

Action Item	Description	Action by	Status	Update
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 in SBR.	David Baker	In progress	
12/11 - 02	David Baker will provide an update on a client being unable to change their tax agents address in ATO Online.	David Baker	In progress	
12/11 - 01	Danny will provide an update on EVTE during the ASFP shutdown at the next meeting.	Danny Figueiredo	In progress	
TT event	Ross Barns committed to		Closed	Ross has now provided content on ato.gov.au on the intended use of the IITRPRFL service :

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	providing a statement outlining the intended use of the ITRPREFL service.			

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29/10 - 02	David Baker will provide an overview of work planned during both the Christmas and Easter shutdown periods.	David Baker	In progress	<p><b>12 Nov:</b>  <u>ASFP shutdown</u> – 24 December 2019 6:15pm to 1 January 2020 11.30pm (Extended but not yet endorsed to 24 December 2019 12.00pm to 2 January 2020 6.00am). All systems are offline except STP and some Super applications which will be operating in a catch and hold mode only.  <u>Easter shutdown</u> – 9 April 2020 11:00pm to 14 April 2020 7.00am</p> <p>Full Outage to core systems:</p> <ul style="list-style-type: none"> <li>• IPS (BAS generation),</li> <li>• Tax Practitioner Database,</li> <li>• ATOO (ATO Online for Individuals and Agents),</li> <li>• CAL (logging),</li> <li>• EAI (transaction management),</li> <li>• ICP (mainframe tax system),</li> <li>• Siebel (customer relationship),</li> <li>• ICP CICS (mainframe management),</li> <li>• DASP (data storage),</li> <li>• SuperTick (super systems),</li> <li>• Access manager, and</li> </ul> <p>SBR2 – inclusive of PLS and STP.</p>
29/10 - 01	David Baker/Sangitha Sivayogaraj will follow up to confirm the naming issues raised in relation to lodging NLA for trusts or entities with # in the name have been resolved.	David Baker/Sangitha Sivayogaraj	In progress	<p><b>12 Nov:</b> 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>

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15/10 - 02	David Baker will work with Paul Walters to develop scripts for call centre staff to support enquiries coming in related to EFTRS not being generated and end-dated FIDs – possibly related to agents unsubscribing and re-subscribing to EFTRS.	David Baker	Closed	<b>29 Oct:</b> This has been referred to the Registered Agent Support team who are investigating this issue with the aim in mind to having the relevant scripting changed.
15/10 - 01	Account managers to touch base with DSPs to gauge interest/ability to support the addition of an informative message when a FRCGTW credit is completed on CTR.	DPO account managers	Closed	<b>29 Oct:</b> Feedback is starting to come in – once we have it all, we will forward it through to Laurence.

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01/10 - 01	DWIS to confirm that the sequencing in the ITR Granular Data service is available to track errors.	Damien Rush/Cameron Loo	<b>Closed</b>	<p><b>15 Oct:</b> Damien Rush has confirmed that the error should contain a location, for example: /tns:INCDTLS/tns:Rp/tns:IncomeCollection/tns:Income[3] /tns:OrganisationNameDetails/tns:SalaryOrWages /tns:TaxPayAsYouGoWithholdingCreditTaxWithheldSalaryOrWagesA</p> <p>The [3] in this example is referencing the third instance of the tuple in the collection.</p>
06/08 - 03	Spouse preservation age issue	Mick Ferris/DPO	<b>Closed</b>	<p><b>29 Oct:</b> Cameron has provided the validation rules document – it will be made available to the group by request through OS4Ds.</p> <p><b>29 Oct:</b> The relaxation of the Validation Rule was deployed to PROD on 25/10. EVTE will be retrofitted in November EVTE drop. Cameron will provide details of the changes to the group.</p> <p><b>15 Oct:</b> Cameron Loo confirmed Reckon’s analysis is correct. This scenario has been validated with the Business. The Validation Rule is in the process of being reviewed and a new fix will be applied after.</p> <p>As spouse SLS payment date is not collected by the ATO, the Validation Rule will need to be relaxed to meet the outcome. This relaxation is awaiting business approval.</p> <p><b>01 Oct:</b> Confirmation from technical team that a fix has gone into EVTE on 24/09, and PROD hotfix was deployed on 26/09. We will leave this open until next meeting once confirmation of production fix is confirmed.</p> <p>Cameron Loo will investigate the issue with the reduced age limits raised by Reckon which results in errors in common scenarios.</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	<b>In progress</b>	<p><b>12 Nov:</b> No further update – still awaiting approval.</p> <p><b>29 Oct:</b> No further update – still awaiting approval.</p> <p><b>15 Oct:</b> This is current pending final approval and all DSPs will be informed once completed.</p> <p><b>01 Oct:</b> There were 2 different questions related to this action item:</p> <ol style="list-style-type: none"> <li>1. Requested update to Validation rule CMN.ATO.ITR.000236 as it did not contain FHSS tax withheld amount. <b>UPDATE:</b> 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 (<a href="#">link</a>).</li> <li>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</li> </ol>

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				<p>website and may prevent agents from lodging their client's IITR.</p> <p>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> <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.</p> <p>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> <p><b>03 Sept:</b> The ATO business team has advised that information has been drafted and has been sent for relevant stakeholders approvals.</p> <p><b>20 August:</b> 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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06/08 - 01	The DPO has been compiling a list of interactive errors which have previously been identified as being unclear. Paul W. will send out the list to DSPs and DSPs will continue to send through examples.	Paul Walters	In progress	<p><b>12 Nov:</b> <i>Waiting on action item 25/06 - 02</i></p> <p><b>29 Oct:</b> <i>Waiting on action item 25/06 - 02</i></p> <p><b>15 Oct:</b> Document has been provided and will be published with the outcomes and action item updates for action item 25/06 - 02.</p> <p><b>01 Oct:</b> No update as Paul is on leave. This item will be closed during the next meeting.</p> <p><b>03 Sept:</b> Relevant IEH codes have been extracted from various sources including OS4DSPs, DSP emails and internal reviews and currently being consolidated. The list should be available by 05/09/19.</p> <p><b>20 August:</b> A review of the AS processing code has identified a number of mismatches between internal error codes and SBR errors. These are being discussed currently and will be added to the list of problem IEH codes for consideration.</p>												
23/07 - 02	DSPs queried whether there have been many incidences of clients exceeding the maximum number of records for a label and consolidating records, or just providing totals at the consolidation record.	Ross Barns	Closed	<p><b>06 August:</b></p> <p>Overall there have been 112 Deductions schedules lodged @ 2<sup>nd</sup> August 2019 whereby a client had reached the limit of the repeatable fields. (Total number of Deduction Schedules was just over 1.5 million.) These are distributed across a number of software suppliers. The labels impacted are:</p> <table> <tbody> <tr> <td>D01 (Car Expenses)</td> <td>14</td> </tr> <tr> <td>D02 (Travel Expenses)</td> <td>18</td> </tr> <tr> <td>D04 (Self Education Expenses)</td> <td>5</td> </tr> <tr> <td>D05 (Other Work Related Expenses)</td> <td>11</td> </tr> <tr> <td>D09 (Gifts and Donations)</td> <td>64</td> </tr> <tr> <td>Total</td> <td><u>112</u></td> </tr> </tbody> </table>	D01 (Car Expenses)	14	D02 (Travel Expenses)	18	D04 (Self Education Expenses)	5	D05 (Other Work Related Expenses)	11	D09 (Gifts and Donations)	64	Total	<u>112</u>
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23/07 - 01	As DSPs are receiving queries on the level of detail to be provided (how granular is granular) in the deductions schedule, Ross will revisit whether clarifying information can be published on ato.gov.au. He will draft a document for circulation prior to publishing.	Ross Barns	<b>Closed</b>	<p><b>29 Oct:</b> The supporting work has been completed however finalisation of the individual DSP reports has been delayed due to other corporate priorities in relation to the Automation and Artificial Intelligence Exemplar which relates to the use of the granular data as well the progression of the remaining deliverables associated with the Granular Data Program of work. The formal write-up of the reports is expected to be completed soon.</p> <p><b>15 Oct:</b> Analysis has been completed and should be documented by COB 18/10/2019. Based on this we will update any advice via the web and further briefing will be provided to a future meeting of the DSP's.</p> <p><b>01 Oct:</b> There is a webpage up for the deductions schedule. This will be updated soon to provide clarity on the cars and D4 labels. A news article may be released on Services for Tax Agents as an update.</p> <p><b>03 Sept:</b> DSP's will be contacted over the forthcoming 2 weeks where data quality issues have been identified in Tax Agent 2019 returns to determine cause of the issue – system design or user entry. Based on discussions with DSP's and Tax Agents we will look to publish guidance for agents relating to the matters of concern.</p> <p><b>20 August:</b> No further update at this time</p> <p><b>06 August:</b> This matter was again raised at the recent Income Schedule forum in Sydney. Whilst the current granular data being provided by most Tax Agents is in line with specifications and expectations there are some areas that do require further clarity. We are working with our corporate colleagues on the options for publishing a level of guidance for Tax Agents focusing on those areas identified as part of the analysis.</p>
25/06 - 04	Paul will provide an update on the three options which were proposed in the EFTRS solution.	Paul Walters	<b>Closed</b>	<p><b>09 July:</b> Paul provided an update on the proposed changes as a result of DSP feedback. The details will be attached to the Key outcomes form the 09 July meeting.</p>
25/06 - 03	A communication will be sent out to the group outlining the	Sharna Maltman	<b>In progress</b>	<p><b>12 Nov:</b> No further updates</p> <p><b>29 Oct:</b> Work is continuing – update to be provided on 26 November.</p> <p><b>15 Oct:</b> Work is continuing. No further update at this time.</p> <p><b>01 Oct:</b> Sharna Maltman mentioned high level advice has been provide in a recent DSP</p>



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	most appropriate channel for the various enquiry types			<p>newsletter, and further communications will be sent out to provide additional clarity. New ticket types will be trialled shortly and internal processes will be updated for internal business teams.</p> <p><b>03 Sept:</b> The DPO is currently investigating the support model for these particular business/SBR type questions. We are aiming to utilise the Online Services for DSP to better capture required information up front, provide clear SLAs to our clients and harness the tools reporting capability so we can monitor request uptake and time to resolution.</p> <p>The tool will be advertising a 28 day SLA for our SBR related questions and we are also aiming to provide additional information about other avenues for contacting the ATO regarding these questions on the Online Services for DSPs</p> <p><b>20 August:</b> Discussions are continuing, no further update at this time.</p> <p><b>06 August:</b> Kylie is progressing the request with business areas to determine how we will provide a response to general questions and are looking at setting up an escalation process.</p> <p><b>23 July:</b> No further update at this time</p> <p><b>09 July:</b> We are looking at updating our internal processes to be able to facilitate responses to technical questions when they are necessary to help you in building your products. We will come back to the group once we have something definite in place, however with the number of other high priority items we have on hand currently, this may take some time.</p>
25/06 - 02	Warren will provide an update on the work occurring on handling 'interactive errors'.	Warren Sturgiss	In progress	<p><b>12 Nov:</b> The document is awaiting final approval for publishing and should be available by 15/11.</p> <p><b>29 Oct:</b> 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><b>15 Oct:</b> 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.</p> <p>Document to be provided for publishing by COB 25/10/2019.</p> <p><b>01 Oct:</b> DWIS will be able to refocus on this item and should be finalised by the end of the month.</p> <p><b>03 Sept:</b></p> <p><b>DWIS:</b> Individual issues raised outside of this action item are being reviewed independently. The</p>

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				<p>IEH concerns regarding the decisions around maintaining a rule within the IEH engine or VaTS is still in progress.</p> <p><b>20 August:</b> work has progressed on the IEH / VaTS process, with the expectation to deliver this information to DSP's once final.</p> <p><b>06 August:</b></p> <p><b>DWIS:</b> 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 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><b>DPO:</b> 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><b>23 July:</b> No further update at this time</p> <p><b>09 July:</b> 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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25/06 - 01	Ian will provide the group with an overview of what to expect from the agent-based-client amendment process in relation to pre-filled STP data.	Ian Colhoun	Closed	<p><b>06 August:</b> Where an employer amends the income statement for their employees we expect most will continue to notify their employees of any changes, taxpayers can continue to lodge an amendment via ATO online or through their agent as is the current practice to have these changes reflected in the return.</p> <p>Updated information provided by an employer will be visible to an individual through ATO Online, and to agents through Agent Online Services. Changes will also be reflected in prefill data for any subsequent lodgements.</p> <p>In addition to this we will review returns of clients where the ATO is notified by the employer of a change to reported STP data. Where we assess the change to have a material impact to the refund for the client and they haven't self-amended we will provide them with an amended Notice of Assessment and the additional refund.</p> <p>In cases where the change may result in a debt and our risk rules identifies the return needs to be corrected and results in a debt, we will contact the client to notify them of the difference and give them an opportunity to review the updated data before we issue a debit assessment to the client.</p> <p>The processes and systems that will enable us to use the new STP data to amend client returns are currently being built and are expected to start during the current 19/20 year.</p> <p>For those employers that have not commenced STP reporting and issue payment summaries to their employers and subsequently makes a change to them; the ATO does apply the above strategies to ensure accuracy of income tax assessment outcome. Employers are also required to reissue a new payment summary to individuals.</p> <p><b>23 July:</b> No further update at this time</p> <p><b>09 July:</b> Work is continuing on preparing this overview.</p>
11/06 - 01	A query was raised in relation to instructions for the IITR deductions schedule – whether there would be any	Ross Barns	Closed	<p><b>25 June:</b> At this stage we are not intending to publish anything specifically for accountants to ATO.GOV.AU. We will monitor the feedback from both DSP and practitioners via our call centres and address specific issues as they arise. DSP's are welcome to share the Q&amp;A document that supports the development of the deduction schedule with clients.</p> <p><b>11 June:</b> Ross advised there was no current plan to publish details or instructions, however he will review the deductions schedule Q&amp;A document to determine whether there is a level of detail which would be of use to agents. He will report back to the group whether a version of the document can be published on ato.gov.au</p>

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	documentation published on ato.gov.au			
14/05 - 02	An overview of the EFTRS solution proposal will be sent out	DPO/Warren Sturgiss	<b>Closed</b>	<b>27 May:</b> EFTRS proposal slide has now been published <a href="https://softwaredevelopers.ato.gov.au/PLSWG_20190514">https://softwaredevelopers.ato.gov.au/PLSWG_20190514</a> <b>24 May:</b> EFTRS proposal slide received. To be sent for publishing
14/05 - 01	Expressions of interest will be sought from DSPs to be involved in design discussions for the 2020 income schedule granular data	DPO	<b>Closed</b>	<b>28 May:</b> EOIs received
30/04 - 02	DSPs want the specifications for portal IITR pre-fill made available.	David Baker/DPO	<b>Closed</b>	<b>16 May:</b> Sample reports also now published <b>15 May:</b> Pre-fill specifications have now been published <a href="https://softwaredevelopers.ato.gov.au/prefillingreport">https://softwaredevelopers.ato.gov.au/prefillingreport</a> <b>14 May:</b> The pre-fill specs have been sent to publishing 14 May, with the sample reports expected shortly. <b>30 April:</b> David will advise when the pre-fill specifications will be made available.
30/04 - 01	Reckon is experiencing an issue when agents are lodging Simpler BAS and they are prompted to select a GST reporting option,	Nadeem Shariff	<b>Closed</b>	<b>15 Oct:</b> DSPs that raised the concerns at last meeting were re-sent the guidance/information as available from the ATO Activity Statement Business Team. Some DSPs have requested additional information to the ATO where the DPO has responded directly. DPO has nothing further to provide. <b>01 Oct:</b> The guidance provided to all DSPs is available on the SWD website <a href="https://softwaredevelopers.ato.gov.au/PLSWG_20190903">https://softwaredevelopers.ato.gov.au/PLSWG_20190903</a> <b>03 Sept:</b> Reckon has been sent information and guidance from the discussions DPO has acquired from liaising with the Activity Statement business team, their SMEs and the SBR technical teams regarding Simpler BAS reporting problems. The guidance information the DPO

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	yet when one is selected, the lodgement is rejected.			<p>has received aligns with what the technical team also believes to be in place. Reckon has requested additional information based on that response and DPO will provide it Reckon once it's received. The same guidance that was made available to Reckon is available on the SWD website: <a href="https://softwaredevelopers.ato.gov.au/PLSWG_20190903">https://softwaredevelopers.ato.gov.au/PLSWG_20190903</a></p> <p><b>20 August:</b> The DPO is liaising with both the business and technical teams to identify any issues with the information provided and how the system should and actually behave (work).</p> <p><b>06 August:</b> We are progressing, but are still waiting on sign off from business on the final explanation and guidance.</p> <p><b>23 July:</b> We are still waiting on some final details from DWIS and business. Once we have it, we will publish on SWD.</p> <p><b>09 July:</b> Initial analysis has been completed, awaiting final recommendation by next week</p> <p><b>25 June:</b> DWS have been engaged (via Madhavi) – detailed code analysis underway in relation to the reporting options and selections. Once complete, a technical recommendation will follow. This will then be communicated to the DSP community.</p> <p><b>11 June:</b> The activity statement team referred Reckon back to the BIG. Reckon are to make the necessary software changes based on the BIG. Due to the upcoming changes (around early next year) to Activity Statements, any changes to the the current taxonomy are unlikely. The DPO will consider how to communicate this information out more broadly to ensure consistent messaging.</p> <p><b>28 May:</b> DPO (Nadeem) will meet with business then advise Reckon of outcome – will also liaise with account managers of other affected DSPs and get back to the group</p> <p><b>28 May:</b> The activity statement team is reviewing the matter and will follow up with Reckon.</p> <p><b>16 May:</b> Reckon's account manager is in the process of scheduling a discussion with the appropriate ATO SME in relation to the Simpler BAS related MSTs and other documentation. Steven Ivanopoulos has been updated accordingly.</p> <p><b>14 May:</b> Reckon advised that the pre-fill brings in a blank field, and can be returned with a blank field – is this the correct action. Nadeem is seeking further clarification.</p> <p><b>14 May:</b> The BIG states that SBR cannot be used to elect a reporting method. It also states that the supplied reporting method should be used to display to agents. This is supplied as part of the prefill response. A response has been provided to Reckon.</p> <p><b>30 April:</b> Nadeem is working with business to determine a resolution to this issue.</p>

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16/04 - 06	Sage indicated there have been issues with ELS Prior Year lodgement validation reports.	DPO/Paul Mosca	<b>Closed</b>	<p><b>30 April:</b> Incident INC000034229769 has been raised for this issue. As this is a DSP specific incident, it will be dealt directly with DSP outside the PLS Forum.</p> <p><b>16 April:</b> There is already a logged incident and the DPO account manager will request for an update on the incident.</p>
16/04 - 05	Multiple DSPs are experiencing issues with the TPCMR on-demand reports (ie ASLRPT) where the report is never received for the tax agent. The number of these cases are increasing on a daily basis. Account managers have already been looking into these issues via separate incidents.	DPO / Danny Figueiredo, Paul Walters	<b>In progress</b>	<p><b>15 Oct:</b> Systemic issues with EFTRS reports have been resolved. We are now working directly with DSPs with known significant ongoing issues with other TPCMR reports. If you are experiencing significant issues with these reports and do not have an escalated support process in place, please contact your account manager. We will now be closing this action item.</p> <p><b>01 Oct:</b> Continued monitoring and no significant change. There was a problem with the EFTRS reports during last week's systems issues on Tuesday 17<sup>th</sup>, but the ATO's monitoring systems picked up the problem and retriggered the EFTRS reports which were all made available during the day.</p> <p>ATO continues to monitor the other TPCMR reports with the assistance from the reporting DSPs. This item will remain open on this action item list but detailed information will be provided on troubleshooting will be provided directly to DSPs.</p> <p><b>03 Sept:</b>  <u>EFTRS:</u> The internal monitoring and restarting for the batch process has continued to be successful and resulted in no significant platform wide EFTRS problems. Over the last 2 weeks specific EFTRS problems have been resolved with multiple DSPs and the number of tax agent requesting a manual report has significantly decreased.</p> <p><b>20 August:</b> The ATO is currently reviewing the request message structures being used by different DSPs to determine if this is having any impact on the success rate for pulling reports. Investigation of specific cases is continuing in the interim.</p> <p><b>06 August:</b> Since last reported at this forum, there daily monitoring and restarting for the batch process has resulted in no significant platform wide EFTRS problems resulting in non-delivery of reports.</p> <p>Trust/Trustee issue affecting EFTRS reports has been deployed successfully and ATO business and technical teams are monitoring.</p>

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				<p><b>23 July:</b> Due to Tax Time priorities there has not been significant progress on these reports since the last meeting. We will now apply a renewed focus to these issues. Issues with the EFT reconciliation Report batch processing have been identified. The batch process on SBR is terminating unexpectedly. The report is now being monitored daily and restarted if required. Root cause analysis is currently underway</p> <p><b>09 July:</b> High demand at this time has highlighted the need for further consultation on polling cycles and information is still being collected. In the interim we are also continuing to investigate and fix individual defects when identified. A fix was deployed on 24/6 for a bug preventing reports being generated where an agent had no client links at the account level.</p> <p><b>25 June:</b> We have identified that in a number of cases reports are unsuccessful due to the timing of polling attempts and incorrect message standards being applied. Guidance is being developed on the optimal process to follow. Other issues preventing successful reports being pulled are still under investigation.</p> <p><b>11 June:</b> Recent checks show only a small number of reports are failing to complete on the mainframe and in each case investigated a legitimate cause has been identified. We continue to receive advice that agents are not receiving the reports indicating a different issue. This is now under investigation. DSPS should continue to report failures in receiving the reports.</p> <p><b>28 May:</b> DPO will continue to monitor issues – DSPs please do not hesitate to contact the DPO to raise any additional incidents or further information.</p> <p><b>28 May:</b> There was a recent deployment to the ATO backend systems that envisaged the improvement of the TPCMR reports. There have been significant improvements to the services however some specific agents from multiple DSPs are still experiencing issues where the reports are not being received. The ATO/DPO is still investigating these multiple incidents and if DSPs are continuing to receive these problems from agents please do not hesitate to contact the DPO to raise any additional incidents or further information.</p> <p><b>14 May:</b> The update is currently in code review. We are still aiming for deployment 20/5/19.</p> <p><b>30 April:</b> DPO has received an update from the resolver team and that we have identified the root cause for this particular issue.</p> <p>We are currently working on Code fixes for both AS Client Report and AS Client Lodgement Report with an estimated date to complete the code changes, testing and Production deployment for May (proposed date 24th). We will monitor this action item.</p>

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				<b>16 April:</b> DPO account managers and DPO management will look at getting the priority increased as requested by the multiple DSPs.
16/04 - 04	Some DSPs expressed their concern as they have not received some of the IITR 2019 newsletter and DPO bulk communications.	Danny Figueiredo	<b>Closed</b>	<b>30 April:</b> on 18 April, Danny sent all IITR DSPs a copy of all the IITR comms to date. This was sent from his personal ATO mailbox. Some DSPs have responded, thus action item closed. <b>16 April:</b> Danny will re-send DPO emails detailing IITR 2019 changes notifications direct to DSPs developing this service.
16/04 - 03	DSPs expressed concerns over the SMSFAR changes and when it will be released to EVTE	DWS / Anu Duggiraia, Mick Ferris	<b>Closed</b>	<b>14 May:</b> This was deployed to EVTE as a hotfix on 2 <sup>nd</sup> of May Published to SWD website 01/05: <a href="https://softwaredevelopers.ato.gov.au/SMSFARrollback">https://softwaredevelopers.ato.gov.au/SMSFARrollback</a> Alert issued in DSP Newsletter 01/05 <b>30 April:</b> DWS has supplied the ATO SMSFAR planned roll back of changes. Official comms to all DSPs has been drafted and includes the proposed MST file this will bridge the gap as changes are still planned for May EVTE. There will be no changes to the taxonomy. <b>16 April:</b> DWS will determine whether pre-EVTE release or hotfix will be available for SMSF changes which are being rolled back
16/04 - 02	Reckon requested for an update on the availability of the PDF forms which includes the TT19 change details. In past years this would have already been provided.	DPO / I&I	<b>Closed</b>	<b>30 April:</b> Updated draft forms and instructions will be published progressively as they are finalised – a number were sent to publishing this week. The FBT return final form was published on ato.gov.au – and is now also published on the SWD website. <a href="https://softwaredevelopers.ato.gov.au/2019Finalreturnforms">https://softwaredevelopers.ato.gov.au/2019Finalreturnforms</a> <b>16 April:</b> DPO and I&I teams to liaise with other internal ATO teams to source this information for all DSPs



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16/04 - 01	Reckon requested for the updated Tax time change advices to be provided to DSPs regarding. These include but not limited to: <ul style="list-style-type: none"> <li>• Personal tax plan</li> <li>• Instant asset write-off changes for small business</li> </ul>	DPO/ I&I	<b>Closed</b>	<b>30 April:</b> Updated Change Advice has been published 30/04. <b>16 April:</b> DPO and I&I teams to liaise with other internal ATO teams to source this information for all DSPs
02/04-03	DSPs are waiting for the BIGs for IITR 2019 and IITR pre-fill.	DPO	<b>Closed</b>	<b>16 April:</b> These have now been published 12/04 to SBR.gov.au <b>11 April:</b> Dino Di Lorenzo confirmed the BIGs have been updated and are in the process of being sent to publishing, with approval for priority publishing. Expected to be published by Mon 15/04. <b>02 April:</b> Sonia following this up with Ross Barns.
02/04-02	Company Tax Return specifications have not been released.	Mick Ferris	<b>Closed</b>	<b>30 April:</b> Functional changes for RDTIS and CTR have been released in April EVTE release <b>16 April:</b> Expected in EVTE drop 18/04 <b>02 April:</b> Mick to confirm when this will be available and see how DSPs can access this faster.
02/04-01	DPO to publish new IITR Deductions Schedule Q&A to SWD and send	DPO	<b>Closed</b>	<b>11 April:</b> Revised document published to SWD website <b>02 April:</b> Document sent to publishing on 04/04

Action Item	Description	Action by	Status	Update
	out links to members.			
20/03 - 03	Sage and MYOB are having issues with the SBR transaction data statistics reports as they are not provided by the account managers in a consistent manner. Also the current format of PROD2 transmission report is not the same as the previous PROD1 report. Account managers have stated that the ATO is working on this but no solution has yet been provided.	Danny Figueiredo	<b>Closed</b>	<p><b>30 April:</b> In progress. DPO testing the e-commerce reporting solution over the next few weeks. SAGE and MYOB should be receiving the reports from their account manager. Suggested this action item to be closed and dealt with those accounts directly.</p> <p><b>16 April:</b> We are still working on a solution for account managers to be able to do these reports. Danny has been sending the interim reports weekly. Anticipating this issue to be resolved by next meeting.</p> <p><b>11 April:</b> Interim PROD2 reports have been sent to the requesting DSP for 2 weeks. This is still an interim report and DWS ecommerce reporting is still working on a long term solution.</p> <p><b>02 April:</b> Danny is working with the DWS ecommerce team on the PROD2 report.</p> <p><b>20 March:</b> Danny to check with ATO/DWS for an update on the reports</p>
20/03 - 02	DSPs are still experiencing issues with receiving bulk	Scott Rumford	<b>Closed</b>	<p><b>16 April:</b> Our IT security area has advised that we are unable to resolve the issue with the daily email updates at the present time. You can still subscribe to the weekly <b>DSP newsletter</b> and we will continue to look for other opportunities to improve the site and provide other suitable workarounds. This issue will be addressed when we move to the new platform – expected by</p>

Action Item	Description	Action by	Status	Update
	emails generated from the SWD website – daily/weekly updates			end 2019. <b>02 April:</b> No further update at this time <b>20 March:</b> We are working with the security area to get this resolved. Scott will follow up.
20/03 - 01	A focus group will be established for involvement in the design process for the AS service changes. (STP pre-fill, etc)	DPO	<b>Closed</b>	<b>26 March:</b> EOI published in DSP Newsletter <b>20 March:</b> EOI was issued on 26 March. First meeting expected to be scheduled within the next 2 to 3 weeks
05/03 - 01	Do the DSP's who have just moved to Prod 2 need to update certificates, or was that done as part of the move. Sharna to get in touch with Wolters Kluwer	Sharna Maltman	<b>Closed</b>	<b>20 March:</b> The recent SBR1 and SBR2 certificate changes were for the following: <ul style="list-style-type: none"> <li>• SBR2 PROD1 SSL (<a href="https://ato.sbr.gov.au">ato.sbr.gov.au</a>)</li> <li>• Signing certs (<a href="https://signing.sbr.gov.au">signing.sbr.gov.au</a>), and</li> <li>• SBR2 PROD2 Signing certs (<a href="https://signing.sbr.gov.au">signing.sbr.gov.au</a>).</li> <li>• SBR2 <a href="https://prod2.ato.sbr.gov.au">prod2.ato.sbr.gov.au</a> was not changed and it expires 5/12/2020.</li> </ul> <p>Please note that as the <a href="https://signing.sbr.gov.au">signing.sbr.gov.au</a> certificates changed for both PROD1 and PROD2, this needed to be changed as the <a href="https://signing.sbr.gov.au">signing.sbr.gov.au</a> certificates handles integrity verification of the responses from ATO/SBR which is different to the SSL root certificates which to established a trusted connection with SBR/ATO.</p>
05/03 - 02	GovReports were having issues with the DSP online services. GovReports raised a concern that on certain occasions, while	Sharna Maltman	<b>Closed</b>	<b>20 March:</b> GovReports are now successfully using Online Services for DSPs to communicate with us. No further issues have been raised.  Please note also that JIRA was successfully upgraded to the latest version over the weekend.

Action Item	Description	Action by	Status	Update
	updating an existing Jira item, data was not saving. It appeared to GovReports that the Jira item was not updating with their comments or details (sometimes).			
05/03 - 03	Document the whitelisting and PVT process when DSPs are requesting whitelisting for TT19, where DSPs are whitelisted for the TT18 version of the service.	Danny Figueiredo	<b>Closed</b>	<p><b>14 May:</b> An email issued on Fri 10 May to all relevant DSPs outlining the 2019 IITR whitelisting and PVT process, including an attachment with PVT scenarios. Also published on SWD website – link issued in DSP newsletter date 14 May.</p> <p><b>30 April:</b> Based on the comments and feedback from last meeting, the DPO and IITR business team is finalising the PVT process and all DSPs will be communicated via e-mail and newsletter either this week or next week.</p> <p><b>16 April:</b> DPO has been working with the internal ATO business team on the IITR 2019 PVT process which will be required for all DSPs. Danny has contacted some DSPs directly via phone for pre-discussions and presented the draft process for discussion at the meeting on the 16<sup>th</sup>. DSP expressed the need for this information to be sent via e-mail and published as reference. DPO will provide this once all the comments and feedback have been analysed from 16<sup>th</sup> meeting.</p> <p><b>02 April:</b> All DSPs consuming IITR 2019 will need to go through a re-certification process. The PVT process is currently being discussed internally within the ATO and once finalised will be provided to all DSPs via the PLS Working Group forum and other official communication channels. This can be closed once the process is finalised.</p> <p><b>20 March:</b> Waiting on clarification from business whether whitelisting against the new IITR19 service will be required given the number of changes – this will be communicated to all DSPs. There are no issues with FBT19 – no additional whitelisting is required.</p> <p><b>20 March:</b> If a DSP is certified for the prior year service they can package their tax time request</p>

Action Item	Description	Action by	Status	Update
				<p>into one single online services for DSP system ticket after the conformance tests are completed. If no PVT is required the DPO will whitelist, inform the DSP and close the ticket.</p> <p>In the event that PVT is required the DPO will advise the DSP, and the PVT process will be conducted.</p> <p>A DSP will need to PVT if they are new, haven't gone through PVT for a particular service previously, or there are significant changes to a service i.e., IITR 2019, upon completion of the conformance tests a DSP will need to raise online services for DSP system ticket.</p> <p>The DPO is currently working on the PVT process for IITR2019 and will inform all DSPs in due course.</p> <p>FBT2019 will be removed from this action item.</p>

Action Item	Description	Action by	Status	Update
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><b>12 Nov:</b> This fix is expected to be deployed in Jan 2020 EVTE release and Q1 for production.</p> <p><b>29 Oct:</b> Resolving the on-going WPN issue has come into the delivery space, and a timeframe for release should be available soon.</p> <p><b>15 Oct:</b> No further update at this time – awaiting deployment</p> <p><b>01 Oct:</b> No further update at this time – awaiting deployment</p> <p><b>03 Sept:</b> No further update at this time – awaiting deployment</p> <p><b>20 August:</b> No further update at this time – awaiting deployment</p> <p><b>06 August:</b> No further update at this time – awaiting deployment</p> <p><b>23 July:</b> No further update at this time – awaiting deployment</p> <p><b>09 July:</b> No further update at this time – awaiting deployment</p> <p><b>25 June:</b> No further update at this time – awaiting deployment</p> <p><b>11 June:</b> No further update at this time – awaiting deployment</p> <p><b>28 May:</b> No further update at this time – awaiting deployment</p> <p><b>14 May:</b> No further update at this time – awaiting deployment</p> <p><b>30 April:</b> No further update at this time – awaiting deployment</p> <p><b>16 April:</b> No further update at this time – awaiting deployment</p> <p><b>02 April:</b> 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><b>20 March:</b> Mick will provide confirmation that ‘11’ is the correct length.</p> <p><b>20 March:</b> 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><b>5 March:</b> Mick is still waiting for information</p>
19/02 - 09	Reckon to forward queries around deductions granular data to Account manager (Nadeem) and	Beth Strods/Nadeem Shariff	Closed	<p><b>21 February:</b> Full list of concerns was sent by Kevin and responded to in detail by Ross Barns. Kevin required further clarification – Ross and Kevin have had further conversations to close this issue.</p>

Action Item	Description	Action by	Status	Update
	Beth Strods for clarification. (TT19 car deductions too complicated, Super deductions schedule and complicated validation rules)			
19/02 - 08	DSPs to be provided details on the next BIG ITR update available for DSP consumption to take into account the ITR TT19 changes	Mick Ferris	<b>Closed</b>	<b>5 March:</b> Mick assured DSP's that the next BIG has taken into account the feedback provided in previous meetings.
19/02 - 07	Xero account manager to follow up INC00003412642 1 related to EFTRS incident.	Alex Barnes	<b>Closed</b>	<b>5 March:</b> Alex and Kelvin are working through the issues out of session.
19/02 - 06	Xero account manager to follow up INC00003395038 4 related to CUREL 2018 list function not	Alex Barnes	<b>Closed</b>	<b>5 March:</b> Alex and Kelvin are working through the issues out of session.

Action Item	Description	Action by	Status	Update
	working			
19/02 - 05	MYOB are having issues with the Activity statement Lodgement Report (ASLRPT), some agents can never pull these reports. This is where some clients have reached the branch number limit on the ASLRPT, incident have been raised.	Paul Walters / Anne Soe	<b>Closed</b>	<p><b>02 April:</b> Fix deployed to Production 26 March 2019 and confirmation has been received from the agent that they have received the reports.</p> <p><b>20 March 2019:</b> The large client incident INC 34139890 is scheduled to be fixed on 26 March 2019.</p> <p>Other report incidents are being actively managed and investigated.</p> <p><b>5 March:</b> This issue is being looked at as a priority, but may not be resolved by the end of March.</p>
19/02 - 04	GovReports account manager to follow up lodgment list issues being experienced	Amrik Singh	<b>Closed</b>	<p><b>20 March:</b> This item will be closed as it will be followed up by the account manager offline.</p> <p><b>20 March:</b> Still being investigated – no update</p> <p><b>5 March:</b> INC000034075635 was previously raised and the account manager is liaising with DSP and ATO technical teams.</p>
19/02 - 03	Update on TPB information on removal of branch number registrations – impacts on CAA registration	Danny Figueiredo / Steven Holmes	<b>Closed</b>	<p><b>20 March:</b> Steven will liaise direct with Class – item will be closed out of this forum</p> <p><b>20 March:</b> As the information from the TPB has been sent to Class this issue is considered closed</p> <p><b>5 March:</b> Danny is on leave and Steven has only just started to look at this</p> <p><b>19 February:</b> Information provided in attachment (Final approved Branch policy correspondence)</p>
19/02 -	Mick Ferris to	Mick Ferris	<b>In</b>	<b>06 August:</b> Fix implemented on 02/08 as planned.



Action Item	Description	Action by	Status	Update
02	give an update on when the 'Trustee for' naming issue will be resolved.		progress	<p><b>23 July:</b> We are aiming to implement a fix on 03/08.</p> <p><b>09 July:</b> We are aiming to implement a fix on 03/08.</p> <p><b>25 June:</b> We are aiming to implement a fix on 03/08.</p> <p><b>11 June:</b> No further update at this time – awaiting deployment</p> <p><b>28 May:</b> No further update at this time – awaiting deployment</p> <p><b>14 May:</b> No further update at this time – awaiting deployment</p> <p><b>30 April:</b> No further update at this time – awaiting deployment</p> <p><b>16 April:</b> No further update at this time – awaiting deployment</p> <p><b>02 April:</b> Fixed planned, it will be scheduled for the April EVTE release. Mick to send through further information.</p> <p><b>20 March:</b> Date for resolution still TBA</p> <p><b>20 March:</b> This has been escalated as the solution involves ICP and AM with an impact on the Intermediary Registration Process. Pls see attached email.</p> <p>Note: AM having advised the solution would not be in place prior to Q3 – hence the escalation. Once escalated, DWS have little involvement. The TFS item should be 'removed' from out Pipeline.</p> <p><b>5 March:</b> This will go in as an eFix, the date will be provided as soon as it's known, though hopefully very soon.</p>
19/02 - 01	Details on the TT19 plan on a page to be released and communicated to DSPs.	Mick Ferris	Closed	<b>5 March:</b> The TT19 release on a page was published on 27 February
05/02 - 05	Sharna will investigate the nature of the issue and provide an update to the group at next meeting.	Sharna Maltman	Closed	<b>19 February:</b> An incident was logged, and a fix was implemented on 06/02/2019. DPO and DSPs issues were resolved

Action Item	Description	Action by	Status	Update
05/02 - 04	David will provide details as to whether the IITR pre-fill downloadable XML file which is available from the tax agent portal will still be available with the transition to Online Services for Agents	DPO	Closed	<b>08 February 2019:</b> The IITR prefill XML file will be available for download in Online Services for Agents.
05/02 - 03	Anne will confirm the process for email rejection once the mailbox is closed and the grace period has expired. (Will there will be a standard fail message validation, rejection email, or will it simply time-out)	Anne Soe	Closed	<b>20 March 2019:</b> The ATO ELS team has not been able to provide advice on the exact error message when the direct connection to ELS is closed. They suggest the likely message will be 'Authentication time out' or 'Authentication error'. <b>19 February:</b> Direct connection to ELS will be prevented from the 18 <sup>th</sup> April. The ATO ELS team are currently investigating if a system errors/message will be viewable by tax agents and if so what that will be.
05/02 - 02	Anne will confirm details around the password update process	Anne Soe	Closed	<b>19 February:</b> ELS passwords will no longer need to be maintained after the 18 <sup>th</sup> April. Note: If issue with agent's ELS account, e.g. T21 Transmission error these should be escalated to ATO by agent rather than software provider.

Action Item	Description	Action by	Status	Update
	once direct access to the ELS gateway is decommissioned.			
05/02 - 01	<p>Ross will look at:</p> <ul style="list-style-type: none"> <li>the impacts of the shift of D12 and D15 entries from the main form to the Deductions schedule on the ability to generate a complete PDF version of the IITR for possible lodgement as a paper form</li> <li>the impact of rounding and how this is to be applied to the IITR with the implementation of the</li> </ul>	Ross Barns	<b>Closed</b>	<p><b>20 March:</b> Ross has sent the responses to these and other questions, it has been published as a <a href="#">separate document</a> with the artefacts from today's meeting</p> <p><b>5 March:</b> Ross to send an email which answers these questions</p>

Action Item	Description	Action by	Status	Update
	<p>Deductions schedule</p> <ul style="list-style-type: none"> <li>the requirement for the lodgement of individual rental schedules for Partnerships and Trusts post the full implementation of the Multi-property rental schedule for Individuals by TT20.</li> </ul> <p>Ross to ensure that the IITR BIG is updated to address issues of:</p> <ul style="list-style-type: none"> <li>consolidation of records where the maximum repeatable</li> </ul>			

Action Item	Description	Action by	Status	Update
	fields for a label or form are exceeded, <ul style="list-style-type: none"><li data-bbox="331 389 519 491">• rounding of values policy</li><li data-bbox="331 496 519 598">• order of line item transactions associated with the Deductions schedule</li></ul>			

Action Item	Description	Action by	Status	Update
22/01 - 05	In relation to the ODRPT errors, follow-up to see what fixes we have in and the timing and impacts of these.	Mick Ferris	<b>Closed</b>	<p><b>05 February 2019</b></p> <p>There is currently one ongoing issues (no incident) for on-demand reports and one incident that has been closed as the service is working as per design.</p> <p>1. INC000033923049 Report not returning when one of the child documents fail. e.g.: Report has 100 child documents, if 1 fails, none of the other 99 is returned to the user. <b>Outcome:</b> Due to the type of change and enhancing the service to return all child documents and dismiss failed ones - will involve ICP (Correspondence Module) - a feature should be submitted to the DWS Pipeline / DWS Product Management mailbox</p> <p>2. Performance and Reliability. Due to the volume of transactions maintained within a report, this is placing pressure on the system, to reduce the load a proposed solution was to modify the report schema to include a date range in the request.</p> <p><b>Outcome:</b> Due to the type of change (breaking change) on DSP - a feature should be submitted to the DWS Pipeline / DWS Product Management mailbox</p>
22/01 - 04	Why is there no reflection of the labels D6 (Low Value Pool) and D11 (Deductible amount of undeducted purchase price of a foreign pension or annuity) in the DDCTNS MST specification V0.1	Ross Barns	<b>Closed</b>	<p>As outlined below, the key principal was not to create additional fields (including summary fields) or duplicate fields on either the main form or new schedule where they were not in place in the design for the 2018 return. For D6 the following values are reflected in the DDCTNS - Low value pool deduction relating to financial investment , Low value pool deduction relating to rental property, remaining low value pool deduction. The deduction claim for Low Value Pool is reflected on the ITR main form.</p> <p>For D11 (Deductible amount of un-deducted purchase price of a foreign pension or annuity) there is only one (unchanged) field reflected on the main form. This field is not repeated on the Deduction Schedule.</p> <p>For Taxtime 2020, the new income associated form will allow for granular foreign pension information to be included. Each foreign pension will have provision for a UPP amount if applicable (and other pension related deductions) to arrive at a net foreign pension income</p>

Action Item	Description	Action by	Status	Update
				amount. The total of the UPP amounts from the income form will then write to the total UPP on the main form. Hence, the deductions form does not require granular UPP deduction fields. With the new income schedule not starting until Taxtime 2020, no change for UPP amounts is required for Taxtime 2019.

Action Item	Description	Action by	Status	Update
22/01 - 03	Why does the deductions schedule DDCTNS specification V0.1 reflect a summary or total expense labels on the main ITR for labels D12 (Personal superannuation contributions) and D15 (Other deductions – not claimable at items D1 to D14). This means that they exist only on the Deductions Schedule.	Ross Barns	Closed	<p><b>05 February 2019</b> BIG release date TBA</p> <p>A key principal adopted in the design process was <b>not</b> to create additional fields (including summary fields) or duplicate fields on the main form or new schedule where they were not in place in the design for the 2018 return. For both D12 and D15 the 2018 MST for the ITR main form reflected the details at a granular level – D12 = 25 entries and D15 = 100 entries. In aligning to the myTax design these fields were shifted from the main form to the deduction schedule. These will be appropriately mapped by the ATO for back-end processing purposes.</p> <p>This means that DSP's would need to continue to reference the schedule entries for these fields for the purposes of the ITR main form total deduction calculations. If it is seen as preferable to the majority of the DSP's that a consolidated summary field be identified for the ITR main form then we will be responsive to this request.</p>
22/01 - 02	Advise the group on when the MST will be updated to include limits and orders	Mick Ferris	Closed	<p><b>05 February 2019</b> The MST is an auto generated artefact and any change to the MST output would need the ATO ESR Toolset modified to accommodate.</p> <p><b>Outcome</b> Business has advised, the Limits and Orders will be address via the Business Implementation Guide (BIG).</p> <p><i>Note: A technical feature can be created to support a shift in MST output. This would need to be</i></p>



Action Item	Description	Action by	Status	Update
				<i>prioritised against current Legislative and Time critical work.</i>