



Key Outcomes

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Title:	PLS working group – Key outcomes		
Issue date:	11 November 2021		
Venue:	WEBEX		
Event date:	9 November 2021	Start: 1:00pm	Finish: 2:00pm

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

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

Agenda item: 1 – Welcome

Sonia welcomed the group and advised that two focus group expressions of interest would be going out in the DSP newsletter today:

- Modernisation of the Trust experience - We want to work with interested DSPs to improve the future Trust experience for trustees and beneficiaries.
- Business inbox - We're looking to work with interested DSPs to help design a new business inbox service. This service will allow businesses to securely access and view messages from us.

EOIs can be submitted via [Online Services for DSPs](#).

Agenda item: 2 – Action item updates

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

Agenda item: 3 – Tax time related documentation

An updated version of [CA2022-007 SAR changes](#) and updated draft instructions for the [Fund income tax return](#) were published in Online Services for DSPs.

Agenda item: 4 – Changes to Superannuation fund return and SAR declaration

Jane Dirkis provided details of the changes published (see above) for the SAR and fund income tax return.

SAR changes: changes to Section F Member information to include the members email address and mobile number are no longer going ahead. An updated change advice has been published.

Fund income tax return:

- Increase in membership – Law changes that took effect from 1 July 2021 allow an SMSF and Small APRA funds (SAFs) to have up to a maximum of 6 members.
- Actuarial Certificates for SAF's - there is no longer a requirement to obtain an actuarial certificate, when calculating ECPI where all members are solely in pension phase for the entire financial year and could have used the segregated method apart from the disregarded small fund asset rules. The new law excludes these funds from the definition of disregarded small fund assets, allowing them to use the segregated method and not obtain an actuarial certificate.

Updated draft instructions have been published.

Agenda item: 5 – Update on current issues

Danny reminded DSPs that only the allowed forms (as detailed in the ELStagformat BIG) should be submitted via the ELStagformat service. Currently when a non-allowed form is submitted, error V145 is returned. The group is reminded that when the current service is deactivated at the end of January 2022, validation rules will no longer be returned, and these forms will no longer show as 'rejected'. As part of the certification process, the DPO will ensure only approved forms are submitted.

See [presentation pack](#) for further details.

Agenda item: 6 – Delivery update

An updated [Release on a page](#) is available in the Collaboration Hub.

Sangitha highlighted a few changes:

- There have been issues identified with the new ELStagformat service in EVTE. The service is due to move into PROD in December, however this may be delayed if the issues have not been resolved.
- Draft XML specifications for the IDS are due for release in December. They will be available for review by this group prior to publishing.
- Tax time rollovers will be going into EVTE in December.
- The new lodgment list service is going into EVTE in November.
- Activity statement suite artefacts are expected to be available in December.

Agenda item: 7 – Platform update

Anu advised that all platforms are currently stable.

An issue was experienced across SBR1 and SBR2 on 27/10 for the activity statement services. It was resolved quickly and stuck messages were replayed.

The ELS wrapped service hasn't come back up after the outage on 6/11 - this has been an issue for few releases recently. To avoid this issue in future, this service status will be verified as part of our TDV checks.

Agenda item: 8 – Agent online environment update

No update was provided.

Agenda item: 9 – DSP communications update

Esther Daniell from the Intermediary Communications team will be providing regular updates in this forum on communications impacting DSPs and agents.

The final DSP newsletter for 2021 will be issued on Tuesday 14 December, and the first one for 2022 is scheduled for 18 January.

Agenda item: 10 – DSP feedback

A number of DSPs advised they were experiencing on-going issues with OS4DSPs, particularly with slowness and inability to lodge a ticket due to time-out errors.

The DPO is aware of these issues and investigations are continuing. An update will be provided at the next session.

Danny will add current issues relating to the IDS to the [Tax Time 2022 PLS Additional Information FAQs](#) page in the Collaboration Hub.