Key Outcomes

Title:	Client Communication API and Preferencing design discussion
Issue date:	27 July 2021
Venue:	WEBEX
Event date:	21 July 2021 **Start:** 3:00pm **Finish:** 4:00pm

Chair:	Sonia Lark	**Facilitator:**	Sonia Lark
Contact	Sonya Summers	**Contact phone:**	02 47257383

Attendees: names/section	ATO: Mark Ayers – Director, Strategy and Support Outbound Capabilities Sonia Lark – Director, Digital Partnership Office Ash Bray – Strategy and Support Outbound Capabilities Damien Choy – Application Architecture and Design Danny Figueiredo - Digital Partnership Office Brendan Kee – Digital Wholesale Integration Services Leanne Lee – Strategy and Support Outbound Capabilities Felicity Stokes – Digital Partnership Office Industry: Mike Behling – MYOB Darin Carter - Sage Stan Corner - Business Automation Works Ron Drost – Digital Disruption Solutions Karl Farrand – TaxLab Trojan Goldsworthy – Etax Sandeep Gopalan - GovReports Amir Hussein - KPMG Kevin Johnson – Reckon Nathan Kerr – HostOne Albert Lilie – HostOne Anthony Migliardi - Xero Paul Salcombe – Business Automation Works Simon Smart– Etax

	Nic Taylor – HostOne Richard Venal - KPMG Danna Zheng – Wolters Kluwer
Apologies: name/section	ATO: Tyson Andrews – Director, Digital Communications & Identity Services David Baker – Director, Individuals & Intermediaries Jimit Patel - Digital Communications & Identity Services Industry: Mike Denniss – Class Damian Eley - PwC Vikas Kumar – Wolters Kluwer Ursula Lepporoli – KPMG Phil Martin – KPMG Andrew Noble – IT Noble Jack Wee - Catsoft Kevin Zhang – Class

Next meeting	TBA

Key messages

The Client Communication API working group was reconvened to review and discuss planned changes to the Business Implementation Guide (BIG) and provide feedback prior to the updated version being published in late July.

It was noted that updates would be made to ensure consistency in the use of the term 'batch' rather than bulk throughout the document to avoid confusion or ambiguity.

The key points of the discussion include:

- Consistency in the use of TAN/RAN throughout the document
- Clarification of the need to establish the client/agent relationship each time correspondence is retrieved, especially in case of BAS agents who may only have access to some client roles, hence may only retrieve correspondence associated with those roles
- Clarification around the constraints of using the service:
  - for the most part an agent should only retrieve a document once
  - both SRP and BBRP should be implemented
  - preferred retrieval window
- the known issue which sees possible reissue/duplication of correspondence as a result of a client unlinking myGov and the document reissuing via another channel. We are hoping to resolve this issue within the next six months, but no timeframes can be confirmed at this stage.

Polling for initial foundational loads will be discussed at a later session

There was a question raised around limitations or requirements of sharing retrieved documents with third parties such as document management parties. Danny Figueiredo advised that the updated requirements of the Operational Security Framework address the issue of third-party add-ons. We will reach out to the Operational Security Framework team for their position on this topic.

It is expected that access to the service in PROD will be available form 30 July.

<u>Next steps:</u>

1. The BIG will be updated and published
    If you have any additional feedback on the BIG, please lodge a [ticket](#) via Online Services for DSPs.

2. The group will be reconvened to discuss the management of foundational loads.

3. If there are no major issues beyond this once the services go live, the group will be closed.