Compliments

Compliment	
Client search / predictive search	Predictive search is available in all search fields in OSfA and behaves as follows: • starts after the agent has entered three or more characters • displays up to 10 matches. To see all matches the agent uses the scroll bar in the list • if the agent presses enter they will go to Advanced search. To go directly to a client in the quick search field select the client • the agent may be taken to Advanced search when they select a client, if there are numerous clients with that name. **Feedback** Agents like that they can now just enter part of the clients name to find a client. Predictive search is not available in the portal
Payment plans	Agents can view or make payment plans for your client for the following accounts: • Income tax • Activity statement • Super guarantee director penalty accounts • Super guarantee employer • Fringe benefits tax. Not available in legacy portal. **Feedback** Easier and quicker than calling the ATO to action. Agents can self- serve. Payment plans are not available in the portal.
Access to information not included in the portal – loan account and Super information plus tax registrations	For example: **Tax registrations** – in addition to GST and pay as you go (PAYG) withholding agents can also register, update and cancel: • fuel tax credits (FTC) • wine equalisation tax (WET) • luxury car tax (LCT). **Consolidated summary of ATO accounts** – view and print a summary of all ATO accounts held by a clients, including the balance and overdue amount in one place. This includes accounts that are not visible in the portals, such as Superannuation Guarantee, loan accounts and GST property credits. **Superannuation** - super information available for agents to view **Payment plans** These options are not available in the portal. **Feedback** This is so good...new features/additions gives me as much

	information as I need for my clients to do manage their affairs... i.e. superannuation, payment plan, etc...
Prior year returns	Agents can view and print details of previously lodged income tax returns. Previously agents would need to call the ATO and request a copy. **Feedback** Saves time – confirm correct information – don't have to wait for ATO to provide a copy
Lodgment Program status report	Agents are required to lodge 85% or more of your clients' current year returns by the lodgment program due date, or by the deferred due date if a deferral is granted. Agents can track their on-time lodgment performance online through the Online Services for agents. OSfA displays the percentage of current year tax returns lodged at a point in time – an 'as at date'. **Feedback** I could see at a glance where the practice was at This is a fantastic practice dashboard with the important ATO KPI's available.
Favourite client	Agents can quickly access up to 30 regular clients by creating a favourites list. Agents can access some of the list directly from the homepage or go to the full favourites list. Not available in the legacy portal. **Feedback** Love having a list of Favourite Clients from which I can easily select. This is so much more convenient - and time saving - than going back to the individual look up. Thank you!
For action	The For action window provides the agent with a quick view of the client's outstanding obligations. The lodgments section displays reminders for all outstanding obligations for the following account types: • Income tax • Activity statement • GST joint venture • Fringe benefits tax Using the action links, agents can navigate to the relevant ATO Online screen to manage the lodgment obligation e.g. lodge an activity statement or view details of the outstanding tax return. Payments • Only accounts with a debit balance are displayed. • The account balance can reflect a not yet due or an overdue balance. • Where the client has an active payment plan against an account, a 'payment plan' indicator will be displayed.

	• Using the action links, agents can navigate to the relevant ATO Online screen to manage the payment obligation e.g. view payment options. • Where there is a related account with a credit balance, selecting the action link will navigate the agent to the accounts view. **Feedback** Easy to see what the client has outstanding and how to prioritise the clients obligations. Love the For Action box. A great overview of client's current and overdue lodgements

Ideas

Idea	
Add all obligations to the 'For Action'	For action list all types of obligations including TPAR Consolidated view of all upcoming lodgment obligations
Lodgment program status report	The screen displays the numbers for each of the following categories: Lodged tax returns • Late tax returns • On-time tax returns Due tax returns • Overdue tax returns • Upcoming obligations • Total due lodgements Agents would like each of the above categories to link directly to a report that lists the clients in each category.
Account date order	Agents would like to be able to sort each of the accounts listed in OSfA by the following: • Earliest to latest • Latest to earliest
TPAR and PSAR	Make obligations visiable for these reports that are due in the For action. Agents would also like a menu option under lodgements for TPAR and PSAR (similar to Inome tax) that has a 'Not lodged' and 'History' tab for these reports.

Issues

Issue	Background
Pre-fill reports – can only request one at a time	Pre-fill reports in OSfA allows the user to search using only a single valid TFN to generate one Prefill report at a time for a selected financial year. In legacy portal agents are able to run the prefill report for the same year for multiple (up to 5) clients at the one time. Agents would like the same function in OSfA.
Blank payment slip/options for activity statement	Currently in legacy portal an agent can print off a 'blank payment slip'. The portal will gather the required client information from tax systems and the payment slip will be prepared with the client's personalised data (excluding the payment dollar value). After it is printed agents can complete the slip by filling in the value of the amount being paid, before making the payment to send to the client. OSfA does not provide a blank payment slip.

Tax Type Summary report	Substantial Agent feedback has been around the significant impact of not having the availability of the 'tax type summary' in OSfA. The Tax type summary is widely used to:
	
	▪ Reconcile all client BAS accounts with other sources i.e. general ledger/bank statements etc.
	▪ have information broken down into the various taxes; i.e. GST/PAYG etc.
	▪ Determine at a glance payments that need to be identified when preparing income tax accounts.
	▪ Reduce the time in gathering the information manually by going into each lodged document to source the details.
	▪ Making a better work flow and quicker reconciliation with accounting processes
	
	The tax type summary allows Tax and BAS agents to view transactions relevant to an income tax year that total:
	• each tax type related to the account
	• interest amounts processed during the selected income year
	• Have the net amounts display the sum of:
	  ○ all activity statement obligations reported
	  ○ all pay as you go withholding obligations reported by large withholders
	  ○ all obligations reported for excise

	o all interest obligations processed. Currently not available in OSfA.
Income tax lodgment status on demand report filtering on screen view and print	The Income tax lodgment status report (current + previous three years) provides a list of all the tax agent's current income tax clients at the time the report is requested. The report is based on financial years. The portals allow the agent to filter the Outstanding Income tax on demand report into either 'Show all clients', 'Not lodge', 'lodged' or 'not necessary' prior to downloading. Allowing agents to view the results on screen and also to print. OSfA only allows the agent to download a report in CSV listing all clients without prior filtering – the agent will then need to sort the report themselves. This could impact the time it will take to download the report - either same day or overnight. As large reports will take over night to download.
Account links – Account transactions linking to Activity statement	When the agent views the transactions listed under the Activity Statement account they want the amounts (DR or CR) for a particular activity statement and general interest charges to have hyperlinks to redirect the agent to be able to view the related Activity statement and General interest charge calculation details screen respectively.