

# Services available to import client details into new software

As a software developer I consume ATO services that allow my users to populate their new software with tax and super information

As an agent and user of software it allows me to import my client list and all of my client's tax and super information from the ATO

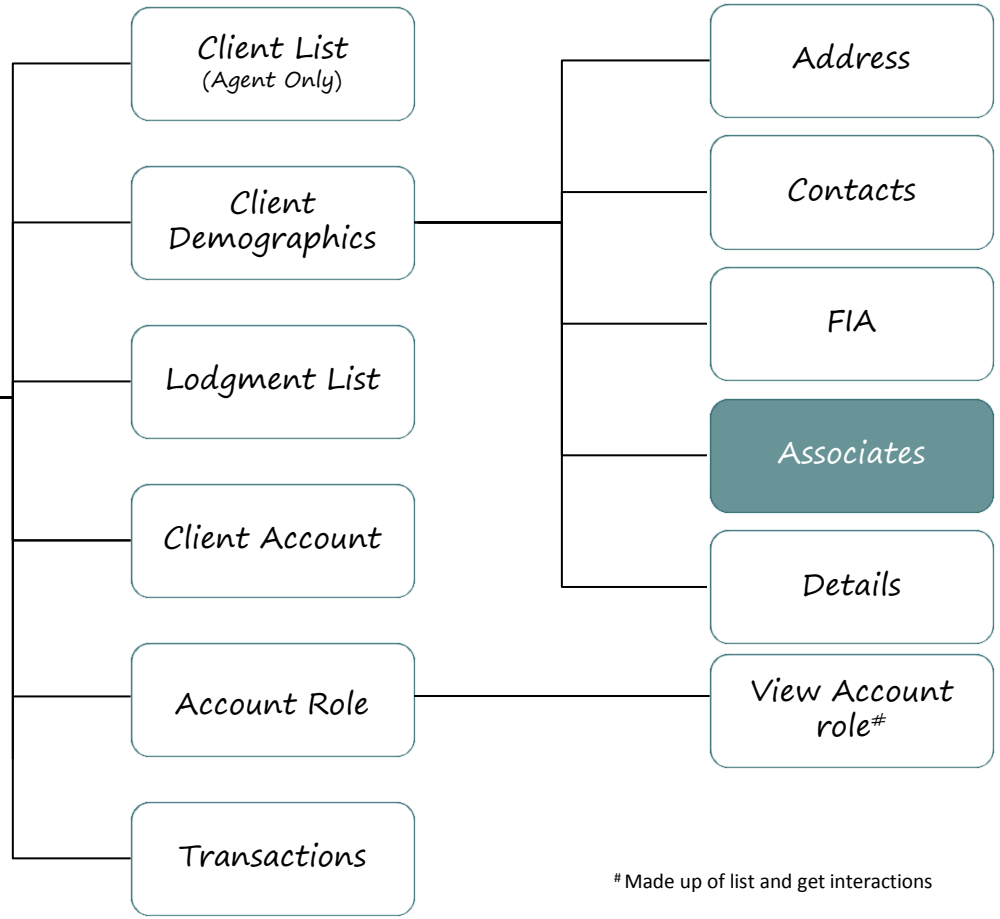
As a business client and user of software it allows me to import all of my tax and super information from the ATO



Current DDS Service

Proposed DDS Service

Original SBR Service



# Made up of list and get interactions

# Services available to manage agent profile and visibility of client

I can retrieve a list of all client relationships linked to my agent profile in ATO systems and delete a client I no longer manage

I can search ATO systems for a new client to validate client details before adding the relationship to my agent profile

I can retrieve a list of my client communications\*  
I can view a electronic PDF copy of the correspondence

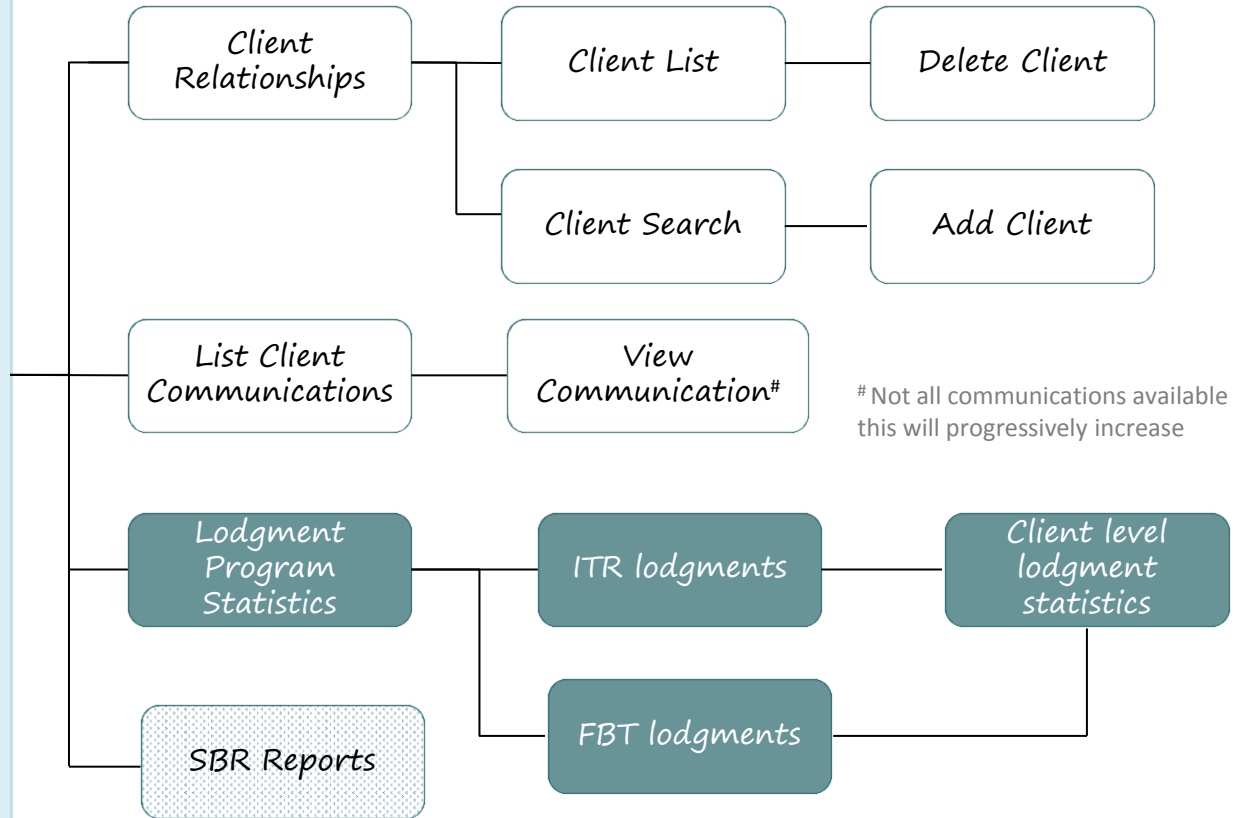
I can view how I'm tracking against my 85% on-time lodgment benchmark to ensure I receive my agent lodgment program. I have access to current SBR reports



Current DDS Service

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Original SBR Service



\* Existing SBR service are available until they are enhanced AND the new services are implemented by SWD.

# Services available to agents and businesses to manage details

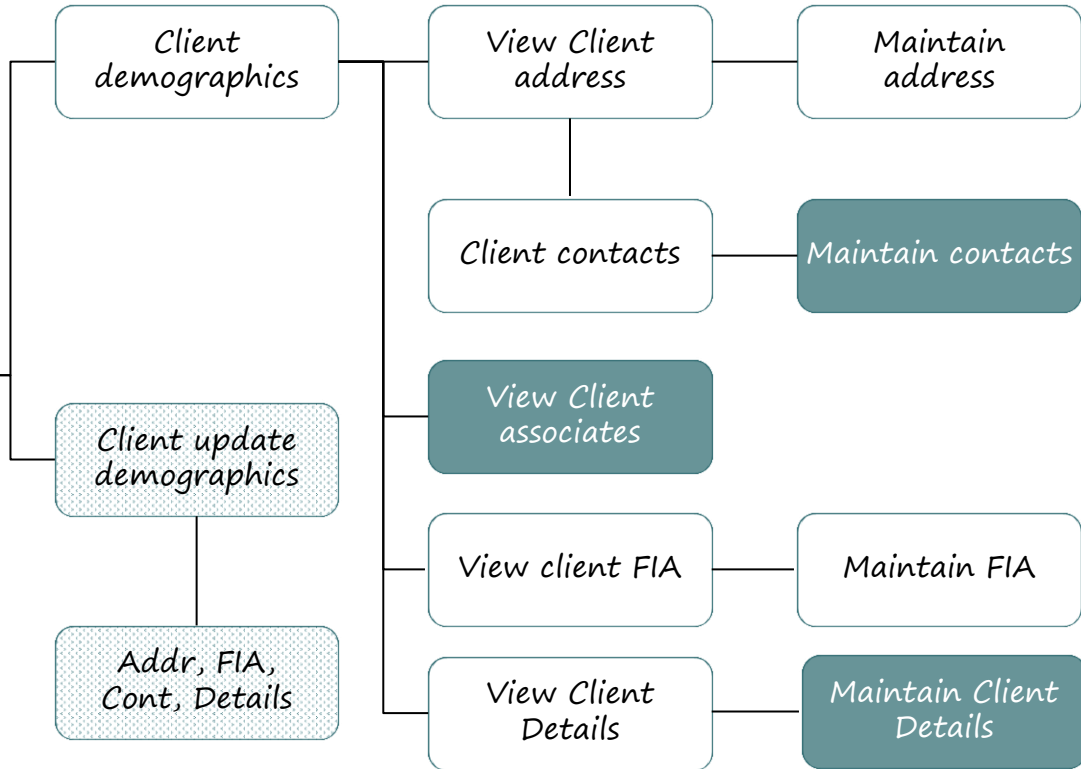
As a user of software I can view and manage my or my clients tax and super information.

I can view client demographics stored in ATO systems:

- addresses (includes view for authorised contacts)
- associates
- bank account details (FIA)
- Details.

I can maintain the demographics of my business or client:

- addresses
- contacts
- bank accounts (FIA)
- Details.



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Proposed DDS Service

Original SBR Service

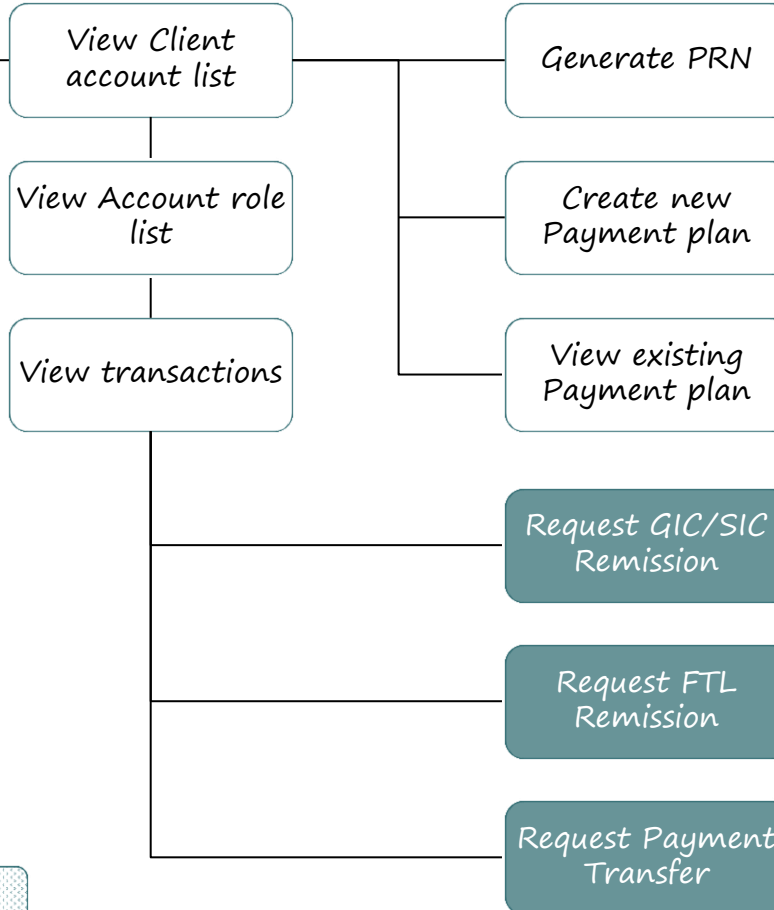
# Services available to agents and businesses to manage accounts

- I can retrieve a list of accounts and the balance
- I can view transactions associated with tax accounts

- I can retrieve a list of super accounts and roles, including the balance
- I can view the transactions for these roles

From the account or transaction list I can manage my or my clients details:

- generate a payment reference number
- create a payment plan and use direct debit
- request a remission of interest or FTL penalty
- transfer a payment made to an incorrect account.



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# Services available to agents and businesses to manage Activity statements

I can view the activity statement roles and the details of my registration for:

- GST (including deferred GST role)
- WET
- LCT
- FTC
- PAYGW
- PAYGI (including CGH)
- FBT instalment

I can maintain the information of my activity statement roles:

- Lodgment cycle
- GST turnover
- GST accounting method
- Reporting method

I can lodge an Activity Statement

I can add or remove activity statement roles when there is a change in circumstances

View Account role

Account role submit

Account role update

Account role cancel

List Activity statements

Prefill Activity statements

Lodge Activity statements

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# Available in Account role service

# Services available to agents and businesses to manage lodgments

I can view the lodgment status and history for:

- Income tax return
- Activity statement
- Fringe benefit tax return

As an agent I can request a deferral for my clients income tax and activity statements

I can track the progress of income tax return and review pending issues

As an agent I can view the outcome of my individual and trust clients income tax returns to reconcile adjustments made

I can lodge other obligations through SBR software (examples shown only)



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View Lodgment List

Lodge ITR

Lodge FBT return

Lodge Payment summaries

Lodge TPAR

Lodge Non lodgment advice (IT/FBT/TPAR)

Request deferral (agent only)

Request deferral enhancement (agent only)

Progress of Return

Outcome of Individual ITR (agent only)