



Australian Government

Australian Taxation Office

Online services for agents

Walkthrough of main functionality

Presented by Sonia Corsini, Director, Australian Taxation Office / **18 December 2018**



My practice



Reports and forms



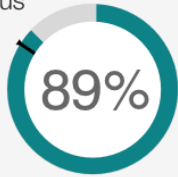
Communication



You have **1** notifications



Income tax lodgment status



More

Favourite clients

> col [redacted]

Mc...

Practice mail



View



Add client



View client list



Access Manager



Favourite clients



My details



Reports



Remove client



Lodgment program status

Customise homepage



Practice

Reports and forms

Communication

Lodgment performance

Income tax

Fringe benefits tax

Your current lodgment progress for 2016-17

Income tax returns lodged on time



1 Jul 2016 - 31 Jul 2017

Tax returns lodged to date



175 lodged out of 200 expected tax returns

This data is based on current year returns lodged as at 31 July 2017

Lodged returns

Late returns	50
On-time returns	1450

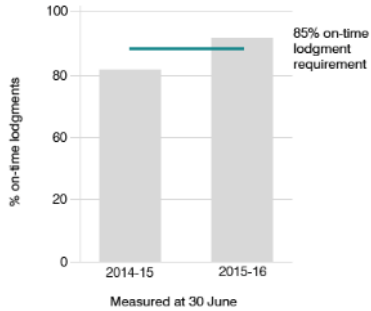
Due returns

Overdue returns	1
Upcoming obligations	299

View can be changed from
Income Tax to Fringe Benefit
Tax Program Status

Annual income tax lodgment performance

Your performance history



Lodgment performance

Performance period	Returns due	Returns lodged on time	Lodgment performance %
Jul 2015 - Jun 2016	178	94	94.0%
Jul 2014 - Jun 2015	200	78	78.0%

Lodgment deferrals

Deferral period	Returns due	Returns deferred	Practice deferrals use
Jul 2015 - Jun 2016	178	10	5.6%
Jul 2014 - Jun 2015	200	20	10.0%



This data is based on current year returns lodged, and clients attached to your Registered Agent Number as at 30 June 2015. 'On-time' includes returns lodged by the lodgment program concessional due date or, where a deferral has been granted, the deferred due date.

Certificate 2015-16

89%

[View](#)

Your practice's lodgment program annual performance summary is available. This covers the period Jul 2015 to Jun 2016.

[How do we calculate your lodgment performance?](#)





Practice mail



View

Favourite clients

- > M... 18
- > B... 278
- > CC... 69
- > H... 47
- > KE... 17
- > OL... 190
- > R... 607
- > T... 795
- > VI... 13
- > AU... 125

More

Indicator of new and/or unread secure mail



Add client



View client list



Access Manager [↗](#)



Favourite clients



My details



Reports



Remove client



Lodgment program status

Customise homepage

Inbox - [REDACTED]		New
Client	Subject	Received
<input type="checkbox"/> M [REDACTED] WARD	Refunds/remissions: Excess imputation credit refunds	09/07/2018
<input type="checkbox"/> [REDACTED]	Individuals Audit: Employee Share Scheme	26/06/2018
<input type="checkbox"/> [REDACTED]	Income Tax: Income tax return amendment - superannuation funds	07/06/2018
<input type="checkbox"/>	Income Tax: AMIT Member Choice	28/05/2018
<input type="checkbox"/>	Activity statements: Agent Assessed Deferral	28/05/2018
<input type="checkbox"/>	Individuals Audit: Employee Share Scheme	24/05/2018
<input type="checkbox"/>	General questions/problems/help: Review of decision for the remission of late lodgment penalty - tax agent requests	21/05/2018
<input type="checkbox"/>	General questions/problems/help: Notify ATO of appointment of new public officer	21/05/2018
<input type="checkbox"/>	Debt and lodgment: Remission of shortfall interest charge	18/05/2018
<input type="checkbox"/>	Debt and lodgment: Remission of shortfall interest charge	18/05/2018

Allocate Delete Notifications



Practice staff are able to view incoming and sent messages, as well as reply and delete. They can also allocate the message to other staff within their practice for action.

When selecting the notification box, practice staff can enter their email address to receive new online notifications in their email inbox.



My practice



Reports and forms



Communication



Historical transactions

This is a list of your ATO enquiries. Estimated date of completion is based on the [Taxpayers' charter standards](#).

Historical transactions

Filter



Date Received	Description	Status	Estimated completion	
09/11/2018	LARGE BUSINESS & INTERNATIONAL	Received	20/11/2018	
<div style="border: 1px solid black; padding: 5px;"> <p>Contact Method Tax Agent Portal</p> <p>Receipt Number 5010014039879</p> </div>				
08/11/2018	Third party data Data	Received	19/11/2018	
08/11/2018	LARGE BUSINESS & INTERNATIONAL	Received	19/11/2018	
08/11/2018	Third party data Data	Received	19/11/2018	
08/11/2018	Third party data Data	Received	19/11/2018	
07/11/2018	Third party data Data	Received	18/11/2018	
23/10/2018	Client Liaison Active Compliance	Received	03/11/2018	



Print friendly version

Favourite clients

Search results			
Identifier	Name	Entity	Favourite
15 1 34 2		LTD	Company <input checked="" type="checkbox"/>
77 4 39 1		LTD	Super fund <input type="checkbox"/>
96 8 30 3		LTD	Super fund <input type="checkbox"/>
36 K 28 2			Company <input type="checkbox"/>
96 K 13 2		.TD	Partnership <input type="checkbox"/>
77 1 10 4		ANG	Super fund <input type="checkbox"/>
75 8 31 2		D	Company <input type="checkbox"/>
86 4 34 1		HURST	Company <input type="checkbox"/>
24 1 12 3		VC	Company <input type="checkbox"/>
96 K 20		EGGY	Individual <input checked="" type="checkbox"/>

Results per page

< Page **1** of 4 >

10

Clients can be selected as favourites from various areas with Online Services for Agents, including the Client List by selecting or deselecting the star





My practice

Reports and forms

Communication

TFN

Add to favourites

Summary

Profile

Accounts and payments

Lodgments

Super

Business

For action

Lodgments

Account	Description	Due date	
Activity statement 001	PAYG instalment notice Apr 2018 - Jun 2018	30 Jul 2018	Lodge >

Payments

Account	Description	Balance	
Activity statement 001	Payment obligation	\$2,091.00	Overdue Payment options >



Maintain authorisations



Client details



Client addresses



Associates



Financial institution details



Tax registrations



Super fund administration accounts



Activity statements

Customise quick links

Individual client for action screen shows upcoming and outstanding lodgments as well as payments due or overdue.



[Summary](#)[Profile](#)[Accounts and payments](#)[Lodgments](#)[Super](#)[Business](#)

For action

Lodgments

Account
Income tax 551
Income tax 551
Income tax 551

Due date
15 May 2019
15 May 2006
15 May 2005

Overdue**Overdue**[View](#) >[View](#) >[View](#) >[Accounts summary](#)[Tax accounts](#)[Excise and resource rent tax accounts](#)[Loan accounts](#)[Super guarantee accounts](#)[Overpaid super accounts](#)[Payment plans](#)[Transfer request](#)[Refund request](#)

✓ Payments are up to date



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favourites



Summary

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Lodgments

Business

Activity statements

Income tax

Client reports

Client forms

For action

Lodgments

Account	Description	Due date	
Income tax 551	Jul 2017 - Jun 2018 Annual Return	31 Oct 2018	View >
Activity statement 001	PAYG instalment notice Apr 2018 - Jun 2018	30 Jul 2018	Lodge >
Income tax 551	Jul 2016 - Jun 2017 Annual Return	15 May 2018	Overdue View >

Payments

Account	Description	Balance	
Activity statement 001	Payment obligation	\$4,056.00	Overdue Payment options >

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TFN

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Income tax 551

[View payment plan](#)**Overdue**
\$26,487.68 DR**Not yet due**
\$0.00**Balance**
\$26,487.68 DR

Help

[Print friendly version](#)

Transactions

[Download](#)[Filter](#)

Results for Processed date from 17 December 2016 to 17 December 2018.

Processed date	Effective date	Description	Debit(DR)	Credit(CR)	Balance
03 Dec 2018	03 Dec 2018	General interest charge (GIC) calculated from 01 Nov 18 to 02 Dec 18	\$212.36		\$26,487.68 DR
16 Nov 2018	15 Nov 2018	Payment received		\$1,500.00	\$26,275.32 DR
01 Nov 2018	01 Nov 2018	General interest charge (GIC) calculated from 05 Oct 18 to 31 Oct 18	\$187.13		\$27,775.32 DR
16 Oct 2018	15 Oct 2018	Payment received		\$1,500.00	\$27,588.19 DR



My practice



Reports and forms



Communication



Reports

Pre-filled reports for the financial year

[2018](#)

[2017](#)

[2016](#)

[2015](#)

[2014](#)

[2013](#)

[2012](#)

[2011](#)

[2010](#)

[2009](#)

Pre-generated reports

Date updated

On demand reports

Status

[Income tax lodgment status \(current + previous 3 years\)](#)

[Outstanding activity statements \(current + previous 3 years\)](#)



My practice



Reports and forms



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TFN

ABN

Added to
favourites



Summary

Profile



Accounts and payments



Lodgments



Business



Reports

Pre-generated reports

Date updated

[STP - View income statements](#)

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My practice



Reports and forms



Communication



Forms


Select the form you require.


- > [ELS password reset](#)
- > [Lodgment deferral](#)
- > [Request for replacement cheque form](#)
- > [Tax practitioner complaints](#)
- > [Private ruling application](#)
- > [Lodge an objection](#)
- > [Submit further information for lodged private ruling / objection](#)

Make a payment plan

Privacy: For important information about your privacy see our [privacy notice](#).

All fields marked with * are mandatory

Select account * 

Higher Education Loan Programme (HELP) 552 - \$1,528.50 

Select amount *

Full account balance - \$1,528.50 DR

Overdue amount - \$0.00


Select payment method * 

Direct debit

Other payment options


Select payment frequency *


Fortnightly 

 The upfront payment must be made within 7 days as a condition of setting up the payment plan.
The instalments will then be due fortnightly from this date.

Payment date *

23/07/2018 

How much will your upfront payment be? 

30%  \$ 458.55

How much will your instalments be? *

\$ 200

Calculate payment plan

Cancel

Next

Online payment plans can be entered into for clients who meet certain eligibility criteria.