



Key Outcomes

UNCLASSIFIED External

Title:	PLS working group – key outcomes		
Issue date:	29 January 2020		
Venue:	WEBEX		
Event date:	21 January 2020	Start: 13:00 AEDT	Finish: 14:00

Chair:	Sonia Lark	Facilitator:	Sonia Lark
Contact	Julie Sen	Contact phone:	02 889 49304

Attendees: names/section	<p>ATO – Sonia Lark, Steven Holmes, Paul Mosca, Danny Figueiredo, David Andreoli, Amrik Singh, Ross Barns, Karen Greaves, Tania Andrews-Zanozin, Anupama Duggirala, Danielle Miller, Julie Sen, Sonya Summers, Paul Stasinowsky, Dino Di Lorenzo, Carl Bennett, Brendan Kee, Paul Walters, Dylon Moyle</p> <p>Industry – Jack Wee (Catsoft), Sandeep Gopalan (GovReports), Mike Behling, Scott Reid, (MYOB), Steven Ivanopoulos (Reckon), Michael Wright, Saiful Larry (Sage), Grant Whytcross , Danna Zheng (Wolters Kluwer), Andrew Sprankling, Kelvin Newton, (Xero), Lex Edmonds (MicroTax)</p>
Apologies: name/section	<p>Michael Ferris, David Baker, Sangitha Sivayogaraj, Mike Denniss, Sha Sha (Class Super), Simon Smart (eTax), Trent Hayes (MYOB), Nathan Kerr (One-Click), Darin Carter, (Sage),Tania Dai, Lisa Kim (Wolters Kluwer), Anthony Migliardi (Xero), Shane Paxton, Paul Siriwardana (Thomson Reuters), Kevin Johnson (Reckon)</p>

Next meeting	4 February 2020
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Agenda item: 1– Introduction

Sonia advised that Tax Time 2020 draft instructions are now available in Controlled Information on the software developers website.

Agenda item: 2 – Action item updates

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

Agenda item: 3 – Digital Identity update including transition of Online Services for DSPs

Paul S. provided an update on work occurring in the Digital Identity space.

There are 1000 machine credentials in production. DSPs are encouraged to get in touch with their account manager or DPO if they are experiencing any transitioning or on-boarding issues. The project team has noticed some differences between the MAS-ST and Vanguard – this is currently being investigated.

The team is looking to publish common guidance or FAQ documents. Significant ramp up in transitional activities will begin soon, DSPs are encouraged to on-board early.

Dylon Moyle provided an update on the myGovID transition on Online Services for DSPs (OSDSPs). The transition was successful; Online Services will now accept myGovID only. 80 DSPs have already successfully transitioned.

There is an automatic matching process to link the DSPs previous profile with the new credential. In the event that the matching is not successful, DSPs can raise a ticket to have it manually matched.

DSPs should ensure that the ‘Online Services for Digital Service Provider’ agency permission option has been selected in RAM and grant either full or custom access, before they access OS4DSPs. The error “You are not currently linked to a business’ will occur if this has not been done. Work is progressing with the RAM project team to ensure the description of the error is accurate and communications are clear.

Agenda item: 4 – Business guidance for IITR

Ross advised that the draft IITR was published on 19 December 2019, and the latest MST published on 16 January 2020. The team has already started to receive feedback and welcome more from DSPs as early as possible.

The deductions Q&A and income schedules guidance will be consolidated into one document. The development of the pre-filling specs is in progress.

There are issues with the interest and dividends which are currently being reviewed due to challenges with country codes. Recommendations are being worked on and business will seek input from DSPs.

Ross is seeking DSP feedback regarding the removal of the Australian government benefit Remote Area Allowance from the IITR Income Schedule MST. This is a non-

assessable payment and is not currently required for reporting. This feedback item has been made available on the Collaboration Hub and DSPs are encouraged to review the item and provide any comments by COB 23 January.

Agenda item: 5 – Downsizer contributions

Paul W. presented an issue related to the downsizer contributions in the Self Managed Superannuation Fund Annual Return (SMSFAR). The SMSFAR provides two labels:

- Label H: for downsizer contribution amount reported for the member and
- Label H1: the date the downsizer was received by the fund

The ATO has identified that a number of these returns are failing as a date has been provided at Label H1 when the value in H is zero. SMSFAR forms are increasingly being suspending in the ATO systems and require manual intervention due to the above reason.

DSPs are advised to review their code to ensure that they are not prepopulating a value of \$0 into H1, and/or ensuring that the software does not allow a date to be entered into H1 if the value in H is not greater than \$0. In addition, it is recommended that DSPs review and provide any guidance material to clients.

Paul W. has provided additional details in a separate document ([link to resource](#)).

Agenda item: 6 – CUREL service

Danielle presented findings from internal analysis in relation to the timeliness of CUREL submit service which was raised in the PLS working group last year. DPO have analysed response times for the service, and provided assurance that the service was working to design.

For DSPs building the service, the decision to send messages via SRP or BBRP request is dependent on the intended use of the service. For user initiated requests SRP is preferable as there is a Service Level Agreement (SLA) applicable.

The average processing time of the DSPs analysed using an SRP request for the CUREL submit service was 2.54 seconds. It's important to note that a gen.ok response should be received for the add transaction before moving on to further calls for that client. Until that add transaction has been processed, authorisation has not been established on the account and any further requests will return errors.

There are certain scenarios where BBRP is required to be used such as automated or bulk requests. If that is the case, DSPs need to bear in mind that there are limitations to BBRP i.e.:

- ATO cannot guarantee that batches are run in order, and there could be issues if sending multiple requests for the same client
- There is no SLA in BBRP so the time frame for processing is not guaranteed.

Agenda item: 7 – Tax Time 2020

Warren advised a successful January EVTE deployment which included:

- Updated EFTRS schema to include new data element 'unstructured name data element'
- WPN update for CUREL only to increase digits from 9 to 11
- PLS ITP 2020 rollover of Prefill
- Shares and units service update to include new data element
- CGTTX updates

Further EVTE plans will be provided soon.

Agenda item: 8 – Platform update, including ASFP

Anu reported no new issues as the platform has been stable.

The ASFP release went live and SBR channel has been available for specific services (PAYEVENT and STIC) in catch-and-hold mode throughout the shutdown period while deployment activities continued. There was around 30% more BBRP traffic seen in a day (on 2 January) than ever seen before. The channel has processed the volumes without any issues and the transition has been smooth.

Operations team have commenced ramp up activities in two phases:

1. First phase of SBR2 ramp up started on 30 December and a backlog of just under 1 million documents was cleared and catch-and-hold was re-applied
2. Second phase of SBR2 ramp up activities started at 3am on 02 January and processed nearly 7 million transactions that day

Agenda item: 9 – Agent online environment update

Carl advised that the ASFP deployment was successful given its length and breadth with only a few irritants discovered in Online Services for Agents as part of BDV testing. There have also been a couple of subsequent minor irritants that are being managed; and are not affecting agents. Safety nets were in place for processing Activity Statements during this deployment which caused agents to call the ATO – the number of calls was minimal.

There is work being done the Payment Plan Monitor system as part of a broader deployment of functions in the PRM space, causing payments to be made and recorded against the client account, but not updating the payment plan. This is a temporary problem while the Payment Plan Monitor is switched off and will be resolved once the deployment work is completed.

MYOB asked if there was a full breakdown of how the concessional dates are applied in ASFP for activity statements. It is a struggle to explain to clients how the dates are updated and calculated without proper guidance. Conversation will be taken offline.

Action item: Carl Bennett will provide concessional date information for DSPs to guide their clients.

MYOB also raised an issue with the PLS dashboard not populating the correct metrics.

Action item: Carl Bennett will further investigate the population errors in the PLS Dashboard metrics.

Agenda item: 10 – Collaboration Hub run through

Julie provided a run through of the Collaboration Hub. Resources relating to the PLS working group will be published on both software developers website and Collaboration Hub as a trial. DSPs can contact DPO for further information

DSPs queried whether artefacts on SBR Sharefile may migrate to the Collaboration Hub in the future to support the single entry point initiative. Dylan advised that there is no intention of moving Sharefile content into the Collaboration Hub at this stage. If there was a decision made about its migration, the Collaboration Hub will have the necessary functionality to support it.

Agenda item: 11 – DSP feedback/issues

Xero asked when DSPs can expect conformance suites for the new IITR. Brendan advised that he may be able to provide additional information at the next PLS working group meeting.

Agenda item: 12 – Close

Sonia informed the group that the next PLS working group meeting on 4 February will be extended by 30 minutes to accommodate a feedback session relating to the on demand reports.

Last year, the client communication service which was put on hold is currently undergoing internal discussions. DSPs who had expressed interest to be involved in any design work during the 11-12 September 2019 Services for Tax Practitioners event may be contacted. Any DSPs who wish to also be involved can contact DPO.

Danielle Miller will be facilitating the next couple of meetings while Sonia Lark is working in another role.