



Key Outcomes

UNCLASSIFIED External

Title:	PLS working group – key outcomes		
Issue date:	16 May 2019		
Venue:	WEBEX		
Event date:	14 May 2019	Start: 1:00pm AEST	Finish: 2:00pm

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

Attendees: names/section	ATO – Sonia Lark, Paul Mosca, Paul Walters, Ross Barns, Madhavi Talapaneni, Karen Greaves, Gerardine Burke, Tania Andrews-Zanozin, Beth Strods, Warren Sturgiss, Ted Simes, Anupama Duggirala, Sonya Summers, Andrew Watson, Danielle Miller, Sharna Maltman, Amrik Singh, Irma Briggs, Brendan Kee. Industry – Sandeep Gopalan (GovReports), Lex Edmonds (Microtax), Mike Behling, Trent Hayes (MYOB), Nathan Kerr (One-Click), Kevin Johnson (Reckon), Michael Wright, Saiful Larry (Sage), Shane Paxton, Paul Siriwardana (Thomson Reuters), Tania Dai, (Wolters Kluwer), Andrew Sprankling (Xero).
Apologies: name/section	Jack Wee (Catsoft), Mike Denniss (Class Super), Anthony Migliardi, Kelvin Newton (Xero), Grant Whytcross (Wolters Kluwer).

Next meeting	28 May 2019
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Agenda item: 2– Action item update

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

Sonia Lark advised six more services are due to be released on 16 May.

A highlight issued in the DSP Newsletter on 14 May:

<https://softwaredevelopers.ato.gov.au/software/services>

As a follow up to the meeting, we would like to advise the 2019 tax return final forms have been published to the Software Developer's website.

<https://softwaredevelopers.ato.gov.au/2019Finalreturnforms>

We are currently working on preparing the Individual tax return and supplement instructions and expect them to be published shortly.

Agenda item: 3– Preferecing – Business overview

Ross Day presented a business overview of the preferencing solution.

- Traditionally registered agents added their postal address to the client record to receive correspondence
- Since the advent of myGov in April 2015, correspondence was issued digitally to clients who set up a myGov account, deeming the postal address irrelevant
- This caused issues for agents as it effectively kept agents out of the loop

There has been some discovery work done around improving online services for agents. This has highlighted three main things they wanted:

1. Control – if an agent lodges the return, they want to see the outcome before it goes to the client
2. Choice – they only want relevant correspondence, they don't want everything (eg: debt-related letters should go direct to the client)
3. Reduction in paper – more correspondence to issue digitally

Correspondence will be grouped according to communication type:

- All
- Income tax
- Activity statement related
- Study and training support loans
- Superannuation
- Debt
- Employer and business obligations

The list will be personalised and not include irrelevant categories, or ones for which the agent is not authorised.

There will be the option to set preferences at the client or practice level. Agents **MUST** get the client's permission before they change a correspondence delivery preference.

Michael Wright queried whether preferencing would be available in the tax agent portal and Online Services for agents. Ross advised only on Online Services for agents.

Anu advised work is being done on the preferencing API, and it is expected to be in EVTE by June – this will be confirmed after the next program increment (PI) planning session.

Agenda item: 4 – 2019 Copies of return

The 2018/19 copy of return service, including the deduction schedule where it exists and has passed integrity checks, will be returned via XML regardless of lodgement method.

Action item: Expressions of interest are sought from DSPs to be involved in design discussions for the 2020 income schedule granular data

An error has been identified in the latest version of the 2019 ITR deductions schedule Q&A document relating to Point 2 – Rounding. The document will be corrected, but the service will be realigned in future to accept the decimal point.

Ross advised there has been one incident of an agent going to the Inspector General of Taxation with concerns over the level of personal/in-confidence client detail coming through to the ATO in the new schedules.

Andrew Sprankling commented that the Tax Practitioner Board has advised not to publicise the fact that those details come through to the ATO.

Andrew Watson will discuss this further with Ross offline.

Ross asked the group whether any intended to bring in the multi-property rental schedule by 01 July – there were no replies.

Ross asked the group whether they found the Q&A document valuable, as it may be used as a template moving forward.
The general consensus was that the information should be in the BIG rather than a separate document, and should be available earlier.

Agenda item: 5 – EFTRS – first name error

A fix is planned for the EFTRS issue where the full name is being returned into the given name field. The proposed solution is to modify the schema to align with what is coming out of the back-end, meaning one unstructured field name, rather than <given name><surname>.

An overview of the proposed solution will be sent out shortly, and DSP feedback is sought.

Action item: An overview of the EFTRS solution proposal will be sent out

Agenda item: 6 – Tax Time update

Anu advised integration testing is being finalised, with no issues or risks identified.

Agenda item: 7 – Platform update

Madhavi advised the root cause of the recent PROD/EVTE issue has been identified, and fixes are being worked on as a priority. An interim solution has been developed which will provide a seamless experience if the issue recurs prior to the fix being implemented.

Replaying of stuck batches is progressing well. The number of new stuck batches is reducing since fixes have been implemented.

AWS transition – 96% have migrated from PROD1 to PROD2, with the remaining expected to transition by 03 June.

Some DSPs expressed concerns that they may not be able to transition by this date. DSPs with concerns should contact their account manager directly to discuss the transition date.

Sharna Maltman advised those who have transitioned will receive an email to advise dewhitelisting from PROD1.

Agenda item: 8 – DSP Feedback/issues

No issues were raised by the group.

Sonia advised she would be sharing feedback ATO has received in regard to Online Services for Agents with the group at the next meeting.