



## Key Outcomes

UNCLASSIFIED External

<b>Title:</b>	PLS working group – key outcomes		
<b>Issue date:</b>	4 September 2019		
<b>Venue:</b>	WEBEX		
<b>Event date:</b>	3 September 2019	<b>Start:</b> 1:00pm	<b>Finish:</b> 2:00pm

<b>Chair:</b>	Sonia Lark	<b>Facilitator:</b>	Sonia Lark
<b>Contact</b>	Sonya Summers	<b>Contact phone:</b>	02 472 57383

<b>Attendees: names/section</b>	<p>ATO – Sonia Lark, Sonya Summers, Sharna Maltman, Paul Mosca, Danny Figueiredo, David Andreoli, Paul Walters, Steven Holmes, Alex Barnes, Nadeem Shariff, Amrik Singh, David Baker, Madhavi Talapaneni, Brendan Kee, Ross Barns, Karen Greaves, Beth Strods, Danielle Miller, William Fahd, Rissell Siachico, Rose Robertson, Paul Stasinowsky, Roger Obbes.</p> <p>Industry – Jack Wee (Catsoft), Mike Denniss (Class Super), Sandeep Gopalan (GovReports), Scott Reid, Trent Hayes, Christine Saava (MYOB), Saiful Larry (Sage), Shane Paxton,(Thomson Reuters), Danna Zheng (Wolters Kluwer), Andrew Sprankling (Xero),</p>
<b>Apologies: name/section</b>	<p>Mick Ferris, Lex Edmonds (Microtax), Mike Behling (MYOB), Nathan Kerr (One-Click), Kevin Johnson (Reckon), Michael Wright, Darin Carter (Sage), Paul Siriwardana (Thomson Reuters), Briony Campbell, Lisa Kim, Tania Dai, Grant Whytcross (Wolters Kluwer), Kelvin Newton, Anthony Migliardi (Xero), Damian Eley (PwC), Mark Walmsley (GoTax), Andrew Noble (LodgeIT), Quan Tran (H&amp;R Block).</p>

<b>Next meeting</b>	1 October 2019
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## 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>

## Agenda item: 3 – Deductions schedule – Tax time findings

Ross advised that they have been reviewing the quality of the information provided as part of the deductions schedule lodged by Tax Agents. Overall the information is of a relatively high quality however there are some areas that require further assessment with DSP's and Tax Agents. The three key areas of focus have been:

1. Higher instances where no granular description information for particular labels
2. The use of Schedule W (Work related Expense) codes in replacement for descriptions
3. Incorrect reporting of information associated with Self-education deductions

We plan to set up meetings with DSPs which have issues and individually work through these issues over the forthcoming 2 weeks.

In regards to the granular data for income schedule, we hope to have a rough list of fields that may be included in the schedule. Please note this a draft only being circulated to open a conversation with DSPs.

## Agenda item: 4 – Q&A opportunity for digital identity and M2M

Paul Stasinowsky gave a quick overview of the topics covered in the AUSkey transition webinar held on 28 August. The recording and presentation have been published on the Software Developer's website:

<https://softwaredevelopers.ato.gov.au/AUSkeytransitioninfosession28082019>

The topics covered included:

- AUSkey is being decommissioned in March 2020
- myGovID to prove your identity
- RAM
- M2M solution to replace device AUSkey

He opened up to the group for any questions they may have.

Sandeep Gopalan had a query related to other government agency portals which required linking to AUSkey. Paul advised that the process would be the same – an account would still need to be created to use their portals, but would now be linked to the new M2M credential rather than the AUSkey.

## Agenda item: 5 – Timeline of deliverables impacting DSPs and Support for M2M in EVTE and production

Roger Obbes spoke to the group about the timelines for the delivery of the M2M solution, testing M2M in EVTE and what support would be provided during the transition. Roger advised we were working to very tight timeframes, with all AUSKey's being decommissioned at the end of March 2020 and won't be extended beyond this date.

The machine credential will be released into production on 16/09/2019, but will not be available for use until end October as we wait on the iRap assessment. Once the iRap is complete, the M2M solution will be available in production and will operate in parallel with AUSKey from October 2019 to March 2020. We expect DSPs to begin to transition to the new M2M solution from November 2019 to January 2020. This will allow time to support DSPs and manage any issues through to March 2020.

M2M testing in EVTE for SBR2 is now available – we would like DSPs' to have completed testing in EVTE by the end of October 2019 to ensure their software is fully compatible. DSP's can register for EVTE testing using Online Services and navigating to the M2M credential group then submitting a [Register for M2M testing in EVTE](#). DSP's will receive a welcome pack via email which contains the detailed steps of how to test the new machine credential in EVTE.

M2M testing in EVTE for SBR1 is in a limited trial and DSP's can test software products after the trial is completed. This is expected to be available soon.

There will be further communications to DSPs as we ramp up testing in EVTE.

There is additional support available for EVTE with the rapid resolution of issues and escalation of tickets. Issues and questions can be raised by using 'Online Services for DSPs' and navigating to the M2M credential group. Support in PROD will align with the current support model, but with heightened response. There will also be user support for myGovID and RAM.

Read more about the [M2M authentication solution](#) and [AUSKey decommissioning](#).

## Agenda item: 6 – Tax time 2020

Brendan Kee advised DWIS was carrying out a basic rollover of all ITR forms and that the new income schedule was coming.

Partnership, Attributed Managed Investment Trust (AMIT), and Trust returns will see new labels added – more details will be provided when we talk about Stapled Structures at next week's Tax Time event.

The preservation age issue has been escalated and is being followed up with income tax product.

## Agenda item: 7 – Platform update

Madhavi provided an update on platform performance over the past fortnight.

The platform has been quite stable with no significant issues to report.

Post Implementation Review of Taxtime19 Performance:

- During the month of July, availability of PROD2 is 97.26%.
  - Planned Outages - 24.5 hours
  - And Unplanned - 11.5hrs
- Volumes for Taxtime19
  - In July 2019 alone, SBR2 processed 633% more transactions compared to July 2018.
  - In August 2019, SBR2 processed 490% more transactions compared to August 2018.
  - Platform optimisation work that has been done before and during the Tax Time has helped handle this load. This includes but not limited to:
    - Increase of Disk Volume of the Sterling and MEIG servers and the Reporting Server Databases
    - Also GPFS Servers have been scaled up to improve performance

Some feedback we have received:

For Taxtime19, our systems have

- Increased Platform Stability
- Better Performance and are
- More Reliable

We continue to explore areas of improvement for future Tax Time and here are few things that are on our agenda:

- Provide End to End Picture on the Dashboard for clients – we have started analysis around how best and quickly we can communicate system degradations to our clients.
- Continue to improve the stuck batch reporting and replay

Request for suggestions:

If DSPs have recommendations for any other improvements, please share with account managers, or send ideas through Online Services for DSPs.

## Agenda item: 8 – Agent online environment update

Sonia Lark introduced David Baker, advising he would have an on-going agenda item to give some business context to what is occurring in the agents' online environment.

David began with an update on the PLS dashboard as the group had previously raised a query around the batch graph having been removed. David advised a batch graph is being designed – it made a brief appearance, but was removed as it was not complete. He hopes it will be back up within the next four weeks.

David also advised that they had responded to feedback that DSPs wanted company tax return available in a SRP service – this is currently being tested.

A recent open forum event in Perth highlighted a couple of issues raised by agents:

- STP is a major issue for BAS agents, some of which provide boutique payroll services
- Access to deceased clients' records - agent authority ceased once ATO receives notification of death. This causes frustration to agents and the executors. ATO is working with various public trustees to come up with a solution to assist agents.

### Agenda item: 9 – DSP feedback/issues

Sonia advised the group that there is now a new set of tickets available in Online Services for DSPs related to Consultation and Engagement:

- Submit an Expression of Interest
- Raise a matter for consultation
- DSP Insights
- General questions
- Consultation feedback.

No other issues were raised by the group.

Please note: Due to the proximity to the Services for Tax Practitioners event being held 11 and 12 September, the PLS working group meeting on the 17 September has been cancelled.

The next meeting will be **01 October 2019**.