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| Standard Business Reporting  Australian Taxation Office  PR.0001 2015 Package v1.4 Contents    Date: 20th September 2018 | | | |
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| attention_pms This document and its attachments are **Unclassified** | direction_pms **For further information or questions, contact the SBR Service Desk at** [SBRServiceDesk@sbr.gov.au](mailto:SBRServiceDesk@sbr.gov.au) | | |
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VERSION CONTROL

| Version | Release date | Description of changes |
| --- | --- | --- |
| 1.4 | 20/09/2018 | This document has been updated for the September 2018 EVTE Release.  **Section 2 Package contents**  **Updates:**  The following artefacts have been **versioned to final** with functional changes:   * **ATO PR.0001 2015 Validation Rules.xlsx** INC000029748406: Delete validation rule VR.ATO.GEN.410206 to allow ‘The trustee’ and other like messages through lodgement * **ATO PR.0001 2015 Schematron.zip**   This zip file contains the updated schematron files for PR.  **Section 3 Schematron changes**  **Additions:**  There are no known additions in this package version.  **Section 4 Known issues and future scope**  There are no known issues and future scope in this package version.  **Appendix A – Prior Version History**  Moved prior version control (v1.3) history to Appendix A – Prior Version History. |

|  |  |
| --- | --- |
| ENDORSEMENT  APPROVAL | |
|  | Chief Solutions Architect  Standard Business Reporting |
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1. Introduction
   1. Purpose

The purpose of this document is to advise software developers of the package contents for Standard Business Reporting (SBR) Private Ruling (PR) 2015 service provided by the Australian Taxation Office (ATO).

* 1. Audience

The audience for this release note is software developers who are interested in developing PR services on the SBR ebMS3 platform.

* 1. Purpose of this package

The purpose of this package is to streamline the way message artefacts are presented to software developers.

All relevant message artefacts that comprise the PR suite are contained within one zip file. The package will be versioned up each time artefacts are added or updated.

* 1. Summary of artefacts in the ATO package
     1. In general

For each service/message, the following artefacts have been released:

* Message Structure Table (MST),
* Message Repository (MR),
* Schematron zip file and
* Validation Rules (VR)

***Note:*** *From September 2016 the Message Implementation Guide/s (MIGs) will not be produced and will be replaced by the ATO Service Registry which is published under the ATO Common information artefacts section on all ATO pages on sbr.gov.au.*

The first PCN released outlines the expected artefacts to be within the package at an end state – as known at that point in time.

As a general rule, each service will have at minimum an MST and VR.

Where a ‘suite’ of like services is packaged, there will be service specific MSTs and VRs packaged to form a bundle of related information.

The basic exception to the above is Income tax Returns. Due to complexity of relationships between parent returns and child schedules each has its own set of documents (MSTs and VRs) yet is packaged together as a ‘suite’.

* + 1. Circumstances where artefacts are not present in a package

The table in *Section 2 Package Contents* reflects the status of artefacts in the *Package Status* column and needs to be read in conjunction with the *Comments* column in order to understand the scale of change that may be applicable.

The table below describes the terminology used in the *Package Status* column and the business description of the package status:

| **Package Status** | **Business Description** |
| --- | --- |
| Pending | The artefact is currently under development and is expected to be released in a future package. |
| New | The artefact is new for the package and has not been published previously. This would usually occur when an artefact has previously been marked as Pending (under development) or a new Government/ATO initiative sees the development of new services/messages to be deployed. |
| Present | The artefact is within the package and has had no change from the prior package for this year or a previous/forward year where artefacts cross multiple years. |
| Removed | The artefact was within the package in a prior release but has been removed as it is not relevant for the suite in question. This could occur due to Government legislation waiting on Royal Assent not being passed or other factors. |
| Updated | The artefact has changed since the last public release for this package. It could occur as a result of refining service/messages due to feedback or defects. |

* + 1. New services

There are no new services for this release.

* + 1. New message associated with services (child relationship)

There are no new messages for this release.

1. Package contents

The table below outlines the package contents.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name | Document Date | Document Status | Version | Comments | Package Status |
| ATO PR.0001 2015 Request Message Structure Table.xlsx | 16.11.2017 | Final | 1.3 | No change from prior publication. | Present |
| ATO PR.0001 2015 Response Message Structure Table.xlsx | 15.10.2015 | Final | 1.2 | No change from prior publication. | Present |
| ATO PR.0001 2015 Schematron.zip | 20.09.2018 | Final | 1.4 | This zip file contains the updated schematron files for PR. | Updated |
| ATO PR.0001 2015 Validation Rules.xlsx | 20.09.2018 | Final | 1.4 | INC000029748406: Delete validation rule VR.ATO.GEN.410206 to allow ‘The trustee’ and other like messages through lodgement | Updated |

|  |  |
| --- | --- |
| **Total artefacts in this Package:** | **4** |
| Present artefacts | 2 |
| New artefacts | 0 |
| Updated artefacts | 2 |
| Pending artefacts | 0 |
| Removed artefacts | 0 |

1. Schematron changes
   1. Technical Changes

The table below outlines the changes made in the schematron files in this package version.

| **Service Name** | **Schematron ID** | **Change** | **Previous Rule** | **Previous Message ID** | **New Rule** | **New Message ID** |
| --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |

***Note:*** *Some modifications to Schematron may not always have an impact to the technical rule or response message. There may be instances where the change made impacts to content not captured in this section such as the ‘Rule Type’ e.g.: Crossform to Crossfield, or updates to the ‘English Business Rule’ or the Namespace Prefix version associated to a data element has incremented.*

* 1. Event Message Changes

| **Service Name** | **Schematron ID** | **Change** | **Previous Event Message** | **Previous Message ID** | **New Event Message** | **New Message ID** |
| --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |

1. Known issues and future scope

There are no known issues or future scope items at the time of publication.

Appendix A – Prior Version History

| Version | Release date | Description of changes |
| --- | --- | --- |
| 1.3 | 19/07/2018 | This document has been updated for the July 2018 EVTE Release.  **Section 2 Package contents**  **Updates:**  The following artefacts have been **versioned to final** with functional changes:   * **ATO PR.0001 2015 Validation Rules.xlsx** INC000028721130: Modify validation rules to allow ABN or TFN for an individual and added validation rule to enforce a contact position when both individual and non-individuals are present * **ATO PR.0001 2015 Schematron.zip**   This zip file contains the updated schematron files for PR.  **Section 3 Schematron changes**  **Additions:**  There are no known additions in this package version.  **Section 4 Known issues and future scope**  There are no known issues and future scope in this package version.  **Appendix A – Prior Version History**  Moved prior version control (v1.2) history to Appendix A – Prior Version History. |
| 1.2 | 16/11/2017 | **NOTE: This package is now at a status of ‘FINAL’.**  This document has been updated for the November 2017 EVTE Release.  **Section 2 Package contents**  **Updates:**  The following artefacts have been **versioned to final** with functional changes:   * **ATO PR.0001 2015 Validation Rules.xlsx**   Refer to change history for details of functional changes.   * **ATO PR.0001 2015 Schematron.zip**   This zip file contains the updated schematron files for PR.  The following artefacts have been updated with non - functional changes:   * **ATO PR.0001 2015 Request Message Structure Table.xlsx**   Refer to change history for details of functional changes.  **Section 3 Schematron changes**  **Additions:**  There are no known additions in this package version.  **Section 4 Known issues and future scope**  There are no known issues and future scope in this package version.  **Appendix A – Prior Version History**  Section added and previous history removed from here and is now under this section. |
| 1.1 | 21/09/2017 | **NOTE: This package is now at a status of ‘FINAL’.**  This document has been updated for the September 2017 EVTE Release.  **Section 2 Package contents**  **Updates:**  The following artefacts have been **versioned to final** with functional changes:   * **ATO PR.0001 2015 Validation Rules.xlsx**   Driver: [INC000028040097](http://insightitsm.atonet.gov.au/arsys/forms/syd02h747pvn/HPD:Help+Desk+Classic/Default+User+View/?qual=%271000000161%27%3D%22INC000028040097%22&cacheid=3b8c7159) - Validation rule **VR.ATO.GEN.500055** updated to allow maximum of 200 characters for field [**PR44].**  Refer to change history for details of functional changes.   * **ATO PR.0001 2015 Schematron.zip**   This zip file contains the updated schematron files for PR.  **Removals:**  There are no known removals in this package version.  **Section 3 Schematron changes**  **Additions:**  There are no known additions in this package version.  **Updates:**  **Section 3.1 Technical Changes**   * **Modified VR.ATO.GEN.500055**   **Technical Business Rule**  From:  IF LENGTH(pyde.xx.xx:PersonUnstructuredName.FullName.Text) > 25      RETURN VALIDATION MESSAGE ENDIF  To:  IF LENGTH(pyde.xx.xx:PersonUnstructuredName.FullName.Text) > 200      RETURN VALIDATION MESSAGE ENDIF  **Section 3.2 Event Message Changes**   * **Modified VR.ATO.GEN.500055 (CMN.ATO.GEN.500055)**   **Error Message - Long Description**  From:  For Declarer contact name, the maximum allowable characters for this form is 25.  To:  For Declarer contact name, the maximum allowable characters for this form is 200.  **Short Message Description**  From:  Declarer Contact Name must not exceed 25 characters  To:  Declarer Contact Name must not exceed 200 characters    **Section 4 Known issues and future scope**  There are no known issues and future scope in this package version.  **Appendix A – Prior Version History**  Section added and previous history removed from here and is now under this section. |
| 1.0 | 23/02/2017 | **NOTE: This package is now at a status of ‘FINAL’.**  This document has been updated for the February 2017 EVTE Release.  **Section 1 Introduction**  **Additions:**  The following subsections have been included:  **1.4.2 Circumstances where artefacts are not present in a package**  **1.4.3 New services**  **1.4.4 New messages assocaiated with services (child relationship)**  **Updates:**  Renamed Section 1.4 from "**Summary of impacts on software developers**" to "**Summary of artefacts in the ATO package**".  **1.4.1 In general**  Section has been reworded to clarify list of artefacts that are included in the package, with artefact status information now located under section 1.4.2.  *Note: From September 2016 the Message Implementation Guide/s (MIGs) will not be produced and will be replaced by the ATO Service Registry which is published under the ATO Common information artefacts section on all ATO pages on sbr.gov.au.*  **Section 2 Package contents**  **Updates:**  The following artefacts have been **versioned to final** with functional changes:   * **ATO PR.0001 2015 Validation Rules.xlsx**   Driver: INC000019697385 - Validation rule VR.ATO.GEN.500069 updated to allow character ‘\_’ (underscore) in element Declaration.SignatoryIdentifier.Text.  Refer to change history for details of functional changes.   * **ATO PR.0001 2015 Schematron.zip**   This zip file contains the updated schematron files for PR.  **Removals:**   * **ATO PR.0001 2015 Message Repository.xml**   This file has now been removed from the PR 2015 package, refer to the ATO SBR Message Repository.   * **ATO PR.0001 2015 Message Implementation Guide.docx**   Message Implementation Guide (MIG) documents have been replaced by the ATO Service Registry which is published under the ATO Common information artefacts section on all ATO pages on sbr.gov.au.  **Section 3 Schematron changes**  **Additions:**  The following subsections have been included:  Section 3.1 Technical Changes  Section 3.2 Event Message Changes  **Updates:**  **Section 3.1 Technical Changes**   * **Modified VR.ATO.GEN.500069**   **Technical Business Rule**  From:  IF (pyin.xx.xx:Declaration.SignatoryIdentifier.Text <> NULLORBLANK) AND (ANY CHARACTER OF pyin.xx.xx:Declaration.SignatoryIdentifier.Text <> SET(a-z,A-Z,0-9,"!","@","$","%","&","\*","(",")","-","=","[","]",";",":","'",""",",",".","?","/"," "))  RETURN VALIDATION MESSAGE  ENDIF  To:  IF (pyin.xx.xx:Declaration.SignatoryIdentifier.Text <> NULLORBLANK) AND (ANY CHARACTER OF pyin.xx.xx:Declaration.SIgnatoryidentifier.Text <> SET(a-z,A-Z,0-9,"!","@","$","%","&","\*","(",")","-","\_","=","[","]",";",":","'",""",",",".","?","/"," "))  RETURN VALIDATION MESSAGE  ENDIF  **Section 3.2 Event Message Changes**   * **Modified VR.ATO.GEN.500069 (CMN.ATO.GEN.500069)**   **English Business Rule**  From:  A text character must be one of the following: A to Z a to z 0 to 9 ! @ $ % & \* ( ) - = [ ] ; : ' " , . ? / or a space character.  To:  A text character must be one of the following: A to Z a to z 0 to 9 ! @ $ % & \* ( ) - \_ = [ ] ; : ' " , . ? / or a space character.  **Message - Long Description**  From:  A text character must be one of the following: A to Z a to z 0 to 9 ! @ $ % & \* ( ) - = [ ] ; : ' " , . ? / or a space character.  To:  A text character must be one of the following: A to Z a to z 0 to 9 ! @ $ % & \* ( ) - \_ = [ ] ; : ' " , . ? / or a space character.    **Section 4 Known issues and future scope**  There are no known issues and future scope in this package version.  **Appendix A – Prior Version History**  Section added and previous history removed from here and is now under this section. |
| 0.6 | 19/05/2016 | This document has been updated for the May 2016 EVTE Release.  **Updates:**  The following artefacts were updated with **functional changes**:  Refer to the artefact's change history for further information.   * **ATO PR.0001 2015 Message Repository.xml**   Updated response messages for PR.   * **ATO PR.0001 2015 Schematron.zip**   Refer to Section 3 for details of changes.   * **ATO PR.0001 2015 Validation Rules.xlsx**   Modified to allow underscores in email address fields.  **Additions:**  The following sections have been included:   * **3 Schematron changes** * **4 Known issues and future scope** |
| 0.5 | 15/10/2015 | This document has been updated for the October 2015 EVTE Release.  **Updates:**  The following artefacts have been updated with **no functional changes:**   * **ATO PR.0001 2015 Message Implementation Guide.docx -**Added Client Information and Declaration sections. Updated Definitional Taxonomy version number. * **ATO PR.0001 2015 Request Message Structure Table.xlsx-**Added Australian Business Number and Organisation Branch code due to missing labels. * **ATO PR.0001 2015 Response Message Structure Table.xlsx -** Removed incorrect context. |
| 0.4 | 17/09/2015 | This document has been updated for the September 2015 EVTE Release.  **Updates:**  The following artefacts have been updated with **functional changes:**   * **ATO PR.0001 2015 Message Repository.xml-** updated response messages for PR. * **ATO PR.0001 2015 Schematron.zip** –refer below * **ATO PR.0001 2015 Validation Rules.xlsx** - Replaced non-ASCII characters in Technical Rules.  - Replaced non-ASCII characters in message descriptions.   The following artefacts have been updated with **no functional changes:**   * **ATO PR.0001 2015 Request Message Structure Table.xlsx-**Updated column names in CST and added missing Legal Reference column names to MST. * **ATO PR.0001 2015 Response Message Structure Table.xlsx -** Updated column names in CST and added missing Legal Reference column names to MST.   Refer to section 2 of this document for a description of the change relevant to an artefact. |
| 0.3 | 20/08/2015 | This document has been updated for the August 2015 EVTE Release.  **Updates:**  The following artefacts have been updated with **functional changes:**   * **ATO PR.0001 2015 Message Implementation Guide.docx** Updated the following sections: 2.1 Attachments and 3 Lodge Interaction Specifications * **ATO PR.0001 2015 Message Repository.xml-** contains the updated messages for PR. * **ATO PR.0001 2015 Schematron.zip–** refers validation rules below. * **ATO PR.0001 2015 Validation Rules.xlsx** 78468: Update ABN and ASN fields missing for Applicants 80033: Included DOMAIN of allowable codes for "Main Subject Area".   81321: Update ABN Fact Field  Refer to section 2 of this document for a description of the change relevant to an artefact. |
| 0.2 | 16/07/2015 | This document has been updated for the July 2015 EVTE Release.  **Updates:**  The following artefacts have been updated with **functional changes:**   * **ATO PR.0001 2015 Message Repository.xml -** Updated response messages to include the Interactive Error Handler messages. * **ATO PR.0001 2015 Schematron.zip–** refer validation rules below. * **ATO PR.0001 2015 Validation Rules.xlsx** 76268: Updated allowable codes for "Main Subject Area".  76025: Business Intermediary can successfully request ruling for more than 1 client 76034: Request should fail when Additional Clients Indicator is true but there is no attachment   The following artefacts have been published as ‘Final’ on the SBR Website:   * **All Reporting and Definitional Taxonomies for PR.0001 2015:**   + **pr.0001 (request and response)**   The following artefacts have been versioned to **‘Final’ with no functional change:**   * **ATO PR.0001 2015 Message Implementation Guide.docx** * **ATO PR.0001 2015 Request Message Structure Table.xlsx** * **ATO PR.0001 2015 Response Message Structure Table.xlsx** |
| 0.1 | 18/06/2015 | Initial release. |