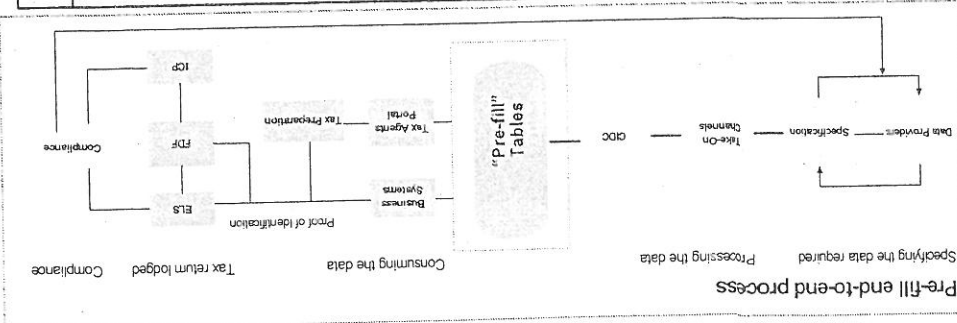


e-tax & Pre-filing Future Roadmap 2008 to 2012

"2012 Vision" - To have a channel independent tax lodgement process, which provides a compliant prepared tax return, pre-filled with data in real time, for easy lodgement of income tax returns, meeting Government, community and ATO requirements.



2008/2009 Release July ICP Pilot A	2009/2010 Release July ICP Pilot B	2010/2011 Release July ICP Production	2011/2012 Release July 12	2012/2013 Release July 13	2014 and beyond
Change Program, Legislative Changes, User Research, Building Compliance Relationships					
<p>Compliance</p> <ul style="list-style-type: none"> - Driving change with compliance - Engage compliance as a partner - Design a solution whereby compliance is an integral component of the solution 					
<p>Online</p> <p>F1. Capability of ICP to provide the backbone of e-tax and pre-fill</p> <p>F2. Cost Benefit Analysis of online vs. downloadable</p> <p>F3. Develop High Level Specifications for online application</p> <p>F4. Learn from Best Practice and engage with global partners</p> <p>F5. Put forth the key business changes required in moving to an online application</p> <p>F6. Source / procure / build and deploy online prototype</p> <p>F7. Continue to grow the pre-fill and compliance capability, in addition focus on analytics, data matching, bulk data exchange and improving the overall architecture</p> <p>F8. Define a business plan for the potential decommissioning of legacy systems</p> <p>F9. Design, build, test and roll-out a solution to a larger cross-section of users (Prototype No. 2), which meets the intent of the future of tax lodgement, in an online capacity</p> <p>F10. Design, build, test and roll-out a solution (Prototype No. 3), which extends on Prototype No.1 and 2, however including interactivity (e.g. Web 2.0 technology, such as online chat, secure messaging etc.)</p> <p>F7. Continue to grow the pre-fill and compliance capability, in addition focus on analytics, data matching, bulk data exchange and improving the overall architecture</p> <p>F11. Design, build, test and roll-out a solution (Prototype No. 4), which extends on Prototype No.1, 2 and 3, however including real-time interaction and reconciliation</p> <p>F7. Continue to grow the pre-fill and compliance capability, in addition focus on analytics, data matching, bulk data exchange and improving the overall architecture</p>					
<p>Cyclical (e-tax)</p> <p>L2. Define the scope of 2009 downloadable, including UCD for enhancement and modernisation, such as modernisation options to non-windows</p> <p>L4. Define the scope of the 2010 downloadable, including enhancement and modernisation (e.g. redesign complex components)</p> <p>L5. Endorse a decommission plan and put in place decommission activities for the forthcoming years</p> <p>L6. Define the scope of the 2010 downloadable, including enhancement and modernisation (e.g. redesign complex components)</p> <p>L7. Execute the decommission plan</p> <p>L3. Procure services for further development of e-tax via RFI / sole source</p> <p>A focus on what priorities a business as user capability looks like and where the ATO want to progress to in the future</p> <p>- Increase in institutions providing data for pre-filing</p> <p>- Better solutions for identity and data matching</p> <p>- Increase in institutions utilising the preferred methods of capturing data</p> <p>- Increase in the amounts of data presented by post-assessment matching programs drop significantly</p>					
<p>Pre-fill Outcome: Transition from data provision to integrated compliance</p> <p>15. Identify how the business will change as a result of the change in delivery and business model</p> <p>16. Understand what AGOSP can provide to the ATO in enabling online tax lodgement</p>					
<p>Key Initiatives</p> <p>11. Define the lifecycle view of the tax return</p> <p>12. Define what the future of tax lodgement looks like and what the ATO will deliver to the community in the future</p> <p>13. Re-examine and identify "what is e-tax and pre-fill" including: -Intent, priorities, milestones and outcomes -Examining the future of tax lodgement -Defining the end goal for pre-filing capabilities -Data security definition -Potential legislative changes -Future workforce requirements</p> <p>14. Perform an analysis of the current e-tax application and infrastructure to determine long term viability and boundaries</p>					
<p>Benefits</p> <ul style="list-style-type: none"> • More time for business analysis by agents • Cost Savings (ATO & Consumer) • Better Service • Respond in timely manner • Have a scalable product <p>• Evolution of technology</p> <p>• Electronic Security Identity, whole of Government authentication</p> <p>• Pre-filing for business</p> <p>• Interactive including amendments</p> <p>• Increased expectations of Tax framework from consumers to "make it easier"</p> <p>• Online/realtime/24hr Access</p>					
<p>Our Future Challenges</p> <p>Increasing focus on development of strategies for moving compliance forward</p> <p>2006 – Data Availability</p> <p>2007/08 – Data In Focus and relative changes made</p> <p>2009/10 – Compliance and making it easier to lodge</p>					
<p>Focus Area</p> <p>Linking into Change Program</p> <p>Obtaining data earlier</p> <p>Changing compliance thinking to being pre-assessment rather than post-event</p> <p>Moving from a post to pre-compliance</p>					
<p>Key Issues</p> <p>Individuals are presented with data from pre-fill summaries and other paper-based solutions</p> <p>Pre-emptive tax returns based on previous years data</p> <p>Government becomes the consolidator using natural systems</p> <p>Move to a "just in time"</p> <p>Whole of Government interaction</p> <p>Individuals becoming the "validation"</p> <p>Continue the growth of pre-filing</p> <p>Taxpayer does not need to lodge a tax return if they do not have to pay tax, or do not need a refund</p>					
<p>What will be different?</p> <ul style="list-style-type: none"> • Utilise Change Program infrastructure • Regulatory changes • Compliance changes including data handling and matching • Full suite of online forms • Whole of Government electronic initiatives 					