INDUSTRY GUIDE · 2026

Phone Systems for Accountants and Bookkeepers

Lodgment peaks, verifying callers, ATO scam calls and records of client discussions, for Australian practices.

> An accounting practice's calls follow the ATO lodgment calendar, every caller asking about a file could be a third party, and **the TPB now requires records of key client discussions for at least five years**. General information only, read 16 November 2026, not legal or professional advice.

Peak dates for 2026–27 (ATO)

What is due	Self lodged	Via registered agent
Monthly BAS	21st of next month	21st of next month
Q1 BAS	28 October	25 November
Q2 BAS	28 February	28 February
Q3 BAS	28 April	26 May
Q4 BAS	28 July	Late August
New clients on agent list		By 31 October
Remaining 2026 returns		15 May 2027

Code item 6: confidentiality

"Unless you have a legal duty to do so, you must not disclose any information relating to a client's affairs to a third party without your client's permission." The TPB counts cloud storage providers as third parties, so name your phone and recording provider in the engagement letter.

Verify before you discuss a file

1. Discuss only general matters (fees, due dates, what to bring) until verified.
2. Check something not easily stolen: a client reference or last year's fee.
3. Call back on the number on file for bank, email or address changes.
4. Treat urgency as a warning sign. Caller ID is not identity.
5. Note on the file who called and how they were verified.

ATO scam calls: what the ATO says it never does

- Threaten arrest or demand you stay on the line.
- Ask for gift cards, crypto or payment to personal accounts.
- Threaten to cancel a TFN or charge a fee to release a refund.
- **Prevent you from speaking with your tax agent.**
- ATO calls show as No Caller ID. Verify on 1800 008 540.

Records: the five year rule

Since 2025 the Code requires key communications and records of discussion with clients, kept at least five years. Record calls with notice, file a short reviewed summary, and keep TFNs off recorded lines.

Illustrative six person practice on Uniden Voice

Item	Price (16 Nov 2026)
Business plan, 6 users, 36 month term	$174.90 a month
Port existing numbers	Free with new signup
1300 number (optional)	$19.90 a month + $89 setup
Recording storage, 30 hours	$25.00 a month
Vocky AI agent	From $49 a week + talk minutes

On Uniden Voice

Queues, time conditions and ring groups across desk phones and apps; recordings, transcripts and AI summaries kept in Australian datacentres; Xero contacts as caller ID; CRM click to call; Vocky for after hours. Book a demo at unidenvoice.com/get-started/book-a-demo or call 1300 881 662.