Key Outcomes

Title:	PLS working group – key outcomes
Issue date:	13 May 2020
Venue:	WEBEX
Event date:	12 May 2020 **Start:** 1:00pm **Finish:** 2:00pm

Chair:	Sonia Lark	**Facilitator:**	Sonia Lark
Contact	Sonya Summers	**Contact phone:**	02 472 57383

Attendees: names/section	ATO – Sonia Lark, Sangitha Sivayogaraj, Danny Figueiredo, Ross Barns, Karen Greaves, Anupama Duggirala, David Baker, Helen Adamovich. Industry – Jack Wee (Catsoft), Simon Smart (eTax), Lex Edmonds (MicroTax), Mike Behling, Michael Tong, Danny Koutoulas, Scott Reid, Christinique Chapman, Andrew Smith (MYOB), Nathan Kerr (One-Click), Kevin Johnson, (Reckon), Saiful Larry, Michael Wright (Sage), Charudatta More (Sparken), Karl Farrand (Taxlab), Shane Paxton, Paul Siriwidana (Thomson Reuters), Andrew Sprankling, Kelvin Newton, (Xero).
Apologies: name/section	Mike Denniss, Sha Sha (Class Super), Sandeep Gopalan (GovReports), Andrew Noble (Noble Accounting), Steven Ivanopoulos (Reckon), Darin Carter (Sage), Charudatta More (Sparken), Dillon Tsotsis, Lisa Kim, Robert Xie, Danna Zhang (Wolters Kluwer), Anthony Migliardi, Rosemary Missier (Xero)

Next meeting	26 May 2020

Agenda item: 1 – Introduction

Sonia Lark welcomed the group and advised that an updated version of the IITR granular data FAQs document was now available in the Knowledge Base in Online Services for DSPs and would also be published in controlled information tomorrow.

Updated versions of the *draft* instructions for the company, trust, and partnership income tax returns and components of the individual income tax returns have been published where there has been updated to guidance around reporting of COVID-19 stimulus payments.

Final versions of all the instructions are expected late May.

Agenda item: 2 – Action item updates

Updates on outstanding items were provided. (see action items)

Agenda item: 3 – R&D schedule – additional questions

Helen Adamovich provided some additional clarification around mitigation strategies for the retrospective changes to the R&D schedule.

The legislation is still in Parliament so the current provisions will remain until this is enacted. It currently has a retrospective start date of income year commencing on or after 1 July 2019.

At this stage the Bill is subject to a Senate Committee enquiry, their report is not due until early August 2020, so the legislation is highly unlikely to be enacted any time before September.

We will not be making any changes to the actual forms (R&D Schedule or Company tax return) for the R&D measure for 2020.

We have put in place mitigation for the measure in its current form, which will allow us to get the correct tax outcome using the existing forms.

This mitigation feature has been built and will be deployed in Q2, however this will not mean any changes to current treatment until enactment. It involves changing some of the edits/rules which will need to be built for 1 July and will allow for 8 specific additional information fields to be provided with the schedule after legislative enactment.

If, as a result of legislative passage, amendments are required to returns already lodged for the year, the ATO will look to automate this process as much as possible minimising the number that will have to re-lodgement.

Helen's team will provide an updated Change Advice which will be published in controlled information.

Other details:

- RDTIS54 – this is an additional information label only, this amount should still be included as part of RDTIS48, which means that the rule is correct.

- RDTIS51 – seems to have disappeared, however this will be resolved in the next document release which on the 21st of May. There is no impact on the schema or validation.

Agenda item: 4 – Tax Time 2020

Sangitha advised there were plans for late changes to the IITR pre-fill service.

The VET Student Loans (VSL) was intended to be separated from HELP in the IITR prefill service as part of TT20, unfortunately the requirements for the change were received late in the Tax Time delivery period.

The options for addressing this late change are:
1. Implement a workaround for TT20 where the VSL debt would be combined with the HELP debt in the IITR Prefill response via SBR2. This would be inconsistent with the ATO online implementation which has two separate fields until implemented in SBR2 in TT21.
2. Implement the new additional element into the IITR Prefill response message, causing a late impacting change.
3. Do nothing

The PLS members preference is to implement option 2 – a schema change to introduce the new element into the IITR prefill response message.

It was suggested the proposed workaround is a poor design choice for VSL and HELP debt.

Next steps:
- We will supply an update MST via the account managers as soon as possible and ahead of the EVTE deployment
- Advise the earliest EVTE deployment date (this will occur after the May EVTE deployment)

Agenda item: 5 – Platform update

Anu provided an overview of platform performance over the past fortnight.

The SBR2 channel has been operating as expected with no issues.

Planned performance and stability changes occurred over the weekend to help alleviate issues like those which were encountered last Friday (8 May).

Agenda item: 6 – Agent online environment update

David Baker advised that systems were coping well with the increased traffic loads resulting from the JobKeeper measure. There is a fix going in on 14 May to address an issue that sole traders with employees have been experiencing.

Work has been continuing on updated metrics for the PLS dashboard to include all batch processes rather than just PLS. A monitoring API is being developed so the updated metrics can be published to the dashboard. It is expected to be ready for testing by 21 May.

Work is also being done on an additional metric onto the Online Services dashboard for JobKeeper by the end of May.

Agenda item: 7 – DSP feedback/Other issues

Michael Wright asked for an update on the progress of the new SBR platform.
Sonia will reach out to Mick Ferris to attend the next meeting to provide an update.

Kevin Johnson asked for an update on what is happening with the activity statement service.
Sonia advised she has reached out to the activity statement team for an update with a view to organising an information session for interested DSPs. If it looks like it will be a few weeks off still, she will try and have them attend the next meeting to provide an update to the group.

Mike Behling asked what was happening with the CC service design.
Sonia advised the next meeting to design the service is scheduled to occur within the next two weeks and an invite should issue shortly.