



## Key Outcomes

OFFICIAL External

<b>Title:</b>	PLS working group – Key outcomes		
<b>Issue date:</b>	18 March 2022		
<b>Venue:</b>	WEBEX		
<b>Event date:</b>	15 March 2022	<b>Start:</b> 1:00pm	<b>Finish:</b> 1:55pm

<b>Chair:</b>	Sonya Summers	<b>Facilitator:</b>	Sonya Summers
<b>Contact</b>	Janette Zafiroopoulos	<b>Contact phone:</b>	02 8894 9263

<b>Attendees: names/section</b>	<p>ATO – Danny Figueiredo, Felicity Stokes, Sangitha Sivayogaraj, Sonya Summers, David Baker, Craig Hughes, Anupama Duggirala, Maree Caulfield, Esther Daniell</p> <p>Industry – Michael Wright (Access Group), Jack Wee (Catsoft), Ron Drost (Digital Disruption Solutions), Mike Behling, Scott Reid, Eli Gomez, Michael Tong, Christine Savva (MYOB), Albert Lillie (One Click), Steven Ivanopoulos, Kevin Johnson (Reckon), Karl Farrand (TaxLab), Shifa Akbar, Nikunj Simariya, Linda Kerhoulas (Thomson Reuters), Mark Walmsley (Walmsley Family Trust), Sue Zhao (Wolters Kluwer), Andrew Sprankling (Xero)</p>
<b>Apologies: name/section</b>	<p>Darin Carter, Saiful Larry (Access Group), Paul Salcombe (Business Automation Works), Misha Ali, Trajan Goldsworthy (eTax), Sandeep Gopalan (GovReports), Lex Edmonds (MicroTax), Andrew Smith, Andreas Robertson (MYOB), Nathan Kerr (One Click), Andrew Noble (Noble Accounting), Chardutta More (Sparken), James Barillaro, Alex Jacklin, Shane Paxton, Ankit Rawat (Thomson Reuters), Krunal Patel, Farah Shaikh, Patrick Bogle, Danna Zheng (Wolters Kluwer), Kelvin Newton (Xero).</p>

## Agenda item: 1 – Welcome

Sonya opened the meeting and welcomed the members.

## Agenda item: 2 – Action item updates

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

## Agenda item: 3 – Tax time related documentation

Two updated [change advices](#) have been published since the last meeting:

CA2022 - 003 Loss Carry Back Extension

CA2022 - 004 Flexible super - Repealing the work test for voluntary contributions

One [draft instruction](#) was also published since the last meeting:

Draft Research & Development tax incentive schedule instructions 2022

The group was advised of the new [Rates and Thresholds table](#) in Collaboration Hub. Whilst the list is not exhaustive, we hope it will provide greater ease with locating necessary rates and thresholds.

## Agenda item: 4 – XBRL to XML transition update

The group was provided a run through of the plans for the XBRL to XML transition for the next financial year. The [release on page](#) (ROAP) will start to reflect confirmed dates once feedback has been received, with this being the same approach as taken last year. We anticipate that there may be changes to the plan as a result of possible legislative requirements for the next financial year. The group was thanked for their feedback so far. In October/November, we will reach out to DSPs with drafts and will have more details as we approach.

The draft specifications will be published in the [Knowledge base](#) for review and feedback as they become available.

[XBRL to XML Roadmap update presentation](#)

[XBRL to XML conversion principles](#)

It was confirmed the early balancer schedules for 2023 can still be lodged with XBRL.

## Agenda item: 5 – Loss carry back update

### 2023 Early Balancer SAP

As discussed at the PLS working group meeting on 1 March, it was confirmed that labels to enable 2023 losses to be carried back using the 2022 service would not be built.

There was discussion on building the necessary validations to enable 2022 and earlier year losses to be carried back using the 2022 service for an early balancer SAP, however based on feedback from the group this will not be proceeding. When published, early SAP guidance for 2023 will set out the lodgment channels for LCB claims.

It was confirmed that we would not be including the 2022 labels in the 2021 LCB schedule. The 2022 labels were added into the 2021 CTR to enable early balancing SAPs to access this stimulus payment prior to 30 June 2022 as an extraordinary out of pattern approach. It is not our intention that the change in choice schedule should also be built with the additional labels to accommodate this. The number of early balancing SAPs, who have lodged using the 2021 form, who subsequently request a change a choice is anticipated to be extremely small.

### Agenda item: 6 – Update on general matters and Tax time delivery

The 2022 FBT return will be available late March for lodgment 1 April. Requests for access to production (PVT ticket) must be requested via Online Services.

There is a change to the action number for TRT and PTR 2022 services in EVTE – please refer to the new SBR Service Registry as it is changing from 009 to 010.

The new Individual Income Tax Return Profile service (IITRPRFL) will also be available in EVTE after this weekend.

There was mention of Private Health prefill information that is still missing from ATO responses. This is a known ATO issue and the DPO is seeking an update with no ETA at the moment.

### Agenda item: 7 – Delivery update

The EVTE release for March is occurring this weekend and a large proportion of legislation changes will be implemented. A second April EVTE release has been planned on the 29th of April to accommodate any budget announcements or cyclical changes that are not available for the 9th of April (first EVTE) release. Any issues will be attempted to be targeted in May. The conversion of artefacts to a final version will occur in March.

Changes coming to the program roadmap:

Special characters – unable to get them in before Tax Time this year. IITR, Income details schedule, AMIT and CTR have updated organisation names to accept the additional characters.

Conformance suite data update of identifiers and demographic details have been updated for 2022 tax time services, however there is a pause on all other existing conformance suites. This will be rescheduled for next financial year.

## Agenda item: 8 – Platform update

Platforms are currently operating as expected with no issues to report.

1 March – Delays were experienced with BBRP responses in PROD for approximately 50 minutes

8 March – issues with EVTE SBR1 & 2 – DSPs unable to connect to that environment due to an issue with the SAML token and this has now been resolved.

10 March - similar issue, impacted certificates.

15 March - 26 min delay caused by the database. Stuck messages are being replayed.

## Agenda item: 9 – Agent online environment update

The Q1 deployment was successful and testing was completed today with no significant issues. There is a new non-concessional contribution Single Page Application (SPA) available.

Feedback was requested from the group on whether they received requests from users for practice wide status of lodgment base, as currently OSFA only supports on-demand reports for IT and AS status. The Group identified Outstanding FBT reports as a ideal additional candidate to add to the one demand report list. The group was asked if they noticed any issues in OSFA with no one reporting any issues.

## Agenda item: 10 – DSP communications update

The weekly DSP newsletter will be sent out on Wednesday. The software developers website is being reviewed to see if any content needs to go onto the ATO website content or OSDSPs. There were over 500,000 views last year. The DSP experience feedback survey will likely be issued later this week.

## Agenda item: 11 – DSP feedback

DPO will follow up business on the expected release of the PAYG withholding tax tables noting they are usually published each year in mid-June, along with key information for employers at the [tax tables landing page](#).