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NZ DAG Meeting Minutes & Actions - 16.12.2021

Attendees	**Chairs -** Emma Dobson (DSPANZ), Rogan Clarke (IRD) **Members -** Alex Forgie (Wolters Kluwer), Chris Mar (Datacom), Don Hounsell (MYOB), Edwin McLearn (Reckon), Gaston Milsom (AMS), Karl Farrand (Taxlab), Katherine Truman (SAP), Kat Cavanagh (ReadyTech), Jason Langworthy (Xero), Mike Behling (MYOB), Simone Dixon (ELMO Software). **Secretary -** Maggie Leese (DSPANZ), Jordan Molloy (DSPANZ) **IRD participants -** Anil Srinivasa, Barbara Millyard, Glen Evans, Mark Tapara, Nick Wilkins, Shan Dutta, Sophie Smith, William Jamieson. **DSPANZ participants -** Simon Foster (DSPANZ)
Apologies	Matthew Prouse (DSPANZ)

Agenda Item	Description
1	**Welcome and introductions** Emma Dobson and Rogan Clarke welcomed everyone to the meeting.
2	**Acceptance of previous minutes** The minutes were taken as read and accepted.
3	**Ecosystem update** IRD are running sessions across January, February and March on their strategy refresh. Rogan discussed the influence of the Consumer Data Right (CDR) thinking on consumer consent and how IRD collects data. There is a draft issues paper being circulated internally and it is expected that extracts will be shared externally. There was a question on the role of digital identity in the CDR. It was noted that the implementation of digital identity is still at the policy phase and that it may be worth having a conversation with the digital identity team to ensure the technology is suitable for DSPs. <u>Action</u> William to provide information on the ministers dealing with digital identity to Emma.
4	**IR services moving forward** Rogan presented on the focus areas for IR services moving forward. IRD will aim to host sessions after Christmas for DSPs (with a split between tax and payroll players) on service management and performance management. IRD will be taking on board feedback from the DAG and will speak to the ATO about their approach. It was acknowledged that this will be an evolution of how IRD and DSPs work together

	similar to the ATO's experience where they improved their ability to detect issues but still rely on DSPs to alert them to some issues. There is a backlog of demand that needs to be worked through. Some of the items raised has led to IRD questioning their role in what and who they enable. Alongside the above work, IRD is creating a roadmap including new services and changes to existing services which will cover: - What the initiatives are - Current state - What it would mean for gateways services. Once the roadmap is in a shareable form, IRD would like to share it with the DAG for feedback. The roadmap will come alongside a versioning strategy. DSP members agreed that this is a positive direction to support current and future services. Rogan covered the principles that will shape the service catalogue moving forward highlighting a number initiatives and areas where IRD would like to improve including: - Real time TDS - Lean data collection - Event based rather than cyclical data collection / sharing - Direct data access rather than large scale replication and reconciliation - Customer consent as the basis for data access These principles will continue to be refined to the point where both IRD and the DAG are comfortable with them. Rogan noted that there are no plans to move away from daily payroll processing but clarified that IRD is beginning discussions on how they could move away from some cyclical processes.
5	**Template annual change process** Glen Evans presented a revised version of the generic annual change timeline. The feedback from members was mostly on DSPs wanting to be involved in the policy and design stages of the process. As a result of the feedback, two new streams were added: - Policy consultation with DSPs and other stakeholders - what needs to be captured, intent from policy - Design consultation with DSPs - IRD thinking, how it could be implemented Glen noted that this was not a final version and that it still requires input from the policy. It was also mentioned that there is a constraint on how early the build packs can be developed but that IRD are working through this. It was raised that when things do not go to plan that there needs to be an understanding of how DSPs can adapt to any late items that come in. IRD will be talking to the policy team to get them aligned with this plan but it was acknowledged that things may not always go as planned. IRD will be using the block plan as a lobbying instrument internally to show what good lead times look like and with an aim of creating a standard vehicle for engaging with DSPs.

		It was suggested that the design consultation should run in parallel with the build so that DSPs could provide input on any issues that arise. Rogan and Glen noted the feedback on testing and suggested that the DAG should cover this after tax time 22 and undertake a review of the experience. **Annual Changes 22** The timeline has not changed substantially since the last meeting but the delivery has now been split between trust and non trust changes which allows the non trust changes to be delivered earlier (week beginning 10 January - once the environment has been validated). The trust change environment will be available in February. The non trust packs have been sent out and the trust packs will be sent in the first week of January. The reason for the delay in trust delivery is that most of the feedback on the trust changes from the DAG members has been incorporated. Rogan and Glen will set up a session to talk through the changes before Christmas to give those interested a heads up.
6		**Review work plan** IRD recently held a feedback session on TDS. Once the design has been finalised, IRD will share this with the DAG for broader feedback with a summary of what is different. IRD will be moving the discussion on Annual Change to a weekly catch up for those interested meaning that the DAG will only cover this when it is a broader item. It was noted that the DAG will still cover the Annual Change block plan given that it will be used as a plan for implementing major changes to other services. It was noted that the TLS 1.2 certificates will expire in March 2021. Concern was voiced that this would create issues due to the overlap with other ongoing changes in this period. Inland Revenue will validate that this is the data of expiry and loop back to the DAG.
7		**Meeting dates and times for 2022** The following meeting times for the beginning of next year were agreed upon noting that the March and April dates were moved forward to avoid public holidays and the January meeting will start later to avoid a clash for Emma. ● 27 January 3pm NZDT / 1pm AEDT ● 24 February 2pm NZDT / 12pm AEDT ● 17 March 2pm NZDT / 12pm AEDT ● 14 April 2pm NZDT / 12pm AEDT Placeholders for each of these meetings will be issued. If you are unable to attend a meeting, you are able to send someone else in your place. Just email Maggie, Rogan and/or Emma to let us know.
8		**Next steps and meeting close** Emma and Rogan thanked the members for their participation in the DAG so far and acknowledged how far the level of engagement has come since the first meeting.

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Actions

Date Raised	Description	Responsible
16.12.2021	William to provide information on the ministers dealing with digital identity to Emma.	William Jamieson

Next meeting:

The next meeting will be held on 27 January at 3pm NZDT / 12pm AEDT. Any changes to the date and time will be communicated through the Slack channel and email.