



Key Outcomes

OFFICIAL External

Title:	PLS working group – key outcomes		
Issue date:	7 April 2021		
Venue:	WEBEX		
Event date:	30 March 2021	Start: 1:00pm	Finish: 2:00pm

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

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

Next meeting	13 April 2021
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Agenda item: 2 – Action item updates

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

Agenda item: 3 – Tax time related documentation

The updated draft CTR form is available on the [Software Developers Website](#) and in the [collaboration hub](#).

CA2021-006: Increase in SMSF membership has been updated. As the legislation did not pass, the initial change of SMSF membership from 4 to 6 is no longer required for the 2021 FY. Should this legislation pass for 2022 FY a new change advice will be issued. If there are any DSPs who have difficulties rolling back these changes, please let us know via Online services for DSPs.

[Tax determination](#) information is available for FBT rates beginning 1 April 2021.

The draft CTR2020 validation rules which were made available in the collaboration hub following the last meeting are now available on sbr.gov.au.

The [Summary of changes to CTR instructions 2021.pdf](#) has been available in the collaboration hub since 04 March 2021 for your review. This document provides a summary and details of new measures and new labels in the 2021 Company tax return and other key matters.

The final instructions are expected to be available in **early May**. If there are any specific concerns or questions after reviewing this document, please raise a ticket in Online Services for DSPs.

Agenda item: 4– Service Registry update

Craig Hughes advised of the intent to add a new column “Duplication Transmission Check” to the Service Registry under the SBR ebMS3 section in the Service Actions tab. The change is anticipated for 6 May 21.

Agenda item: 5 – Delivery update

Overview of upcoming April release changes:

- Some items for IITR and CTR required further refinement of requirements, which will be delivered in the April release. This is related to Aggregated turnover amount, Loss Carry Back offset, and increasing age of dependants.
- Other significant call outs include:
 - o cutover of 2021 NITR services to use XML IEE and FTER to occur in April EVTE release
 - o final release of the client communication service for bulk document retrieval.

Overview of upcoming May release changes:

- Additional changes are in discussion for Loss carry back offset impacting CTR. Early visibility of changes has been requested.
- Incident fixes and production issues planned for May EVTE.

Overview of upcoming June release changes:

- Reserved for a number of cyclical changes pending budget announcement in May. Once announcement is known, the delivery schedule for any impacting changes will be shared.
- Next service for the XBRL to XML transition will be Closely Held Withholding – early artefacts to be published by end of June.

Questions raised:

- Duplicate alias found in TRTAMI services. This will be addressed in the April EVTE release
- Request for early visibility of new/changes to scope in May. We will provide an offline summary of upcoming changes to services where they are not cyclical changes.
- SMSF membership increase not passing legislation – change advice indicated the SMSFAR changes will not be rolled back, however software products should continue to align to current accepted limits.
 - o Questions raised whether SBR will introduce validation to limit the service to 8 members instead of 12.
 - o Following further internal discussion, the legislative change will be rolled back.

The updated Release on a Page, along with a version with additional commentary has been published on the [software developers website](#) and the [Collaboration hub](#)

Agenda item: 6 – Platform update

Anu provided details around recent platform issues:

- SBR1, SBR2 and BDE platforms are all stable with no issues to report.
- On 25 March EVTE - SBR1 & SBR2 experienced an outage from around 8pm - 12:45am. This was due to failure of the authorisation and systems were operational again around 12:45am.
- On 29 March some users experienced a SAML token issue in SBR1 and SBR2 production systems. Messages were processed through SBR1 and SBR2 without an issue where DSPs were able to get a SAML token. A fix has now been applied.

Agenda item: 7 – Agent online environment update

Carl Bennett provided updates on behalf of David Baker.

Online Services For Agents - Post our March quarterly release, four practitioners were unable to access practice mail. We have been working directly with the impacted agents while we investigate and resolve the issue.

Activity statement lodgment report (ASLRPT) – Updates to include additional fields is progressing. Online Services for Agents and PLS services are being upgraded to include extra fields requested by DPSs and Practitioners. We are hoping the changes will be implemented in our quarter four release this year (December 2021)

Agenda item: 8 – DSP Feedback/issues

Action item: The DPO will follow up on IITR assessments returned without lump sum in arrears tax offset in the assessment.

Update: Lump sum payments in arrears (LSPIA) cannot be processed for foreign pension and annuities clients, however LSPIA can be processed for salary and wages clients. The LSPIA tax offset will only appear on a Notice of Assessment (NOA) if it is greater than \$0.