Australian Government
Australian Taxation Office

Client Communications Workshop Day One key outcomes

UNCLASSIFIED External

Title:	Client Communications Workshop Day One		
Issue date:	25 May 2020		
Venue:	Level 11.713 , ATO Office, 2-12 Macquarie Street, Parramatta, NSW		
Event date:	12 March 2020	**Start:** 9:00am	**Finish:** 4:00pm

Facilitator:	Brett Connors		
Contact	Danielle Miller	**Contact phone:**	0247257189

Attendees: names/section	ATO: Tyson Andrews - Director, Digital Communication Management David Baker - Director, Intermediaries Digital Services & Support Ash Bray – Director, Strategy and Support Outbound Capabilities Brett Connors – Director, National Site Leadership Peter Evans - Director, Digital Communication Management Katrena Cawthorne - Individuals and Intermediaries Craig Hughes - Digital Wholesale Integration Services Brendan Kee - Digital Wholesale Integration Services Damien Choy - Application Architecture and Design Sonia Lark – Digital Partnership Office Danielle Miller - Digital Partnership Office Niki Scepanovic – Intermediaries Digital Services & Support Julian Wilson - Intermediaries Digital Services & Support Digital Service Provider Industry: Mike Denniss – Class

	Kevin Zhang – Class Ron Drost – Digital Disruption Solutions Simon Smart– Etax Albert Lilie – HostOne Nathan Kerr – HostOne Nic Taylor – HostOne Ursula Lepporoli – KPMG Mike Behling – MYOB Lisa Miks – MYOB Kevin Johnson – Reckon Karl Farrand – TaxLab Vikas Kumar – Wolters Kluwer Danna Zheng – Wolters Kluwer Tax and BAS Agent Industry: Vinita Raj - I.T.P. The Income Tax Professionals Kamel Jabbour - Ideal Income Tax Pty Ltd Jennifer Laurence – Jennifer Eulalie Laurence Susan Galaz - Key Business Accountants Robert Basselly - R.C.N. Accountancy Solutions Pty Ltd Meera Tampoe - Sri Accounting & Business Services Tahera Jehanbeen - T&R Accountants Pty Ltd Antonio Morgillo - TFS – Teachers Financial Services Sree Kuchi - Vins Taxation Services
Apologies: name/section	Kylie Johnston - Digital Partnership Office Sultan Ahmed - Goodwill Taxation Nicole Johnson - Khourys & Associates Mai Huynh Ha - Knysh and Associates

Agenda item: 1 – Welcome and Introduction

Agents and DSPs were welcomed by facilitator Brett Connors who advised the purpose of the day was to understand current agent practices for managing client communications. These insights will feed into the design of the Client Communication service for software.

Agenda item: 2 – Background and business context for Client Communication Service

David Baker provided an overview of the Client Communication service and why it was introduced. He discussed the performance issues that have prevented the advancement of the service in software and the infrastructure work completed to ensure that ATO systems can support the increase in load.

David emphasised that there are a raft of deliveries that are possible through software that can't be delivered through Online services for agents.

David then provided the intent of the workshop overall - To consult on the design to build a client communication service delivered through practice management software.

Agenda item: 3 – How the Client communication service works in Online services for agents

David Baker presented screen shots of the Online services for agents (OSfA) Client Communication List (CCL) interface to provide an understanding of the current functionality.

The group was provided with a list of correspondence types currently available in CCL. The types of communications that can be sent electronically have been categorised into six broad communication types:

- income tax
- activity statement related
- study and training support loans
- debt
- superannuation
- employer and business obligations

Agenda item: 5 – Communication preferencing and how it works. What are the impacts?

Ashley Bray provided an overview of preferencing, advising that it would be going live in OSfA on the following Monday. Around 30,000 agents were invited to participate in the beta (with 11% participating).

The preferencing journey was discussed with screen shots of the retail service provided, including the digital inbox.

Users are currently able to set either agent or client preferences, not both. However, multiple preference types is in the pipeline for the future.

Ashley reiterated that express written authority is required to change preferences and confirmed that a digital signature is acceptable, SMS is not acceptable. He also confirmed default preferences are applied to the client and not the practice.

It was noted further materials to help agents understand preferences will be available in the future.

Issues raised for future consideration:

- Ability to track express authority in software
- Dual notifications
- Ability for agents to view who is linked in myGov

Action item – Kevin Johnson requested a rough breakdown of how many people have sent to myGov vs agent

Agenda item: 6 – How has the Client Communication service changed your tax practice business operations?

Discussions covered:

- irritants with the current retail service
- mail management including how agents currently distribute client communications to clientele. Agents responses included:
    - Print and forward to client
    - Email (limited viability due to security concerns)
    - Upload to client portal

Agenda item: 7 & 8 – Exploring opportunities – what would you like the Client Communication service to look like in software? & Prioritisation of identified opportunities for the Client Communication service

Brett Connors lead the group in an activity to identify elements that they would like to see in the Client Communication service, followed by a prioritisation activity where the group ranked the importance of the elements. Participants were asked to individually vote for their top 3 items. The results of the exercise are displayed below.

Top 3 CCL API Features

Legend
MVP

Item	Agent Score	DSP Score	ATO Score	Total Score
Ability to store documents - MVP	3	13	6	20
All the data all of the time	1	3	4	8
Auto handling – rules to decide how to manage	3	3	1	7
Being able to sort and filter communication - MVP	1	5	11	17
Client level dashboard	3	1	0	4
Control who see's what correspondence	2	6	0	8
Daily alerts for new communications - MVP	13	5	3	21
Match technology with different clients	0	0	0	0
Practice level report - MVP	2	6	10	18
Practice level view/dashboard - MVP	3	7	0	10
Priority rating by communication type - MVP	9	0	1	10
Retrieve historical communication for new clients – MVP*	0	7	1	8
Single button – Practice level/client tax return - MVP	8	5	1	14
Single button - Download option	0	5	0	5
Software practice mail	0	0	0	0
Wanting communications in real-time	0	5	3	8

Agenda item: 9 – Check in with DSPs

Brett gave DSPs the final opportunity to seek information from the agents in the room.

Agenda item: 10 – Summary of outcomes

Brett summarised the findings from the group activities with Agents' top priority being the ability to receive daily alerts for new communications, followed by priority ratings for communication types and a single button to retrieve at a client or practice level.

Agents were advised that DSPs would be meeting again on the following day to work on solution design.

Brett thanked both agents and DSPs for taking the time to provide their insights into what they would like to see in the Client Communications API.