



PLS working group – key outcomes

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Title:	PLS working group – key outcomes		
Venue:	WEBEX		
Event date:	1/10/2019	Start: 13:00 AEST	Finish: 14:00
Chair:	Danielle Miller	Contact:	Sonya Summers 02 472 57383
Attendees:	<p>ATO – Sonia Lark, Sharna Maltman, Paul Mosca, Danny Figueiredo, Steven Holmes, Alex Barnes, Nadeem Shariff, Amrik Singh, David Baker, Ross Barns, Karen Greaves, Danielle Miller, Russell Siachico, Julie Sen, Anupama Duggirala, Sangitha Sivayogaraj, Warren Sturgiss, Cameron Loo, Damien Rush, Greg Dunbar, Rachel Phillips</p> <p>Industry – Jack Wee (Catsoft), Sandeep Gopalan (GovReports), Andrew Smith, Mike Behling, Scott Reid, Trent Hayes, Christine Savva (MYOB), Saiful Larry (Sage), Shane Paxton,(Thomson Reuters), Danna Zheng (Wolters Kluwer), Andrew Sprankling (Xero), Lex Edmonds (Microtax), Nathan Kerr (One-Click), Kevin Johnson (Reckon), Paul Siriwardana (Thomson Reuters), Lisa Kim, Tania Dai, Grant Whytcross (Wolters Kluwer), Albert Lilie (OneClick Life)</p>		
Apologies:	David Andreoli, Kylie Johnson, Mick Ferris, Sonya Summers, Michael Wright, Darin Carter (Sage), Briony Campbell (Wolters Kluwer), Kelvin Newton, Anthony Migliardi (Xero), Damian Eley (PwC), Mark Walmsley (GoTax), Andrew Noble (LodgeIT), Quan Tran (H&R Block), Mike Denniss (Class Super)		

Agenda item: 1 – Introduction

Sonia Lark introduced Danielle Miller who will be acting in Sonia's role during her leave period.

Resources from the Services for Tax Practitioners event on 11-12 September 2019 are now available on the Software Developers website.

The Data Window workshop was introduced to the group; this may be held on 15 November in Melbourne after the Tax Profession Digital Implementation Group (TPDIG) - dates to be confirmed.

Agenda item: 2 – Action item update

Updates on outstanding items were provided. ([see action items](#))

The guidance for the Simpler BAS action item has been published on the Software Developer's website: <https://softwaredevelopers.ato.gov.au/sites/default/files/resource-attachments/Simpler%20BAS%20clarification.pdf>

The spouse preservation age issue hotfix was implemented on 26 September; however Kevin Johnson raised a problem that the age limits have been reduced. This results in transaction errors. Cameron Loo and Damien Rush will review and provide guidance by the next meeting.

Agenda item: 3 – ITR granular data - draft MST feedback and discussion

The zip file was sent to all PLSWG members by email last week. The DPO is looking to publish the files on SWD website.

The MST is a work in progress for learning purposes. Data missing in the current version, such as employee share scheme and foreign income data, will be added in at a later stage. This version covers the changeover to XML and this is evident in columns A and B of the MST.

A number of technical decisions were made to reflect the myTax experience such as the 50 record limit on dividends reporting. Ross Barns stressed that that granular data reporting is at a consolidated level.

Mike Behling raised a question relating to infinite instances of the payment summaries in the MST. Errors in XML mapping could mean that it will be difficult to identify which submissions are incorrect. 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
```

The [3] in this example is referencing the third instance of the tuple in the collection.

Agenda item: 3 – ITR granular data - draft MST feedback and discussion

Cameron Loo advised on the following dates (subject to change):

- 17 October 2019 – EVTE release for the incomplete product
- January 2020 – Complete product release
- After January 2020 – new conformance suites

The Tax Time 2019 mocks will be used for initial October 2019 release. A new mock will be created to reflect the 2020 version and released at a later date.

Please send through any additional technical and business feedback to the DPO via the usual communication channels (Online Services for DSPs ticket or DPO@ato.gov.au).

Agenda item: 4 – Tax Time 2020

Sangitha Sivayogaraj will be acting in Mick Ferris's role for the time being. A few Tax Time deliverables will be released over the coming months.

Warren Sturgiss gave a quick overview of the DWIS release on a page, noting that it is a work in progress and it subject to change. The delivery approach for the granular data release is currently being refined to provide more clarity.

Other projected releases include:

20Q1:

- Fringe Benefit Tax
- Payment plan updates
- New shares and units service

Draft documentation for 20Q1 services will be made available from October 2019 for FBT and November/December 2019 for Payment Plan, new Shares and Units service.

20Q2:

- Rollover of primary income tax returns (services)
- Delivery of new measures (Stapled Structures and Testamentary Trust) are planned for the October / November EVTE. While measures are dependent on legislation passing, the updates to those services will be delivered to DSP's to assist in their planning. These services include: Trust Tax Return (TRT) Partnership Trust Return (PTR) and Attribution Managed Investment Trust Schedule (TRTAMIS)

Draft documentation for 20Q1 services is expected to be available to DSPs from October 2019 for Income Tax Returns, both Individual (IITR including Income) and Non-individual (TRT, TRTAMI, CTR, PTR, etc.).

A draft of the release on a page will be provided when available.

Agenda item: 5 – Platform update

Anu Duggirala provided an update on platform performance.

SBR2 experienced production issues last week, with the platform being stable since 27 September.

The outage on Friday 27 September was related to a hardware failure in the AWS environment.

DWIS will be revisiting the previous incidents and working closely with IBM to understand the cause and similarities between the incidents in order to minimise future outages.

Extra monitoring and automated alerts are in place to provide more granular detail about system issues in production environments.

Agenda item: 6 – Agent online environment update

David Baker highlighted the instability of SBR last week between 23 – 25 September and the outage on 27 September. The floor was open for DSPs to provide feedback and updates from their clients, and how their support centre environments were coping with the ATO system issues.

Kevin Johnson mentioned that the issue was with the timeliness of the ATO communications to stakeholders. There was a period where DSPs were not aware that the environments were down.

DSP support centres experiences vary. Some support centres do not actively monitor ATO dashboards and will investigate a matter when clients call in to raising incidents. Other support centres monitor ATO dashboards and their own in-house monitoring tools to respond to issues e.g. updating IVR messaging for clients. MYOB specifically mentioned the PLS Dashboard and appreciated the speed at which information on outages was published.

Please send through any additional feedback to the DPO via the usual communication channels (Online Services for DSPs ticket or DPO@ato.gov.au). The feedback will be passed on to David.

Agenda item: 7 – DSP feedback/issues

No other issues were raised by the group.

The next meeting will be **15 October 2019**.
