PLS working group – key outcomes

Title:	PLS working group – key outcomes		
Venue:	WEBEX		
Event date:	26/11/2019	**Start:** 13:00 AEDT	**Finish:** 14:00
Chair:	Sonia Lark	**Contact:**	Sonya Summers 02 472 57383
Attendees:	**ATO** – Sonia Lark, Steven Holmes, Paul Mosca, Alex Barnes, Danny Figueiredo, Nadeem Shariff, Ross Barns, Karen Greaves, David Baker, Gerardine Burke, Tania Andrews-Zanozin, Warren Sturgiss, Anupama Duggirala, Danielle Miller, Sangitha Sivayogaraj, Helen Adamovich, Danielle Miller, Julie Sen, Sonya Summers, Dylon Moyle, Scott Rumford, Tash Le Blond, Mel Oxman, Paul Stasinowsky, Roger Obbes, Stacey Wilson. **Industry** – Jack Wee (Catsoft), Simon Smart (eTax), Sandeep Gopalan (GovReports), Mike Behling, Scott Reid, Trent Hayes MYOB), Kevin Johnson (Reckon), Michael Wright, Saiful Larry (Sage), Shane Paxton, Paul Siriwardana (Thomson Reuters), Grant Whytcross, Danna Zheng (Wolters Kluwer), Andrew Sprankling, Kelvin Newton, (Xero).		
Apologies:	Michael Ferris, Mike Denniss, Sha Sha (Class Super), Lex Edmonds (MicroTax), Nathan Kerr (One-Click), Darin Carter, (Sage), Briony Campbell, Tania Dai, Lisa Kim (Wolters Kluwer), Anthony Migliardi (Xero).		

Agenda item: 1 – Introduction

Sonia welcomed the group and advised the DPO would be making a new Q&A document relating to the Multi-property rental schedule available on the Software Developers website with the outcomes.

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Ross Barns advised that the document was similar to the one provided for the deductions schedule and was intended to make guidance available to developers as an interim measure, and that the BIGs would be updated in due course.

The multi-property rental schedule Q&A document will be published here: https://softwaredevelopers.ato.gov.au/PLSWG_20191126

Agenda item: 2 – Action item updates

Updates on outstanding items were provided. (see action items). The list of interactive errors which were previously identified as being part of action item **06/08 – 01** has now been published: https://softwaredevelopers.ato.gov.au/PLSWG_20191126

Agenda item: 3 – Digital identity update

Paul Stasinowsky provided an update on work occurring in the Digital Identity space:

- myGov ID is available in PROD for both iOS and Android platforms
- RAM is available to link individuals to businesses
- More services are being introduced to consume the new credential
- The M2M credential is now in place
- Work is being done to help end-users, DSPs and businesses to transition to the new solution – with more information being published in coming weeks
- More improvements are planned between now and March 2020

Sage queried whether there were any expected changes in the coming weeks. Paul confirmed that although there were a few small enhancements planned, the overall flow was not changing.

MYOB raised an issue relating to the importing of AUSkey permissions to the new myGovID credential – whilst a user may have had access to Access Manager with their AUSkey, this permission is not automatically imported across to the myGov ID credential\, it needs to be manually added as this particular permission exists in RAM. Mike asked for information to be included in the relevant documentation.

Sonia reminded the group of the AUSkey decommissioning webinar which is scheduled for the 27th of November:
https://softwaredevelopers.ato.gov.au/AUSkeydecommissioninginfosession27112019

Agenda item: 4 – Change advice – Taxation of testamentary trusts

Helen Adamovich advised the group that although legislation relating to the taxation of

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testamentary trusts is expected to be introduced to parliament next week, the changes described in the change advice (available in controlled information) will be implemented with no plans for rollback if the legislation is not passed.

The changes include:

- A new type of trust will be introduced, and
- There will be a new label in the statement of distribution (6AA)

The specifications are expected through from DWIS shortly.

Agenda item: 5 – How AUSkey decommissioning will impact Online Services for DSPs

Dylon Moyle from the DPO gave the group an overview of what they can expect when Online Services for DSPs transitions from AUSkey to myGovID.

The transition date is **13 January 2020** – prior to this date DSPs will only be able to use their AUSkey, and not their myGovID, to access Online Services for DSPs.

From 13/01/2020, DSPs will no longer be able to use AUSkey to access Online Services for DSPs, and must use their myGovID.

Dylon reminded the group that they should set up their myGovIDs now and start preparing for the migration... DSPs can also import AUSkey users into RAM – this allows automatic matching of AUSkey profiles to myGovID profiles so permissions carry across. If the AUSkey is not imported, DSPs may not be able to see the full range of tickets in OS4Ds as there will not be automatic matching of permissions.

There will however, be a new ticket which will allow DSPs to request a manual connection of a new myGovID profile to an old AUSkey profile.

A document covering details on how AUSkey decommissioning will impact Online Services for DSPs has been published on the Software Developers website:

https://softwaredevelopers.ato.gov.au/PLSWG_20191126

MYOB reminded the group the check their company 'principal' in case they are no longer with the organisation as updates will need to be made to ensure all AUSkey accesses are not lost with no-longer-valid profiles.

Agenda item: 6 – Software Developers website migration – Accessing controlled information

Scott Rumford advised the group that as part of the Software Developer website migration to the new platform, access to controlled information would be changing. Controlled information will not be able to be stored on the new platform, but will be accessed via Online Services for DSPs. In the next few days, the current controlled information will be copied across to

Agenda item: 6 – Software Developers website migration – Accessing controlled information

OS4DSPs and will be available in both locations until the current website is fully migrated. Once the new platform goes live, controlled information will ONLY be available in OS4DSPs. Any DSPs who do not have an AUSkey (prior to 13/1/2020) will not be able to access the controlled information - contact the DPO for assistance.

There will be a highlight in the DSP Newsletter, and the DPO will be contacting all DSPs who have access to controlled information currently to advise them of the upcoming changes.

Agenda item: 7 – Tax Time 2020

Sangitha Sivayogaraj advised that during the EVTE drop on the weekend, there was an issue experienced with the CGTTX service, but a fix was scheduled to be deployed 26/11. Relevant artefacts have been published.

Agenda item: 8 – Platform update

Anupama Duggirala advised the SBR2 systems have been stable recently.

She advised work is being done on the operations plan for ASFP readiness regarding the ramp down, resources and remediation activities.

Function testing has been completed and the process is working as defined for catch and hold.

Proposed volumes testing to be completed in the lower levels environment by the end of week.

DWIS has been working closely and heavily involved with the ASFP programme to provide the comms strategy for integrated communications to DSP.

Catch and hold strategies are working as designed, and performance testing is occurring before ramp up/ramp down strategies are implemented. SBR2PROD1 has been removed from monitoring as decommissioning activities get underway.

Agenda item: 9 – Agent online environment update

David Baker advised that the tax and Bas agent portals would be decommissioned next Tuesday after 20 years. The replacements were Online Services for Agents and wholesale in software. There was work being done with the 1800 agents who have not yet transitioned to the new platform.

David went on to introduce Mel Oxman who wanted to address an issue which had come up through 'Complex issues resolution services' related to taxpayer declarations. Mel advised there was some confusion among agents in regard to the provision of declarations. She advised that as long as the SBR declaration guidelines were being

Agenda item: 9 – Agent online environment update

followed, DSPs could remove the ELS declaration entirely as it was no longer required.

Any questions in relation to this can be sent through to the DPO via Online Services for DSPs or DPO@ato.gov.au.

Reckon suggested that it be clearly communicated to agents that only one declaration is required. Mel Oxman will look into a relevant communications strategy.

Agenda item: 10 – DSP feedback/issues

The group was asked whether they had any other issues they wanted addressed:

GovReports raised two issues which will be taken as action items by Paul Stasinowsky.

1. GovReports raised an issue whereby they created an M2M credential with the same name as a previously expired device AUSkey, however it did not appear in Access Manager even after being primed. When a new one was created with a different name, it appeared and was available for use with no issues.

2. The M2M credential for Office of State Revenue (OSR) payroll tax has not been created for testing. With the current AUSkey model, all state payroll tax portals require AUSkey authentication before transmitting data through SBR channel in PROD. Need the OSR credential created.

MYOB asked whether ALL activity statement due dates will change after ASFP deployment, or only the ones generated after deployment.

David Baker advised only quarterly activity statements were impacted, and that all 2.5 million outstanding activity statements (at crossover) will have the concessional due dates applied (whether that be the 2 week or 4 week concession). From the generation of the Mar 2020 quarterly activity statement onward, the concessional due dates will automatically apply.

Sage raised an issue in relation to how the 'god rule' applies to PLS reports which means agents get lists of all client obligations, and not just the ones they are responsible for. DSPs are looking for an option to configure the reports so agents can select the obligations they want included in the report.

Action item: David Baker will investigate whether there is anything that can be done to give agents report configuration options.

Sage also requested the R&D specs for 2020. Sangitha and Warren Sturgiss will take this as an action item.

There were no further issues raised.

The next meeting on 10 December will be the last for 2019.

The first meeting after the shutdown period will be 07 January 2020.