



INSTITUTE OF
PUBLIC
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Inspector-General of Taxation and Taxation Ombudsman
GPO Box 551
SYDNEY NSW 2001

By email to: consultations@igt.gov.au

Systemic review of the effectiveness of the ATO's registered agent phone line

The Institute of Public Accountants (IPA) welcomes the opportunity to make a submission in relation to the IGTO's *Systemic review of the effectiveness of the ATO's registered agent phone line*.

The IPA is one of the three professional accounting bodies in Australia, representing over 50,000 members and students in Australia and in over 100 countries. Approximately three-quarters of the IPA's members work in or are advisers to small business and small to medium enterprises.

From the feedback we have received, we note the following key issues faced by tax practitioners in relation to their use of the ATO's registered agent phone line:

- Calls take too long, including issues which should be simple tasks. For example, it has been anecdotally reported that:
 - a call does not take less than half an hour
 - a compromised TFN issue took 1.5 hours over 2 phone calls to resolve.

Practitioners cannot oncharge or otherwise recover the costs of spending a lot of time on the registered agent phone line.

- The service quality has decreased since COVID.
- Practitioners miss having a dedicated relationship manager.
- The automated message about tasks that can be done online takes too long.
- Frontline staff appear to be junior, inexperienced and under-trained and often needing to contact a supervisor.
- Particularly problematic where the query is process-driven, e.g. registration processes — calls appear to be taken by less experienced staff.
- In particular, the use of contractors may be problematic where they are not given sufficient training and do not have relevant experience.
- Inexperienced staff use wrong terms, or ask redundant questions (e.g. asking whether a client can pay a debt in full during a payment plan query).



- Fewer issues with the phone line when calls are escalated to more experienced staff or technical queries are dealt with by specialists. That is, most of the phone line issues relate to the first point of contact / frontline.
- Difficult to get back to the first person who dealt with the original query.
- At times it can appear as though the call is directed to a call centre that deals with general public queries rather than a dedicated agent service — for example, the caller may be asked if they are a tax agent.

The feedback we have received includes some specific recommendations for the improvement of the phone line:

- there should be a wider range of Fast Key Codes for more targeted and expert assistance
- there should be a dedicated registered agent line for dealing with emergency security breach issues (e.g. compromised TFNs, identity theft, hacked myGov accounts)
- consider the functionality of Online Services for Agents, including the visibility of available functions — which could reduce calls for issues which can be dealt with online (e.g. details about status of returns and reasons for delays)
- consider the efficiency and speed of using Practice Mail — slow response times lead to agents calling the phone line
- the IGTO should consider staff and contractors' KPIs — they need to be fit for the purpose of the phone line, e.g. how quickly a query is resolved.

We emphasise that it is of utmost importance that the ATO improves the service levels of the registered agent phone line as a matter of urgency. The phone line is not simply an alternative to using the ATO website or online services for agents. There are situations in which the practitioner has no choice but to use the phone line — in relation to certain functions, or where information cannot be found on the ATO website or legal database, or at times of unreliable internet. Tax agents require a highly functional and efficient phone line in order to perform their professional duties. Practitioners are already under unprecedented pressure with new regulatory requirements, staffing shortages, rising costs of doing business and cost pressures on clients. They cannot easily recover the costs of unproductive tasks such as spending a lot of time dealing with inexperienced ATO staff or waiting for queries to be resolved.

In addition, agents may need to call because they receive a letter requesting that the agent calls the ATO to explain something — the effectiveness of such communications may fall within the remit of the IGTO's current review of ATO letters and written communications. We encourage the IGTO to consider the impact of such requests and communications on the phone line.

We also briefly note that we have received feedback that the outgoing calls system also needs improvement, particularly with security issues at the forefront. Calls are made with no caller ID, and the ATO caller is required to obtain the tax agent's name and agent number before they can discuss a client matter. This increases the risk of scams and causes uncertainty for tax agents. In addition, we have been informed that many times these outbound calls relate to debts which are small, not long overdue, and where the taxpayer has a good compliance



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history. Resources for the outbound calls function could be allocated to more significant compliance issues.

If you have any queries or require further information, please don't hesitate to contact Tony Greco, General Manager, Technical Policy, either at tony.greco@publicaccountants.org.au or mobile: 0419 369 038.

Yours sincerely

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