

**This memorandum applies to: all Departments, Territory Authorities  
and Territory Owned Corporations**

**Department of Treasury Finance Memorandum 2004/10**

**Chief Executives**

**cc Chief Finance Officers**

**cc Budget Contact Officers**

**PROTOCOL FOR TAXATION HELPDESK SERVICES**

**Executive Summary**

**Commencement of Taxation Helpdesk Services**

- The Taxation Helpdesk will commence operation from 1 July 2004.
- Contact details:

Email:	<a href="mailto:tab@kpmg.com.au">tab@kpmg.com.au</a>
Telephone:	6248 1199
Fax:	6248 1122
- Agencies will be required to complete the attached proforma and provide contact details for a designated taxation manager to access the helpdesk services.

**Purpose**

To advise agencies of the procedures in accessing the Taxation Helpdesk services.

**Background**

2. The Territory's Taxation Management Framework is to be implemented on 1 July 2004. The framework will assist in the management of taxation risks across the ACT Government and establishes the responsibilities and accountabilities for agencies and the Department of Treasury. The framework is available on the Accounting website [www.treasury.act.gov.au/accounting](http://www.treasury.act.gov.au/accounting), then select Taxation.
3. Treasury has engaged an external contractor, KPMG, to provide Taxation Helpdesk services to agencies.
4. The services provided by the Taxation Helpdesk will include verbal or written advice. The Taxation Helpdesk will be operational from 1 July 2004.
5. It should be noted that agencies are not required to use the services offered by the Taxation Helpdesk and can therefore use alternative sources of advice.

**ACT GOVERNMENT** GPO Box 158 Canberra ACT 2601  
T 13 22 81

ACT Government Homepage: <http://www.treasury.act.gov.au>

6. The Department of Treasury will fund the first two hours of usage of the helpdesk by each agency per year. KPMG have offered one additional half hour of free time, with agencies only being required to pay for time after the first two and a half hours of usage.

### **Protocol in accessing the Taxation Helpdesk**

#### *Contact*

7. Agencies will need to 'activate' the services from the Helpdesk, to ensure that services are correctly authorised, funded and invoiced. A proforma is provided at Attachment A. Agencies need to include details of their taxation manager contact details, and the services authorised for use. Agencies may choose only to 'activate' services funded by Treasury, to ensure they are advised when the 2 and a half hour free allocation is exhausted.
8. Agencies are asked to provide a copy of the proforma to Treasury to allow a central register of designated Tax Managers to be maintained. Please ensure this information is provided as soon as possible. All initial contact with the helpdesk must be coordinated by a designated taxation manager to ensure effective and efficient use of the Helpdesk services. Designated taxation managers will have specific responsibilities under the Taxation Framework. For further information please refer to the Taxation Management Framework, available at <http://www.treasury.act.gov.au/accounting/html/gst.htm#i> or DT Memo 2004/07 available at [www.treasury.act.gov.au/accounting/html/treasury.htm](http://www.treasury.act.gov.au/accounting/html/treasury.htm).
9. The Taxation Helpdesk services are accessible by both telephone on 6248 1199, fax on 6248 1122 and electronic email on [tab@kpmg.com.au](mailto:tab@kpmg.com.au) during normal business hours, 8.15am to 5.15pm. If problems are experienced with these contact options, the KPMG senior manager responsible for the helpdesk service, Langdon Patrick, can be contacted by mobile phone: 0412 995 485 or KPMG partner, Craig Sloan, on 0412 302 027, during business hours.

#### *Helpdesk services*

10. KPMG advises that the Taxation Helpdesk service will operate as follows:
  - (a) when an issue arises, the agency Tax Manager will telephone / email one of KPMG's nominated specialists directly. The agency Tax Manager will be attended to immediately or within one hour in instances where the KPMG specialist is not presently available;
  - (b) in most instances, and depending on the complexity of the issue, KPMG will provide verbal advice followed by a brief written confirmation via email within 24 hours;
  - (c) should the issue be more complex, KPMG will contact the relevant agency Tax Manager and at that time, agree the approach to resolve the issue. This may include providing written advice where appropriate. In addition, KPMG will provide an estimate of the likely timing and fees involved, if applicable; and
  - (d) KPMG will provide an email hyperlink to a dedicated KPMG email address to all agency Tax Managers.

### *Reporting*

11. Agencies will receive quarterly reports from KPMG regarding their use of the helpdesk services, including the length of time taken to answer queries and a summary of advice provided on each issue.
12. Treasury will receive a summary on each agency's usage of the service for contract administration purposes.

### *Payment for Helpdesk*

13. To assist KPMG in the processing of invoices, each agency accessing services additional to the free 2½ hours, is required to provide to Treasury the name of the relevant Accounts Payable staff member to whom invoices for any chargeable services are to be addressed. This information should be included in the proforma at Attachment A.

### *Tax Manager Forums*

14. Treasury will be organising and facilitating regular (generally quarterly) Tax Manager Forums to provide agency Tax Managers with technical updates, improve inter-agency dialogue on tax and compliance issues, and disseminate information from the ATO. Agencies should ensure they advise Treasury of their designated tax manager, to ensure they are informed of upcoming forums.

### *Taxation Compliance Reviews - Audits*

15. Each agency will be subject to an independent taxation compliance review once every three years, on a rolling basis. A panel of external taxation contractors will be appointed and managed by Treasury. A schedule of reviews will be planned in consultation with agencies and the service providers.

### *Further information*

16. If you require any further information in relation to this memorandum, or other taxation issues, please contact Hamish Palfreyman on 620 70245.
17. Treasury welcomes feedback on the clarity and usefulness of its memoranda. Any comments can be forward to Wayne Hunt, Department of Treasury, Level 1 Canberra Nara Centre (620 70231).

Phil Hextell  
Director, Accounting

June 2004

Fax to: Michael Talevich  
 Assistant Manager, KPMG  
 6248 1122

cc: Hamish Palfreyman  
 Accounting Branch, Department of Treasury  
 Fax: 6207 0298

**AGENCY TAX MANAGER - CONTACT DETAILS FOR TAXATION HELPDESK SERVICES**

<b>Name of Agency:</b>			
<b>Name of Designated Tax Manager:</b>			
Telephone Number:		Fax number:	
Email Address:			
<b>Alternate Contact Officer:</b>			
Telephone Number:		Fax number:	
Email Address:			
<b>Accounts Payable Officer</b>			
Telephone Number:			
Email Address:			

**CATEGORY OF SERVICE(S) REQUIRED (please tick applicable boxes)**

Verbal and written services paid for by Treasury (2½ hours funded per year)	
Verbal and written services paid for by individual agency	

Agencies may choose to initially only activate centrally funded services, in which case they will receive 2½ hours of advice. If agency-funded services are not initially activated, a further activation form will be necessary to access additional advice.