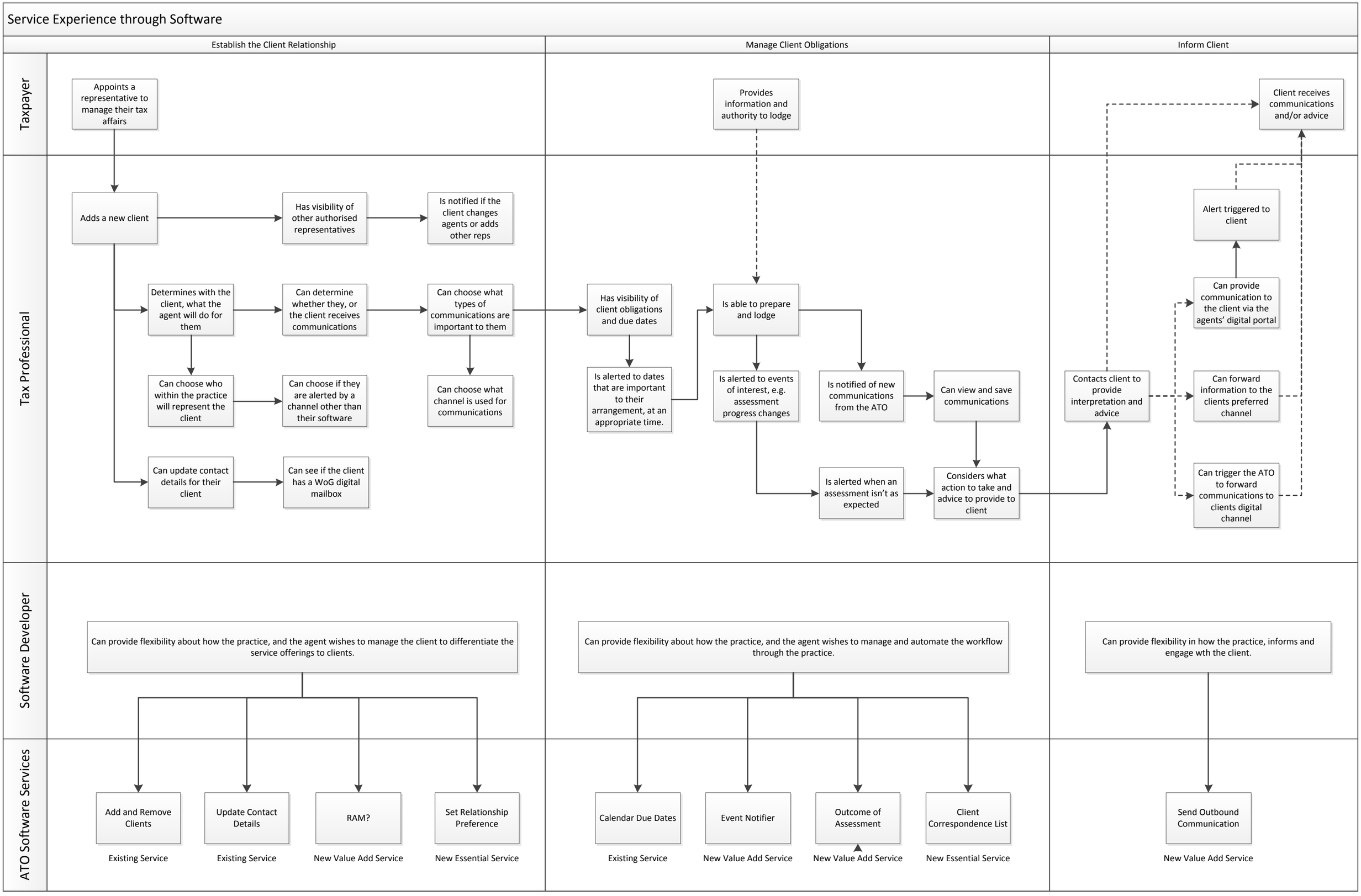
Service Experience through Software
Establish the Client Relationship
Manage Client Obligations
Inform Client
Taxpayer
Tax Professional
Software Developer
ATO Software Services
Appoints a representative to manage their tax affairs
Adds a new client
Has visibility of other authorised representatives
Is notified if the client changes agents or adds other reps
Determines with the client, what the agent will do for them
Can determine whether they, or the client receives communications
Can choose what types of communications are important to them
Can choose who within the practice will represent the client
Can choose if they are alerted by a channel other than their software
Can choose what channel is used for communications
Can update contact details for their client
Can see if the client has a WoG digital mailbox
Provides information and authority to lodge
Has visibility of client obligations and due dates
Is able to prepare and lodge
Is alerted to dates that are important to their arrangement, at an appropriate time.
Is alerted to events of interest, e.g. assessment progress changes
Is notified of new communications from the ATO
Can view and save communications
Is alerted when an assessment isn't as expected
Considers what action to take and advice to provide to client
Client receives communications and/or advice
Alert triggered to client
Can provide communication to the client via the agents' digital portal
Contacts client to provide interpretation and advice
Can forward information to the clients preferred channel
Can trigger the ATO to forward communications to clients digital channel
Can provide flexibility about how the practice, and the agent wishes to manage the client to differentiate the service offerings to clients.
Can provide flexibility about how the practice, and the agent wishes to manage and automate the workflow through the practice.
Can provide flexibility in how the practice, informs and engage wth the client.
Add and Remove Clients
Existing Service
Update Contact Details
Existing Service
RAM?
New Value Add Service
Set Relationship Preference
New Essential Service
Calendar Due Dates
Existing Service
Event Notifier
New Value Add Service
Outcome of Assessment
New Value Add Service
Client Correspondence List
New Essential Service
Send Outbound Communication
New Value Add Service