



Australian Government
Australian Taxation Office

Charter



Superannuation Data Standards Technical Group

15 December 2023

Role

Stakeholder Relationship Group

The Superannuation Data Standards Technical Group (SDSTG) is a Stakeholder Relationship Group operated by the ATO.

Its role is to provide a forum to discuss recommendations to the ATO and industry which assist in managing the technical and change aspects of the data standard in alignment with superannuation law.

The ATO will seek to resolve key issues identified by the Superannuation industry which are pertinent to continuous improvement of the superannuation system. This will involve active management of high priority issues.

Scope

The SDSTG will be responsible for:

- interpretation of the Standard, including defining allowable implementations within the constraints of the Standard as defined by law
- elaboration of common technical or business practices within the Standard framework which would assist in driving efficiency and inter-operability
- assessment of the merits and potential impact, timing and cost of changes to the Standard
- engagement and understanding of impacts of changes to enabling services that support fund reporting and SuperStream
- engaging in productive consultation on policy changes that have an impact on SuperStream

Roles and responsibilities

The Chair will ensure the group operates efficiently and effectively to achieve its desired purpose. The Chair should ensure:

- they display integrity, courage and determination
- conflicts of interest are considered, and the appropriate course of action determined and noted in key messages
- they are informed about matters that may arise during group discussions
- they direct the deliberations of the group by framing the issues, setting the tone for discussion and actively engaging members
- members respect and maintain the confidentiality of information provided by others
- members' views are heard while balancing staying on time and on track
- open discussions are encouraged to enable members to

- understand the experience of other members
- present their position on the subject matter, identify issues and any other relevant concerns
- members engage in good faith and respect the expertise and contributions of others

Members are expected to:

- disclose any matters that could be perceived to be, or are, conflicts of interest
- maintain confidentiality of information provided
- actively contribute to the meeting discussion
- engage in good faith and respect the expertise and contributions of others
- bring relevant knowledge and expertise, either from own experience or by canvassing members of any organisation they represent
- provide the views of any association, profession or organisation they are representing, if applicable
- meet their legislative requirements regarding their personal tax obligations
- attend meetings.

The secretariat will support the chair by managing administration matters relating to the group, including

- arranging meetings and distributing agendas
- taking and circulating key messages
- identifying and recording action items noting who is accountable and the timeframes
- managing the forward work program.

Meeting requirements

- the group operate in an environment of transparency where information should standardly be considered public.
- members are not authorised to disclose information that was discussed or provided at a meeting which is declared confidential, or which they ought to reasonably know is confidential, without the prior written approval of the chair.
- the SDSTG will meet quarterly, meetings may be held out of session at the discretion of the chair or more frequently if required.
- meeting papers will be distributed at least 3 business days before a meeting.
- the Secretariat aims to have final key messages distributed to members within 3 weeks of a meeting.
- final key messages will be published on ato.gov.au within 6 weeks of a meeting.