
From: Legal Profession Relationships
Sent: Tuesday, 9 August 2022 1:06 PM
Subject: For information and dissemination [SEC=OFFICIAL]



Australian Government
Australian Taxation Office

Changes to accessing client information – from 22 August 2022

Legal practitioners

We've made some changes to improve how you can access client information from us.

Recently we've been experiencing an increase in requests for copies of tax documents (COTD) through a variety of channels, including non-ATO approved channels. This has resulted in a less-than-ideal client service, with unnecessary delays and backlogs that extend across many months.

To improve this service, we're making changes and seeking your co-operation to promote and use ATO-approved channels.

The quickest and simplest way is for clients to access their own records through ATO Online.

What's changing

1. New automated service

To provide you with a more responsive, client-focused service, we're delivering a new and improved automated process, called COREngine. It will be available from 22 August 2022.

COREngine allows you to request your individual client's income tax returns, notices of assessments and payment summaries or income statements, for the 2010 income year onwards. You'll need to register for this service and there are terms and conditions for use.

You can only use COREngine for clients you represent in relation to one or more tax laws.

It's not available to obtain records relating to a deceased individual or a non-individual entity.

In limited situations COREngine can be used to obtain information relating to a guardianship, where the correct process has been followed and the guardian has notified us of their appointment.

To register your interest in COREngine, the main 'controller' of your legal practitioner firm (for example, public officer or director, sole trader, trustee, chief executive officer, managing partner) will need to send an email to [Copies of tax documents](#) and provide us with the following information:

- ABN
- legal name of the entity as per the ABR
- contact name
- contact number
- email address.

We'll email you with the terms and conditions to use COREngine. If you acknowledge acceptance of these by return email, we'll provide you with instructions and supporting documents, including a guide.

You must comply with the terms and conditions to retain access to COREngine.

2. A new COTD form for 1997 to 2009 income years

To request documents relating to the 1997 to 2009 income years, you'll need to use our new COTD request form (NAT 75438). The new form and instructions for submitting the request will be available on our website from 22 August 2022 under [Copies of tax documents request](#).

If you need to request documents relating to income years prior to 2010, allow extra time. We have to manually process these requests, which results in a longer response time.

3. Client self-service - supporting your clients

The quickest and simplest way to get access to copies of tax documents is for clients to access their own records through ATO Online. So, we encourage you to familiarise yourself with the self-service options available to your clients.

These are explained on our website under [Copies of tax documents request](#).

If your client doesn't:

- have a myGov account linked to the ATO, guidance is provided on our website on our [Create your myGov account and link it to the ATO](#) page
- know their TFN, guidance is provided on our website on our [Lost or stolen TFN](#) page.

Taxpayers can also use the services of their tax agent to get access to copies of tax documents.

Legal Profession Relationships

Individuals and Intermediaries

Australian Taxation Office