

Key messages

[CLASSIFICATION] External

File ref: 11/2021

Title:	Rollovers v3.0 Implementation Forum (RIF)		
Issue date:	17 August 2021		
Venue:	WebEx		
Event date:	12 August 2021	Start: 2:00pm AEDT	Finish: 2:11pm AEST
Chair:	Belinda Black, Rollover v3 Project Manager Superannuation & Employer Obligations ATO		
Contact	Maria Bosnjakovic	Contact email: Super&EmploymentConsultation@ato.gov.au	

Agenda item: 1– Welcome and opening remarks

Belinda Black opened the meeting and welcomed the group.

Agenda item: 2– ATO Update

- Production Verification Testing (PVT)
 - There is still only one fund who has cut over to production however this will increase over the coming week.
 - One Electronic Portability Form (EPF) has gone through Rv3 functionality and passed.
 - The first SMSF provider is due to cut over by the end of the month. Refer to the [SMSF service provider Readiness](#) document available on the SuperStream Rollover v3 wrapper page for more information on SMSF readiness dates.
 - As more funds onboard the level of PVT will reduce given our confidence in this system has already been confirmed. We will however support all fund through their PVT. This will be achieved by Funds notifying us of any transactions they would like confirmation of receipt for.

- Fund Validation Service (FVS)
 - Funds are reminded that it is an obligation notify us of changes to the FVS at least 10 business days prior to going into production.
 - It is also critical that certification is updated correctly as per the [Fund Validation Service user guide](#). If you need assistance updating your certifications, please contact SuperStreamStandards@ato.gov.au
 - Where the FVS certification update is incorrect and not rectified in a timely manner once you have been notified, we may consider cancelling the update request/s to avoid downstream impacts to other users of the service.

- Government 2 Business (G2B) - G2B testing progress with funds, administrators, SMSF providers and digital services providers (DSPs) as at 12/08:
 - 18 completed their G2B testing.
 - 16 are currently undertaking G2B testing.

ATO has capacity to support any fund that is ready now and would like to bring forward their G2B testing. Please contact us via emailing SuperStreamStandards@ato.gov.au

- Business 2 Business (B2B)
 - Cohort 6/7 is currently underway and due to finish 13 August 2021
 - Cohort 8 is currently underway and due to finish 20 August 2021
 - Cohort 9 will commence 23 August and the pre cohort testing discussion occurred today 12 August

We have brought forward the pre-cohort testing discussion to ensure funds are ready to commence B2B testing from the start of each cohort.

We have also brought forward the recommendation to undertake a handshake test with testing partners a week prior to the cohort commencing. This is to ensure a smooth experience for everyone and to avoid any downstream impacts for you and your testing partners.

- Cohort scheduling
 - The most recent iteration of the cohort schedule was published 13 August. Cohort 10 participants have been contacted and contact will begin for Cohort 11 participants from 16 August.
 - Continuing to provide regular updates of readiness information (G2B, P2P & B2B and production cut-over dates) via the SuperStreamStandards@ato.gov.au mailbox ensures information is accurately recorded.
 - With funds beginning to cutover to production, funds are reminded that a completed Production Readiness checklist needs to be supplied prior to cutover.
- Superannuation Dashboard – this will be updated once the SVS and SMSFmemberTICK services have been utilised.
- The following documents have been updated and forwarded for publishing on our [SuperStream Rollover v3](#) wrapper page:
 - [12 August 2021 weekly onboarding update](#)
 - [29 July 2021 RIF key message](#)
 - [SuperStream Rollover v3 production verification testing](#)
 - [SuperStream Rollover v3 Cohort Schedule](#)
 - [SuperStream Rollover v3 implementation and onboarding learnings and issues register](#)
 - [SuperStream Rollover v3 SMSF service provider readiness](#)

Agenda item: 3– Industry update and questions

- Industry asked about the recent updates to both the SMSF verification and SMSF member TICK web content available on ato.gov.au.
 - ATO confirmed there was an error within the tables published which will be resolved overnight.

POST MEETING UPDATE – correction was available from 9am Friday 13 August

Agenda item: 4– Issues register

The latest version of the [SuperStream Rollover v3 implementation and onboarding learnings and issues register](#) was published to the [SuperStream Rollover v3 wrapper](#) page 13 August 2021.

Agenda item: 5– Lessons learned

No updates

Agenda item: 6 – Other business

No other business raised

Agenda item: 7 – Wrap up and close

Belinda thanked the group for their attendance and participation.

Next meeting: 26 August 2021

Action item summary

No updates