



Access Handisoft Evo FAQs

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What is Handisoft Evo?

Access Evo is an evolution of Access Workspace incorporating AI features and functionality and an upgrade in the user experience of our software.


An addition to your HandiSoft software we'll provide Access Evo as a combined package. Access Evo initially connects to your client tax data, ATO and Fair Work websites providing AI capabilities and insights. You'll also have access to additional apps to help you run your practice like a pro.



 Find the answers to ATO and Fair work questions without exiting your Access solution or interrupting your workflow.

 Motivate, connect and align colleagues, to get everyone growing in the same direction with employee recognition and engagement apps.

 Bringing new capabilities including AI in a secure way.

 Speed up our deployment of all products onto the platform

 Delivering more capabilities and improved user experience to allow you the Freedom to do More.

Is Access Evo a required part of Handisoft software?

Yes, it incorporates AI and embeds it into our systems for customers who wish to take up that capability. We believe Access Evo will enhance user experience and provide additional value to users and the practice using our software, and it will evolve and become the new way you use our software.

Is it possible to have Access Evo products without the Access Evo features?

No these go hand in hand. Any product that is part of the Evo family by its very nature incorporates the Access Evo features. The incorporation of these features is something that will build over time. Some products will be earlier in their AI journey so not all products will have the same features at the same time but they are all heading in the same direction.

With the Access Evo features, how can I be sure my data remains secure?

Data security is paramount, regardless of the technology used. All our technology will never compromise data security and we are offering the use of AI at three security levels:

- 1** Our use of AI remains within a private secure environment, no customer data is used in OpenAI systems
- 2** User role-specific AI – the technology can only access data based on existing software permissions and controls
- 3** Each individual's use of our GenAI capabilities remains personally confidential

With Access Evo features such as Copilot, who can see what I have asked the system?

It's at an entirely individual level, and nobody can see what a user has asked for or what systems they use. However, to allow us to check the security against permissions and controls in place, we will run random testing, but that will be confidential and unattributed to individuals. In addition we will run queries past an automated checking system to ensure the use of AI is legal and appropriate to prevent misuse by any user.

What happens to the information I might upload into the AI features of Access Evo?

It stays within the secure environment and won't leave the Access infrastructure. No one outside of Access or your organisation will see the prompts, queries or information. We keep each customer's information independently confidential and secure, unlike open ChatGPT, where any information you input or ask it to reformat will be used by open AI services to inform their future models and will therefore be available to others to view. You need to use a secure system like Access Copilot to protect yourself and prevent your information from being available to the wider internet.

Does Access Evo functionality cost more?

The cost of this new technology is high, and using AI is expensive. However, we are investing on behalf of our customers to bring new value and evolve the software experience for our customers' benefit. HandiSoft Evo has a Base, Standard and Advanced option. You will have the choice to select the most suitable option for your practice.

What are the top three questions front of mind for most of us when thinking about using AI?

We've done extensive research into this and are confident about the answers because our findings align with 3rd party research into the same topics. The three areas in order of priority are:

- 1 Data security and confidentiality**
- 2 Accuracy and reliability**
- 3 Job replacement risk**

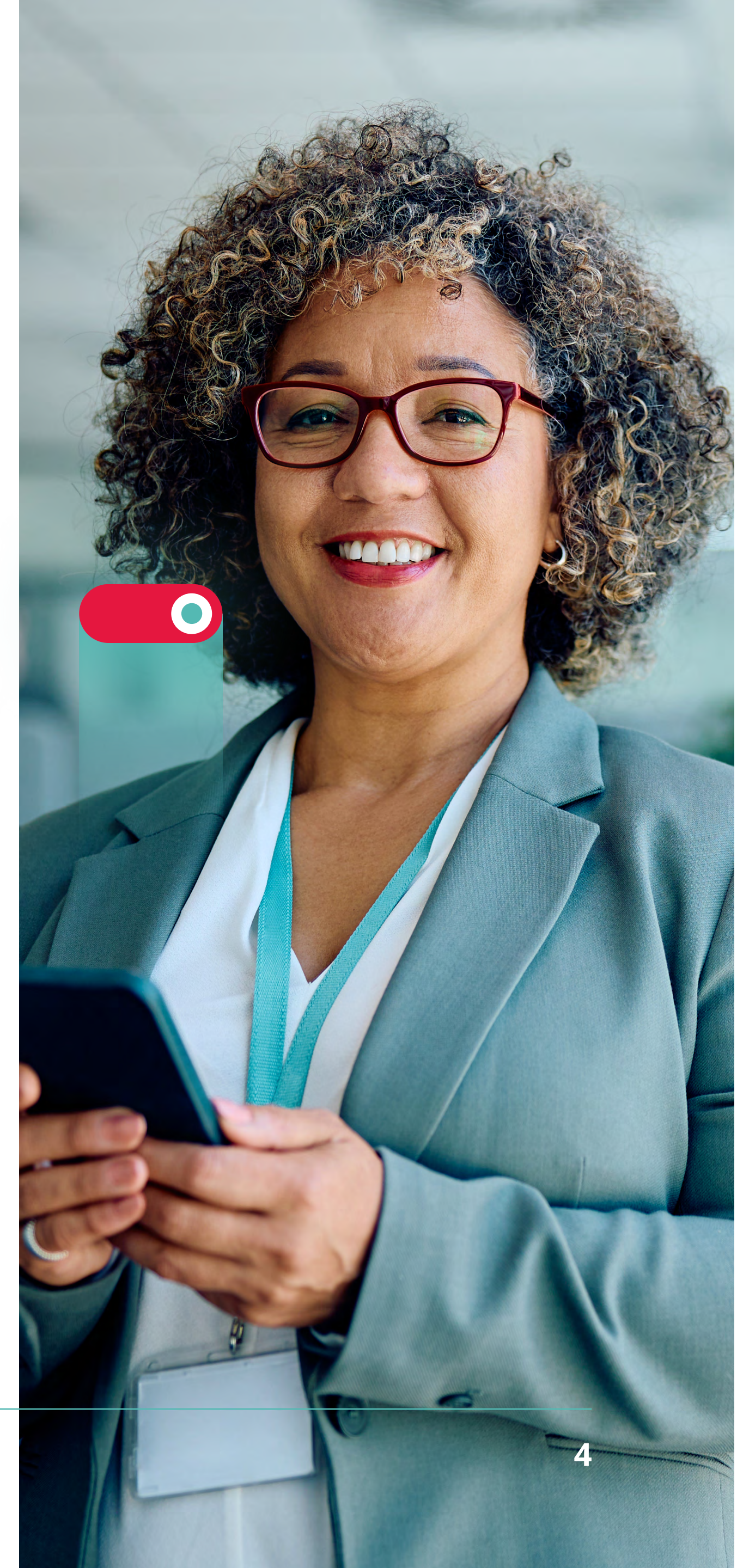
1 Data security and confidentiality

Organisations may not want to put their data into these systems because of the power of AI data processing and open ChatGPT data services that have been mining data at record speed. In addition, where we've seen lawsuits occur, it's been because of inappropriate use of confidential data in these open systems that have caused issues.

Response:

How does Access safeguard customer data?

Customer data is sacrosanct. Our generative AI works within a secure Access environment that keeps each customer's data private and secure. When a query is made, including the uploading of information by the user, it will only make use of information within the secure system and will not send any customer queries or information to train open AI systems. The result is unparalleled data privacy and security allowing Access customers the utmost confidence in taking advantage of all the feature that AI has to offer.



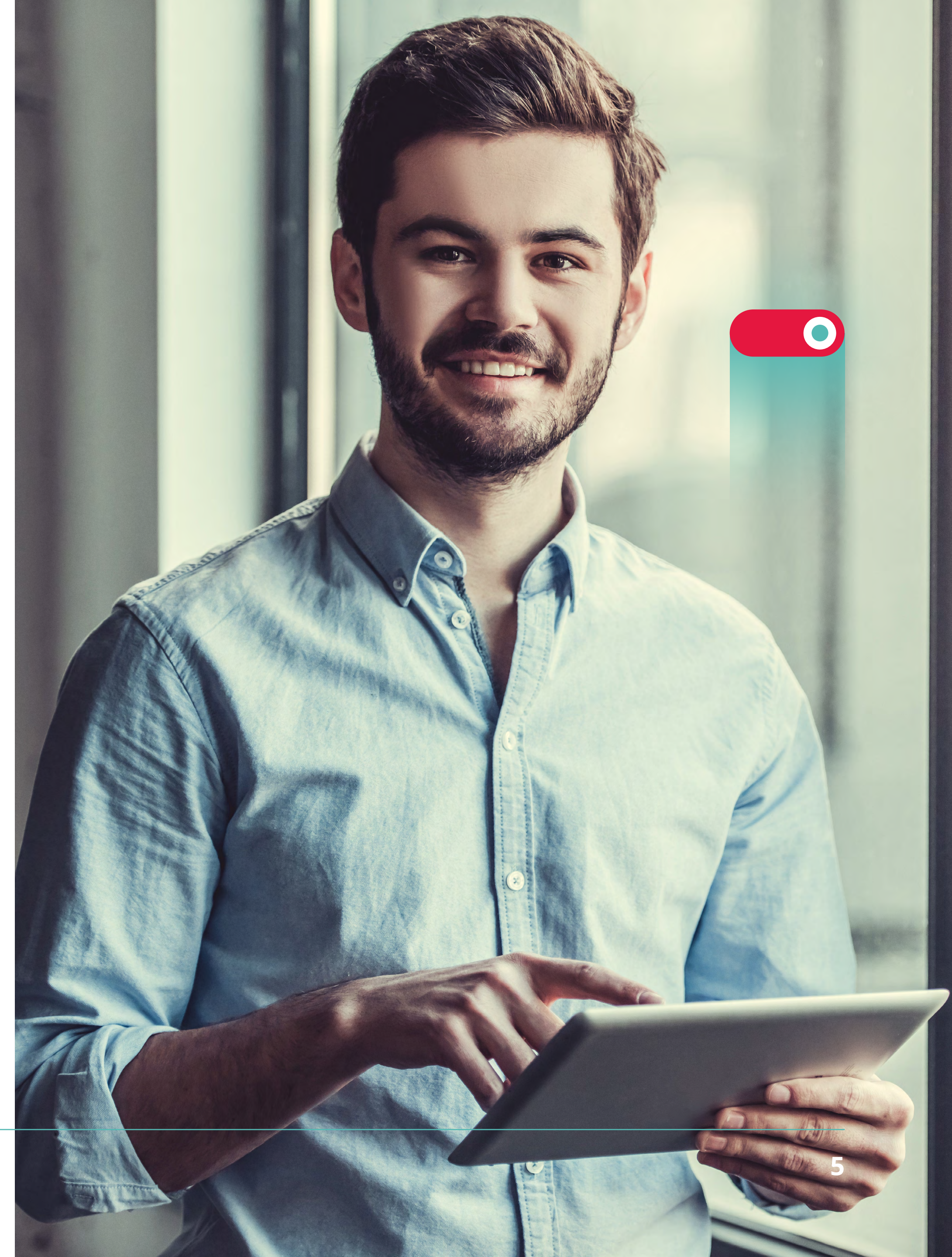
2 Accuracy and reliability

Using AI-driven features in software is different. AI mimics human intelligence in processing requests and actions; to do this, software developers have to train their AI models to work appropriately. The accuracy with which we ask the AI features to undertake an action on our behalf can vary in quality. The reality is that AI models will improve over time, as will people's ability to use them as they become more familiar with what to ask.

Response:

How reliable is AI at Access and how does it differ from other technologies we use?

AI has two key features that differ from other software technology. Firstly, it can quickly process vast amounts of info and extract relevant content. Secondly, Generative AI, which is the element catching the eye of the media, is the part we see as replacing human effort. Additionally, it's important to understand that AI (Artificial Intelligence) mimics the human brain, meaning engaging with AI-powered software will be more like engaging with a human than with traditional binary technology. The speed and capability are exciting, but we must adapt how we use it. If there are risks involved with replicating human intelligence, we wouldn't use it in that case. Testing is part of the critical path to launching new products especially when they incorporate AI, and we are investing heavily with our partners, in particular Microsoft and their AI and Cognitive Services experts, to improve accuracy and reliability.



3 Job replacement risk

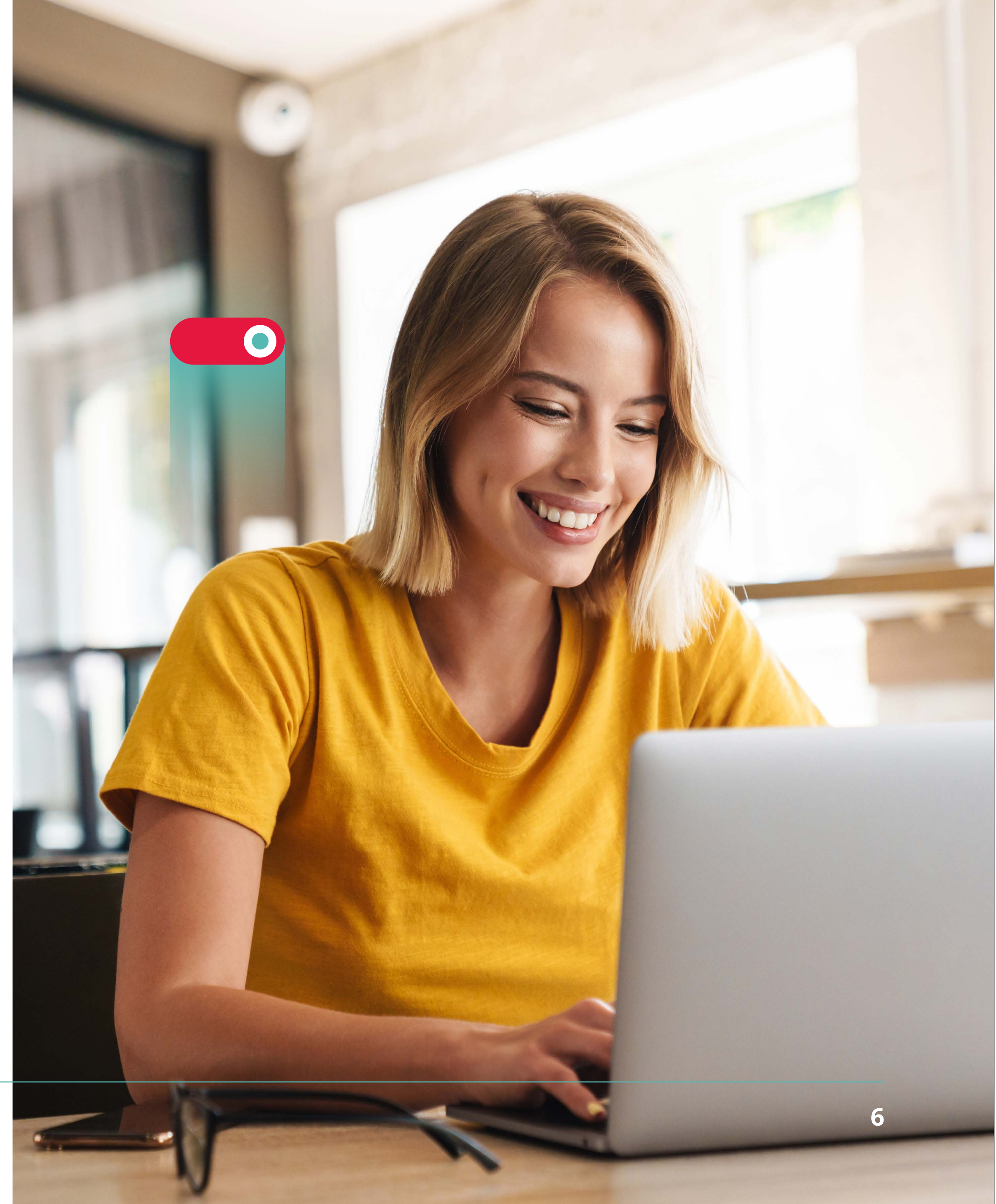
Research tells us it's less of a concern for professionals but more of a worry for administrative roles. For example, an Accountant may be less worried about losing their job than an administrative assistant, where AI could significantly reduce the work and time needed.

Response:

Will people lose their jobs as a result of AI?

The impact of AI on job losses is a complex and much-debated topic. AI can automate repetitive tasks, making some roles no longer required.

In the case of Access AI-assisted technology, it's about getting work done more quickly and efficiently, not replacing humans with technology—rather, it's about empowering them to do more of what's important to them.



Other FAQs.

What is AI?

AI aims to make machines capable of simulating human intelligence. To replicate the characteristics of human thought and reasoning by imitating how humans learn and process data and information. Technologies include machine learning - and others - that combine to produce advanced AI systems.

What are the risks and disadvantages?

The main risk in business applications surrounds data integrity. AI systems open to the internet risk exposure to confidential or commercially sensitive data. You must use a provider who can assure confidentiality and data security within their systems. Access has ensured that security is multidimensional: private, personally confidential and role-specific.

What are the main benefits?

Increased productivity and employee empowerment to handle time-consuming or complex tasks. Work that could take hours or days is done in seconds. AI can help with researching, formatting, writing and communicating. People who worry about the accuracy and reliability of AI can recall the early days of search, but we are more demanding of what we put into Google today, and this is revolutionising the way we deliver information.

How do we use AI?

AI uses natural language queries to provide answers or functions. In other words, the user interfaces by writing a query into a field, otherwise known as a prompt.

Is AI a good thing for us to use?

AI brings efficiency and transformative productivity. Acting as an assistant, it can empower and enable employees to do more of what their core job requires. The application of AI to achieve efficiencies to increase revenue, reduce operational costs and enhance overall valuations is obvious. The challenge is in specifying, adopting and aligning AI with your organisation's core objectives.

Why do we need AI?

Organisations like yours are probably ready for AI; you're expecting it and might already be using it. But what you want is better AI, grown-up AI if you like. Thoughtful, designed for your specific tasks and sectors. You want to get jobs done more quickly, find ways to reduce admin, get better insights into your data, enable people to find information without asking someone else. That's what Access can help you with.

Why is Access actively investing in AI?

Access isn't creating AI-enabled technology just because it's the latest thing expected of us or to keep up with the crowd! You may have seen the news from Microsoft, Xero, Google and many others promoting their AI solutions. AI has been around for decades but has only recently started to trend due to technological advances such as faster processors and more powerful algorithms. This has enabled AI to become more efficient and accurate, allowing it to take on more complex tasks.

Why would we partner with Access over another tech provider with AI solutions?

Access has been investing in technology solutions for over 30 years. Our approach is to make them available with a security-first approach so you can confidently get the true benefit of a software experience. Our AI is working with you and your data.

Can you reassure us about how Access uses AI?

Customers can be assured that Access is implementing AI responsibly and thoughtfully. We see AI bringing freedom to do more of what their job demands. Incorporating artificial intelligence into our products is the next step towards that objective.

Are there examples of how AI helps us at work?

Unlocking years of client data for your practice

Imagine one of your team members emails you with a request for reimbursement for study expenses. You're busy and you've got to work an hour early to clear some of your backlog but you are confronted by this email that you know you don't have the answer to and need to respond in a kind and considerate manner.

You ask Access Copilot to find out what the company policies are in such circumstances, and the response is up \$10,000 per year. So, you ask the system to write an email to the team member as if it were from you, notifying them of the policy. Reviewing the email, you personalise it and then send it. The whole process has taken minutes. No waiting around for a response from HR or managing partner. Better still, you can allow your team to self serve this information using Access Collaborate now including with Handisoft Evo.

How can you justify the additional cost of Access Evo features?

Through the scale of our investment, we'll keep the cost to our customers to a minimum. The value delivered in terms of the users ability to make productivity gains will far outweigh the increase in cost.

When will I get Handisoft Evo?

We expect HandiSoft Evo to be available from February 2024. We will communicate with you once launched, alternatively you could contact your Access Account Manager for more information.

Will these new Access Evo features mean my users must take more training?

We've invested heavily in user testing and software design with the single-minded objective of making it a highly intuitive experience, easy to use and the minimum of instructions needed. We will seek continual feedback on how customers use it and where we may need to improve.

What are examples of AI incorporated into Access products today?

- Dynamically generated analytics dashboards
- Reviewing CVs and writing job specs for the recruitment industry
- Industry best practice advice search, e.g. for HR specialists
- Fast access to company policies
- Generating an email comprising information from internal systems together with external best practice guidance

Is Access AI easy to use?

Using AI is natural for most people. We ensure that guidance on querying the system for the most useful results is readily available, easily accessible and understandable. Access has been investing in this area to craft prompts so that customers don't need to be AI specialists to benefit. In general, where you encounter AI in Access products it will be iterative and feel natural and helpful.



What if we don't allow our people to use ChatGPT on our system?

That is potentially a good thing as you cannot control what your people upload into a public system. That is why when using the Access generative capabilities you have the reassurance of your data being protected and your users only having access to what is appropriate. This is one of the central benefits of using Access as your partner to bring you the benefits of AI.

I'm worried AI will reveal confidential information to our employees – how do we remove this risk?

AI incorporated into our products runs within permission-based rules you would normally set for sensitive data. Employees won't see what they shouldn't have access to. No data leaves the secure Access environment during any use of the technology, and the prompt and its response are subject to the same levels of security, data retention and permissions as any other customer data held within Access products. We may monitor the prompts 'transiently' and in real-time to ensure the AI models are not being used for unethical/abusive purposes, etc., which is an added layer of security.

What if we don't want to have to train people to use AI?

AI uses natural language. Access has been investing in this area to devise prompts so that customers don't need to become AI specialists to benefit. Guidance on querying the system for the most useful results is readily available, easily accessible and understandable.

ChatGPT is free, so why do we need yours?

ChatGPT in the public domain seriously threatens your data security. It is not recommended as a tool for your employees to use as you cannot control who sees your data and commercially sensitive information may be leaked onto the Internet. The AI incorporated into Access software works within Access products. It never leaves your secure domain and prompts and results are destroyed immediately afterwards. AI in our products follows the rules you have set up for your internal security about who sees what and has access to different types of data.

Aren't closed-circuit AI systems prohibitively expensive?

We deploy the technology into our software to make it more cost-effective for our customers. Increases in productivity will also offset costs.

How do we get our employees to adopt it?

Our research shows that some people use it more frequently than others and some are reticent. If you follow our guidance and use our products in the way we suggest, we feel sure that all employees will come to see the benefits and adopt the technology rapidly.

How do we reassure our workforce with worries that AI will take over their jobs?

AI is designed to assist you in decision-making for both management and the frontline of your practice. Our objective with AI is to allow users to do more of what their core job involves or be redeployed to other meaningful work.

What if I don't buy this improved productivity message?

Jobs beyond an employee's usual remit - or tasks they don't often do - can take time to resolve, distracting them from their day-to-day role of meaningful work. When that happens, AI can do the heavy lifting, helping everyone follow procedure and act with impunity and immediacy. AI means not asking others, making users more independent and confident in their work.

What if our customers are worried if we tell them we are using AI?

Your data is secure and any use of their data - normally in your system - is also secure. It will not be exposed beyond your firm's domain, so your customers can be reassured and know that data is hosted in an Australian data centre.

What if we can't pay more for you to include AI?

AI incorporation into Access products is part of a capability improvement process and will be charged incrementally. However, savings will balance costs, resulting in productivity and greater efficiency.

How do we know where the AI elements are and can we remove those?

AI is incorporated - to a greater or lesser extent - into many Access products. In those cases, it is fundamental to their operation and cannot be removed.

What if we don't want to use AI because it is unreliable and inaccurate?

We use AI in our products to aid decision-making and generate content and inputs. Our on-screen prompt assistance helps you get the most from it and reduces inaccuracies.





If you have any other questions about Handisoft EVO, please contact your account manager, customer success manager or visit theaccessgroup.com.au

