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## Bag Issues Log 07-003: Senior representative for tax practitioners

### Log Item sent: 27/04/2007

The role of the senior representative is to consult with tax practitioners in order to gain a better understanding of practice issues.

<http://www.ato.gov.au/distributor.asp?doc=/content/content/00097720.htm>

It would appear that this is a service for tax practitioners only and it excludes bookkeepers. It also mentions the relationship manager and the relationship between the two roles.

AAPB would like to recommend that the ATO please consider having a similar relationship manager role for bookkeepers sometime in the near future. Can the ATO please consider this and advise us of their position.

### Response from ATO received 13 June 2007:

*"Thank you for your enquiry regarding Tax Office Senior Representatives and your question regarding a relationship manager service for Bookkeepers.  
The introduction of the Senior representative role is one of a number of initiatives which aim to improve consultation, advice and service arrangements with tax practitioners. The intent of the role is to work with Tax Practitioners, business and the community in order to better understand regional issues. We will be progressively piloting and implementing this initiative and initially the Senior representative role will focus on Tax Practitioners and then extend out to business and the community including Bookkeepers.  
In regard to your revised question about a relationship management role for bookkeepers, we have this in place already and you can find relevant information including BAS service provider advisory visits at the following link at [www.ato.gov.au](http://www.ato.gov.au) > bookkeeping essentials> information for BAS Service Providers or you can follow this link*

<http://www.ato.gov.au/businesses/content.asp?doc=/content/82204.htm&pc=001/003/078/001/001&mnu=30290&mfp=001&st=&cy=1> "

### AAPB's response sent to the ATO on 18 June 2007:

Background:

"Issues Log - 28/4/2007

"Senior representative for tax practitioners

The role of the senior representative is to consult with tax practitioners in order to gain a better understanding of practice issues.

<http://www.ato.gov.au/distributor.asp?doc=/content/content/00097720.htm>"

AAPB would like recommend to the ATO that they please consider having a similar relationship manager role for bookkeepers sometime in the near future. "



## AAPB Response

It is AAPB's understanding that the role of the BAS Service Provider Advisory Program (as is outlined on the ATO web-site) that the field advisors can visit bookkeepers at their place of business to:

- increase awareness of our products and services, with a focus on those specifically designed to meet your business requirements
- communicate significant legislative and procedural developments
- identify challenges/issues facing bookkeepers in undertaking their role – and provide guidance on escalating issues where appropriate, and
- improve your overall experience of working with the Tax Office.

A relationship manager on the other hand offers a number of specialised services which include:

- access to a team who are familiar with individual practices
- troubleshooting, accountability and resolution of issues
- a program of visits and product and service updates.

Please see link:

<http://www.ato.gov.au/taxprofessionals/content.asp?doc=/content/37047.htm>

The role of the new senior representative *"is to consult with tax practitioners in order to gain a better understanding of practice issues. The senior representative will be involved in the identification and resolution of systemic issues, and consultation regarding Tax Office products and services, as well as undertaking the role of secretariat for the revitalised regional forums"*.

For example currently bookkeepers have no key escalation point to resolve issues that cannot be resolved using the regular ATO channels. The current ATO officers conducting the BSP visits have made it very clear that they are there to only inform and educate.

AAPB does not believe that the current BSP role undertakes any of the roles and duties that a relationship manager or the new role of the senior representative performs. AAPB would like to again recommend to the ATO that they please consider having a similar relationship manager role for bookkeepers sometime in the near future and when the ATO anticipates this may occur.

I look forward to your response and to seeing this issue on the BAG issues log list.

### *Disclaimer*

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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