



Key Outcomes

UNCLASSIFIED External

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| Title: | PLS working group – key outcomes | | |
| Issue date: | 20 February 2020 | | |
| Venue: | WEBEX | | |
| Event date: | 18 February 2020 | Start: 1:00pm | Finish: 2:00pm |

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| Chair: | Danielle Miller | Facilitator: | Danielle Miller |
| Contact | Sonya Summers | Contact phone: | 02 472 57383 |

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| Attendees: names/section | <p>ATO – Sangitha Sivayogaraj, Paul Walters, Danny Figueiredo, David Andreoli, Ross Barns, David Baker, Tania Andrews-Zanozin, Warren Sturgiss, Anupama Duggirala, Danielle Miller, Julie Sen, Paul Stasinowsky, Dylon Moyle, Josh Corlett, Julie Rowland, Grange Alcock, Angela Ogg, Sharna Maltman.</p> <p>Industry – Jack Wee (Catsoft), Simon Smart (eTax), Lex Edmonds (MicroTax), Mike Behling, Michael Tong (MYOB), Nathan Kerr (One-Click), Kevin Johnson (Reckon), Saiful Larry, (Sage), Chardutta More (Sparken), Shane Paxton, Paul Siriwardana (Thomson Reuters), Danna Zhang (Wolters Kluwer), Andrew Sprankling (Xero).</p> |
| Apologies: name/section | <p>Andrew Holloway, Sonia Lark, Mike Denniss, Sha Sha (Class Super), Sandeep Gopalan (GovReports), Trent Hayes, Scott Reid (MYOB), Andrew Noble (Noble Accounting), Michael Wright, Darin Carter (Sage), Karl Farrand (Taxlab), Dillon Tsotsis, Grant Whytcross, Lisa Kim, Robert Xie (Wolters Kluwer), Anthony Migliardi, Kelvin Newton (Xero)</p> |

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| Next meeting | 3 March 2020 |
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Agenda item: 1 – Introduction

Danielle welcomed the group and advised there were a couple of late additions to the agenda.

Paul Walters quickly updated the group with a response to an FTER query which had been raised previously in relation to the Family Trust Election (FTE) form. The MST is not clear where to incorporate the income year in a Family trust Election Form. The service design calls for FTER40 to be used as the Income Year for Elections (Q6 paper form), Variations (Q6 Paper Form) and Revocations (Q11 paper form). The heading label is somewhat misleading as it refers to Family Trust revocation whereas the income tax year element is to be used for election, variation and revocation. This guidance will be added to the FAQ documents in the [Knowledge Base](#) in Online Services for DSPs.

Agenda item: 2 – Action item update

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

Agenda item: 3 – Digital Identity update

Paul Stasinowsky advised there were no major updates to be provided to the group this time. Any issues which arise are being dealt with as they come up. If DSPs are seeing issues, please send them through your account manager so they can be resolved as quickly as possible.

Agenda item: 4 – Division 293 (DIV293) alert in Individual Income Tax Return (IITR)

Julie Rowland presented an overview of the changes which are being implemented in myTax in relation to Div293 assessment alerts. She explained that a Division 293 assessment was triggered when the individual income threshold of \$250K was exceeded and additional tax (15%) is payable on concessional superannuation contributions.

Div293 assessments were introduced in 2012/13 and were historically complex, although some improvements to the process were seen in 2016. Div293 assessments happen after initial ITR lodgment/NOA issue – a two-step process which often has a level of ‘surprise’ for the client. To move closer to a ‘tax just happens’ and improved client experience, this initiative is a way of providing prior notice that the client may incur a Div293 liability. Similar benefits are expected for software users as the alert would be triggered when the ‘calculate’ button is clicked – this would allow the agent to talk to their clients about their Div293 liability at the time of ITR lodgment.

Future improvements will look towards more refined and tailored messaging and more real-time data, with a view to eventually issuing the Div293 assessment at the same time as the NOA.

Julie asked if the group had any questions, comments or feedback:

Kevin Johnson commented that super information is available in Online Services for Agents (OS4A) and it would be helpful if it was also available in prefill reports.

Julie advised the formulae for the messages would be provided in due course, initially they were testing DSP interest.

Kevin suggested the changes would be implemented the same way by everyone if they were added to the validation rules, as Div293 touches all DSPs.

Kevin went on to ask whether the changes would be extended to excess contributions as well. Julie advised that they will assess the success of this message and do plan to work with the concessional contributions teams to see if something similar can be incorporated.

The presentation will be published with the outcomes of the meeting on the Software Developers website and also on the [Collaboration Hub](#) in Online Services for DSPs.

Agenda item: 5 – Online Services for DSPs – compatibility issues

Dylon Moyle advised the group that future upgrades to the Online Services for DSPs platform will no longer support Internet Explorer 11 (IE11). In the short term you will be able to continue to use IE11 to access OS4Ds, however over time you may experience degraded performance. Other browsers such as Firefox and Chrome will continue to work.

Dylon advised that if anyone has any concerns they can send details through to DPO@ato.gov.au.

Kevin raised an issue regarding timeouts when completing a ticket in OS4Ds, advising that even though you may be actively typing and completing ticket details, the system will timeout after 30 minutes and return the user to the myGov screen. Paul Walters explained that there needs to be interaction with the back-end for it to register as activity, and that typing in the front-end is not seen as activity and would cause a timeout after the 30 minutes. Dylon will investigate possible solutions.

Agenda item: 6 – Tax time 2020

Sangitha Sivayogaraj summarised the EVTE deployment for February will include updates to; IITR Profile (IITRPRFL), Non-Individual Services (SMSFAR) and removing references to 'AUSkey' when returning authorisation error messages. No error codes have been added or removed; there has just been an update to the text.

The February EVTE code deployment and the publication of the supporting design artefacts will occur on the 20.02.2020.

Scheduled for Q1 Production Deployment:

- the AUSKey registration service will be removed as will the AUSKey registration process within the ABN registration service.
- there will also be a new capital gains tax transaction service (CGTTX)
- FBT service will be rolled over for 2020.
- Work has completed on the 'lift and shift' of TPAR from SBR1 to SBR2, with some changes to the formatting of the SBR2 version. While the Reporting Taxonomy will retain the same structure, the bulk data (Parent and Child) format for the service will be in XML with C# validation. The updated SBR2 conformance suites will better reflect business scenarios and the SBR2 TPAR specs are expected to be published on 20/02.

Sangitha also advised an updated version of Release on a Page will be published this week.

The work-related expenses (WRE) schedule will be disabled for tax time 2020 – the artefacts to remove the validation rules from the MST will be in the March EVTE drop.

IITR 2020 conformance suites

Danny Figueiredo advised that there will be an EVTE drop on 20/02 which will include the IITR 2020 conformance suites. There will be a note included on the document highlighting an issue which has been identified, with a fix being implemented in the next EVTE drop.

EFTRS

A naming issue was identified last year, and after discussion with DSPs and the PLS working group, proposals were presented and analysed. The proposed timeline for the changes to be implemented was published in the November 2019 Release on a Page. The EFTRS changes were deployed into EVTE on 16/01/2020 with the specs available on SBR.gov.au under tax practitioner reports.

Please review the specs to determine whether or not you will be required to make changes. The current report will need to be deactivated and the new report activated.

Feedback request: All DSPs who use the EFTRS service are asked to provide feedback on their ability to quickly apply the required changes. An email will issue from the DPO on 20/02.

Mike Behling advised there was an issue with the EFTRS taxonomy. Warren Sturgiss assured the group the remediated taxonomy would be released on SBR.gov.au on 20/02.

Saiful Larry asked whether it would be a hard cutover. He went on to explain that a hard cutover would result in a significant impact as they have a desktop product and

would need to have a version update for users. He asked whether the old and new versions could run concurrently.

The current proposed hard cutover date is 13/03, however Paul Walters advised that those DSPs who feel that this is unachievable should provide feedback and they will assess the possibility of deferring the date.

Agenda item: 7 – Platform update

Anu advised that the production platform has been stable and there were no issues to report.

There was an EVTE outage this morning (18/02) which was resolved at 1.35pm

Long running business processes were identified in Core, which in turn impacted MEIG created backlogs and caused the degradation/outage. Restarting the servers did not restore the services. Detailed analysis revealed that there were memory issues with MEIG and the issue has now been resolved, servers are back online and now operational.

Agenda item: 8 – Agent online environment update

David Baker advised that as a result of Google changing the way it manages cookies, users may experience drop outs if they use Chrome. He suggested that Firefox be the default browser if still using AUSkey.

Agenda item: 9 DSP feedback/issues

MYOB mentioned they were waiting on more of the draft forms and instructions to be made available, in particular the partnership ITR. The DPO will follow up and publish these documents progressively as soon as they are released.

Kevin re-visited an issue which was raised in October 2019 in relation to end-dated FIAs (action item 15/10 – 02).

Action item: The DPO will review the scripting to ensure it covers the scenario where an agent may not receive their EFTRS report and their FIAs are end-dated due to unsubscribing and re-subscribing to EFTRS.