



Key Outcomes

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Title:	PLS working group – Key outcomes		
Issue date:	14 April 2022		
Venue:	WEBEX		
Event date:	12 April 2022	Start: 1:00pm	Finish: 2:00pm

Chair:	Sonya Summers	Facilitator:	Sonya Summers
Contact	Kaethe Seidel-Wynne	Contact phone:	02 9208 9374

Attendees: names/section	<p>ATO – Danny Figueiredo, Felicity Stokes, Sangitha Sivayogaraj, Sonya Summers, Katrena Cawthorne, Anupama Duggirala, Esther Daniell, Matthew Musolino,</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) Darin Carter, Wenmin Lu, Kelvin Newton (Xero), Misha Ali (eTax), Sandeep Gopalan (GovReports), Shane Paxton (Thomson Reuters)</p>
Apologies: name/section	<p>Saiful Larry (Access Group), Paul Salcombe (Business Automation Works), Trajan Goldsworthy (eTax), Lex Edmonds (MicroTax), Andrew Smith, Andreas Robertson (MYOB), Nathan Kerr (One Click), Andrew Noble (Noble Accounting), Chardutta More (Sparken), James Barillaro, Alex Jacklin, Ankit Rawat (Thomson Reuters), Krunal Patel, Farah Shaikh, Patrick Bogle, Danna Zheng (Wolters Kluwer),</p>

Agenda item: 1 – Welcome

Sonya welcomed the group and advised that we are considering options on whether the Tax Time event this year will be able to be held in person and queried DSP preference.

Agenda item: 2 – Action item updates

There are no open action items. ([see action items](#))

Agenda item: 3 – Tax time related documentation

The change advice for Enhanced Prefill Bank Interest [CA2022-009](#) has been published in Collaboration Hub.

Agenda item: 4 – Enhanced Prefill Interest Income, Change Advice

From Tax Time 2022, the bank interest component of the prefill service will be further enhanced in the individual tax return, providing greater certainty of data. Enhanced prefill will see a new key indicator added to both the OSfA prefilling report and the SBR prefill service within PLS to alert the agent to high certainty interest data.

There is no shift in experience expected where correct interest income is reported, however there will be an experience shift where the ATO believes there may be underreporting of interest income and no use of the prefill service.

The experience shift will come in the way of the agent needing to notify of an adjustment reason of the prefilled interest amount available. It was confirmed that reason for adjustment will be taken into consideration with any post lodgment compliance action.

Refer to the [presentation pack](#) for additional details.

The group raised queries about consolidating adjustment reasons. The following examples have been provided:

Scenario: What if there are more than 20 records that require an adjustment reason?

Answer: In the first 19 records display the interest amount and individual adjustment reason for those records from highest to lowest interest income. The 20th record will be a consolidation of the remaining records with the same adjustment reason.

Examples

If there were 25 records that required an adjustment reason and the reasons are exactly the same:

- include separately the first 19 records from highest to lowest interest income with an adjustment reason
- consolidate the 20th record with the records with the same adjustment reason

If there were 25 records that required an adjustment reason and the reasons are different:

- include separately the first 18 records from highest to lowest interest income with an adjustment reason
- consolidate the 19th record with all other records with the first same reason code
- consolidate the 20th record with all other records with the same second reason code

If there were 25 records and 22 of those records require an adjustment reason and the remaining 3 do not:

- Include separately the first 18 records from highest to lowest interest income with an adjustment reason
- consolidate at row 19 the interest income that have the same adjustment reason
- consolidate at row 20 all remaining income without an adjustment reason.

Agenda item: 5 – Update on general matters and Tax time delivery

Whitelisting for FBT 2022 has been completed. There will be an initial review period after which updates can be made to the [product register](#) on the sbr.gov.au website.

The Individual Income Tax Return (IITR) and Company Tax Return (CTR) Business Implementation Guides (BIGs) have been updated.

Agenda item: 6 – Delivery update

The EVTE release scheduled for 29 April will capture any late cyclical changes and possibly updates to Medicare rates and thresholds. The May EVTE release will include any bug fixes, possibly for CTR Loss Carry Back (LCB).

Issues have been identified around packaging of NITR April publications, where the incorrect wrong version was used and will be updated in the next release on 29 April 2022.

Agenda item: 7 – Platform update

The platforms are currently operating as expected.

EVTE

30 March – an issue was experienced where the system was unable to return the SAML token in SBR2 and was restored after 47 mins.

7 April – Full SBR2 degradation for 15 mins

11 April – there was a full outage in SBR1 where there was a complex issue in the security layer and it is being actively monitored with a post implementation review being conducted.

Agenda item: 8 – Agent online environment update

The 2022 CTR and IITR BIGs were published. There was an issue with on-demand Activity Statement lodgment reports where agents were unable to download. A fix was implemented on 11 April for PLS and Online services for Agents.

Agenda item: 9 – DSP communications update

We are now in Caretaker mode which requires the ATO to be extra vigilant with communications.

The DSP newsletter will issue on Wednesday 13 April and will include a message from Elly Stinchcombe, the new DPPG Assistant Commissioner. Newsletters will issue as normal over the April break.

Agenda item: 10 – DSP feedback

DSPs expressed frustrations with inconsistencies regarding validation rules and specifications. Feedback was noted.