



Key Outcomes

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Title:	PLS working group – Key outcomes		
Issue date:	2 September 2021		
Venue:	WEBEX		
Event date:	31 August 2021	Start: 1:00pm	Finish: 2:00pm

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

Attendees: names/section	<p>ATO – Sonia Lark, Danny Figueiredo, Sangitha Sivayogaraj, Anupama Duggirala, David Baker, Craig Hughes, Tania Andrews-Zanozin.</p> <p>Industry – Jack Wee (Catsoft), Misha Ali, Trajan Goldsworthy (eTax), Sandeep Gopalan (GovReports), Scott Reid, Michael Tong, Eli Gomez, Andrew Smith (MYOB), Albert Lillie, Nathan Kerr (One-Click), Kevin Johnson, Steven Ivanopoulos (Reckon), Michael Wright, Darin Carter, Saiful Larry (Sage), Karl Farrand (TaxLab), Shane Paxton, Linda Kerhoulas, James Barillaro, Alex Jacklin, Shifa Akbar (Thomson Reuters), Raihani Rahmat (Wolters Kluwer), Andrew Sprankling, Kelvin Newton (Xero).</p>
Apologies: name/section	<p>Lex Edmonds (MicroTax), Mike Behling, Christine Savva (MYOB), Andrew Noble (Noble Accounting) Chardutta More (Sparken), Krunal Patel, Nikunj Simariya (Thomson Reuters), Mark Walmsley (Walmsley Family Trust), Farah Shaikh, Patrick Bogle, Danna Zheng (Wolters Kluwer).</p>

Agenda item: 1 – Welcome

Sonia Lark welcomed the group and advised that expressions of interest are still open for this year's [Services for Tax Practitioners](#) event which is scheduled for **14 & 15 September**. Please submit a ticket in OS4DSPs if you would like to attend and an invitation will be sent to you.

Also, consider any new PLS services you would like to see the ATO consider building as these will be discussed during one of the sessions.

Loss Carry Back measure – amendments

A miscellaneous bill has passed allowing amendments to Loss Carry Back (LCB) choice. Changing an LCB choice can result in complex consequential amendments to a number of years' worth of CTRs.

On **12 July 2021** we held a meeting with a few DSPs from the PLSWG to discuss the options and get their feedback.

Five options to amend the LCB choice were discussed:

1. Correspondence – requesting the change in LCB and resulting amendments in writing. This would require manual processing.
2. A fillable PDF which could be lodged through OSfA or OSfB using a similar process for LCB election for early balancers implemented earlier this year.
3. A new form in OSfA or OSfB would give better data integrity, however these are not the normal channels for CTR lodgment.
4. Allow amendment to the CTR – this would require each consequential amendment to be done separately
5. A new stand-alone form in PLS or paper would allow capture of the data in the correct format and would trigger all consequential amendments where necessary

The group agreed that although a schedule would be preferable to a stand-alone form due to the developmental effort and cost involved, they still considered that an amendment to the CTR to be the favoured approach.

See the [Key Messages](#) for the main discussion points.

We held a follow up meeting on **27 August 2021** where we went through the proposed solution based on DSP recommendation and stewardship group consultation.

A 'Hybrid' option has been proposed which would be a CTR amendment request which would include an attached schedule for:

- The change of LCB choice, and
- The consequential amendment details.

See the [Key Messages](#) for the main discussion points and concerns.

The final solution will be presented at the TT event 14/15 September.

At the last PLSWG meeting an issue was raised where DSPs were seeing rejections due to duplicate lodgements for entities which had changed their substituted accounting period.

Guidance is being drafted and will be published on the [PLS troubleshooting page](#) shortly.

ELStagFormat service: The Intermediaries Communication team is currently working on the communication packages to Tax Agents and DSPs in order to support the transition to the new version of the ELS prior year form service (formally known as ELStagFormat).

DSP feedback has been taken into consideration and this communication package will include tailored information to DSPs and Tax Agents on how lodgments can be classified as “completed”.

As the new service will be changed to “fire and forget”, if a lodgment is accepted by the ATO via SBR the software by default should tag return as lodgment “completed”.

If a DSP and/or Tax Agent requires further information if the lodgment has been processed successfully there are the following options:

- Tax Agents can access the client’s records and check status of return via Online Services for Agents OSfA.
- DSPs that requires to value add its service to Tax Agents, can implement supporting SBR services such as Lodgment List (LDGLST.0002.2016) & Lodgment Progress (LDGPROG.0001.2017) and use the information from these services to update the status of the return in its systems.

The DPO will support any DSP looking to develop and implement these services. As these are already in production use and are get/pull services there are no PVT requirements.

We are also working with DWIS to delay the end-date for the current version to beyond 31 December 2021. We will advise DSPs as soon as we receive confirmation of the new date.

The PLS working group meeting which was scheduled for 14 September has been cancelled as it coincides with the Tax Time event.

The next meeting will be **28 September**.

Agenda item: 2 – Action item updates

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

See [additional details](#) for UI issues being experienced in OS4DSPs.

Agenda item: 3 – Tax time related documentation

New change advices for [Tax Time 2022](#) have been published:

CA2022-001 Increase in SMSF membership from 4 to 6

CA2022-002 Removing the \$450 per month threshold for superannuation guarantee eligibility

CA2022-003 Loss Carry Back Extension

Please note that 'controlled information' is now only published to Online Services for DSPs.

Agenda item: 4 – XBRL to XML transition update

An updated XBRL to XML transition timeline was shared with the group. There have been some items clarified and some moved as a result of DSP feedback.

See [attached slides](#) for additional detail

The initial XML drop will be 'like for like', at which time the draft MST will be released for feedback. Any legislative or other changes will be subsequent to the initial drop. Data elements will be aligned across parent/child forms to ensure consistent naming standards. Some rules will be removed, instead they will be inherent in the schema.

Agenda item: 5 – Delivery update

An updated [Release on a Page](#) document will be available shortly.

The [high-level roadmap](#) is available with these outcomes.

The lodgment.list service is slated for transition to XML by December 2021 (EVTE) and June 2022 (PROD).

The initial *draft* MSTs will be available shortly.

Special character updates will be made in the TT2022 rollover changes in Q4 2021 and into the client update services in Q1 2022.

The remainder of the rollout will be unpacked and captured in a roadmap.

Activity statement service enhancements delivery timeline is also shown on the [roadmap](#).

Agenda item: 6 – Platform update

Platforms are stable, with no current issues to report.

There was an issue experienced in SBR1 and SBR2 EVTE on 26/8, however it was resolved within two hours.

Agenda item: 7 – Agent online environment update

The scheduled maintenance for Online Services for Agents is occurring this weekend, 4 and 5 September.

There has been an issue impacting approximately 200 users – an issue related to receiving practice mail for clients with cancelled ABNs, particularly deceased estates. This is still under investigation.

David reiterated to the group to send through any potential new candidates for new services so some background work can be done prior to the tax time event. So far we have received a few for consideration including practice mail, file transfer function, and super account services.

Agenda item: 8 – DSP feedback

No additional issues were raised.