

PLS working group

UPDATE: ACTION ITEM 25/06 - 04

Issue:

The current EFT Reconciliation report specification includes the client name into three component fields:

- Title
- First (Given) Name
- Last (Family) Name

This is consistent with ATO forms such as the ITR, Activity Statement etc, but is different to the ELS report that provided the full name in an unstructured field.

The report as currently generated includes the Last Name in a Last Name field and a full unstructured client name in the First Name field. This is inconsistent with the specifications and causes problems for some of the DSPs. These include:

- rendering the name on a report can be confusing as the unstructured name and Last Name fields both contain the last name and the name therefore appears twice on the report;
- DSPs that wish to import the name details into a table must find a method for parsing the unstructured full name; and
- the design breaks the current schema.

Background

The issue was raised on a problem ticket through Online Services for DSPs. It was subsequently raised at the PLS Working Group and a change was requested. A proposed change was subsequently taken to this group proposing to update the specification to match the report. The members of the working group rejected this proposal and asked for the report to be modified to match the specification. The ATO agreed to re-visit the design and asked for feedback from the DSPs. DSPs sought clarification on the proposed approach as it appeared to be breaking the schema.

Changing the report requires a change in the ATO back end mainframe services. Given the current priorities this will not be able to be completed before Q3 and is not currently prioritised into that release.

There is no easy method to parse the unstructured name given the variety of title and name structures.

Proposed solution

- The ATO will update the schema to incorporate an additional field in the report for Unstructured Client Full Name. This will be in addition to the existing Title, First Name and Last Name fields in the report.
- The unstructured name will be inserted into the new field;

- The Title and First Name fields will be left blank;
- The Last Name will continue to be populated into the Last Name field and
- When the back end changes have been implemented the report will be populated with the structured name data elements in addition to the unstructured name.

Rationale

- The proposed approach will provide developers the option to utilise the unstructured full name in reports and ignore the structured name fields during this interim period;
- Developers who do not wish to use the full name can still consume the structured fields and will have the Last Name populated into the report;
- When the changes are implemented to the ATO back end systems, developers that have opted to utilise the unstructured full name will be able to continue to do so without additional changes; and
- Developers relying on the structured fields will receive the Title, First Name and Last Name without making additional changes.

This approach was recommended to minimise the breaking change to developers and provide an earlier solution than would be achievable when relying on the ATO back end changes. This approach was also recommended in direct feedback from developers.

Timing

Approximate timings for the proposed changes are:

- Interim (Unstructured Name) change – 19Q4 (Proposed).
- End state (Structured and Unstructured Name) change – TBD