



## Key Outcomes

UNCLASSIFIED External

<b>Title:</b>	PLS working group – key outcomes		
<b>Issue date:</b>	27 June 2019		
<b>Venue:</b>	WEBEX		
<b>Event date:</b>	25 June 2019	<b>Start:</b> 1:00pm	<b>Finish:</b> 2:00pm

<b>Chair:</b>	Sonia Lark	<b>Facilitator:</b>	Sonia Lark
<b>Contact</b>	Sonya Summers	<b>Contact phone:</b>	02 472 57383

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

<b>Next meeting</b>	9 July 2019
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Sonia advised the group an EOI would be going out to for members to be part of a co-design group for the 2020 ITR income schedule granular data.

The meeting is scheduled for **29 July in Sydney**.

She also advised that the annual Services for Tax Practitioners event will be held in Canberra on **11-12 September**.

### Agenda item: 2– Action item update

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

### Agenda item: 3 - Tax Time update

Mick Ferris advised Tax Time updates were released over the weekend.

There were some issues with the granular data for ITR where some of the fields were not available in EVTE and PROD. A 'hot-fix' was put in place post-implementation. The C# code is being published 26/06.

Xero expressed concerns that this issue wasn't addressed when it was raised three months ago.

Mick replied that there had been some issues getting the code up into the environments. He went on to advise they would be doing a post-implementation review to ensure these type of issues will not be repeated, including not making changes to EVTE so close to the PROD release.

He also advised there were strategies in place to ensure the smooth running of Tax Time, including daily meetings, the ability to put in 'hot-fixes', and making sure any identified issues, defects and associated workarounds are published through the DPO – as well as the date when a fix can be expected.

### Agenda item: 4 – Online services for agents - feedback

Irma Briggs ran through an overview of the feedback that has been received from agents for Online Services for Agents:

- Compliments
- Issues
- Ideas

The feedback provided to the group included some of the major or most common items raised. Carl Bennett advised a couple of the items raised in the feedback had already been addressed or considered:

- We are looking at the decision process for not including blank payment slips
- The account sort option has now been implemented
- Including TPAR lodgements in the 'For Action' screen will be available 01 July.

## Agenda item: 5 – STP data in ATO online services - overview

Ian Colhoun gave an overview of how the STP changes to the income tax services would appear in ATO online services.

Ian advised they had been receiving enquiries from agents asking what STP data might look like through practice management software, how the data will be presented.

The slides Ian ran through at the meeting will be published on the SWD website: [https://softwaredevelopers.ato.gov.au/PLSWG\\_20190625](https://softwaredevelopers.ato.gov.au/PLSWG_20190625)

Ian advised that finalised and unfinalised data will be available in pre-fill.

Ian asked whether the group had any concerns with what he presented.

Reckon: where a lodgement is sent through using unfinalised data, and it is determined an amendment is required as the data was subsequently updated, who is responsible for the amendment? Will the ATO issue an amended NOA automatically, or will the onus be on the agent?

Response: Running amendment processes will be held back until October to allow for adjustments.

Action item: Ian will follow up what the agent-based client process will be and provide an update to the group.

The legal requirement for STP includes the finalisation of data.

31 July is the due date for substantial (>20 employees) employers to finalise their STP data. Small employers are also being advised this date, but this is not mandated.

**DSPs**: Please send any feedback through to your account manager, or to the DPO via Online services for DSPs or email [DPO@ato.gov.au](mailto:DPO@ato.gov.au) and we will forward it on to Ian.

## Agenda item: 6 – Platform update

Ted Simes advised it had been a relatively good fortnight for the SBR platforms.

SBR2PROD2 had been very stable and capable  
SBR2PROD1 did have a significant issue on 12/6, but PROD2 was not impacted.

Cutover from PROD1 to PROD2 is currently around 99.2%

A number of new tools have been introduced to allow batches to be actioned much more quickly.

More comprehensive monitoring in PROD2 will mean a more detailed view of metrics in coming weeks.

## Agenda item: 7 – DSP Feedback/Issues

**Class:** Is there a timeframe for alternative services for the ones in SBR1 before they get turned off?

*Response:* DWS are working a plan for deprecation of SBR1. They will try to align changes to updates which would have been made anyway so there is no need for additional work.

**MYOB** did experience an issue in PROD2 at 3.20pm on 12/06 and will be sending through the stuck transactions from this period.

**Reckon:** What work is being done on 'interactive errors'?

Action item: Mick will provide an update on the work occurring on handling 'interactive errors'.

**Reckon** sent through a query via Online Services for DSPs regarding a reported difference in a calculation for investigation. The advice received was that as it pertained to a specific taxpayer the DPO was unable to provide a response.

Action item: Kylie will send out a communication to the group outlining the most appropriate channel for the various enquiry types.

**Sage:** What was decided in relation to the EFTRS solution proposal?

Action item: Paul will provide an update on the three options which were proposed in the EFTRS solution.

**Xero** asked about EFTRS reports not being generated.

Danny responded, advising this was under on-going investigation under action item 16/04-05.

**Xero** also advised they had many agents asking for further details around the granular data for the deductions schedule.

*Response:* Ross Barns advised that DSPs were able to share the Q&A document with their agents. If it was identified that these type of enquiries were ongoing, they would revisit whether the document would be published on the ato website.

**Reckon** and **MYOB** noted that specs for STP pre-fill from the portal were initially incorrect, and were only updated last week – very short timeframe in the lead up to tax time. This feedback will be forwarded to DWS.