



Key Outcomes

OFFICIAL External

Title:	PLS working group – key outcomes		
Issue date:	18 February 2021		
Venue:	WEBEX		
Event date:	16 February 2021	Start: 1:00pm	Finish: 2:00pm

Chair:	Danielle Miller	Facilitator:	Danielle Miller
Contact	Sonya Summers	Contact phone:	02 47257383

Attendees: names/section	<p>ATO – Danielle Miller, Danny Figueiredo, Anupama Duggirala, Sangitha Sivayogaraj, David Baker, Carl Bennett, Matt Musolino, Sophie Zeng.</p> <p>Industry –Simon Smart, Misha Ali (eTax), Lex Edmonds (MicroTax), Sandeep Gopalan (GovReports), Mike Behling, Scott Reid, Michael Tong, Christine Savva, Eli Gomez, Andrew Smith (MYOB), Kevin Johnson (Reckon), Saiful Larry, Darin Carter (Sage), Chardutta More (Sparken), Karl Farrand (Taxlab), Krunal Patel, Linda Kerhoulas (Thomson Reuters), Danna Zhang (Wolters Kluwer), Andrew Sprankling, Kelvin Newton (Xero).</p>
Apologies: name/section	<p>Jack Wee (Catsoft), Mike Denniss, Sha Sha (Class Super), Andrew Noble (Noble Accounting), Nathan Kerr (One-Click), Michael Wright (Sage), Shane Paxton (Thomson Reuters), Dillon Tsotsis, Lisa Kim, Robert Xie (Wolters Kluwer), Rosemary Missier (Xero).</p>

Next meeting	2 March 2021
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Agenda item: 2 – Action item updates

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

Updated web content around changes to STP quarterly reporting concessions and STP reporting options for closely held payees have recently been published:

- [QC59383 - Micro employers](#) – updated content to reflect changes to quarterly reporting concession coming into effect 1 July 2021
- [QC59388 - Seasonal and intermittent employers](#) – updated content to reflect changes to quarterly reporting concession coming into effect 1 July 2021
- [QC60146 - Agriculture, fishing and forestry industry](#) – updated content to reflect changes to quarterly reporting concession coming into effect 1 July 2021
- [QC60147 - Not-for-profit clubs and associations](#) – updated content to reflect changes to quarterly reporting concession coming into effect 1 July 2021
- [QC59387 - Small employers – closely held \(related\) payees](#) – updated content to reflect changes to reporting options for employers with closely held payees coming into effect 1 July 2021
- [QC56185 - Registered agents providing a payroll service](#) – removed references to quarterly reporting concession as the eligibility criteria will be narrowed from 1 July 2021

In short:

- The current STP reporting for concession for closely held payees is ending 30 June 2021. From 1 July 2021, employers with closely held payees can choose to report for these employees: on the same day as their other employees, quarterly based on actual payments, or quarterly based on a reasonable estimate.
- Eligibility for STP quarterly reporting concessions for micro employers will be narrowed from 1 July 2021 to only allow those with 'exceptional circumstances' to access the concession. For STP purposes, exceptional circumstances will include those with seasonal or intermittent workers, and those with no or limited access to internet. This is in addition to the circumstances in [Law Administration Practice Statement 2011/15](#). Applications for the extended concession cannot currently be accepted (expected to be available from June 2021).

Agenda item: 3 – Tax time-related documentation

An update change advice for the loss Carried Back measure was published on 12 February.

Although the IEE and FTER draft forms still reflect 2020, business has confirmed there have been no changes and they are valid for 2021.

Due to the complexity and late announcement of the budget measures, the CTR draft forms and instructions are still being prepared. We will continue to follow up and make them available as soon as possible.

Agenda item: 4 - Enhanced pre-fill

The concept of 'enhanced pre-fill' was presented at last year's tax time event and involves providing some certainty around bank interest data the ATO is likely to use in data matching.

Matt Musolino advised that unfortunately the initiative has been delayed and will now not be implemented until Tax Time 2022.

Agenda item: 5 – Delivery update

The SBR2 roadmap is on track with the following exceptions which will be listed as future changes in the NITR Package contents document:

- The temporary full expensing income amount field in CTR will be changed to an indicator in the March update
- The disability trust code C will be removed from TRT in the March update
- PTR & TRT – the inclusion of aggregated turnover validation in the C# rules wasn't able to be updated in time for the February release, and will be available in March.
- The company base rates for 2021 will be updated in an upcoming EVTE release.
- The FTER and IEE XML are being published in the March code drop

The following are the key call outs from the February release:

- CTR – in addition to the MST and schema changes, the validation rules spreadsheet will now also be included in the artefact publication on 18 February. Leaving the C# rule implementation, Conformance Suites and EVTE code for the March EVTE release
- RDTIS – production deployment completed on 11 February for CTR 2020.
- TPAR – published information on ato.gov.au, sbr.gov.au, service registry and MST guidance to be updated to reflect the alignment of TPAR across channels – to be rolled out over the coming weeks.

Cyclical changes (e.g. rates, thresholders, etc) and defect fixes for NITR and IITR services are planned for the April EVTE release. The significant changes will be the deployment of IEE and FTER as schedules, Client Communication Get bulk service, and IITR outcome of assessment.

Danny reminded the group to request whitelisting against 2021 tax time services as it is not automatic.

Agenda item: 6 – Platform update

Anu advised platforms are stable, with no current issues.

There were a few issues late last week in SBR1 EVTE related to internal network and gateway changes.

Work is occurring on capacity planning and forecasting for TT2021, and we are working with external providers to reduce planned outages.

Agenda item: 7 – Agent online environment update

David Baker and Carl Bennett spoke about work occurring in both the Online Services for Agents (OSfA) and PLS spaces to harmonise the way they return lodgment list reports.

The feature is being developed in consultation with the Tax Practitioner Stewardship Group (TPSG) and enhancements may include displaying the:

1. **ICA RAN** – Current active RAN linked to each activity statement account
2. **ICA Destination** - Current preference i.e. **Practice, Client, 'No preference set'**
3. **ICA Delivery Channel** – **Digital, myGov, Paper**
4. **ICA Email** - Active email address for the ICA
5. **ICA Portal address** - Active postal address for the ICA
6. **ICA Account Balance** (Activity statement account balance at time of report being requested/run)
7. **ICA Payment reference number** -PRN (unique PRN for the relevant activity statement account)
8. **AS PAYG Instalment amount** (only applicable to R, T & N forms and the amount is relevant to the period start date and end date of the Activity statement)
9. **AS GST Instalment amount** (only applicable to S & T forms and the amount is relevant to the period start date and end date of the Activity statement)

These additional details should allow DSPs to 'slice and dice' the information and build subset reports to suit their users.

With the increase in the number of fields being filled in the reports, there is a risk that the increased file size may impact IT loads and may require reports to be scheduled overnight.

The feature details will be available for review and feedback from Friday 19 February in [PLS items for Review](#) in the Collaboration Hub.

Please provide your feedback by next meeting.

Agenda item: 8 – DSP Feedback/issues

No additional issues were raised.