



Key Outcomes

OFFICIAL External

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| Title: | PLS working group – key outcomes | | |
| Issue date: | 9 September 2020 | | |
| Venue: | WEBEX | | |
| Event date: | 1 September 2020 | Start: 1:00pm | Finish: 2:00pm |

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| Chair: | Sonia Lark | Facilitator: | Sonya Summers |
| Contact | Sonya Summers | Contact phone: | 02 472 57383 |

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| Attendees: names/section | <p>ATO – Sonia Lark, Sangitha Sivayogaraj, Danny Figueiredo, Ross Barns, Karen Greaves, Anupama Duggirala, David Baker, Kim McConaghy, Aaron Bennett, Deborah Robinson, Sophie Zeng</p> <p>Industry –Jack Wee (Catsoft), Sandeep Gopalan (GovReports), Christine Saava, Danny Koutoulas, Scott Reid, Michael Tong, Christinique Chapman, Andrew Smith, (MYOB), Kevin Johnson, (Reckon), Darin Carter, Michael Wright, Saiful Larry (Sage), Charudatta More (Sparken), Krunal Patel, Linda Kerhoulas (Thomson Reuters), Andrew Sprankling, Kelvin Newton (Xero).</p> |
| Apologies: name/section | <p>Mike Denniss, Sha Sha (Class Super), Simon Smart, Misha Ali (Etax), Lex Edmonds (MicroTax), Mike Behling, Trent Hayes (MYOB), Andrew Noble (Noble Accounting), Nathan Kerr (One-Click), Steven Ivanopoulos (Reckon), Karl Farrand (Taxlab), Shane Paxton, Paul Siriwidana (Thomson Reuters) Danna Zhang, Dillon Tsotsis, Lisa Kim, Robert Xie (Wolters Kluwer), Rosemary Missier (Xero).</p> |

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| Next meeting | 15 September 2020 |
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Agenda item: 1 – Introduction

Draft FBT 2021 XML specifications were made available to DSPs on the [Online Services for DSPs Collaboration Hub](#). Feedback is due back to DPO by 4 September 2020.

Sonia thanked the group for their participation in the SMSFAR Auditor Information and Software Guidance survey. The responses have been compiled and sent to the responsible ATO team.

The annual Services for Tax Practitioners event will be held online via webinar this year. The software developers website will be updated with information for attendance.

Agenda item: 2 – Action item updates

Updates were provided for outstanding action items. (see [action items](#))

Agenda item: 3 – Tax time related documentation

The following change advices have been published:

- CA2021-001 Reducing Pressure on Housing Affordability
- CA2021-002 Tax Integrity Improving the taxation of Testamentary Trusts

Due to the Budget being pushed to October, there will be a delay with the Tax Time 2021 draft forms and instructions becoming available for DSPs. They are expected to become available towards the end of the year.

In addition, the annual Services for Tax Practitioners event usually held in Canberra will be pushed back to November 10-11 and delivered online. Further details will follow.

Agenda item: 4 – Clarification for AMIT return for Tax Time 2020

A discrepancy between the Attribution Managed Investment Trust (AMIT) return MST and validation rules was discussed with the group.

The return label 'Total Accounting Profit/(Loss)' (TRTAMI73 in the MST) refers to 'accounting income' and should allow for a negative amount. This is consistent with the validation rule VR.ATO.TRTAMI.000164. There is confusion as the Report Guidance incorrectly refers to 'trust law income' and not 'accounting income. There are actually different concepts where:

- Trust law income – determined under the trust law including the trust deed
- Accounting income – the amount calculated using accounting principles

Generally, a negative trust law income amount does not occur, whereas an accounting loss is possible.

The Report Guidance will be updated to provide the correct text to align with the validation rules. In the interim, the current Report Guidance should be ignored as the validation rule is correct.

Agenda item: 5 – Tax Time update

IITR 2020 certifications have been delivered to DSPs with limited requirements for additional PVT..

An email seeking IITR feedback was sent to DSPs. Any feedback will be appreciated as it will allow ATO to update any online content. Most of the critical incidents tickets have been resolved with:

- One fix for annuities being implemented into Prod on the night of 1 September. This is now resolved.
- A message issue where users are alerted of payloads with over 25 messages, where the actual payload has significantly less messages is awaiting a fix on the night of 8 September.

The focus groups for Data Visibility/Data Window and Client Communication services will reconvene shortly.

Agenda item: 6 – Delivery update

Sangitha went through the 'release on a page' discussing the EVTE and Prod releases over the coming months. A copy has been uploaded to the [software developers website](#) and Collaboration Hub.

Tax Time 2021 work is delayed until the Budget is delivered in October, the standard rollover of individual and non-individual services will proceed as normal over January and February 2021.

Work is progressing with the Interactive Error Handling work.

Agenda item: 7 – Platform update

Platform has been stable throughout Tax Time until 31 August.

The morning of 1 September saw an outage in SBR2, with services restored by the morning through production remediation activities.

Logs have been captured and work is occurring to investigate the root cause of the incident.

Agenda item: 8 – Agent online environment update

David spoke about a number of topics:

- Systems will be brought down between 25-28 September for Q3 deployment, with regular communication going to agents
- JobKeeper deployment was successfully deployed on 31 August
- The Client Communication API set will be developed with some restrictions to additional functionality previously discussed in the Client Communication workshops
- The Tax Practitioner Steering Group recently met to discuss current and future debt and lodgement strategies
- If there is any feedback regarding tax practitioners not receiving the correct amounts for the cash flow boost or JobKeeper, please forward the details to the DPO
- A new project has kicked off to transition clients who are using the Interim Business Credential to MyGovID and RAM or equivalent
- David's team will complete a review and design session for the on demand Activity Statement reports (ASLRPT) to allow for agents to differentiate roles. DSPs can volunteer to provide input and feedback on the design by contacting the DPO. The proposal will be presented as a small change request.

Agenda item: 9 – DSP feedback

Kevin Johnson raised an issue with the OSD not accepting zip file attachments. Tania confirmed this is a known issue with no fix at this stage.

DSPs raised the ability to be able to share common issues and incidents amongst other DSPs in Online Services for DSPs after a number of DSPs encountered the same issues and were not aware of a fix. Sonia informed the group that this is being investigated and DPO will reach out to developers for input and feedback.