



# New ATO app security features

Understand how new features help your clients protect their online tax and superannuation information



## Helping your clients stay safe online

We have added new features to the ATO app to help taxpayers keep their personal information secure. These features are available to your individual and sole trader clients using the app.

### ✓ Real time messages

The ATO app will now notify users in real time when key changes are made to their ATO account. ATO app messages will be sent with a push notification when:

- an income tax lodgment is made
- user's bank account details are updated, including changes to use your practice's trust account details
- other changes are made to account details, such as when their ATO online account is linked to a different myGov account.

Users will then be able to act if something doesn't look right.

### ✓ Account lock

Where users are concerned about unauthorised access, they can use the ATO app to lock their ATO account and help keep it safe.

This helps to ensure only the taxpayer or their registered tax practitioner can access their details, make changes or lodge returns on their behalf.

Once an ATO account is locked:

- the user will be logged out of the ATO app
- a confirmation will be emailed to the user
- the user will not be able to log back in to the ATO app or ATO online services
- no refunds will issue.

### ✓ Account unlock

If a user has locked due to suspected fraud, they must phone us as soon as possible to discuss their concerns.

Where fraud is confirmed, we will put further controls in place to protect their information. These controls may be reduced where your client sets a Strong online access strength. Find out more about this at [ato.gov.au/StrongAccess](http://ato.gov.au/StrongAccess).

When they're ready to unlock their account, users can unlock their ATO account from within the app using the same registered device they used to lock it.

## Tips for tax practitioners

### ✓ Encourage clients to register their device

To access all the latest security features and benefits, your client will need to register their mobile device using the ATO app. This is a simple one-time process which enables them to set permissions for receiving push notifications.

The user will be automatically prompted to complete the process from within the app and can register up to 3 devices.

### ✓ See what your client sees

If your client receives an ATO app message or locks their ATO account using the ATO app, this will be visible in Online services for agents under **Communication history**.

### ✓ Help prevent confusion when updating details

Consider how you communicate with your clients about the use of trust accounts and any

differences between your registered business name, trading name, and trust account names.

You can update these details in the onboarding process, rather than waiting until lodgment.

### ✓ Make ATO app messages work for you

ATO app messages can work with the services you provide to let your clients know when you have made updates or lodged their tax return.

### ✓ A lock will not prevent your access to a client's ATO account

You will still be able to view, update and progress any work through your practice software or Online services for agents as normal. Pre-fill details for limited years will be available, however refunds will not issue.

Users can unlock their ATO account from within the app using the same registered device they used to lock it. If they require assistance or want to discuss any concerns, they will need to phone the ATO on **1800 467 033** during business hours. As their practitioner, you can also phone us to request a temporary unlock on your client's behalf.

### Case study: Trevor keeps his client safe and informed

Tax agent Trevor has just received the pre-fill information for Michaela's tax return. He's chuffed to see she has used the myDeductions tool in the ATO app and all her receipts and invoices are ready to go.

Trevor completes Michaela's draft return and, whilst doing so, he updates the bank account details to reflect the new trust account at his practice. He knows updating them will issue a real time message to Michaela. Not wanting her to worry about fraud, Trevor contacts Michaela to let her know he made the change.

Michaela is reassured, and Trevor lets her know to check the ATO app for the outcome of her return and when a refund has been issued.

## Dive deeper into the ATO app features

Visit [ato.gov.au/app](http://ato.gov.au/app) to find out more about existing features. Many of these can streamline the tax experience for your client and support your engagements with them, including:

- tracking their tax returns from start to finish, so they can easily
  - check the progress of their return
  - view the outcome of their return once lodged
  - download and view their notice of assessment
- using the myDeductions tool to keep and organise tax records and easily email data to you, their tax practitioner
- keeping track of their super and employment information
- viewing their tax accounts, including Higher Education Loan Program (HELP) and activity statement accounts
- quickly accessing transactions, payment plan details and making payments in ATO online services
- easily finding details like their tax file number and keeping key personal and business details up to date
- checking your details as their registered tax practitioner
- accessing the tax withheld calculator
- using ABN Lookup
- conducting a business performance check.

**Encourage your clients to download the official ATO app, available from Google Play or the App Store only.**

### This is a general summary only.

For more information or support using the ATO app, visit [ato.gov.au/app](http://ato.gov.au/app) or scan the QR code.

