

Action Item	Description	Action by	Status	Update
18/02 - 01	The scripting will be reviewed to ensure it covers the scenario where an agent may not receive their EFTRS report and their FIAs are end-dated due to unsubscribing and re-subscribing to EFTRS.	David Baker	In progress	03 Mar: Follow up is still progressing 19 Feb: David Baker advised David Zink was looking into the matter
04/02 - 02	DPO to follow up when the final version of the 2020 FBT form (NAT 1067) will be available.	DPO	Closed	5 Feb: The final version is now available in Controlled information both on the Software Developers website and in Online Services for DSPs.
02/02 - 01	DPO to follow up when the draft form for NAT 1371 will be published.	DPO	Closed	7 Feb: The draft form was published in Controlled information on the Software Developers website and in Online Services for DSPs. 5 Feb: The DPO is following up the draft form and will published it as soon as it becomes available.
21/01 - 02	Carl Bennett will further investigate the population errors in the PLS Dashboard metrics.	Carl Bennett	Closed	4 Feb: The root cause of the delayed PLS batch numbers on the dashboard has been found, and a solution has been tested and implemented.
21/01 - 01	Carl Bennett will provide concessional date information for DSPs to guide their clients. A query was further raised that this issue also applies to late-balancing ITRs.	Carl Bennett	In progress	03 Mar: We are still waiting on the DSP who reported the issue to re-run the report to confirm whether or not there is still an issue. 18 Feb: Post the ASFP release it was expected to take 3 weeks to refresh all activity statements due dates. Since the DSPs report was run on the 13 January some of the due dates may not have been updated. We are waiting for the DSP to re-run the report and advise if there are any anomalies - INC000036526601 4 Feb: Clarification has been provided. Across all channels only one date is displayed, the ATO do not display multiple dates to agents or their clients – the due date displayed can be the legislative due date, a concessional due date (if form and client are eligible) or a deferred date if a deferral has been granted. No reasons are

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				<p>displayed to agents or their clients, only the current due date is displayed.</p> <p>All online service channels (ATO Online, portals and software) use the same logic and will display the latter* of either:</p> <ul style="list-style-type: none"> • stored due date Integrated processing system has at time of activity statements generate or, • Integrated Core Processing (ICP) due date – Deferrals may have been lodged or applied to the activity statements due date since the generate run <p>Rules for concessional due dates are easiest from website as there is detailed reference to eligibility criteria and AS obligations/forms that can be eligible:</p> <ul style="list-style-type: none"> • Two week lodgment concession – terms and conditions (this covers the rules for self-preparers) • Tax agent lodgment program (this covers agent rules for activity statements) <p>Carl Bennett reported an active incident is currently being investigated. DSP have been asked to provide examples to investigate further.</p>

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10/12 - 04	DSPs are requesting access to the IITR BIG (draft) as soon as possible.	Dino Di Lorenzo	Closed	21 Jan: Draft IITR BIG has been issued to the group for review and feedback. Ross Barns presented an update on the draft IITR BIG during the meeting. 11 Dec: Dino advised the Draft IITR BIG could available in early Feb 2020 but aiming for mid to late Jan 2020
10/12 - 03	Sangitha will follow up the proposed R&D changes to ensure specs are provided to cover Substituted Accounting Period (SAP) clients as this was a gap last year.	Sangitha Sivayogaraj	In progress	03 Mar: No further update 18 Feb: Following up with business for advice. 4 Feb: Following up with business for advice. 21 Jan: No update - pending business guidance.
10/12 - 02	DSPs are requesting the 2020 OSfA (portal) pre-filling report specs	DPO	In progress	03 Mar: No further updates at this time 18 Feb: Updated advice from the responsible teams is that the portal pre-fill specs will not be available until April. Waiting for confirmation from EST. 4 Feb: There has been a change in teams who will be providing the pre-filling report. This report is now expected to become available in late February. 21 Jan: Advised by business that pre-filling report should be available for DSPs from early February.
10/12 - 01	Sangitha will provide a timeline for when DSPs can expect the IITR granular data changes in EVTE for testing.	Sangitha Sivayogaraj	Closed	21 Jan: This was received on 11 Dec and published with the outcomes from last meeting. 11 Dec: Published on Software developers website: https://softwaredevelopers.ato.gov.au/PLSWG_20191210
26/11 - 03	A suggestion was put forward in regard to the 'God rule' where PLS reports return all outstanding lodgements for a client rather than	David Baker/DPO	In progress	03 Mar: No further updates at this time 18 Feb: No update at this stage. Discussions are occurring internally - we will update the group once we have determined the next steps. 4 Feb: Following on from the conversation last meeting, the DPO will follow up to see what options are available and update the group. 4 Feb: The PLS working group meeting on 4 Feb is extended to allow DSPs to provide

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	just those obligations for which the agent has responsibility. DSPs would like to see an option to select which obligations were returned in these reports.			<p>any feedback regarding the on demand reports.</p> <p>21 Jan: Discussions were held with the DSP who raised the issue to ensure there was proper understanding. There will be an opportunity for any DSPs interested to attend an additional meeting to provide any further feedback.</p> <p>10 Dec: We will need some further information here. The view of the team is that the information should be available to DSPs to filter out at the client side. So if the God Rule applies it brings back everything the software should limit or filter out any information not required based on input from the agent as to what they want to see, in their software.</p> <p><u>Further discussion</u> to occur out-of-session to fully understand the problem to find a way to resolution.</p>

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12/11 - 03	David Baker will provide an update on re-establishing a tax agent link to a client with a recent deceased client indicator. Carl will clarify whether the agent needs to BE the executor or simply have authority from the executor to complete the declaration to add a deceased client.	David Baker/Carl Bennett	Closed	<p>11 Dec: Carl has provided clarification on the wording of the declaration in Online Services for Agents for adding deceased clients. Agents cannot proceed to add unless they check the checkbox <i>"I confirm that I am aware this client is deceased and that I am the executor or administrator of their estate with grant of probate or letters of administration."</i></p> <p>10 Dec: Carl clarified that in the last quarterly deployment there was an update to allow agents to add a client with a deceased indicator once they ticked a new declaration indicating they had authority to act in the capacity of Executor or had authority from the executor – Carl will clarify this last point</p> <p>26 Nov: no update, will discuss in more detail next meeting</p>
12/11 - 02	David Baker will investigate an issue around an agent being unable to change their address at the time of adding a new client – it comes across direct form TPB records and cannot be edited at that time – needs to be done in a separate step.	David Baker/Carl Bennett	Closed	<p>21 Jan: Clarification has been provided below:</p> <p>Online services for agents (OSfA)</p> <ul style="list-style-type: none"> • If referring to Online services for agents (OSfA) the agent can link to the client and update the clients postal address in the one step. • The agent can choose to use their postal address or retain the clients. • The postal address for the registered agent number is the one we have on record as advised by the Tax Practitioner Board (TPB). <p>Practitioner Lodgment Service (PLS)</p> <ul style="list-style-type: none"> • A relationship (client link) must be established before accessing or using the PLS for a particular client, including updating addresses • Where the agent is linked to the IT role they are also able to update client details for other roles such as activity statements (God Rule) • The agents postal address used is the one stored against the intermediary account on the ATO register. • The agent can choose to update the address to their own or retain the clients. • The only way an agent can update the postal address for their intermediary

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				<p>account is to advise the Tax Practitioner Board (TPB).</p> <ul style="list-style-type: none"> The TPB sends the ATO an update file each night so any updates made with the TPB one day will update the ATO records overnight. <p>Intermediary postal addresses.</p> <ul style="list-style-type: none"> Intermediary postal addresses are maintained and sourced from the Tax Practitioner Board (TPB). The TPB sends updated registration information to the ATO each night. The ATO updates the intermediary details when the file is received. This means updates with the TPB one day will update ATO record ready for the next day. <p>10 Dec: When an agent adds a new client, their address is updated directly from tax Practitioner Board records. The issue is that if this address is not appropriate for the client's postal address, it cannot be edited at this step – another step is required to go back an edit it (e.g. adding c/-). Carl Bennett will investigate further.</p> <p>26 Nov: no update available</p>

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29/10 - 01	Sangitha Sivayogaraj will follow up to confirm the naming issues raised in relation to lodging NLA and Dividend and Interest schedules for trusts or entities with # in the name have been resolved.	Sangitha Sivayogaraj	In progress	<p>03 Mar: No further update</p> <p>18 Feb: No movement, still waiting for business to confirm and drive the change</p> <p>4 Feb: Pending business guidance</p> <p>21 Jan: No progress over the shutdown period. Still waiting for business direction on how to proceed.</p> <p>10 Dec: We are still waiting for business direction on how best to resolve this issue.</p> <p>26 Nov: The last update on the 20/11 is that this is still with the business areas to progress.</p> <p>12 Nov: This issue is still being investigated, with the possibility of a fix being required. It has been referred back to business for quality checking.</p>
06/08 - 02	DPO will follow up to see whether there is a Change Advice which can be published in relation to the First Home Super Saver scheme.	DPO/ Danny Figueiredo/ David Baker	In progress	<p>03 Mar: The FHSS change advice was published on 24 Feb. It was raised that the change advice did not contain adequate detail. Kevin will send through questions which are not addressed. DPO will follow up with business.</p> <p>Validation change - VR.ATO.IITR.100043 “Adjusted taxable income is incorrect” This validation previously included the first home super saver released amount when calculating adjusted taxable income. The validation has now been updated to ensure that adjusted taxable income excludes any assessable first home super saver released amount.</p> <p>As a result of this validation change – the following validations will also require updating as the taxable income now excludes any assessable first home super saver released amount:</p> <ul style="list-style-type: none"> • VR.ATO.IITR.400065 • VR.ATO.IITR.400006 • VR.ATO.IITR.300010 • VR.ATO.IITR.300011 • VR.ATO.IITR.300012 • VR.ATO.IITR.400066 • VR.ATO.IITR.300005 <p>In addition, the report guidance for “Spouse's taxable income” has also been updated to ensure any assessable First home super saver released amount is also</p>

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				<p>excluded.</p> <p>18 Feb: The update is scheduled for Q2 release. Still following up change advice with business.</p> <p>4 Feb: No further update. DPO is following up with business for further advice.</p> <p>21 Jan: The change is scheduled for implementation before Tax Time 2020. DPO is following up if a Change Advice is required.</p> <p>10 Dec: This is logged as Feature/TFS 1573135. Date for deployment is still TBA.</p> <p>26 Nov: the ATI/FHSS issue was presented at the Super PMG (product management group) on 21/11/2019 and was voted on. The change was approved and is now available for technical change implementation and deployment. Date is still TBA.</p> <p>12 Nov: No further update – still awaiting approval.</p> <p>29 Oct: No further update – still awaiting approval.</p> <p>15 Oct: This is current pending final approval and all DSPs will be informed once completed.</p> <p>01 Oct: There were 2 different questions related to this action item:</p> <ol style="list-style-type: none"> 1. Requested update to Validation rule CMN.ATO.IITR.000236 as it did not contain FHSS tax withheld amount. UPDATE: Confirmed with the relevant ATO business area that there will be no change to the Validation Rule and the ATO instructions are as per Total tax withheld 2019 guidance (link). 2. The current validation for Adjusted Taxable Income (ATI) does not factor in the FHSS component. This was found not to be consistent with the information available on the ATO website and may prevent agents from lodging their client's IITR. As a result of the change to this validation there are flow on impacts to various other validations as they also use the Adjusted Taxable Income field that is being changed above. <p>In addition, the Report Guidance for Spouse's Taxable Income is also not consistent with the information available on the ATO website. Currently it advises agents to include spouse's taxable income not factoring in the FHSS income which is incorrect. Changes to the above have been requested and we have received technical advice and it was agreed that we are to exclude the FHSS for the spouse's income. This is current pending final approval and all DSPs will be informed once completed.</p>

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				<p>03 Sept: The ATO business team has advised that information has been drafted and has been sent for relevant stakeholders approvals.</p> <p>20 August: Apologies there was no change advice provided. The matter is being reviewed to ensure the validation rules are being triggered appropriately. If not an update must be made to SBR and not rely on the work around as previously informed.</p>

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25/06 - 02	Warren will provide an update on the work occurring on handling 'interactive errors'.	Warren Sturgiss	In progress	<p>03 Mar: It is expected that the final document will be published next week.</p> <p>18 Feb: no further update</p> <p>4 Feb: The document is awaiting formal review, Warren is currently seeking confirmation to release a 'draft' version.</p> <p>21 Jan: Still awaiting publishing on sbr.gov.au – will provide link as soon as it becomes available. Warren will advise if a draft document can be made available to DSPs.</p> <p>10 Dec: Still awaiting publishing on sbr.gov.au – will provide link as soon as it becomes available.</p> <p>26 Nov: The document is awaiting final approval for publishing and will be available on SBR.gov.au – we will provide the link in the outcomes as soon as it is live.</p> <p>12 Nov: The document is awaiting final approval for publishing and should be available by 15/11.</p> <p>29 Oct: Unfortunately there have been delays in preparing the documentation, but it is on track to be finalised by the end of 01/11/2019, including the list of IEH provided by Paul (action item 06/08 – 01)</p> <p>15 Oct: Warren advised that they are tracking to have this one page notification on the decision framework around maintaining rules in the IEH engine or via VaTS (Validation Rules) we publish via the PCN. Document to be provided for publishing by COB 25/10/2019.</p> <p>01 Oct: DWIS will be able to refocus on this item and should be finalised by the end of the month.</p> <p>03 Sept: DWIS: Individual issues raised outside of this action item are being reviewed independently. The IEH concerns regarding the decisions around maintaining a rule within the IEH engine or VaTS is still in progress.</p> <p>20 August: work has progressed on the IEH / VaTS process, with the expectation to deliver this information to DSP's once final.</p> <p>06 August: DWIS: The DPO is continuing to compile a list of IEH concerns raised by DSP's on behalf of their clients. Once this list is provided, The ATO can undertake the analysis</p>

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				<p>and start to work towards a 'position paper' that can be communicated to DSP's around the decision making that supports rules being maintained in either Validation Rules or moved into the Interactive Error Handling engine.</p> <p>DPO: The DPO has identified a number of errors that have created some confusion with DSPs and clients. This will be circulated for comment. DSPs are requested to add to the list and provide any examples where these errors have provided misleading advice. In the interim, DWIS will determine the triggers that can result in these errors and, where appropriate, provide that advice to the DSPS.</p> <p>23 July: No further update at this time</p> <p>09 July: Warren gave a brief overview, however work is still continuing and more information will be provided to the group as it becomes available.</p>

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19/02 - 10	Mick Ferris will provide more detail around decision to update WPN from 11 digits to 9, and how this will work retrospectively. (Reckon)	Mick Ferris	In progress	<p>03 Mar: No further update at this time</p> <p>18 Feb: went into Jan EVTE and still targeted for Q1. Further update will be provided after Q1 deployment</p> <p>4 Feb: WPN change for CUREL is scheduled to go into production during Q1. Changes to other services are pending.</p> <p>21 Jan: WPN change was implemented into the January EVTE on 17 January for CUREL only. Other deployments are pending.</p> <p>10 Dec: No further update at this time – awaiting deployment</p> <p>26 Nov: No further update at this time – awaiting deployment</p> <p>12 Nov: This fix is expected to be deployed in Jan 2020 EVTE release and Q1 for production.</p> <p>12 Nov: No further update at this time – awaiting deployment</p> <p>29 Oct: Resolving the on-going WPN issue has come into the delivery space, and a timeframe for release should be available soon.</p> <p>15 Oct: No further update at this time – awaiting deployment</p> <p>01 Oct: No further update at this time – awaiting deployment</p> <p>03 Sept: No further update at this time – awaiting deployment</p> <p>20 August: No further update at this time – awaiting deployment</p> <p>06 August: No further update at this time – awaiting deployment</p> <p>23 July: No further update at this time – awaiting deployment</p> <p>09 July: No further update at this time – awaiting deployment</p> <p>25 June: No further update at this time – awaiting deployment</p> <p>11 June: No further update at this time – awaiting deployment</p> <p>28 May: No further update at this time – awaiting deployment</p> <p>14 May: No further update at this time – awaiting deployment</p> <p>30 April: No further update at this time – awaiting deployment</p> <p>16 April: No further update at this time – awaiting deployment</p> <p>02 April: Mick confirms a fixed is planned (allowing the field to accept leading zeros to extend the length of the WPN in the ABN field). No date planned for the fix, but it will not be included in the next EVTE release.</p> <p>20 March: Mick will provide confirmation that '11' is the correct length.</p>

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				<p>20 March: For prior services deployed into production, the WPN will remain. Updating will cause a breaking change to the service, to modify the schema. Going forward, the correct length will be used in services deployed.</p> <p>5 March: Mick is still waiting for information</p>