

Digital Advisory Group Meeting Minutes

Date:	Thursday 27 August
Time:	1.00pm - 3.00pm NZST
Co-Chairs:	Anil Srinivasa (Inland Revenue) and Tim Kirkpatrick (Tax Traders)
Secretariat:	Maggie Leese (DSPANZ)
Members:	Andy Dingfelder (iPayroll) Chris Mar (Datacom) Eric Troebner (Tax Management NZ) Erin Adams (Xero) Karl Farrand (Taxlab) Katherine Truman (SAP) Katie Leitch (MYOB) Mayce Green (ReadyTech) Mike Behling (Taxlab) Phil Yarr (The Access Group) - proxy Richard De Zwart (ReadyTech)
Inland Revenue Participants:	Glenn Richards Justine Duthie Mark Tapara Nick Wilkins Patrick Sawyer
Guests:	Adwin Singh (Inland Revenue).
Apologies:	Don Hounsell (MYOB), Edwin McLean (The Access Group), Tracey Turner (Inland Revenue).

Item	Description	Lead
1	Welcome Anil Srinivasa welcomed everyone to the meeting and invited Mark Tapara to provide an opening Karakia.	Anil Srinivasa (Inland Revenue) Mark Tapara (Inland Revenue)
2	Acceptance of previous minutes Tim Kirkpatrick moved to accept the minutes from the 25 June 2026 meeting. The minutes were taken as read and accepted.	Tim Kirkpatrick (Tax Traders)
3	Action item review 25.06.2026-2 Anil Srinivasa provided an update on request to pay functionality, and that Inland Revenue (IR) will seek	Anil Srinivasa (Inland Revenue)

	further information through Middleware New Zealand, an organisation involved in open banking. 25.06.2026-3 Anil shared that the DSP list was targeted for publication in September. 25.06.2026-4 Adwin Singh noted that a date had not been agreed upon for an OSF update information session. 25.06.2026-5 Adwin shared that the OSF FAQ updates remained in progress and were targeted for completion by the end of October. The OSF questionnaire was also being revised to add an acknowledgment that applicants had used AI during the OSF responses. Adwin said the OSF process had been extended for one DSP to align with that DSP's process with the ATO, with the extension process formalised internally. Members shared that parts of the onboarding material and questionnaire were difficult to interpret and insufficiently detailed. Agreed action to seek feedback to make specific improvements as required.	
4	Inland Revenue Update IR has published the organisation's core priorities for the 2026-27 year and beyond, which continues the themes of operating effectively and efficiently taking accountability and responsibility for stewardship of the tax and social policy system. Noted that focus would remain on strengthening the longer-term compliance approach, using intelligence and tools to develop appropriate interventions and create a more unified approach to the organisation's compliance outcomes. IR was continuing to build staff capability using AI-enabled tools. Adoption was still at an early maturity stage. A variety of use cases were in consideration and being piloted in low-risk, low-impact settings. The organisation was developing a "digital dexterity" programme to help staff and leaders understand how digital tools could improve organisational work.	Mark Tapara (Inland Revenue)

5	Operational Security Framework (OSF) Update Adwin reported low uptake of the OSF knowledge base in the CMS portal, which contained walkthroughs, introductory guides, frequently asked questions, terms of use information, operational security framework materials, and additional guidance. Members suggested asking whether AI helped compile any part of the submission and which parts it assisted, while still assessing whether the overall information was true, reasonable, and supported by professional judgement. Adwin clarified the disclosure was intended to capture whether and how AI assisted with the paperwork, support understanding of the submission's context, and overall information was true and supported by professional judgement. Other AI-related questions are already included in the assessment process.	Adwin Singh (Inland Revenue)
6	General DES Team Update <i>Digital Work Programme</i> Anil Srinivasa reported that the executive leadership team had approved creating a digital work programme spanning the organisation to bring together existing digital initiatives and place greater emphasis on enabling capabilities such as digital identity. The next phase of the digital work programme would define specific investment priorities and establish a three- to four-year roadmap for key enabling building blocks. IR would engage the group as the programme took shape to seek perspectives on its different elements. IR was examining how content published on the web was consumed by machines and AI tools rather than only by people or directly through the website, with specific work underway to make public information easier for AI systems to consume. IR remains interested in payments modernisation, noting that the Reserve Bank had taken ownership of this initiative and was consulting widely on a modern real-time payment system with consultation due to close in late October. <i>Cross-Cohort Engagement</i> Proposed joint forum	Anil Srinivasa (Inland Revenue)

	Anil proposed a combined meeting between this group and the tax agent cohort to exchange strategic, high-level insights and enable each group to ask questions of the other. The forum would not address operational issues; its format and topics would require further consideration. Participation and purpose Members said cross-functional forums would be most effective if they included both people authorised to change products and resolve operational issues, and people able to design workable technical solutions for forward-looking policy discussions. The right mix of participants from tax agents, software providers and IR would depend on the topic, with some discussions requiring representation across all three groups. Anil clarified that established consultation processes already covered specific policy and solution matters, including working groups for the annual April and October releases. Direct engagement Members said the two groups should engage directly rather than communicate through IR as an intermediary. IR could facilitate and guide the discussion but should not selectively relay information or act as a conduit for separate messages between the groups. Comparable model Members noted that the Australian Taxation Office's tax practitioner stewardship relationship management team brings software providers and tax agents together to resolve implementation issues and support the smooth rollout of major tax changes. Focus on shared problems Members cautioned that forums could create pressure to deliver long-requested functionality without sufficient context. Erin suggested focusing the forum on a clearly defined problem that participants could work through together. Conditions for success Members said a forum would be most useful when the tax authority had identified a specific problem, allocated a budget and demonstrated a willingness to act. No conclusion was reached on setting up the joint	
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	meeting.	
7	Autonomous workflow and agentic AI interfaces Key discussion points: Members considered how autonomous AI agents could act in tax processes. The discussion revolved around the key functions of identity, authentication, authorization and accountability and the potential impact on the future design of IR Gateway Services. They agreed that high-impact actions - particularly filing returns and directing refunds - should retain clear human review and approval checkpoints. Conclusion: AI-assisted actions should be traceable to an identifiable person with established authority. The authorizer should remain accountable for the outcome regardless of the tool used. Agent permissions could be bound by default and further restricted by individual taxpayers. AI agents could authenticate as separate users when taking an action, making it possible to distinguish an agent-generated outcome from one produced directly by a human. Refund processing and return filing are examples of activity that should have mandatory human checkpoints. Potential next steps: Identify prohibited autonomous activities and explore how AI tax agents could act for taxpayers from intermediary and service-provider perspectives; and return to the topic at a future meeting for a more detailed discussion.	Tim Kirkpatrick (Tax Traders)
8	DSP Onboarding Experiences Discussed the DSP onboarding process as an opportunity for improvement following substantial changes over the previous year to the CMS portal. The group was asked to share onboarding experiences and lessons from the ATO and other jurisdictions. Glenn acknowledged the importance of engaging DSPs earlier on Inland Revenue's onboarding processes, requirements, and conditions while they are being designed. An increase in application volumes compared with previous years was one driver to review the current onboarding approach. This would also help to better understand and respond to forecasted demand, while	Glenn Richards (Inland Revenue), Mark Tapara (Inland Revenue), Justine Duthie (Inland Revenue), Erin Adams (DSPANZ)

	also improving the overall applicant experience. Noted that one change under consideration was making more information available upfront so applicants could assess whether the effort required to complete onboarding was worthwhile before proceeding. Applicant roles and authorisation Members discussed the need to distinguish between the administrative applicants and the senior office holders authorising it. Mark clarified that applications currently had to be submitted by an authorised key office holder and the person managing the application could obtain evidence of the executive's authorisation, such as a signed PDF or email, which IR would retain. Members said the onboarding form did not clearly identify the person responsible for managing the application and receiving information and that requiring direct involvement from a senior executive in an organisation could create undue delays. Members provided an Australian example where applications are lodged through an online pathway with substantive paperwork and internal sign-off completed separately, Members suggested a flexible onboarding approach that can reflect different types of DSPs and risk profiles. An appropriate regional product leader, for example, may be better placed to authorise applications. Onboarding information and documentation Members observed that the Australian and New Zealand processes were at different levels of maturity. The Australian approach provided enough initial information to get started, with further detail available through the relevant specifications, while its operational framework had developed collaboratively in response to issues DSPs needed to resolve. Mark explained that retrospective due diligence is intended to give Inland Revenue confidence that third parties interacting with Gateway Services, and holding substantial customer information, remain fit and proper. The review considers the organisation, the compliance of people operating or controlling it, and	
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	the security of the relevant platform or service, reflecting the need to protect the integrity of the tax system. Mark reported a broader market trend in which existing consumers of products and services, including tax intermediaries, were increasingly considering building their own Gateway Services rather than continuing to rely solely on current offerings from their DSPs. API usage, service behaviour and support Members said DSPs often assemble client services by combining several APIs to meet niche business needs, but API providers did not consistently explain expected usage patterns or how their services were intended to operate alongside other APIs. This made it difficult for DSPs to design compliant and efficient service offerings. Members also explained that unclear update mechanisms forced DSPs to poll APIs frequently - for example, every five minutes - to detect when an assessment had been completed and new information was available. This created unnecessary load on services and could result in requests being rejected or throttled. Mark acknowledged that there is an opportunity to provide more information to DSPs regarding an end-to-end API business use and expected service behaviour when developing a broader Gateway Services offering. <i>API Testing, Design and Early Engagement</i> Members said the ATO's new API systems included a sandbox, but the capability was still embryonic and did not address the core problem of understanding service behaviour, update timing, and appropriate integration patterns. DSPs needed earlier opportunities to discuss these issues during the design phase, before investing significant time and effort and potentially discovering that an API could not support their business case. This included earlier visibility of potential API and service changes, future use cases, inbound and outbound requirements, and associated risk ratings. Understanding these factors early would help balance competing needs and ensure the right support was available before projects began.	
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	Members stressed changes should be developed with consideration of DSP relationships, as introducing requirements without sufficient engagement could damage trust at the outset. The process should support strong, cooperative relationships between DSPs and IR. Operational Framework and Support Information Participants agreed that these issues could be explored in a broader discussion with DSPs around the operational framework, including how DSPs find available elements, what information they expect to find and how the process could be made easier for organisations assessing New Zealand's offerings for the first time. Members said support content was often perceived as being behind a locked paywall and was not consistently usable by DSP organisations. The material appeared to describe what IR wanted DSPs to know rather than answer the questions DSPs needed to communicate internally. Members suggested that content should be written in a way that allowed it to be cited directly when escalating questions within an organisation. Mark explained that access to the Gateway Services Support Portal and technical documentation, including build packs and OSF information, currently sits behind a pay wall. Only applicants meeting permitted-disclosure requirements could access the documentation. Inland Revenue is refining this upfront screening approach. Members said that the electronic onboarding process would be easier to use if guidance currently located in separate PDFs were incorporated directly into field-level help.	
9	Any other business The next session was scheduled for Thursday 5 November and currently planned as an in-person meeting in Wellington. Tim Kirkpatrick invited participants to suggest topics for the longer-form session to himself, Anil Srinivasa or Maggie, including a possible continuation of the DSP operational framework discussion and a second round of AI questions.	Tim Kirkpatrick (Tax Traders)
10	Meeting close Close the meeting and call upon Mark Tapara for a	Anil Srinivasa (Inland Revenue),

	closing Karakia.	Mark Tapara (Inland Revenue)
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Actions

Date Raised	Description	Responsible
25.06.2026-1	IR to share the link to the government's digital target state information to interested participants. Update 27.08.2026: Information shared alongside previous meeting minutes. Action item closed.	Inland Revenue
25.06.2026-2	Reach out to ANZ to discuss the status and future of the request-to-pay (pay-to) functionality in New Zealand. Update 27.08.2026: Anil Srinivasa to seek further information from Middleware New Zealand.	Chris Denney, Anil Srinivasa
25.06.2026-3	Return to the group with details and next steps after executive approval on the publication of the DSP list. Update 27.08.2026: List was targeted for publication in September.	Tracey Turner
25.06.2026-4	Arrange an information session for DSPANZ members on the New Zealand OSF and security framework changes. Update 27.08.2026: A date has not been agreed upon. In the meeting, it was discussed that DSPANZ would support a joint OSF and onboarding discussion.	Adwin Singh, Chris Denney
25.06.2026-5	Update the OSF FAQs to include guidance on extensions for completing the OSF and clarify definitions and expectations for reporting security incidents, including major/minor classifications. Update 27.08.2026: Updates are in progress and were targeted for completion by the end of October.	Adwin Singh
22.02.2024-1	Paused: Anil Srinivasa and DSPANZ will discuss data minimisation and retention further and report back to the group. Update 23.05.2024: Anil will report back to the group post Budget on whether Inland Revenue can progress this work. Update 22.08.2024: Inland Revenue will not pick up new initiatives until the end of the year. This item will remain open. Update 10.10.2024: Anil acknowledged the information collection framework has been shared with members and will be published in November. Anil will reconnect	Anil Srinivasa, DSPANZ

	with the team to understand the resourcing requirements to undertake this work. Update 18.02.2025: Anil Srinivasa shared that, with Inland Revenue welcoming a new Chief Data Officer, changes are happening within the data analytics team. Once work has started internally in March, Anil will bring this topic to the DAG. Update 12.06.2025: This item will be placed on hold.	
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