HandiTax Cloud
Service Level Standard

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freedom to do more

Contents

1   Document Overview

This Document represents a Service Level Standard ("SLS" or "Standard") which describes our approach in providing Standard Level Support. It does so without reference to any specific customer or support agreement that may be in place.

This Document remains valid until superseded by a revised Standard published by Access Software Australia Pty Limited.

2   Goal & Objectives

The purpose of this Document is to ensure that the proper elements and commitments are in place to provide consistent HandiTax Cloud Application Support to the customer.

The objectives of this Standard are to:

- Provide clear reference to service support ownership, accountability, roles and/or responsibilities.
- Present a clear and concise description of service support provision to the customer.
- Match perceptions of expected service support provision with actual service support and delivery.

3   Stakeholders

The following Service Provider(s) and customer(s) will be used as the basis of the Standard and represent the primary stakeholders associated with this SLS:

Service Provider: Access Software Australia Pty Limited

Customer: Customer with a current subscription to the HandiTax Cloud service which incorporates standard level support as specified in the relevant license order.

4   Periodic Review

This Standard is valid from the Effective Date outlined within the title page of this document on page 1 and is valid until further notice. This Standard will be reviewed at a minimum once per year; however, in lieu of a review during any period specified, the current Standard will remain in effect.

This HandiTax Cloud Service Level Standard is maintained by the HandiTax Cloud Support Team, the most current version can be found on our HandiTax Cloud Support Page.

5   Service Standard

The following detailed service parameters are the responsibility of HandiTax Cloud Support Team in the ongoing support of this Standard.

5.1   Service Scope

The following items are described in this section:

- Case Logging
- Service Availability
- Priority determination
- Case Handling Targets
- Status Reporting
- Explanations of Terms
- Case Resolution
- Customer Responsibilities
- Provider Responsibilities
- Evaluation Criteria
- Service Assumptions

5.2   Case Logging

Effective support of in-scope services is a result of maintaining consistent service levels. The following sections provide relevant details on service availability, monitoring of in-scope services and related components.

- Each reported issue will be handled as an individual "Case".
- Cases can be logged via email to aucloudtaxsupport@handisoft.com.au.
- All the information details should be completed for the remedial process to start.
- Where possible and relevant fault codes, error logs or screenshots should be provided.
- Email cases are created initially with P3.

5.3   Service Availability

Coverage parameters specific to the service(s) covered in this Standard are as follows:

- Email Case logging: Monitored 9:00 A.M. to 5:00 P.M. Monday – Friday in all states of Australia.

- Cases logged outside the above hours that are related to connectivity will be monitored 24/7 and details posted on https://trust.sage.com/ to advise of connectivity status.

- HandiSoft's Support portal is available 24/7 at www.sagekb.com
- The Sage City Community is available 24/7 at www.sagecity.com
- Cases can also be logged via our website at https://www.sage.com/en-au/support/#handitaxcloud

5.4 Priority Determination Process

The prioritization of works is based on the severity of the problem in hand.

There are 4 levels with P1 being the most severe and P4 being the least severe.

Level	Category	Description
P1	Critical severity	Total business disruption, significant and continuing data loss, or security breach which requires immediate and continuous work irrespective of working hours.
P2	Urgent severity	Business disruption or escalated due to delay in support process due to HandiTax Cloud. This will be worked on during working hours (see Service Availability above).
P3	High severity	Application and system performance issues. This is the standard level for cases.
P4	Low severity	Cosmetic. Not important to business function or does not require short-term action.

5.5 Case Handling Time Targets

Level	Initial Response & Diagnosis	Target Close or workaround	Escalation
P1	1 hour	4 hours	2 hours
P2	4 hours	8 hours	8 hours
P3	8 hours	16 hours	16 hours
P4	Acknowledgement	None	No escalation

Response times are within business hours. Please note the hours are not cumulative.

Table explanation

If a P1 case related to connectivity is raised the customer will receive a response within one hour whether this be requesting further information or advising the issue has been resolved. 24/7 responses relate to connectivity only. Other causes will be responded to during business hours. For total business disruption, significant and continuing data loss, or security breach that have not been resolved HandiTax Cloud Support will provide a workaround where possible within four hours and continue working on a fix throughout the 24-hour period.

If a P2 case is raised the customer will receive a response within four hours whether this be requesting further information, or the issue has been resolved. If the issue has not been resolved HandiTax Cloud Support will provide a workaround within eight hours and continue working on a fix. After eight hours, the customer can escalate the case.

If a P3 case is raised the customer will receive a response within eight hours whether this be requesting further information, or the issue has been resolved. If the issue has not been resolved HandiTax Cloud Support will provide a workaround within sixteen hours and continue working on a fix. After sixteen hours, the customer can escalate the case.

If a P4 case is raised the customer will receive an acknowledgment there are no timescales involved in resolving the case and therefore no escalation process.

5.6 Status Reporting

An acknowledgement or status report will be provided to the customer as the work on each Case progresses. This will be provided at a minimum at each time-point as defined by the Case handling time targets described in the section above.

Case handling status is detailed in section 5.7 below.

5.7 Explanation of Terms / Case Handling Process and Status

Level	Description
New	Initial diagnosis to ensure HandiTax Cloud Support fully understands the case; • A case requires a proper description, a full description of steps to reproduce, and business impact. • Resolution provided if known and if no other cases in the queue. • P1 and P2 will be diagnosed immediately.
Diagnosis	The case should be fully diagnosed, and resolution attempted, unless it is beyond capability.
Waiting on Customer Information	Wait for the customer to provide more information to explain the issue, to reproduce, or explain the business impact. Requested by email unless P2 where phone may be used. For P1 this will always be first attempted by phone.

Level	Description
Waiting on HandiTax Cloud Support Response	To fully diagnose and find an acceptable resolution to cases; • HandiTax Cloud Support must be able to reproduce or observe the issue, if possible, in a test org. • If there is a delay to a full resolution, or if passing to 'On Hold - Change Raised', a workaround, if available, must be sought and communicated to the customer.
Enhancement Request	The customer has suggested a change to the code therefore the case has been assigned to the Development Team. No commitment to the timing or content of the change can be made.
On Hold – Change Raised	The case requires a code change therefore has been assigned to the Development Team. No commitment to the timing or content of the change can be made.
Pending Customer Approval	HandiTax Cloud Support believes it has resolved the case, the customer has been informed and HandiTax Cloud Support is awaiting the customer's email response. If no response is received the case automatically closes after 4 days.
Closed License Request	The customer has requested to purchase extra HandiTax Cloud licenses, this request has been assigned to the Sales team and the customer has been informed.
Closed	HandiTax Cloud Support believes it has resolved the case, the customer has been informed and the customer agrees that the issue is solved.

5.8 Outcomes

- Case is resolved by support.

- Resolution will be a future change to HandiTax Cloud.

- A paid-for work consulting services is required.

- Completion of a previous work request.

- Training required for the customer.

- Customer Success Manager action required

- No response or closed by customer.

5.9 Case Resolution

A clear resolution will be provided for all Cases raised by customers. In some instances, this may not be possible immediately because of issues beyond the HandiTax Cloud Support Team's control. In these instances, HandiTax Cloud Support will offer a 'workaround' solution to enable the customer to continue working until the underlying issues can be resolved and a permanent resolution provided.

5.10 Customer Requirements and Responsibilities

Customer responsibilities and/or requirements in support of this Standard include:

- Cases to be logged by personnel trained in the use of the system
- If the issue is related to a process the customer is to review self-help materials prior to raising a case.
- To maintain data protection/privacy cases are to be logged only by personnel registered with Access. If cases are received from other areas of the business, they will be routed back to registered contacts.
- Report incidents as they happen, not days later, to enable support to resolve the issue in a timely manner.
- The customer familiarizes themselves with HandiTax Cloud expectations on installing system releases and updates.
- Provision of full information (see Appendix 1) as described.
- Availability of staff to provide further information as requested by HandiTax Cloud Support.
- Remote access to the system for HandiTax Cloud Support staff.
- Reasonable availability of customer representative(s) to test and/or provide feedback on remedial work being carried out.
- Unhindered access to the internet for the users of the system. Be fully subscribed to Standard Support Services.

5.11 Service Provider Requirements and Responsibilities

Service Provider responsibilities and/or requirements in support of this Standard include:

- Meeting response times associated with service-related incidents.
- Appropriate notification to customer for all scheduled maintenance or other occasion of system unavailability.
- Access cannot provide any legislative, tax or interpretation advise to customers

5.12 Evaluation Criteria

Using the internal CRM and daily/weekly reports HandiTax Cloud Support monitors and ensures the Case handling time targets are met to ensure the Standard in not breached. The reporting is used to monitor:

- **Assigned Cases where HandiTax Cloud Support has not responded to the customer**
  Ensures new Cases receive a response within the designated timescales.
  Display the time the case was originally received by email and the time logged in CRM.
- **Open P1's**

Reports on category P1 cases requiring immediate attention.

- **P1's Last 90 Days** Historic reporting on P1 Cases within the 90-day timeframe.

- **First Response in Last 7 Days**
Reports on the average first response time within hours.

- **Trending Customers Last 30 Days**
Reports on the volume of Cases a customer raises within the given timescale. The top three are **displayed highlighting those customers who may need extra assistance, whether that be further training or direct contact by the Customer Success Consultant.**

- **Hot Topics This Month Last 30 Days**
Reports on the product category of the Cases raised, allowing HandiTax Cloud to review processes and procedures and whether enhancements or further support is required.

5.13 Service Assumptions

Assumptions related to in-scope services and/or components include:

- Changes to services will be communicated and documented to all stakeholders.

Release Policy

Access manages the version updates and maintenance requirements for the HandiTax Cloud solution. Customers will be notified in advance in accordance with Clause 3 of the Sage HandiSoft Cloud Terms of Service when there is a downtime required to HandiTax Cloud.

Some HandiTax Cloud version updates may require a corresponding update to your HandiSoft Software.

The HandiTax Cloud release notes will outline this requirement. To ensure that your organisation benefits from the latest features and functionality released with the HandiTax Cloud update, we require that you update your HandiSoft Software to the version outlined in the HandiTax Cloud release notes.

Customers falling outside of this release policy risk losing their entitlement to Standard Level Support.

Appendix 1

Information Required before work on a Case commences

Customers submitting a case are requested to supply the following information:

- HanidSoft Client Number
- Detailed description of the problem:
    - What you were trying to achieve when the problem occurred?
    - What screen were you in when the fault occurred?
    - Please include a screenshot of any error messages in your reply.
    - Confirmation of severity (Impact on Business Operations)
- Confirm Sage HandiSoft Support may access your system and data in the process of resolving this case.

You must also supply:

- Registered Contact Name.
- Company Name.
- Contact telephone.
- Contact Email.

For more information, visit: www.sage.com./au/

On 1 June 2021, Sage sold both HandiSoft to The Access Group.

The Sage website and branding will continue to be used in respect of HandiSoft products for a transitional period.

The Access Group is a leading provider of business management software to mid-sized organisations. It helps more than 35,000 global customers across commercial and not-for-profit sectors become more productive and efficient. Its innovative Access Workspace cloud platform transforms the way business software is used, giving every employee the freedom to do more. Founded in 1991, The Access Group employs more than 2,900 staff. The Access Group acquired Attaché Software in 2019 and HandiSoft and MicrOpay in 2021 to expand Access Workspace solutions internationally.