

TAX PRACTITIONER CHECKLIST

Our website

- Add our website tpb.gov.au as a favourite in your browser.

Login to My Profile

- Access [My Profile](#) on the TPB website to manage your registration details.

Update your professional indemnity (PI) insurance

- Watch our [video](#) that shows how to easily update your PI insurance.
- Add your updated [PI insurance](#) details in [My Profile](#).
- Set up a recurring calendar reminder to update your PI insurance details in [My Profile](#) every year.
- Assess your risk of cyber-attack and consider if you need additional PI insurance to [protect against cyber threats](#).

Download your tax practitioner symbol

- Download the [Registered tax practitioner symbol](#).

Continuing professional education

- Set up your continuing professional education [log](#).

Subscribe

- Subscribe to TPB [eNews](#) to keep up to date with our latest news.
- Subscribe to our free [webinars](#), and claim continuing professional education.
- Subscribe to our [YouTube channel](#) for our full library of webinar recordings. You can also claim continuing professional education for viewing these videos.
- Follow us on [social media](#) such as [Twitter](#), [LinkedIn](#) and [Facebook](#) to hear timely information and engage with other stakeholders.

Comply with the Code of Professional Conduct

- Read and learn about the [Code of Professional Conduct](#). If you breach the code, sanctions may be imposed or your registration may be cancelled.
- You must make sure your personal tax affairs, including those of related entities, are in order. This includes lodging on time and paying your tax bill or coming to an arrangement with the [ATO](#) to pay amounts owing.

Policy and guidance material

- Add our range of [policy and guidance material](#) as a favourite. This will help you understand how the laws we administer apply to you:
 - [Explanatory papers](#) – provide a detailed explanation of our approach to the application of the *Tax Agent Services Act 2009* (TASA).
 - [Practice notes](#) – provide practical guidance and assistance to registered tax practitioners on a range of topics.
 - [Information sheets](#) – provide a brief overview of our position on a range of topics.
 - [Proposed guidelines](#) – provide guidance on issues which have not yet had formal drafting and Parliamentary tabling processes undertaken.
 - [Helpful advice](#) – provides information on a range of TPB and non-TPB related matters.

Manage your registration details

- Set up a recurring calendar reminder for your next [renewal](#). If you fail to renew on time and your registration expires, you cannot provide tax or BAS agent services. You'll also lose access to the ATO online services.
- Tell us when things change. If your [details or circumstances change](#) you have an obligation under the Code of Professional conduct to notify us within **30 days** from when you have or ought to have become aware of the change.

Access ATO services

- As a newly registered tax practitioner you can access information about ATO online services and support at ato.gov.au/Tax-professionals/Your-practice.
- After registering with ATO [digital services](#) access a range of resources to assist your understanding, including:
 - [Tax agent online services guide](#)
 - [BAS agent online services guide](#)
 - [Online services for agents user guide](#)
 - [Practitioner lodgment service user guide](#)
 - [Digital education resources](#)

Make a complaint

- Add our [complaints page](#) as a favourite in your browser and let us know of any tax practitioner engaging in misconduct. Complaints must be lodged in writing via our online [complaints form](#).

Further information

[Contact us](#) via our online form or call us on **1300 362 829** Monday to Friday 9 am – 5 pm (Sydney time).