

SOFTWARE ASSISTANT

PLS SETUP

What is SBR?

SBR stands for Standard Business Reporting.

The Standard Business Reporting Program (SBR) is a government sponsored program, designed to reduce the reporting burden for businesses. SBR offers a quicker and easier way for businesses, Tax and BAS Agents to complete their government reporting requirements, freeing up valuable time for other business activities. SBR is simplifying business-to-government reporting by:

- removing unnecessary or duplicated information from government forms,
- using business software to automatically pre-fill forms,
- adopting a single reporting language, based on international standards and best practice,
- making financial reporting a by-product of natural business processes,
- providing an electronic interface to various government agencies directly from business software, similar to an electronic postal system, which will also provide validation and confirm receipt of reports,
- providing a single secure online sign-on, AUSKey, for users to report electronically to all of the agencies involved.

What is PLS?

The practitioner lodgment service (PLS) is the name the ATO use for the channel which has become the main electronic lodgment channel for tax practitioners. This channel will gradually replace the old ELS. PLS lodgments need to be made using Standard Business Reporting (SBR)-enabled software.



What is an AUSKEY?

AUSkey is a secure login that identifies you when you use participating government online services on behalf of a business. AUSkey allows you to access and send business information to government agencies online.

AUSkey is a single key for accessing government online services. It is common to all the government agencies participating in SBR-enabled reporting and over time will allow you to login to a range of other business to government websites such as ASIC and ABS.

Do I need an AUSKEY?

You will need an AUSkey to lodge forms with Software Assistant via PLS.

To ensure you are set up and ready to start using Tax Assistant you need to first register for an AUSkey and install it within the *Options* screen of Software Assistant. Tax Agents that access the Tax Agent Portal should already have an AUSkey installed.

If you do not have an AUSkey - [Register for one here](#)

***Note** Users must also ensure the correct AUSkey permissions have been set via the ATO Access Manager and should refer to the ATO Access Manager AUSkey help document.

What is the difference between PLS & ELS? How am I affected?

Tax Assistant has moved towards PLS, providing a digital way of interacting with the ATO. Originally ELS was due to be de-commissioned on 31 March 2017, however ELS for most forms will remain available for some time after March. The Individual ELS form will be available until 31 March 2018 as a safety net to ensure tax professionals have access to an online service.

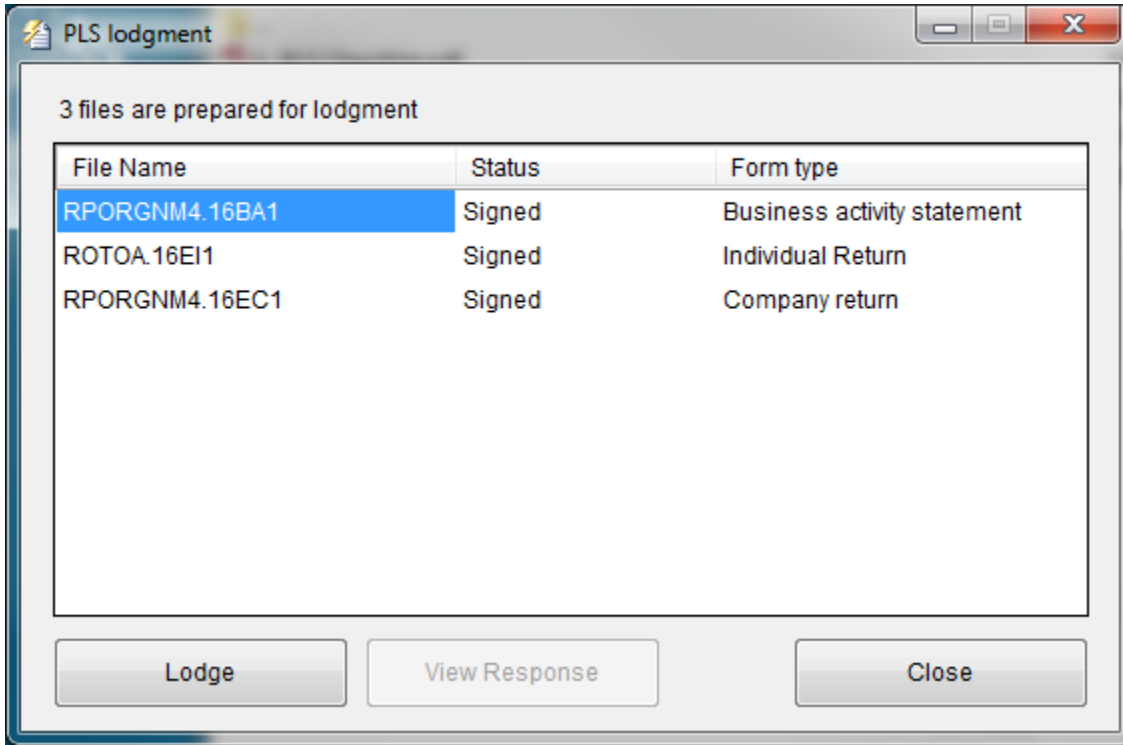
During 2017 we recommend you familiarize yourself with PLS and complete a few PLS tax form lodgments to ensure you are confident lodging via PLS.



How do I lodge using PLS?

As a Tax Agent or a business intermediary lodging on behalf of a Taxpayer, you can currently lodge all prior year Tax forms using the PLS lodgment module. These forms include Individual, Company, Partnership, Trust, SMSF, Fund, BAS, IAS and FBT.

You can expect current year tax forms to be available starting early 2017. Refer to the PLS form roadmap for more information.

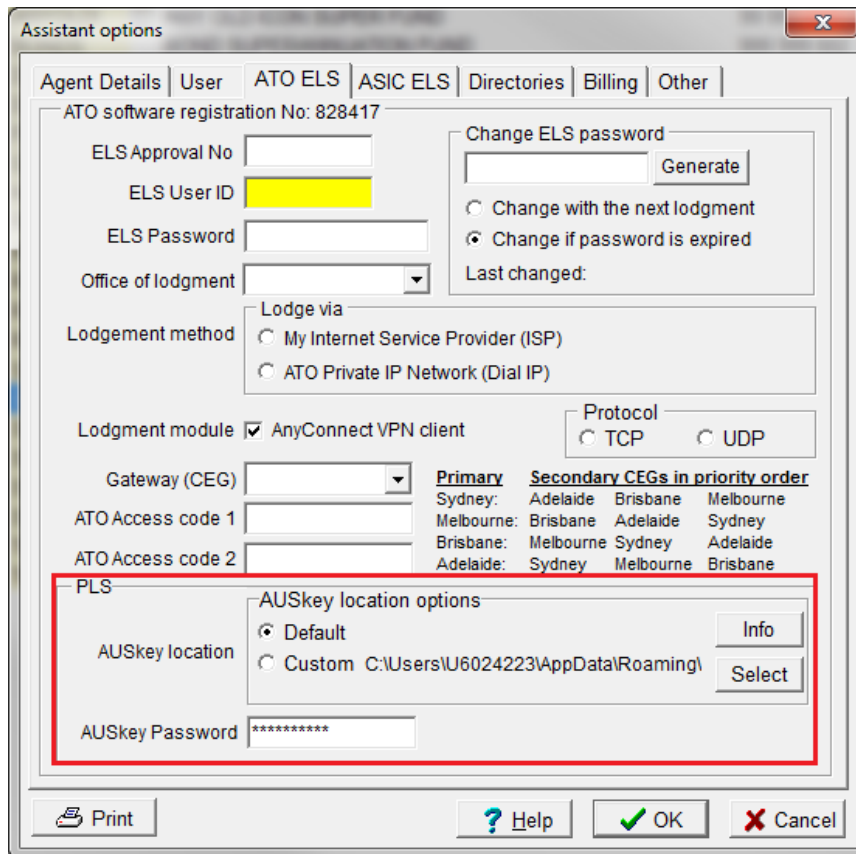


Workflow changes & messages

To prepare for PLS lodgment you must first attach your AUSkey via the *Options / ATO ELS* menu within Software Assistant. Software Assistant now supports those using a Terminal Server. As of v2017.2.1 release, Assistant will now automatically select your AUSkey based on the default locations shown below if you have not already linked the AUSkey. In this case, the path will remain the same.

If you still need to manually link your AUSkey, click on **Select AUSkey** and navigate to your AUSkey location. The default name for the AUSkey file is **keystore.xml**.

Ensure your AUSkey is entered correctly and press OK. We recommend to double-click on the password once entered to confirm it has been entered correctly.



Operating System

Windows 7, 8, 10

MAC OSX

USB

Location

C:\Users\USERNAME\AppData\Roaming\AUSkey

Finder/USERNAME/Library/Application Support/AUSkey

USB Drive\AUSkey or AUSkey Browser\AUSkey

When signing a tax return you must let Tax Assistant know whether you want to send that form via PLS by selecting the following checkbox under *Status*. Not selecting this box will result in the form being sent via ELS.

Status of the EI 2016 form (ROTOA - ROTOA, Services)

Signed & ready to lodge Lodge via PLS

Assigned to: John Smith

Agent notes for the return or form:

Date started: 15/03/2017 Date updated: 15/03/2017

Date prepared: Date downloaded:

Date mailed: Date last lodged:

Date signed: Lodgment Office:

Date due: Lodgment Report:

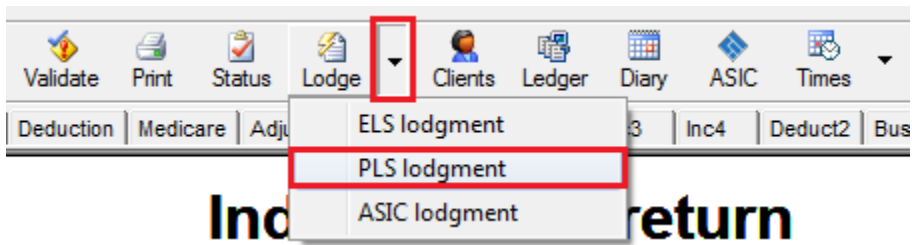
Assessment details

Reference No	<input type="text"/>	Assessment Balance (-) Refundable, (+) Payable	<input type="text" value="0.00"/>
Date received	<input type="text"/>	Tax Assistant estimate	<input type="text" value="-300.00"/>
Date payable	<input type="text"/>	Variance	<input type="text" value="-300.00"/>
PAYG Tax	<input type="text" value="0.00"/>		

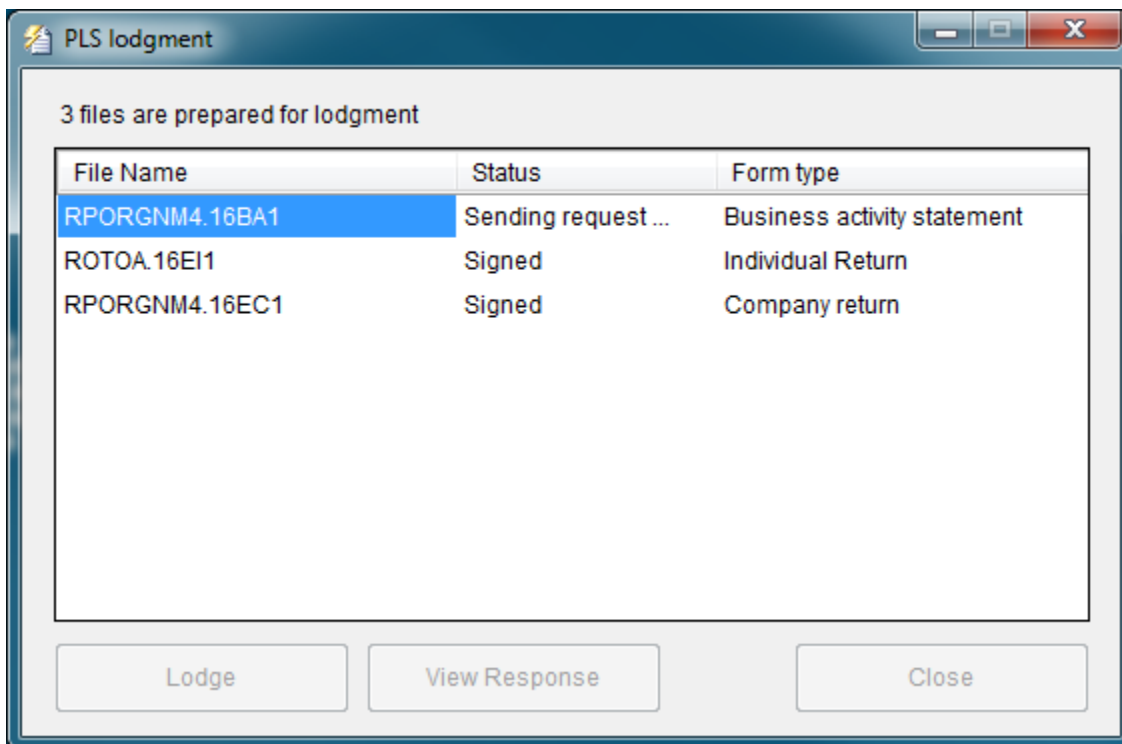
? Help ✓ OK ✗ Close



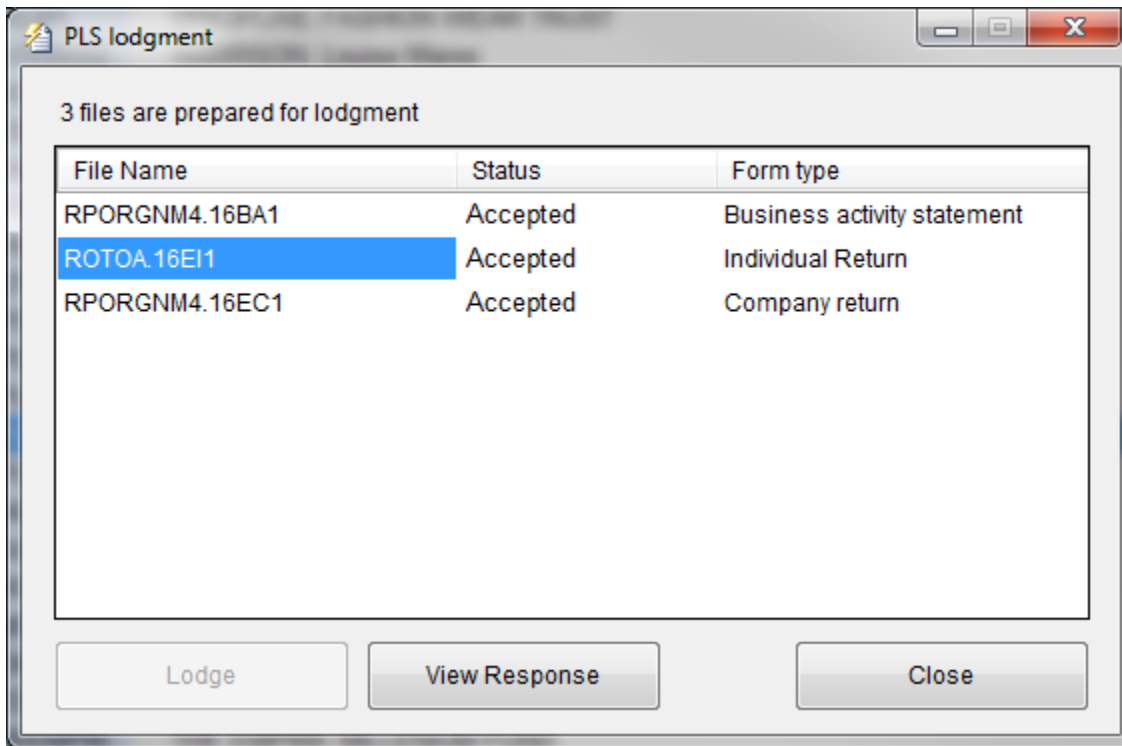
When you are ready to lodge your tax forms via PLS, select *PLS lodgment* by clicking on the arrow next to the *Lodge* button:



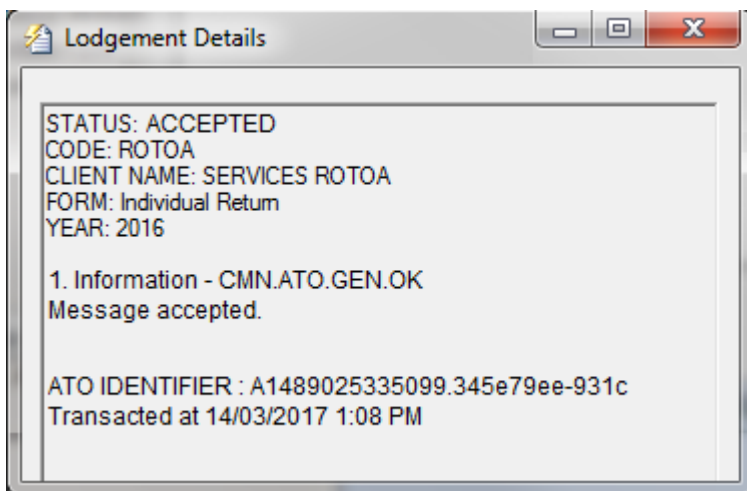
On the lodgment screen you are shown all signed forms to be sent via PLS. When selecting *Lodge*, the message *Sending request ...* is shown as each form is sent:



Once the lodgment is complete, the user can see the change in Status reflecting the response from the ATO:



The user should select the appropriate return and click on the '*View Response*' button to see the response. A response similar to that below is shown, outlining lodgment status, client code, form type and year. If the form was rejected, a rejection message will be shown.



The response will be transferred to the *Status* dialog screen once the lodgment module is closed. To access a tax form lodgment report, click on the *Lodgment Report* as shown in red below.

Status of the EI 2016 form (ROTOA - ROTOA, Services)

Accepted

Assigned to: John Smith

Agent notes for the return or form:

Date started: 23/02/2017 Date updated: 24/03/2017

Date prepared: Date downloaded:

Date mailed: Date last lodged: 09/03/2017

Date signed: 23/02/2017 Lodgment Office:

Date due: Lodgment Report: **VALID_1142708895**

Assessment details

Reference No: Assessment Balance (-) Refundable, (+) Payable: 0.00

Date received: Tax Assistant estimate: -300.00

Date payable: Variance: -300.00

PAYG Tax: 0.00



Changes to validation messages

You may notice some changes to the way validation and transmission reports are delivered when lodging via PLS.

With the implementation of PLS, these validation messages have now changed, aiming to simplify the reporting process. Upon lodgment of a tax return, tax professionals are no longer presented with validation codes, but rather a brief explanation of the rejection reason or notice. An example can be seen on the previous page.

Contact us

For further information on PLS and the changes, please contact the Support Desk.

Email:

supportanz@thomsonreuters.com

TEL:

1800 074 333

