Tax Ombudsman

Implementation plan

Review: ATO online services for agents			
Recommendation	**ATO Response**	**Status**	**Planned implementation**
Recommendation 1: The ATO pursue the following practical improvements to OSfA: (a) improve the completeness of the communication history by ensuring campaign and bespoke correspondence are visible to agents where reasonably practicable. (b) provide BAS agents with access to SGC account information. (c) Expand self-service in OSfA by allowing agents to digitally access more information and complete more lodgement activities online, including: i. self-service access to FBT client list information ii. digital lodgement options for refund of franking credits for non-profit organisations. (d) Allow agents to digitally initiate and progress requests even where manual ATO intervention is required later in the process, including: iii. payment arrangements exceeding online approval thresholds iv. credit transfers. (e) Improve practice-level reporting in OSfA to help agents identify clients with ATO administered tax and	**Agree** The ATO agrees with this recommendation and will consider practical improvements to OSfA to enhance self-service functionality and improved digital interactions for agents. We commit to work in partnership with tax practitioners, to assess the feasibility of specific improvements and prioritise accordingly to achieve benefits for agents and their clients. The improvements prioritised will: • be informed by input from existing and ongoing tax practitioner engagements and consultation forums, including the TPIC • perform appropriate feasibility assessments (including platform suitability) • apply the improved prioritisation approach as delivered through the implementation of Recommendation two.	In progress	Q4 FY27

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superannuation obligations requiring action across their client base. (f) Reduce the need for agents to manually redact TFNs from OSfA documents by implementing automated TFN redaction where reasonably practicable.			
Recommendation 2 The ATO: (a) address the structural risk that the operational needs of agents are underweighted in their current change prioritisation process for system changes or investment. (b) develop a transparent process for communicating prioritisation decisions and providing feedback to agents and their professional bodies on improvement proposals.	**Agreed** The ATO recognises the importance of ensuring that feedback from registered agents, including agent reported incidents and system issues, is appropriately considered when prioritising system changes and investment decisions. The ATO will also develop and communicate a clearer framework to support greater transparency, help manage expectations, and provide agents with a better understanding of how their feedback contributes to the ATO's system improvement and investment decisions.	In progress	Q4 FY27
Recommendations 3 The ATO: (a) develop a secure two-way digital capability that supports ongoing interaction between agents and the ATO across multiple exchanges; and communicate to agents and their professional bodies the timeline to do so.	**Agree** The ATO agrees with the recommendation and acknowledges the value of both short term improvements to Practice Mail that support agents and address current system deficiencies, while also working to determine the longer-term deliverables for a secure two-way digital interaction capability for agents. We are committed to considering feasible and practical short-term improvements to Practice Mail that will result in reduced administrative burdens for agents and improved agent experience.	In progress	Q1 FY30
(b) implement practical short-term improvements to Practice Mail to reduce administrative friction while broader digital interaction capability continues to develop.		In progress	Q4 FY27