

DIGITAL SPACE FOR PARTNERS

Where all Partners have a personalised experience based on their Partner 'type' and chosen preferences. They're able to easily manage clients, targets, access relevant tax related information, plus interact and communicate with the ATO.



FEATURES

FOR PARTNERS

- Integrated guidance and assistance.
- Can be accessed through business and practice management software or direct through ATO.
- Access and view all clients' details including client history, financials, behaviours and patterns.
- Access and view details from other government departments the client has given them access to.
- Manage and download client lists (historical help).
- Communicate with the ATO via webmail, webchat and video chat (recorded and saved).
- Customise communication preferences (types and channel).
- Access to self-serve forms.
- View and update clients details – on ATO systems.
- Co-browsing.
- Access to a 'Premium' service.
- Real-time notification of system issues.
- Live tracking of requests.
- Easy and secure authorisation and entry.
- Easy management of relationships /authorisation.

FOR TAX AND BAS AGENTS

- Access and download prefill individually or in bulk (through to Practice Management Software).
- Lodge Income Tax Returns and BAS, direct to ATO or through software.
- Tracks performance, for example, against the 85% lodgment Benchmark.
- Real-time tracking and progress of client lodgments.

BENEFITS

PARTNERS

Efficiency gains due to:

- Faster authorisation
- Easy to switch between clients.
- Faster access to answers and info.
- Pre-fill – less time spent collecting and entering data.

Compliance/risk improvements due to:

- Pre-fill – Reduction in errors and duplication of data.
- View of all client lodgments and payments due will assist with meeting performance measures and client compliance.

Improved experience due to:

- Ease of accessing and updating client information.
- Ability to self-serve for low-risk transactions (deferral of lodgment, penalty remissions).
- Visibility of lodgment and tracking of requests.

FEATURES

FOR FINANCIAL ADVISORS AND INSOLVENCY PRACTITIONERS

- Easy access to information (searchable).
- Link to client and visibility of their contact and requests history.
- Digital access to insolvency services.

FOR LEGAL PRACTITIONERS

- Access to legal database.
- Specific legal related notifications.
- Ability to get in touch with an ATO legal expert lawyer (the right person).
- Visibility of their customers case (if applicable).
- Proof of authority to represent.
- Access to 'raw laws' that are current (easy search – search by year, legislation number, keywords).

BENEFITS

ADVISORS AND INSOLVENCY

Efficiency gains due to:

- Faster access to more reliable information.
No need to consult multiple sources.
- Easier to identify themselves.
- Additional self service options.

Improved experience due to:

- Less frustration with navigating ATO content.
- Speed of response and accuracy of information.

LEGAL

Efficiency gains due to:

- Faster access to more reliable information.
No need to consult multiple sources.
- Easier to identify themselves

Compliance improvements:

- Made easier with the ATO's identification requirements.

Improved experience due to:

- Less frustration with navigating ATO content.
- Speed of response and accuracy of information.

FEATURES

FOR SOFTWARE PROVIDERS

- API specifications to include services/features in their software.
- Access to ATO data, e.g. analytics on lodgments made through their software and research on their client groups.
- Accurate and personalised view of expectations of their firm/software – roadmap of ATO deliverables and links to related content.
- Publishing and regular updating of ATO strategic digital roadmap.
- Publishing key dates and release plans, and how ATO is tracking against them.
- Publishing of rolling tailored engagement calendar.
- Access to crowd-sourcing forums (on technical, business help and co-design).
- Data driven content delivery based what we know about the software developer and previous activity.
- Ability to save and personalise Partners Portal for easier location of content.
- Testing environment with clear testing and sign off process (and tracking).
- Online Forum for software providers to co-create solutions with ATO and discuss issues.
- Publishing of draft and final ATO administrative designs.
- Access to common tools for all developers.
- Direct access to technical help via phone, web chat and video call.
- Co-browsing capability with ATO technical help.
- Historical record of help and interactions with the ATO.
- Publishing of secondment opportunities.
- Information on “what you need to do” for new software providers.

BENEFITS

Reduced costs:

- Lower cost to make improvements to software.
- Easier to add new services with less investment.

Efficiency gains due to:

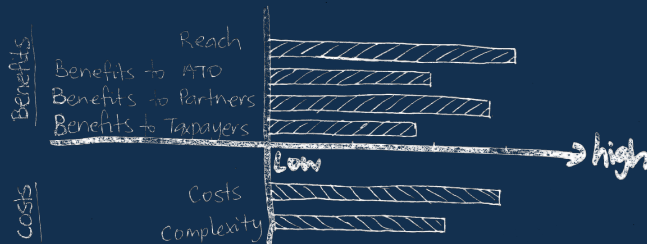
- Ability to plan for future development.
- Improved compliance:
- Improved testing environment and sign-off processes.
- Improved experience:
- Ease of development process.
- Easy access to help.
- Involved in development process from the start so have what is needed.
- Clarity on how to work with the ATO and opportunities for collaboration.

OPPORTUNITIES

- Faster, better service for all partners including “single view” of clients, including history and interactions, visibility relevant information, forms, lodgment status and performance against benchmarks, allowing for value add.
- Removal of duplication and time consuming processes.
- Visibility of ATO future work plans.
- Huge industry investment in developing individual calculations / rules engines (could be centrally developed and consumed).

VALUE SCALE

Score: 7.9 RANK 2/12



PARTNERS: DIGITAL SPACE FOR PARTNERS

IMPACT

PEOPLE

- Partners
- ATO Staff

PROCESS

- Client management, lodgment, requests, research, development.

PLACE

- Online
- Mobile
- Software
- Cloud

PRODUCTS

- SBR
- Siebel
- ICP
- AIS
- Data
- Analytics

PERFORMANCE

- Visibility
- Authorisation
- Privacy

LINKS

- DIGITAL SPACE FOR PARTNERS** Same information available.
- DIGITAL SPACE FOR TAXPAYERS** Same information available.
- TAXBOX** Collects and feeds information.

Priority Digital Services
ato.gov.au

REINVENTING WORKSTREAMS

- Working with our Partners (R50,56)
- Smarter Data (R19,21,23)
- Contemporary Digital Services (R24,25,26,27,10,7)
- Tailored Engagement (R4,2,1,15,13,14)

FJORD + ATO



Reinventing the ATO

WORKING WITH OUR PARTNERS

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