



## Key Outcomes

UNCLASSIFIED External

<b>Title:</b>	PLS working group – key outcomes		
<b>Issue date:</b>	12 June 2019		
<b>Venue:</b>	WEBEX		
<b>Event date:</b>	11 June 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, Paul Walters, Nadeem Shariff, Ross Barns, Karen Greaves, Madhavi Talapaneni, David Baker, Gerardine Burke, Warren Sturgiss, Ted Simes, Danielle Miller, Bronwyn Ryan, Sangitha Sivayogaraj, William Fahd, Russell Siachico, Irma Briggs.</p> <p>Industry – Lex Edmonds (Microtax), Mike Behling, Trent Hayes, Scott Reid (MYOB), Kevin Johnson (Reckon), Michael Wright (Sage), Paul Siriwardana (Thomson Reuters), Grant Whytcross (Wolters Kluwer), Kelvin Newton, Andrew Sprankling (Xero).</p>
<b>Apologies: name/section</b>	Anupama Duggirala, Michael Ferris, Jack Wee (Catsoft), Sandeep Gopalan (GovReports), Mike Denniss (Class Super), Nathan Kerr (One-Click), Saiful Larry, Darin Carter (Sage), Shane Paxton (Thomson Reuters), Tania Dai, Briony Campbell, Lisa Kim (Wolters Kluwer), Anthony Migliardi (Xero).

<b>Next meeting</b>	25 June 2019
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The 06 June EVTE release details were published to the Software Developer's website:  
[https://softwaredevelopers.ato.gov.au/PLSWG\\_20190528](https://softwaredevelopers.ato.gov.au/PLSWG_20190528)

Due to the short time frame available to resolve the bug, the Conformance Suite (including revised payloads) and EVTE Pack which correlates to this change will not be published until 13/06.

## Agenda item: 2– Action item update

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

## Agenda item: 3 – Introduction to Substantiation

Bronwyn Ryan (Application Architecture & Design) provided the group with an overview of Substantiation. She advised that as the initiative is still in the design phase there was no technical detail.

The substantiation initiative will allow the ATO to receive evidence of deduction claims electronically, either at the time of lodgement, after lodgement, or post-issue.

She asked the group what sort of functionality they would like to see.

Sage asked whether providing documents at the time of lodgement when prompted by the real-time analytics would be voluntary, or whether it would be made compulsory. Bronwyn advised it would remain voluntary.

Sage suggested to consider a flow where real-time analytics was not used – how would an agent be prompted to provide evidence prior to lodgement?

Xero queried why the ATO was asking for more detail around deductions after they had already implemented the requirement for the granular deductions data.

Boon Tan advised that the ATO wanted to use system logic to remove the need for manual intervention post-issue. There was also the ability to use the granular data to target substantiation requests.

Reckon wanted clarification whether this measure would only impact individuals or would it be broadened.

Response: Individuals only.

Reckon queried whether this initiative would address the issue with the current free-form notes by allowing documents to be attached instead.

Boon advised that would have to be addressed separately. This measure is to allow a broader range of documents, images and data format types to be attached.

Davis Baker advised that since the measure is still in the design phase, they were still considering whether they could allow agents to voluntarily provide documentation to pre-empt post-issue requests – whereby they could provide documents up front.

Sage asked whether uploaded documents could be viewed, and if so, where?

Response: Uploaded documents will be able to be viewed in Online Services for Agents. Viewing the details in software is not currently in scope; however, David Baker advised they were committed to producing APIs to mirror the retail service, so it was not off the table.

Reckon asked what the timeframe was for the changes as DSPs would like assurance they will be consulted and involved in the design on the way.

Response: anticipated Tax time 2021

Sage suggested this topic would be worthwhile to discuss at the Tax Time event in September with the broader DSP community.

DSPs: Please send through any feedback on the Substantiation initiative to [DPO@ato.gov.au](mailto:DPO@ato.gov.au).

#### Agenda item: 4 – Tax Time update

Sangitha advised she had no new updates for TT19.

MYOB asked whether any instruction documents would be published for the TT19 deductions schedule.

Ross advised there were no plans to publish a document as there was no deductions schedule on the paper form and the Q&A document published previously should address any questions.

A number of DSPs anticipate queries from agents.

Action item: Ross will review the deductions schedule Q&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

MYOB asked whether the PLS guide would be updated to include the deductions schedule. Karen Greaves advised it was updated on 30 May, but not in any detail.

<https://www.ato.gov.au/Tax-professionals/Services-and-support/In-detail/Practitioner-lodgment-service-user-guide/?anchor=Schedules#Schedules>

Warren Sturgiss revisited the EFTRS solution proposal which was published on 27 May – they were still seeking DSP feedback.

The proposal slide has been sent out to the group for those who were unaware it had been published. [https://softwaredevelopers.ato.gov.au/PLSWG\\_20190514](https://softwaredevelopers.ato.gov.au/PLSWG_20190514)

#### Agenda item: 5 – Platform update

There were outages across the SBR platforms last week – the root cause analysis is still underway.

There is an issue with EVTE Blue Mix Synthetic Monitoring for SBR1. It's currently not displaying the monitoring however the application services are fully available.

As mentioned at the last update, we are performing auto restarts on our MEIG operational nodes. This is mainly a preventative action in preparation for the upcoming Tax time.

As in previous years, Control Room has been setup for Tax time readiness. This group will proactively monitor and address any potential Tax time issues pre and post release.

Other than that the platform has been stable.

**Agenda item: 6 – Online services for agents - feedback**

It was decided that due to time constraints this agenda item would be held over until next meeting to allow adequate time for discussion.

**Agenda item: 7 – DSP Feedback/Issues**

No issues were raised by the group.