

## Guide To Onboarding New Clients to OSfA

### Minimise the hurt to your client, their BAS Agent and your practice

13 November 2023 saw the introduction of a new OSfA onboarding regime for clients and client roles. If care is not exercised during the client onboarding process, you risk removing access to OSfA for their bookkeeper (BAS Agent) as well as a frustratingly unsuccessful onboarding process for your practice. Please share this guide with any person in your firm charged with client onboarding. is made aware of this approach and include it as part of your onboarding process. In this way, you can save hurt to your clients, their BAS Agents and your practice.

### The problems

**Tax Agent Appointment:** The new process for adding a client to OSfA prompts you for an identifier. If you enter an ABN, rather than a TFN, as the identifier, you will not get income tax access; you will only gain Activity Statement access and unseat existing BAS Agents. Further, you will need to get the prospective client to renominate you.

**BAS Agent Removal:** If you inadvertently remove your client's OSfA linkage to their BAS Agent, the impact on both your client and their BAS Agent can be significant, including:

- Your client will have to work through the [Client-to-agent linking](#) steps to renominate their BAS Agent. This will frustrate both your client and their BAS Agent and potentially take significant time to complete.
- In the meantime, your client's BAS Agent will be unable to perform some basic business functions for your client, risking late lodgements and penalties for:
  - Single Touch Payroll (STP) Pay Event and finalisations;
  - Activity Statements (BAS & IAS);
  - Superannuation Guarantee (SG) payments when using the ATO's Clearing House (SBSGCH)
- Your client's BAS Agent will not be able to deal with the ATO on your client's behalf.

ATO support messaging [Think Before You Link](#) further explains the issue but unfortunately that messaging is not currently getting through to the right personnel who are adding new clients to your OSfA facility.

The following page will now illustrate the two keys to overcoming the above problems.

## 2 Keys to overcoming the problems

1. You must use the TFN as the identifier if you want the income tax role and normal tax agent functionality.

This will mean that you will need to obtain the TFN from your client. Do not onboard the client in OSfA using an ABN as a means of later retrieving the TFN once the client has been onboarded.

*Note: full Activity Statement functionality is available to tax agents by checking only the Income Tax Account and ignoring the Activity Statement Account.*

### Correct Approach

Select accounts you would like to authorise \*

Income tax

Specific accounts

These accounts have existing agent links. Select an account only if you wish to remove that link and take sole authorisation, otherwise take no action to share authorisation.

| Accounts                                               | Existing agent link |
|--------------------------------------------------------|---------------------|
| 1 result found                                         | Filter              |
| Account                                                | Existing agent link |
| <input type="checkbox"/> Activity statement [REDACTED] | BAS agent           |

Back Cancel

Do **NOT** check this box  
Just click 'Next'

Next

If you onboard using the client's TFN you will be presented with this screen.

2. You must not select the Activity Statement Account where there is an ongoing BAS Agent appointment.

*Note: do not proceed if presented with this screen, as it will set you on a course to having limited functionality and removing the client's BAS Agent. Instead, click cancel and use the TFN as the identifier when adding the client.*

### Incorrect Approach

Find a client Authorisation Client details Summary

1 2 3 4

#### Authorisation

Client name [REDACTED]

Client type  
Company

ABN [REDACTED]

Select the accounts you would like to authorise. If there are any existing agent links they will be removed, so please ensure that you are authorised to do so.

| Accounts                                               | Existing agent link |
|--------------------------------------------------------|---------------------|
| 1 result found                                         | Filter              |
| Account                                                | Existing agent link |
| <input type="checkbox"/> Activity statement [REDACTED] | BAS agent           |

Back Cancel

Do **NOT** check this box

Next

If you onboard using the client's ABN you will be presented with this screen.