



*Prepared by Maria Benardis*

## **AAPB BAG Meeting Notes August 2007**

### **Bookkeeper Advisory Group (BAG) Meeting held on 24 August 2007 and AAPB issues log items**

Kevin Silberberg attended the BAG meeting on behalf of AAPB. The BAG has a new Chair, Mr. Rob Walsh, Assistant Commissioner Intermediaries and Tax Boards Services (I&TBS). His role in the Tax Office is responsibility for strategies and projects focusing on the proposed Tax Practitioner Legislative Framework (TPLF), BAS Service Providers (BSP) and bookkeepers in general, which includes the Bookkeeping Advisory Group (BAG).

Other issues discussed at the meeting included:

#### **1. Tax Office BSP Integration Project – BAS Service Provider View of the Portal**

The Tax Office BAS Service Provider Integration Project leader is Mr. Greg Lansdell who provided a report on an investigation into the introduction of a BAS service provider (BSP) view of the Portal to encourage further electronic interaction. In recognising the limitations of the self assessed nature of s251L(6) ITAA 1936, a proposal has been developed offering a limited 'BSP view' of the Tax Agent Portal.

The functionality for eligible BSP users will be limited to:

- Add/Delete client – with appropriate assurances
- View, lodge and amend BAS
- View client registration information
- Access to interact with the Tax Office using secure portal mail, and
- Access to downloadable payment slips

Eligible BSP users will not be able to:

- View or update client account information
- Update client financial institution information
- Update client registration information, or
- Change client permissions in the Tax Office online facilities.

Design features for the BSP view of the Portal include

- Evidence of BSP eligibility to be supplied with the portal access application form
- A letter will be sent to each client added to the BSP's client listing to advise of BSP authorisation
- Tax File Numbers and non-BAS information will be suppressed from all portal screens

Implementation of the proposed changes is timed to coincide with Portal Version 11 in October 2007.

The ATO has also released on its web-site the minutes for the meeting held on 28 May 2007.

You can view these at:

<http://www.ato.gov.au/distributor.asp?doc=/content/content/00106434.htm>



## **2. Improved telephony for BAS service providers**

Research on bookkeepers (in business) informs us that BSPs do not automatically refer to the Tax Office in relation to their tax issues. One of the disincentives to using our Client Contact centres has been the duration 'on hold' before being attended to by a customer service representative.

For those eligible BSPs who are granted access to the Portal (refer above), an IVR telephony solution has been developed for use in conjunction with the general Business Infoline number (132866). The proposed solution will incorporate a new service standard for eligible BSPs. The IVR options will focus on supporting Portal and accounts related enquiries.

This tailored solution for BSPs does recognise the need to provide timely access to BAS related information to support them and their clients.

## **3. Information on the Industry Research Project in Relation to Bookkeepers Employed in General Business**

TNS Social Research, delivered a presentation on the top line results\* from the '2007 State of the Industry Research: Bookkeepers employed by general business'.

(\*Top line results are the first level presentation of the survey findings. The findings are still undergoing in-depth review of the statistical analysis applied and are therefore subject to change. In addition, the information provided was not presented in the full and complete context of the final report).

The research is addressing a range of issues including:

- What are some of the key working arrangements for bookkeepers employed in general business?
- To what extent are bookkeepers employed in general business interacting with other intermediaries, tax agents, accountants, other bookkeepers and the Tax Office?
- How satisfied are bookkeepers employed in general business with their work?
- What are the most motivating and problematic aspects of being a bookkeeper employed in general business?
- What training and qualifications are bookkeepers employed in general business undertaking?
- What are the future career plans of bookkeepers employed in general business?

AAPB members will be kept informed of outcomes arising from this research.

## **4. Small Business Assistance Program**

The Tax Office Small Business Assistance Program (SBAP) representative, Mr. Gary Holland, provided information on the purpose, objectives and approach of the SBAP. He explained that the information gathered after the initial consultation with various groups indicated that:

- Businesses do not necessarily want to know why they need to do something, they just want to know what they need to do
- It is not the BAS that is the main burden – it is the regular record keeping requirements
- Many new starters in business seek advice from friends and family first, rather than going to a tax professional
- Internet access is still a problem
- Around 40% of small business owners are from overseas origins

As a result of the findings, the SBAP is piloting and evaluating a number of initiatives which will provide a more practical, personalised and timely advice to Small Business for example:

- Pilot of specialist workshops and module with bookkeepers and other groups
- Assistance visits will be more specific, practical and tailored to a client's situation and needs,
- Examining the ATO's e-services to seek opportunities for improvement in ATO's electronic products and their uptake
- Developing a personalised calendar of tax due dates.

Ms Reeta Sidhu provided BAG members with an overview of the Record keeping workshop that the Tax Office is piloting with bookkeepers that will commence in September 2007.

These educational seminars and workshops are designed to assist small business.

It is clear that bookkeepers are recognised as key intermediaries for small business, as well as many being in business themselves.



## 5. Consultation Workshop on GST Property Issues

Ms Karen Anstis, Assistant Commissioner GST and Mr. Ken Sale ran a workshop with the members of BAG. The purpose of the workshop was to consult and seek input from bookkeeper representatives on:

- The extent to which bookkeepers provide service in relation to property transactions
- The level of their technical knowledge
- Education and information needs
- Staying up to date with changes to legislation and Tax Office view.

The focusing questions were:

- To what extent are bookkeepers providing services in the property area?
- What level of understanding do bookkeepers have about property transactions and GST?
- Where do bookkeepers go for information on property transactions and GST?

If there are any issues you would like us to raise on your behalf at the next BAG meeting please do not hesitate to email us on [aapb@aapb.org.au](mailto:aapb@aapb.org.au)

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This document provides general information current at the time of writing. It is not intended that the information provide advice and should not be relied on as such. Professional advice should be sought prior to actions on any of the information contained herein.

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