

Key messages

[CLASSIFICATION] External

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| Title: | Rollovers v3.0 Implementation Forum (RIF) | | |
| Issue date: | 24 June 2021 | | |
| Venue: | WebEx | | |
| Event date: | 17 June 2021 | Start: 2:00pm AEDT | Finish: 2:20pm AEST |
| Chair: | Belinda Black, Rollover v3 Project Manager Superannuation & Employer Obligations ATO | | |
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Agenda item: 1– Welcome and opening remarks

Belinda Black opened the meeting and welcomed the group.

Agenda item: 2– ATO Update

- B2B testing commenced this week and is progressing well with one administrator and one SMSF provider completing all bar 1 test in two days.

Cohort 1 participant feedback: A significant amount of testing has been completed in 2 days – thank you to all involved.

Cohort 2 is starting on 05 July 2021 and we are confirming the funds readiness to commence testing on this date. We will issue the ‘welcome to cohort’ emails on 21 June 2021. This will include the gateway providers supporting the cohort participants.

As a result of the current testing we have had 2 learnings raised. We are in the process of incorporating this information into the existing SuperStream Rollover v3 Implementation and onboarding learnings and issues register available on the SuperStream Rollover v3 wrapper page.

- G2B – 1 fund and 1 administrator have fully completed the G2B test suite. 7 other parties are currently in progress:
 - 4 funds
 - 3 DSPs
- ESA Alias – We can confirm that the ESA alias is case insensitive and we will be including a FAQ into the SuperStream Rollover v3 implementation and onboarding information document available on the [SuperStream Rollover v3](#) wrapper page. We are also investigating whether a test scenario can be added into G2B testing.

- An issue was raised where schematron was incorrectly triggering validation errors on unclaimed.superannuationmoney.date field on rollover transaction requests. The schematron has now been updated to remove this validation, and available to download on the software developers Rollovers v3 website.

- POST MEETING Member verification system UPDATE:

As discussed in our previous RIF meeting on 9 June 2021, you will still have access to the Business Portal to utilise the SMSF member verification system until late September 2021. We would like to notify the group that further information is now available on ato.gov.au under [Changes to the member verification service](#).

Agenda item: 3– Industry update and questions

No updates

Agenda item: 4– Issues register

You can access the latest version of the SuperStream Rollover v3 Implementation and onboarding learnings and issues register on the [SuperStream Rollover v3](#) wrapper page .

Agenda item: 5– Lessons learned

- A member's SMSF ABN and name are required fields when testing B2B messages with SMSF provider. Using ABNs which are not registered but meet the ABN algorithm test may result in some messages failing. Funds are to use the dummy test data developed and provided by industry for testing. Where funds encounter this issue, they are to consult with their SMSF provider testing partner to resolve. This may include using a registered SMSF ABN and name. This learning is recorded as #23 in the SuperStream Rollover v3 Implementation and onboarding learnings and issues register.
- Using SMSF bank account names which include certain symbols will cause your message to be rejected by the SMSF verification service (SVS) in EVTE. The only acceptable symbols in SMSF bank account name field for the SVS are as follows: 0-9 a-z A-Z . () { } ' | - \ # * & Funds should only use SMSF bank account names which contain the above symbols when conducting B2B testing. This learning is recorded as #24 in SuperStream Rollover v3 Implementation and onboarding learnings and issues register.

Agenda item: 6 – Wrap up and close

Reminder to all participants that we are relying on you to keep us informed of your testing and onboarding dates along with any changes.

When we reach out to you for conformation of your dates, we appreciate a quick reply with specific dates (rather than the applicable month) so we can schedule you in to an appropriate cohort group, even if this means you may change your dates at a later point in time.

Next meeting: 1 July 2021

Action item summary

No action items outstanding