Key Outcomes

Title:	PLS working group – key outcomes
Issue date:	16 July 2020
Venue:	WEBEX

Event date:	7 July 2020	**Start:** 1:00pm	**Finish:** 2:00pm

Chair:	Sonya Summers	**Facilitator:**	Sonya Summers
Contact	Julie Sen	**Contact phone:**	02 889 49304

Attendees: names/section	ATO – Sonya Summers, Sangitha Sivayogaraj, Danny Figueiredo, Ross Barns, Karen Greaves, Anupama Duggirala, David Baker, Jason Stewart, Tania Andrews-Zazonin Industry – Naseem Khan (ADP), Jack Wee (Catsoft), Mike Denniss, (Class Super), Sandeep Gopalan (GovReports), Mike Behling, Michael Tong, Christinique Chapman, (MYOB), Kevin Johnson, (Reckon), Michael Wright, Darin Carter (Sage), Charudatta More (Sparken), Karl Farrand (Taxlab), Krunal Patel, Shane Paxton, Paul Siriwidana (Thomson Reuters), Danna Zhang (Wolters Kluwer), Andrew Sprankling, Kelvin Newton (Xero).
Apologies: name/section	Sonia Lark (ATO), Misha Ali, Simon Smart (Etax), Sha Sha (Class Super), Lex Edmonds (MicroTax), Danny Koutoulas, Scott Reid, Andrew Smith (MYOB), Andrew Noble (Noble Accounting), Nathan Kerr (One-Click), Steven Ivanopoulos (Reckon), Saiful Larry (Sage),Dillon Tsotsis, Lisa Kim, Robert Xie (Wolters Kluwer),, Anthony Migliardi, Rosemary Missier (Xero)

Next meeting	21 July 2020

Agenda item: 1 – Introduction

Sonya welcomed the group and asked the DSPs to provide any feedback regarding the Online Services for DSPs Collaboration Hub to DPO@ato.gov.au or via an Online Services ticket.

Kevin and Andrew noted that it is difficult to distinguish when a new document has been uploaded to the Collaboration Hub. Sonya and Julie will investigate further.

The 2020 NRFI schedule occupation deduction ratios were updated in both the Software Developers website and Collaboration Hub. Previous versions of a document attachment in the Collaboration Hub can be viewed by expanding the 'arrow' icon next to the file (see below screenshot). DSPs can also confirm a new version of a document attachment by looking at the 'modified' column.

The safety net has been lifted to the TT2020 PLS services. Certification of the NITRs will begin next week if no issues are identified over the next few days.

Agenda item: 2 – Action item updates

No updates on outstanding items were provided. (see action items)

Agenda item: 3 – Tax Time 2020

Danny reminded the group that the Div 293 alert has been activated in MyTax from this year. This alert was unable to make it into SBR; however a guide will be provided to DSPs. DSPs who have implemented the alert into their software can pass on this information to the DPO (DPO@ato.gov.au or Online Services for DSPs) or Danny directly. This will allow a case to be made to introduce it into SBR for Tax Time 2021.

Sangitha provided information on IITR issues in production. These have been caused by internal coding problems with sequencing – there are no external impacts and a fix was successfully deployed on 8 July to fix the SLS bugs, however the ETP issue remains under investigation.

The error codes were:
SLS:
- CMN.ATO.GEN.EM0004
- CMN.ATO.GEN.EM0003
- CMN.ATO.GEN.EM0002 Code – 91902

EM0002 May be repeated multiple times

ETP:
- CMN.ATO.GEN.EM0002 Code – 91908
- CMN.ATO.IITR.EM001213

May also receive:
- CMN.ATO.GEN.EM0004
- CMN.ATO.GEN.EM0003

All these errors may be received multiple times.

Sangitha confirmed the investment reference number which is masked in shareholder pre-fill data, is not accepted in lodgments in Tax Time 2020. Submitting the masking characters will result in an CMN.ATO.GEN.XML03 error. The field is not mandatory and, as a workaround, can be left blank in the schedule when the return is submitted, however, it cannot be masked. Work is occurring to confirm if the field data will be masked again next year and what change is required to accommodate it. A scenario may be included as part of EVTE for Tax Time 2021.

Karen Greaves has provided a list of masked references from 'BR PIITR BIG' - section 4.1 Constraints, number 11:

Account numbers, SRN or HIN for the following data types will be masked and only display the last three digits:
- dividends
- managed funds
- farm management deposits
- foreign source income
- CGT share disposals
- employee share schemes.

Agenda item: 4 – Platform update

Anu provided an update for the production issue on 30 June where various systems in ATO were impacted by network issues throughout the day. SBR2 has experienced issues throughout the night and network issues could be one of the contributors.

All Q2 changes have been reviewed and the incident on 30 June was not introduced by Q2 changes.

Logs are being reviewed and we are trying to reproduce the prod incident for further testing. Nodes were unable to connect to each other to handle the processing of transactions. ATO has uplifted the nodes to the largest size to handle peak processing volumes to fix the issue.

At the moment, the platform is stable with no issues to report.

6.3 million transactions were processed on 1 July 2020, up from the 3.9 million transaction recorded on 1 July 2019 – an increase of 62% in SBR2 volumes.

We have recently upscaled the infrastructure capacity prior and post Q2 releases and components across all systems are stable and processing volumes at steady rate.

ELS rejections - ELS systems have been updated to accept lodgements post 1 July 2020. Incidents have been fixed for both EVTE & Prod.

Agenda item: 5 – Agent online environment update

Jason advised that despite some issues with the environment, lodgments have trended upwards by 1-2% compared to last year. Some clients who were required to lodge necessary information to meet the family tax benefits may have been affected by the system outage on 30 June. Discussions with Services Australia are continuing to resolve the issue. Lodgments have been smooth since 3 July.

Kylie advised upgrades to platforms was supporting all ATO systems to increase capacity. Some traffic was blocked to allow prioritised services for agents. David also mentioned a new 'waiting room' service for agents using the portal this year.

Action item: David will provide information on whether there has been in increase in call volumes relating to authorisation issues on the Agent Online portal.

Agenda item: 6 – Lodgment list

Tania addressed concerns regarding visibility of other agents linked to a client while using the LDGLST service. A recommendation was been made to utilise the CUREL service, specifically the Search interaction. This interaction provides the requester with details of current agent links for a client at the client, account and role levels (detailed below) meaning that this information could be identified and filtered out if required.

Current agent link codes:

- OTHERTABA = A relationship to a Tax agent other than the requester exists. A relationship to a BAS agent other than the requester may also exist.
- OTHERBA = A relationship to a BAS agent other than the requester exists.
- NONE = No agent relationships exist.
- SELF = Requesting agent relationship exists.
- SELFOTHER = Requesting agent and other agent relationships exist.

Concerns regarding the viability of the recommendation were raised including:

- Increased volumes of the service calls, especially for larger DSPs and during peak periods.
- Desktop compatibility (different backend set up to cloud)

Further discussion will take place to better understand the concerns and to map out a visual of how these services could be used in conjunction while maintaining adherence to the Reasonable Use policy. For any issues, please email DPO@ato.gov.au or raise a ticket in Online Services.

Kylie and Tania will provide a presentation outlining how the services can be used in a later meeting.

Agenda item: 7 – DSP feedback

No feedback was provided by the group.

Sonya noted that the IITR Q&A v7 document has been published on Software Developers website and Collaboration Hub.