Key Outcomes

Title:	PLS working group – key outcomes
Issue date:	24 July 2019
Venue:	WEBEX
Event date:	23 July 2019 **Start:** 1:00pm **Finish:** 2:00pm

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

Attendees: names/section	ATO – Mick Ferris, Sonia Lark, Sonya Summers, Sharna Maltman, Steven Holmes, Paul Mosca, Alex Barnes, Danny Figueiredo, David Andreoli, Paul Walters, Nadeem Shariff, Amrik Singh, Ross Barns, Karen Greaves, David Baker, Grahame Dunnicliff, Russell Siachico, Tania Andrews-Zanozin, Irma Briggs, Sonia Corsini, Martin Kenseley. Industry – Jack Wee (Catsoft), Mike Denniss (Class Super), Nathan Kerr (One-Click), Sandeep Gopalan (GovReports), Mike Behling, Scott Reid, Trent Hayes (MYOB), Kevin Johnson (Reckon), Michael Wright, Saiful Larry, (Sage), Paul Siriwardana, Shane Paxton (Thomson Reuters), Tania Dai (Wolters Kluwer), Kelvin Newton, Andrew Sprankling (Xero).
Apologies: name/section	Warren Sturgiss, Madhavi Talapaneni, Lex Edmonds (Microtax), Darin Carter (Sage), Briony Campbell, Lisa Kim, Grant Whytcross, (Wolters Kluwer), Anthony Migliardi (Xero).

Next meeting	6 August 2019

Agenda item: 2– Action item update

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

Sonia Lark advised the group that Andrew Watson has moved on from the Assistant Commissioner role for Individuals & Intermediaries, and that Sonia Corsini has stepped into that role.

Agenda item: 2 - Tax Time and platform updates

Mick Ferris advised that there have been outages over the past two weekends.

Over the weekend of 12-14 July, there were issues with internal servers across the ATO. BBRP was switched off, but SRP was able to be kept going when back-end systems were not affected. Mick thanked the DSPs for the help they provided throughout the process.

Last weekend during scheduled updates and patching, issues were experienced bringing the database back up. Impact to DSPs was minimised, and processing has been smooth since Sunday.

So far in tax time, we have been seeing in excess of four million transactions through SBR each day – this is now starting to slow. DSPs who have noticed delays should start to see improvements in response times.

Very few specific defects have come up during tax time. We should also shortly have responses to incidents raised by DSPs.

There are no specific fixes planned for the next three to four releases.

MYOB queried Mick's comment regarding the loads dropping off given that an additional 400,000 employers were on boarding in the next three months for STP. Mick replied that that number of employers spread over that period would not be a huge impact and the systems could handle the expected transaction volumes.

MYOB also queried the queueing of report requests following an outage, advising that it seemed the systems did not respond well, and asked whether they should adjust their reconnect strategy. Mick responded that the slowness was due to caching of the load, and it shouldn't be as noticeable as they move away from BBRP.

Agenda item: 3 – Dashboard

David Baker revisited a query raised at the last meeting regarding the BBRP response time graphs which are not currently available. He advised they were seeing some success in testing replacement graphs which will hopefully be live by next meeting.

Thomson Reuters asked whether the CITR transactions should more correctly show as SRP rather than as a bulk request. David agreed, however as there were no resources to address changes this tax time, changes to dashboard posts will be looked at next tax time.

They are looking to do a full review of available dashboard functions, and David asked what was of importance to DSPs.

It was suggested that an explanation of single and bulk requests would be useful for agents viewing the page. David said he would be able to provide definitions. He also advised there was a 'system outage' function, which maintains a history of outages and root cause fixes.

DSPs would like to see a draft before the dashboard is updated.

Agenda item: 5 – myTax FIA issue

David Baker gave the group an overview of an issue which has been raised by some of the bulk ITR lodgment DSPs. Agents have been seeing payments appearing in their trust accounts which are not on the corresponding EFT reconciliation report. The issue is arising when clients, who previously used an agent, hence had agent FIAs on record, are now self-lodging through myTax but are not updating the FIA to their own.

There is consideration being given to the ability to provide a prompt to clients who previously used an agent to update their FIAs – however this will not occur until next tax time.

Agenda item: 6 – DSP Feedback/Issues

Sonia Lark ran through some of the proposed topics for the tax time event in September:
- Digital identity/M2M
- Granular data changes for income and other relevant schedules
- Substantiation
- Preferencing services
- Shares & units
- Activity statement changes
- Changes to CITR instructions
- 2019 copies of return service
- ABN verification
- Online BAS check
- I&I update
- DPO update
- 2020 program of work, including XBRL to XML migration

Sonia reminded the group to send through any other topics they would like to see updates for.

David Baker provided some of the latest tax time stats:
- 2.3 million lodgments (increase of 600,000 on the same period last year)
- 1.3 million calls (increase of 500,000 on same period last year)
- 1.3 million ITR refunds processed

- 600% increase in SBR transactions compared with last year

These stats show that although there may be times where you experience slowness, overall the systems are holding up well.

Reckon advised they are receiving queries from clients regarding the granular data for the deductions schedule – they asked that ATO reconsider publishing the Q&A document on the ATO website to provide clearer guidance. The group agreed this was a common experience.

Action item: Ross Barns will take this back on board, and will develop something to add value to the information that is currently available. Ross asked that DSPs send through common queries, and he will circulate a draft document prior to publishing.

There was a question raised regarding whether there have been many incidences of clients exceeding the maximum number of records for a label and consolidating records, or just providing totals at the consolidation record.

Action item: Ross will take this on notice and get back to the group

Sage asked whether there was any roadmap to see how logic is applied in the deductions schedule and work-related expenses (WRE) to align truncating across the different schedules. Xero added this should also apply to schedules that are shared with non-individual returns that don't have granular data.

Ross advised that yes, work was being done for that, and in addition, they were working to decommission the WRE schedule entirely.