - <i>payments, statements, refunds, general enquiries, etc</i>	10,343	-	6
Refunds/remissions - <i>overpaid amounts, interest calculations, refunds, returned refunds, etc</i>	80,697	1,030	3
Excise - <i>alcohol, petroleum, tobacco, duty free, wine equalisation, fuel tax credit</i>	142	-	14
Fringe Benefits Tax (FBT) - <i>registering for FBT, change of details, general interest charge remission, failure to lodge on time remission, etc</i>	6,975	-	7
Mineral Resource Rent Tax - <i>general enquiries</i>	11	-	15
Provision of further information	1,041	-	12
Quarterly credits	1	-	17



- Start here
- Home
- Favourites
- Your details
- Your dealings
- Reports
- Your clients
- Information
- Directory
- Add client
- Mail
- Online forms**
- Online tools and calculators
- File transfer
- File status

Displays menu of online forms.

Online form type	TAP	BSP	Rank (by volume)
ELS password reset form	8,048	-	1
Portal feedback form	389	22	7
Private ruling application	1,466	4	5
Objections	7,832	12	2
Request for replacement cheque form	6,490	4	3
Relationship manager program form	1,880	-	4
Tax practitioner services referral forms	-	4	8
Tax practitioner complaints online form	1,447	-	6



- Start here
- Home
- Favourites
- Your details
- Your dealings
- Reports
- Your clients
- Information
- Directory
- Add client
- Mail
- Online forms
- Online tools and calculators
- File transfer
- File status

Links to the 'Calculators and tools' page on ato.gov.au

Service name	TAP	BSP
Bulk Data Exchange lodge file	177,021	60,559
Bulk Data Exchange file status	190,103	65,625

For more information on these functions is available at http://portalhelp.ato.gov.au/TAP/TA/File_transfer/