ATO / SBR BAS Lodgement

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The instructions in this article relate to ***ATO SBR Client.*** The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

The ***ATO SBR Client*** is an integrated module designed to assist with the lodgement of a saved StrataMax BAS directly with the Australian Taxation Office (ATO).

ATO / SBR Video

The following video was prepared to demonstrate the SBR functionality of lodging Business Activity Statements with the ATO.

What is Standard Business Reporting?

SBR (Standard Business Reporting) is an enabling technology that can be used in many ways saving the community and government agencies time and money. SBR helps businesses reduce the time spent collating information, filling in forms and submitting reports to government.

The SBR Integration integrates with StrataMax and will perform the following tasks:

1. Retrieve outstanding BAS reports to complete.
2. Prefill the data available from the ATO and saved StrataMax BAS for the selected period.
3. Submit Prelodge BAS to check for errors.
4. Submit completed BAS reports.
5. List previously Lodged BAS reports (lodged via SBR).

The ATO SBR Client will allow BAS's to be lodged for both StrataMax and GLMax, if being utilised.

ATO Credentials

Credentials are created in the form of a saved encrypted file, which is obtained through the ATO. This is

called an *'SBR Keystore file'* and must be available and accessible when StrataMax is open in order for the ***ATO SBR Client*** to be used.

To obtain an SBR Keystore file, this article has included the below links to assist. However, any issues or queries about this process should be forwarded to the ATO directly.

When the ***ATO SBR Client*** is used to lodge BAS, the SBR Keystore file requires a password. When this is entered, the process involves multiple steps and the password is not stored, meaning the password must be re-entered each time a BAS is lodged.

> StrataMax is an installed software product (not hosted), which may need to be advised if discussions with the ATO are required.

Name	Function
MyGovID app	Access to authorised representatives
Relationship Authorisation Manager (website)	Management of credentials and adding additional Users
Machine Credentials (File to be created and stored)	File to be used to allow Lodgement with locally installed software - StrataMax ATO SBR module

Useful links to the ATO

MyGovID and RAM
https://www.ato.gov.au/General/Online-services/Accessing-online-services-with-myGovID-and-RAM/

Guide for creating the machine credential file
https://info.authorisationmanager.gov.au/guide-how-to-install-a-machine-credential

Create Machine Credential
https://info.authorisationmanager.gov.au/sites/default/files/atobeinstaller_exe.zip (this will download a browser extension to install)

Video demonstrating the above process
https://publish.viostream.com/play/bd1bdiuni9z7sw

Create Machine Credentials to use with SBR software
https://info.authorisationmanager.gov.au/business-software-user-or-provider

StrataMax ATO SBR Client

The ***ATO SBR Client*** allows users to easily and quickly lodge saved Business Activity Statements to the ATO. Before using SBR, ensure that the current completed BAS has been saved in the ***Business Activity Statement*** menu.

1. Search or select ***ATO SBR Client***.
    - If the standalone version of the SBR client is not installed, users will see a notification where they can click the button to automatically download and install the SBR client.
2. Select the required *Drive* to use from the drop down list (this will default to the first drive).
3. Click the *Search* button (magnifying glass) next to the Keys field.
4. This will open Windows Explorer to locate the ABR Keystore file.



CLOUD HOSTED CLIENTS

If StrataMax is installed on a remote server or virtual machine, this file will need to be saved or transferred there so that it is accessible to be used in the ***ATO SBR Client*** menu in StrataMax. The office IT support provider will be able to assist with the transfer of this file if necessary.

BAS Types that cannot be lodged using ATO SBR Client

Some BAS types cannot be lodged using the ***ATO SBR Client*** menu. If these BAS appear under the *'New'* section when the *Find Pending* button is clicked, they should be deleted and lodged manually with the ATO either by using MyGovID or with a paper BAS.

GST / PAYG with variable lodgement frequency

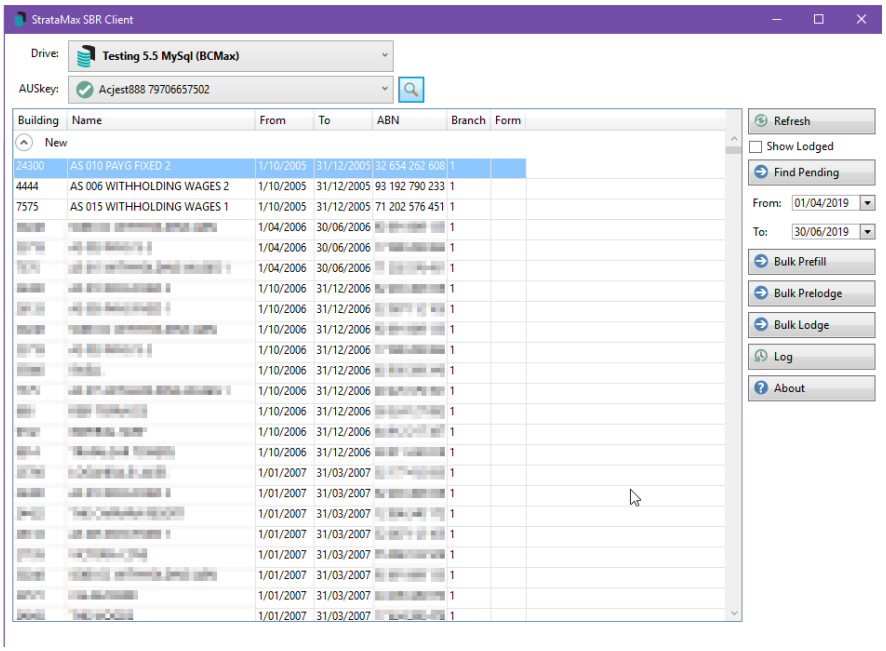
Any buildings that have a different GST frequency (e.g. quarterly), to the PAYG reporting (e.g. monthly) frequency, the ***ATO SBR Client*** will not be able to select the appropriate document from the list web service.

If a building is detected with this condition, the ***ATO SBR Client*** will display an error message in the log and not import the building when the *Find Pending* button is used.

Finding Pending - Business Activity Statement

When the StrataMax ***ATO SBR Client*** screen is opened, the screen will display a list of options for*Find Pending,* the first step in preparing the BAS that are available to be lodged, based on whether the building is *GST Registered* in StrataMax.

1. Review the *To* and *From* dates to ensure that they represent the BAS period due to be lodged.
2. Click the *Find Pending* button.
3. When the list of buildings registered for GST appears, tag the required buildings and click*OK*.
4. The selected BAS will now appear in the list with a status of*'New'*.



Prefilling – Business Activity Statement

Prefilling the BAS will contact the ATO service and will return a response containing details of the selected BAS that the ATO has available. This can be done using the *Bulk Prefill* button or each individual BAS.

Prefill one BAS

To prefill the details for a selected BAS:

1. Select and right-click the required BAS.
2. Select *Prefill* and *OK*.
3. The BAS will now appear in the list with a status of*'Prefilled'*.

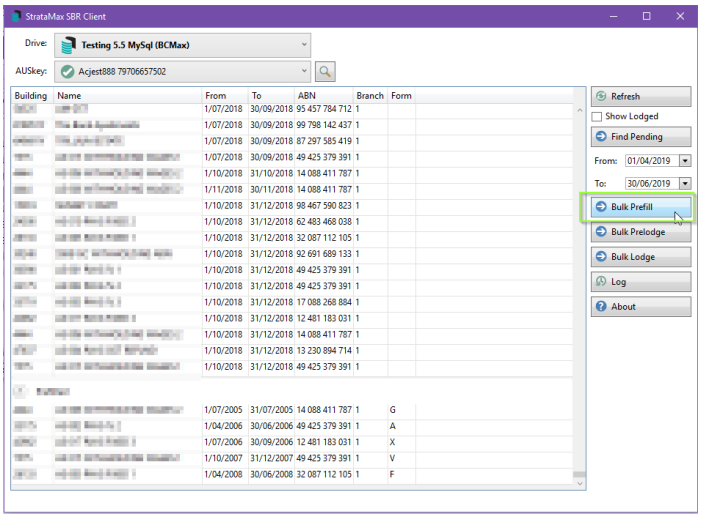
Prefilled

4444	AS 006 WITHHOLDING WAGES 2	1/07/2005	31/07/2005	14 088 411 787	1	G
33175	AS 002 PAYG % 2	1/04/2006	30/06/2006	49 425 379 391	1	A
42962	AS 017 PAYG FIXED 3	1/07/2006	30/09/2006	12 481 183 031	1	X
7575	AS 015 WITHHOLDING WAGES 1	1/10/2007	31/12/2007	49 425 379 391	1	V
26133	AS 005 PAYG FIXED 1	1/04/2008	30/06/2008	32 087 112 105	1	F

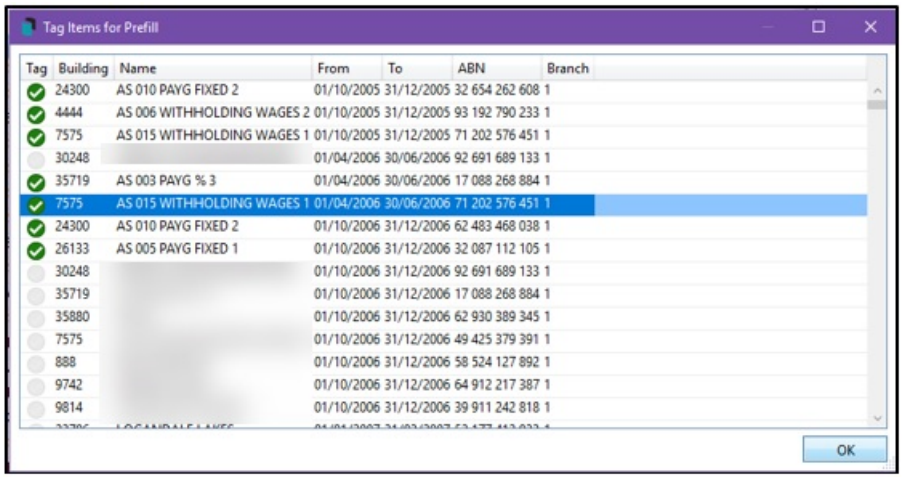
Prefill Multiple BAS

To prefill multiple BAS that are due to be lodged.

1. Click the *Bulk Prefill* button.

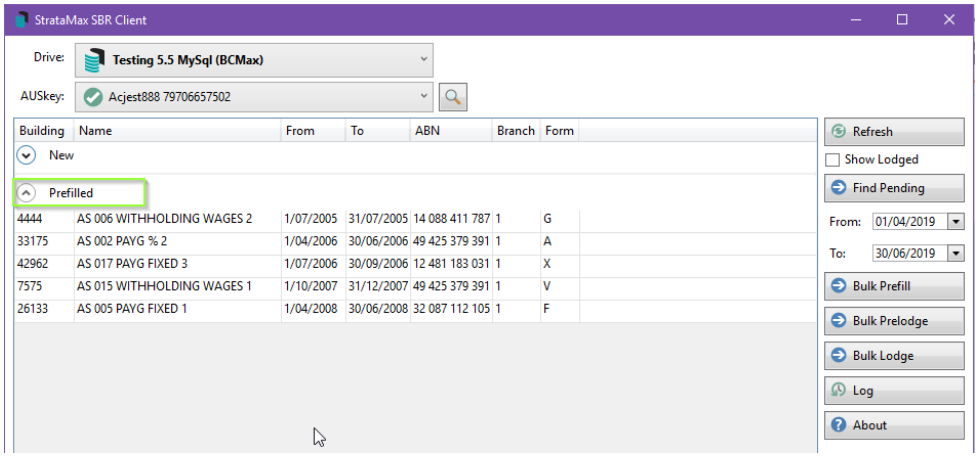


2. Tag the required BAS and click *OK*.



3. The system will return a prefill complete message.
4. All prefilled BAS will now be listed with a status of *'Prefilled'*.

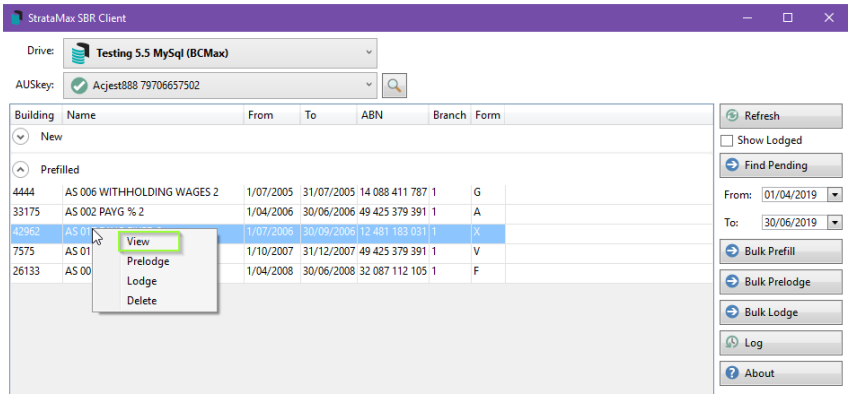
Items that have not changed status will have reported details of any errors which can be reviewed by clicking the *Log* button.



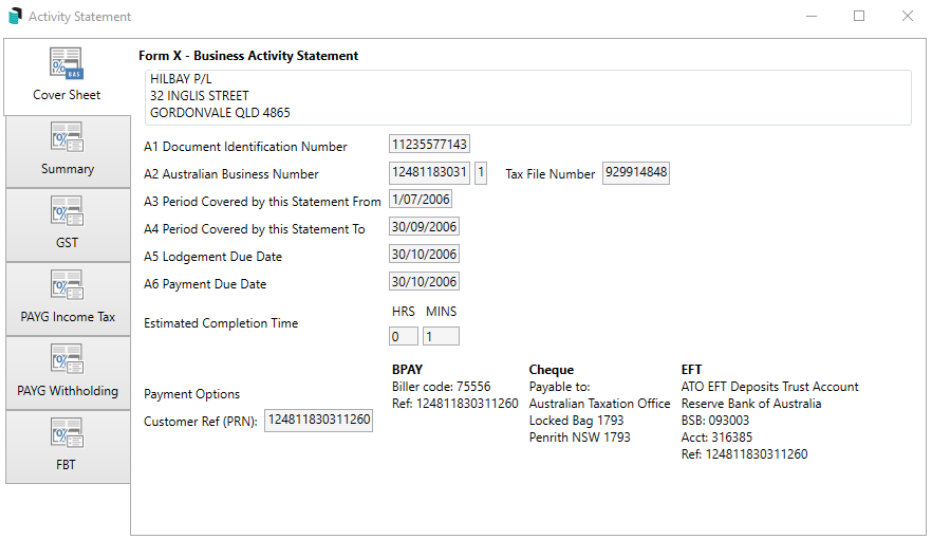
Viewing Prefilled Statement

Once the ***ATO SBR Client*** has prefilled a BAS, it can be viewed under the*Prefilled* section. The BAS should be checked to ensure the data is correct and matches the saved BAS for the same period.

1. Expand the *Prefilled* section of the list by clicking the drop-down arrow.
2. Select and right-click the required BAS, and click*View*.



4. The BAS will appear on screen.

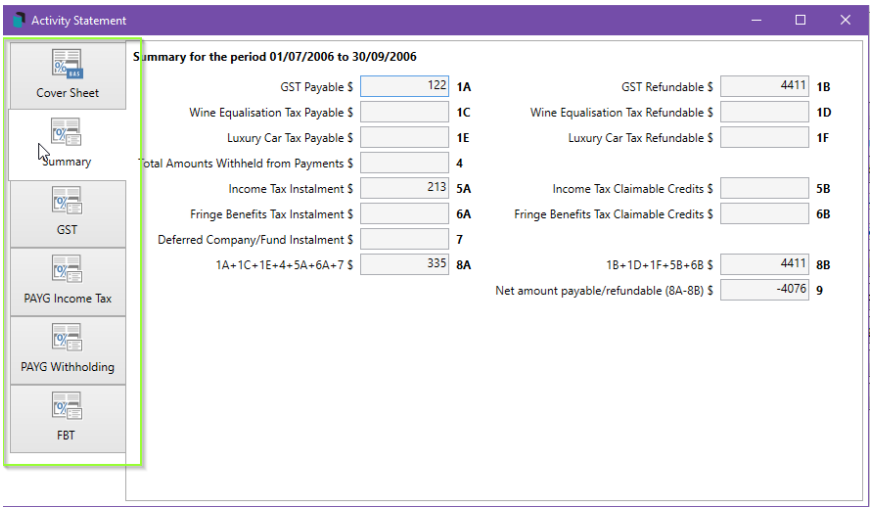


5. All sections of the BAS statement can be viewed by selecting each tab down the side of the page:

- Cover Sheet
- Summary
- GST
- PAYG Income Tax
- PAYG Withholding Tax

There are several fields that are prefilled from the ATO:

- Document Identification Number
- Customer Ref (PRN) Payment Reference Number
- Form type
- Completion Time

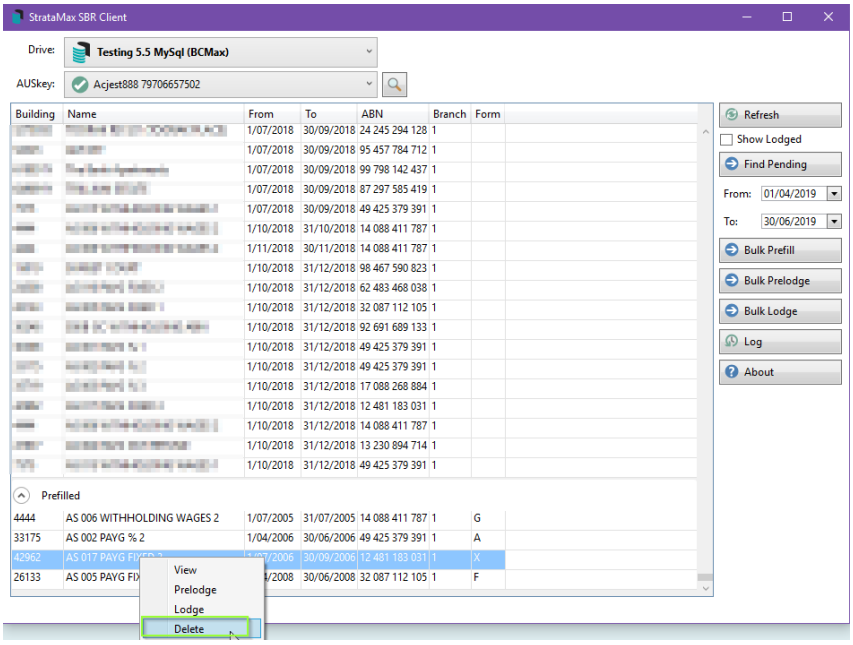


The preview is read-only and if there are discrepancies then the BAS may need to be deleted in the ***ATO SBR Client***. If changes are required, the PAYG or BAS may just need to be edited or may have to be deleted, corrected and saved again.

Deleting Prefilled Statement

If there are changes that need to be made to any*Pending* or *Prefilled* BAS statement, the BAS will need to be deleted and loaded again into the ***ATO SBR Client*** once the changes have been made to the BAS in StrataMax, and saved again. See Re-opening a BAS below.

1. Open the ***ATO SBR Client*** menu and select the required BAS.
2. Right-click and select *Delete*.



4. The prefilled BAS will be deleted from the***ATO SBR Client***.
    - The BAS will no longer be displayed in the current or prefilled list of BAS statements. The BAS will need to be brought back in to the ***ATO SBR Client*** by clicking the *Find Pending* button, after required changes in StrataMax have been made and the BAS is ready to lodge.

Prelodge - Business Activity Statements

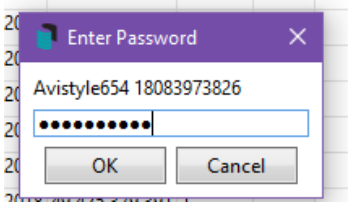
Using the *Prelodge* button verifies the details of the BAS return for the period. The***ATO SBR Client*** will return a response from the ATO outlining any issues with the BAS or if any of the reported amounts will be corrected upon lodging.

> Using the Prelodge feature does not mean that your BAS has been lodged.

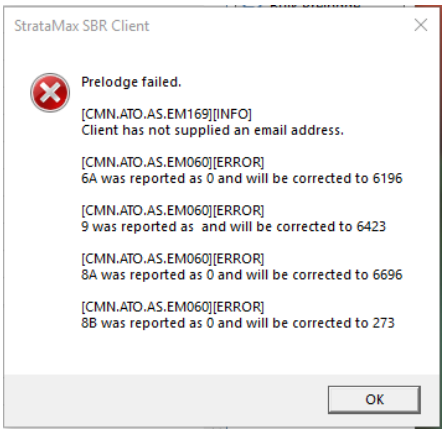
Prelodge one Statement

1. Select the required BAS under the *Prefilled* List.
2. Right-click and select *Prelodge*.
3. Enter the correct password.

When the password is entered to decrypt the M2M keystore file, the process involves multiple steps. The password is not stored, when the process is repeated for lodgement for the next BAS period the password must be re-entered.

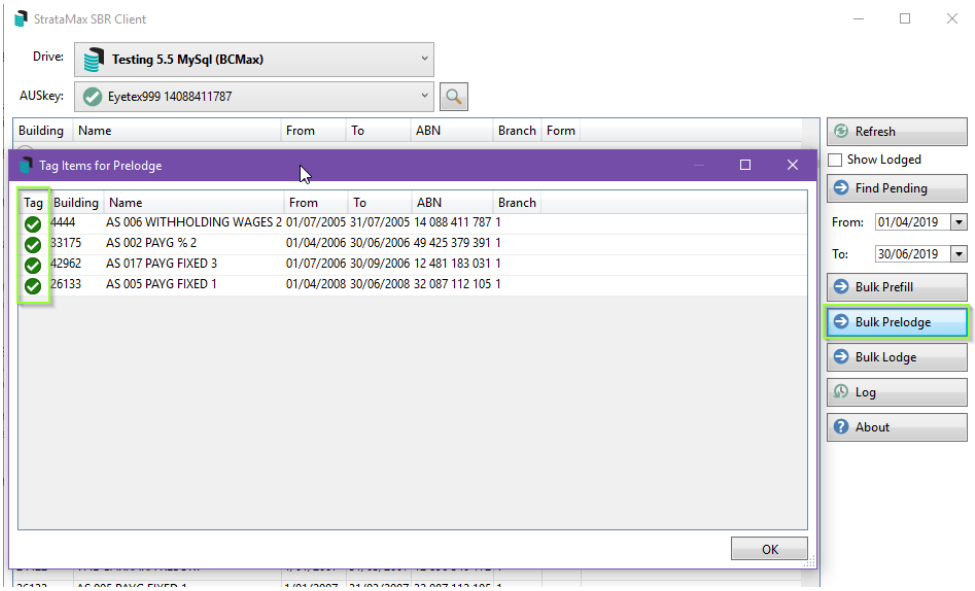


4. Click *OK*.
5. The system will return any issues it may have or move to the status of pre-lodged.



Prelodge Bulk Statements

1. Click the Bulk Prelodge button.
2. Tag the Prefilled BAS Statements from the list.



3. Click *OK*.
4. Errors will appear in the Log or will move to the status of pre-lodged.

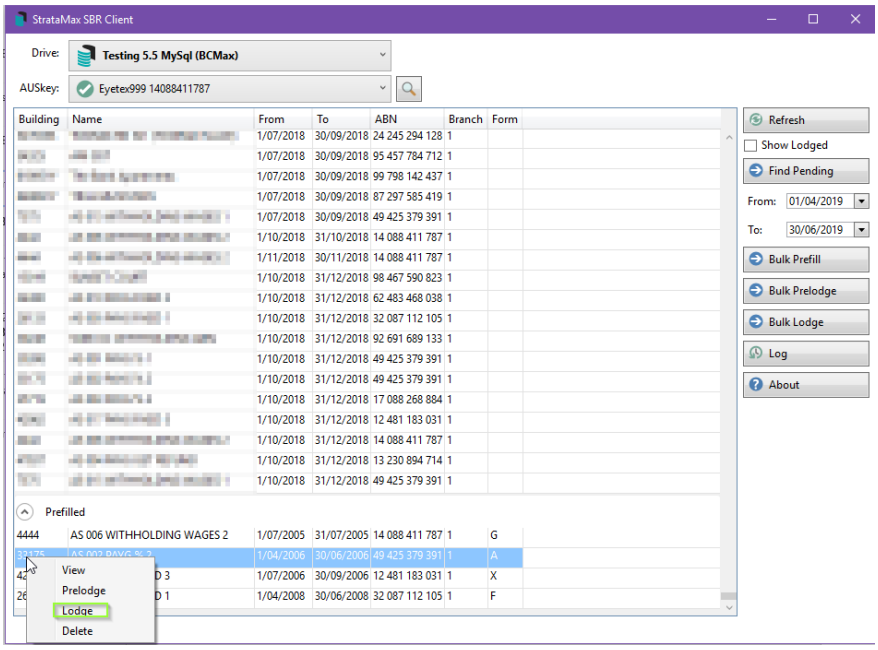
Lodging - Business Activity Statement/s

When the BAS have been prefilled (Prelodge is optional, but recommended) the user can then lodge the BAS. Once a BAS has been lodged using the ***ATO SBR Client*** they cannot be deleted in either the***ATO SBR Client*** or StrataMax.

Lodge single Statement

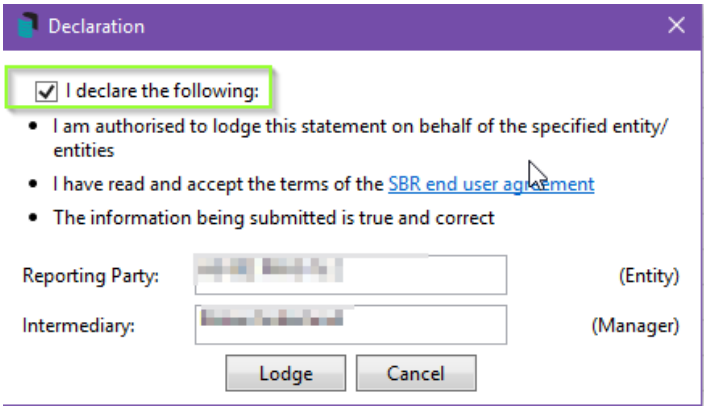
When the BAS Statement is completed, checked and ready for lodgement:

1. Highlight the BAS Statement for Lodgement.
2. Right click and select ‘Lodge’.

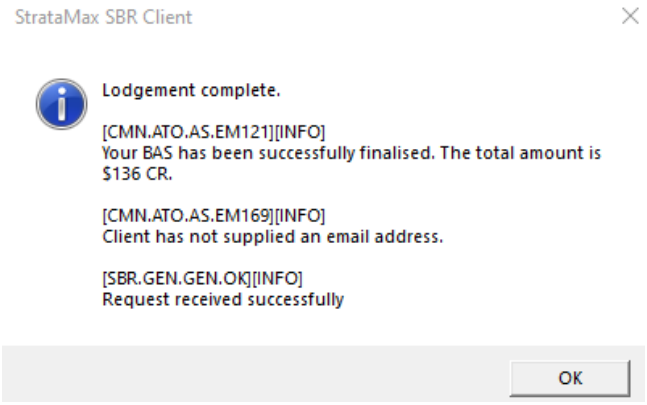


3. The Taxpayer’s Declaration will appear on the screen with the reporting party information this needs to be ticked.

Note: Entity – Building name; Manager – Name/ User;

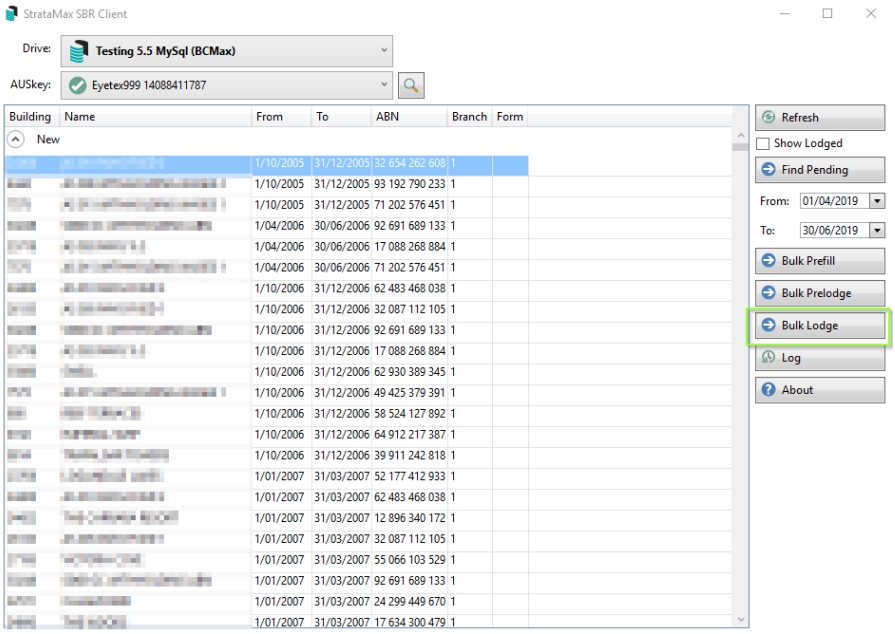


1. Click on ‘Lodge’.
2. Once lodged you will receive confirmation that the lodgement was successful.
3. Lodgement result (successful or otherwise) will be saved in the log.

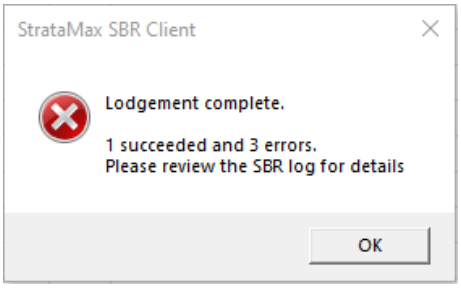


Lodge Bulk Statements

When the BAS Statement is completed and ready for lodgement:



1. Click on the ‘Bulk Lodge’ option.
2. Tag the BAS/s that you wish to Lodge.
3. Click on ‘Ok’.
4. BAS will lodge and log errors if there are any, and return a message box.

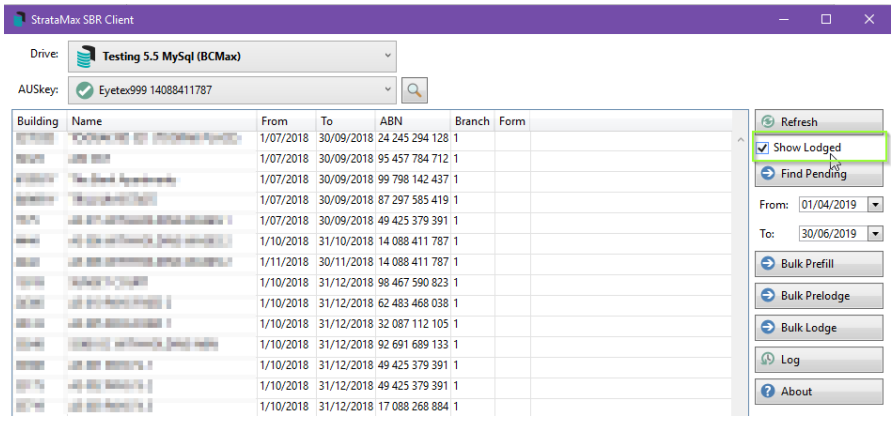


Please Note: When using the Bulk Lodgement button in the ATO SBR client module, the list of items that can be selected are either ‘prefilled or pre-lodged’ status. Therefore ‘Prefilled’ items can be lodged directly if the BAS figures are checked and confirmed as expected.

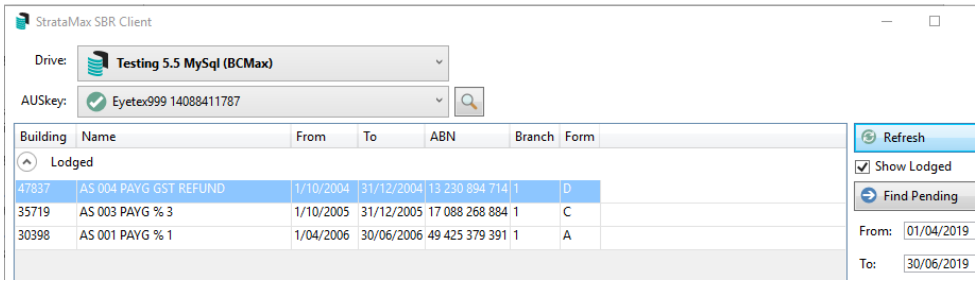
Show Lodged

Once the BAS Statements have been successfully lodged, they will be removed from the list and then can be viewed following the steps below.

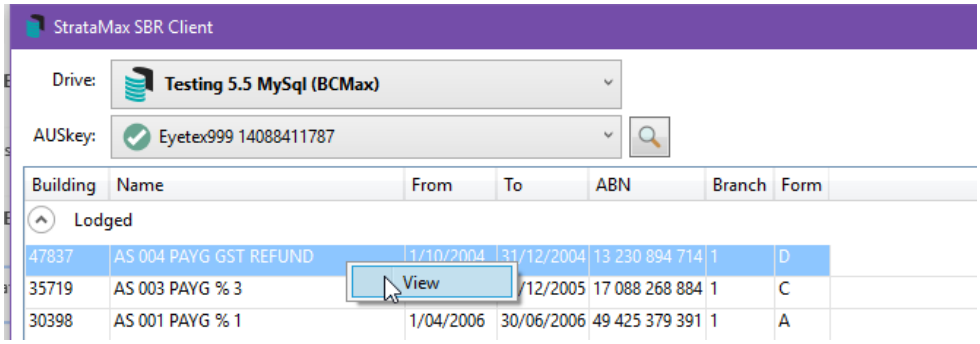
1. Tick the ‘Show Lodged’ Option.



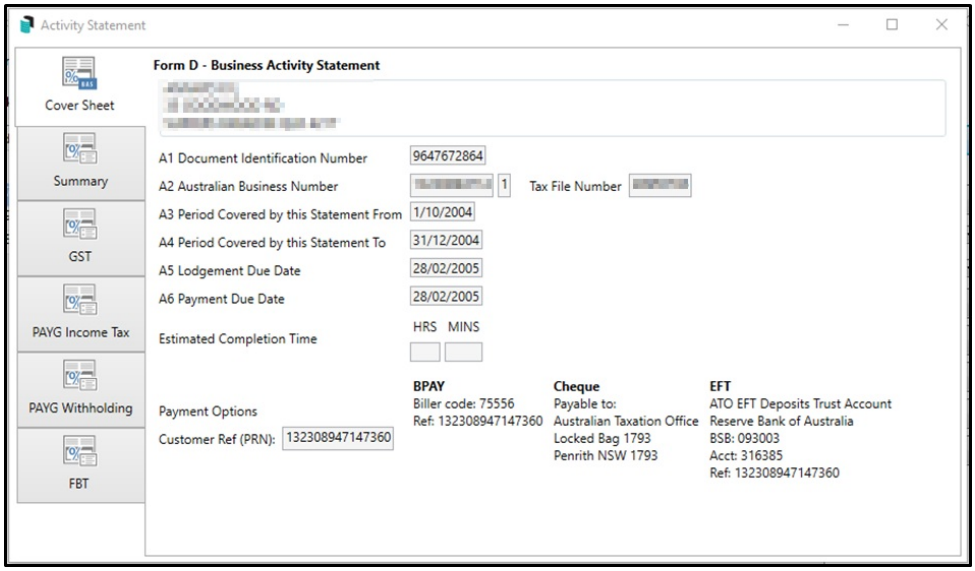
2. Click on ‘Refresh’.
3. A List of Lodged BAS Statements will appear on screen.



4. Right click the required statements and click on ‘View’.



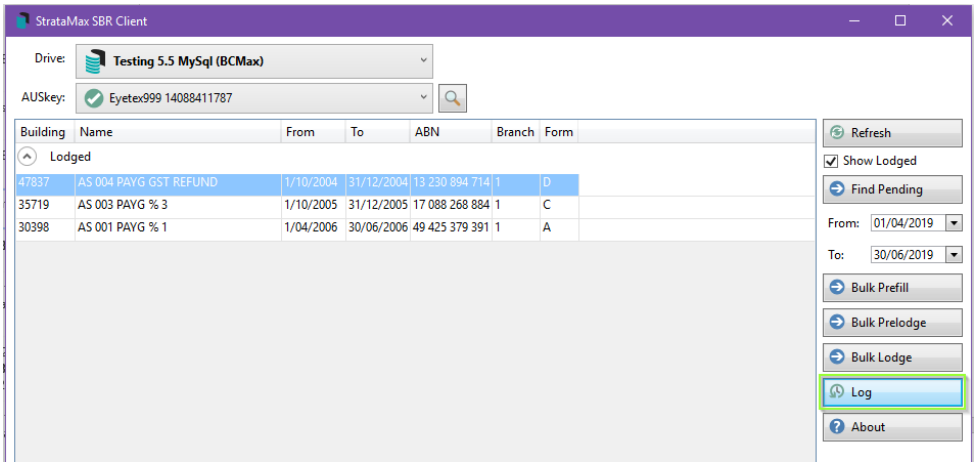
5. The Lodged BAS Return will appear on screen to view.



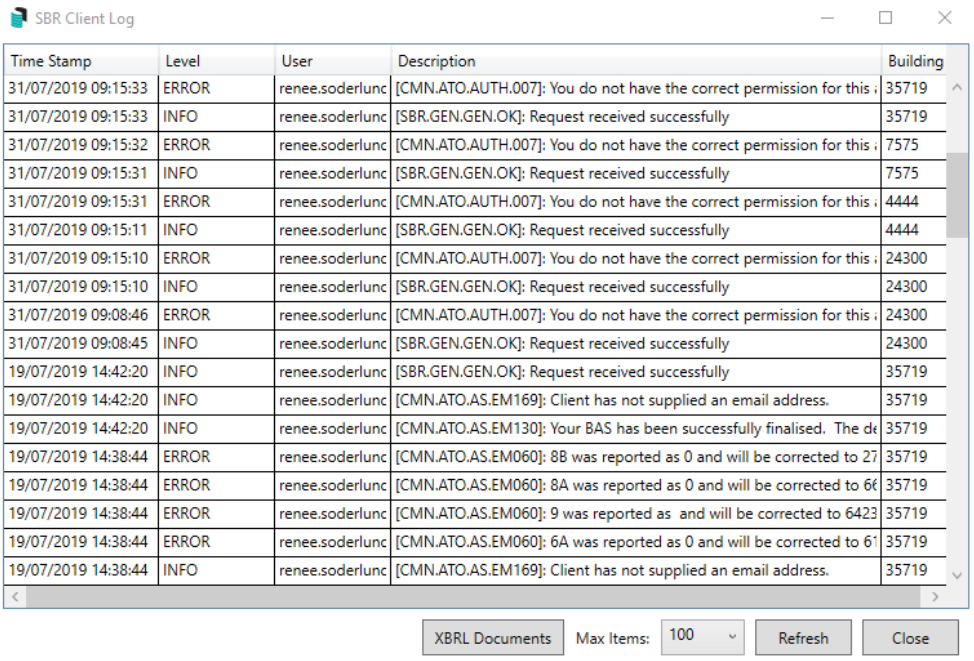
Log – ATO SBR Client

When find Pending, Prefill, Prelodge or Lodge is used on a BAS Statement, the system will log the responses (description), time stamp of the activity, errors and information for all actions, as well as the User and Building details.

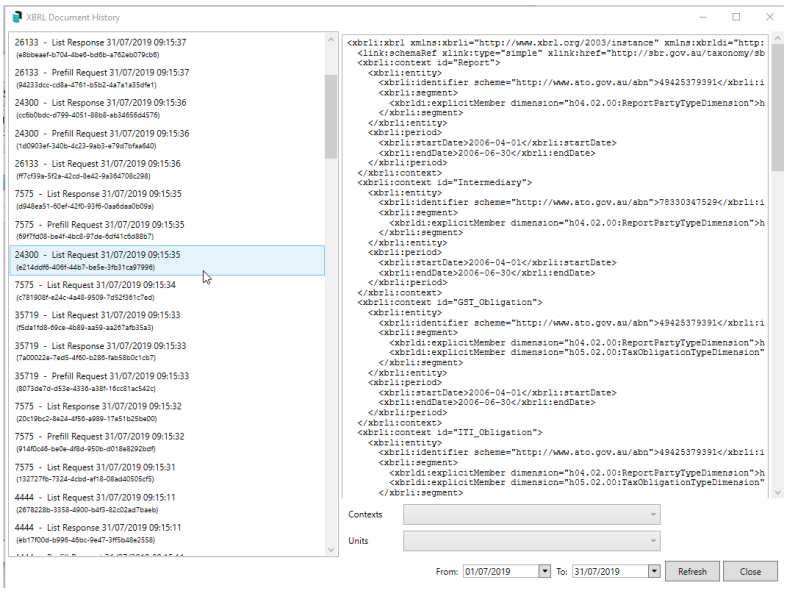
1. Click on ‘Log’.



2. The Log will appear as read only on the screen.



3. For further information the XBRL Document history is also available by clicking on 'XBRL Documents' (this is used for StrataMax Support to troubleshoot issues).



Sample Log Messages

- GST and PAYG Instalment Tax at different lodgement frequencies is not currently supported.
- Access to the Activity Statement is not available. Contract the Tax Office. (Login to ATO and check Branch number and edit if incorrect).
- You are not authorised to lodge on behalf of the requested ABN (Login to ATO and check Branch number and edit if incorrect).
- Request received successfully.
- Client has not supplied an email address.
- Activity Strata under Tax Office review.

- Your BAS has been successfully finalised. The debit amount is $$$.

SBR Error Messages

Example messages that may assist when reviewing the log.

Error Message	Action
[CMN.ATO.AUTH.008] You are not authorised to lodge on behalf of this client.	This message may appear when lodging as a tax agent. Ensure that the Tax Agent/Client relationship between your tax agent ABN and client ABN exists in the ABR Access Manager, and ensure that your Tax Agent number is specified in the intermediary details for the lodgement.
[CMN.ATO.AS.EM139] EM139NoAsAccount [CMN.ATO.AS.EM024] Access to the activity statement is not available. Contact the Tax Office.	The activity statement branch code may be incorrect or missing. Check the branch code associated with the activity statement lodgement matches the branch code of the reporting party shown in in the ATO portal. Before prefilling of the BAS form is done, it is possible to edit the lodgement item to update the branch code.
[CMN.ATO.AS.EM200] For simpler BAS lodgement labels G2 or G3 or G10 or G11 must not be provided	The activity statement was lodged with labels G2, G3, G10, or G11 (Full Reporting), however the ATO requires this ABN to lodge activity statements without these labels (Simpler BAS). Check BAS Info module to ensure that the building is configured to lodge as Simpler BAS/Full Reporting.
[CMN.ATO.GEN.001017] Field not supplied in valid format	This error indicates a formatting problem with one of the fields within the lodgement document. Please contact StrataMax support for assistance.

[CMN.ATO.AS.EM005] T1 is a mandatory field [CMN.ATO.AS.EM059] Complete PAYG-W prior to submitting the activity statement.	This error may indicate a problem with the structure of the lodgement document. Please contact StrataMax support for assistance.

Error Message	**Action**
[mscorlib] Error calling SBR Core Services. The software used to generate this request has not been registered with SBR	This error message may occur during the StrataMax SBR Client SBR Product Verification Testing process, and requires a configuration change by the ATO to allow the software to use SBR services. Please contact StrataMax support for assistance.
[CMN.ATO.AS.EM169]: Client has not supplied an email address	This is simply a reminder message that indicates the ATO has no record of a contact email address for the reporting party. In order to receive notification of new activity statements, registering the reporting party email address with the ATO is required.
[CMN.ATO.AS.EM130] Your BAS has been successfully finalised. The debit amount is $12345.	This is an example of the informational message received when the BAS lodgement is successful. A payment to the ATO of the specified amount is required.
[CMN.ATO.AS.EM121] Your BAS has been successfully finalised. The total amount is $54321 CR.	This is an example of the informational message received when the BAS lodgement is successful. A refund from the ATO of the specified amount will be forthcoming.
[CMN.ATO.AS.EM125] Your BAS has been successfully finalised and there is nothing to pay.	This is an example of the informational message received when the BAS lodgement is successful, and there is no payment/refund amount (i.e. nil balance).

Troubleshooting Error Messages

Editing a Branch Number

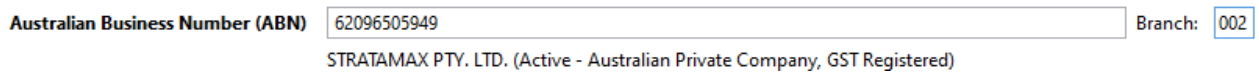
A branch is formed where a business entity separately registers its branch to suit the structural, management and accounting arrangements of the organisation. When an entity registers a branch for GST or PAYG purposes, the entity is called the 'parent entity'. This may require the branch number to be edited from the default number 1, most likely to a 2.

The ‘Prefill’ stage may log a message similar to the below:

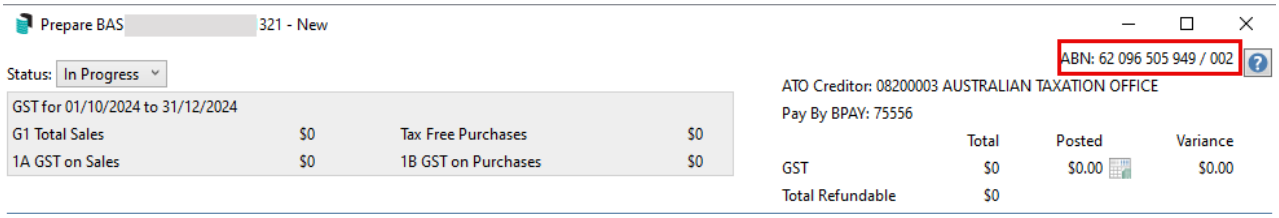
- Access to the Activity Statement is not available. Contact the Tax Office. Logging into the Relationship Authorisation Manager (website) may assist to identify the branch number required to be reported and then can be amended.
- Delete the BAS from the SBR in the prefill section by right clicking and selecting delete.

If it is identified that a branch number is not the default of ‘001’ then the branch number can be entered into ***Building Information***.

1. Search or Select ***Building Information***.
2. Locate the Australian Business Number Field (ABN).
3. Change the Branch number to ‘001’ or ‘002’ (blank will default to ‘001’).
4. Click Save to update the changes made.



When reviewing in Business Activity Statement, the branch Code will show on the Business Activity Statement.



Edit a Branch Number on a prior BAS

If the BAS period is already finalised, and the error is in the SBR prefill or pending section, delete the BAS so that the BAS in StrataMax can be amended.

1. Search or Select SBR.
2. Locate the BAS for the Building to have the Branch number amended, in the prefill or pending section.
3. Right click and select delete.
4. In Building Information, locate the ABN and amend the Branch number and save.
5. Search or Select ***Business Activity Statement.***
6. Use the 'Re-Open Last BAS' action button, select Yes to update for any changes.
7. Check the Branch number is updated on the top right (see screenshot above).

8. Amend the Status to Finalised, then save the BAS.
9. Open the SBR and select 'Find Pending' to re-check and update with the amended branch number.

BAS Reporting Methods

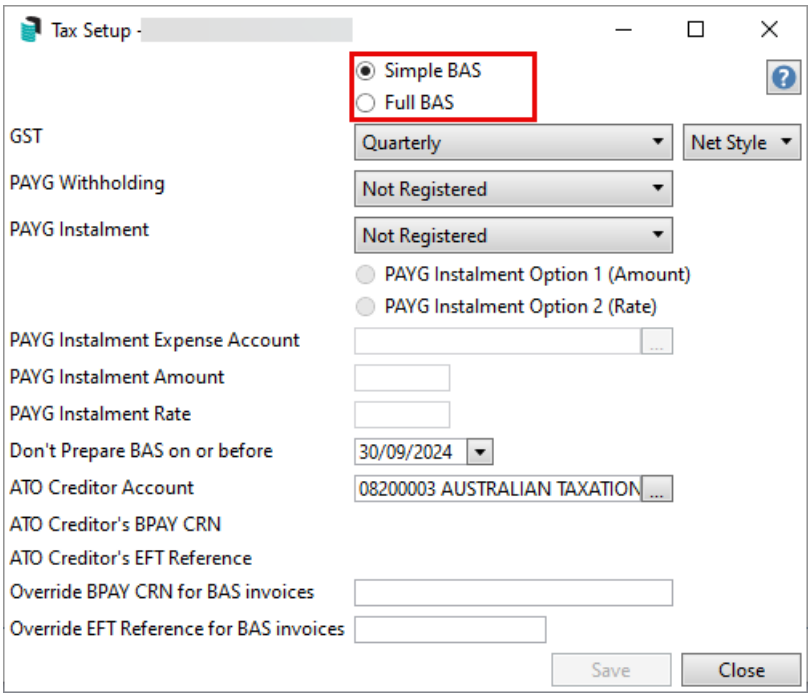
Simple and Full BAS Reporting

ATO SBR Client must know to lodge either using the Simpler BAS method or Full Reporting method BAS:

- Simple BAS – lodging BAS Statement without labels G2, G3, G10, G11 (annual turnover of less than $10 million).
- Full Reporting – lodging BAS Statement with all labels available (annual turnover of more than $10 million).

Reporting method configuration settings have been added to ***Building Information*** to allow for the reporting method to be set, otherwise ATO may reject lodgements for buildings that need to lodge a full BAS with all the extra BAS Labels. To configure the BAS Reporting method follow the below steps:

1. Navigate to ***Building Information***.
2. Update the Tax section with the required Reporting Method and select save.



Please Note: The default reporting method is Simple BAS.

Reopen a BAS in StrataMax

Note: When a BAS has been lodged through the ATO SBR Client, it cannot be deleted. If amendments are required, this should be completed using MyGovID. Rules apply for validation when deleting BAS

Statements within StrataMax:

- If ‘Find Pending’ has not been done in ATO SBR Client for a Bas Period – the StrataMax BAS Statement can be Reopened and amended as required.
- If ‘Find Pending’ is done in ATO SBR Client and the building BAS period has been tagged it will not allow you to Reopen the BAS in StrataMax.
- If ‘Find Pending’ is done and the user deletes the SBR Record from ATO SBR Client (so it no longer appears in the SBR List) it will then allow the user to Reopen the BAS in StrataMax.
- If the BAS has been lodged through SBR, it will not allow users to delete the SBR record or allow it to be Reopened in the StrataMax BAS.

1. Business Activity Statement, select 'Reopen Last BAS' in the action column.
2. Select 'Yes to Reopen and update last BAS to include additional transactions.
    1. If a new tax registration is being setup for the first time - PAYG-W or PAYG-I, after this is completed in Tax Setup, the BAS may need to be deleted for the new tax type to appear and refresh the in progress BAS.
3. Finalise the BAS and then submit to the SBR again.

Should you require further information please contact StrataMax Support Teamsupport@stratamax.com to log a case.

Workstation / Server Requirements

The workstation or server you run this from must support TLS 1.3 or higher.

What's changing

The Australian Taxation Office (ATO) is tightening security. All software that connects to ATO services must use **TLS 1.3**, the latest version of the internet encryption standard used to keep data private in transit.

Why this matters

Think of TLS as the lock on your data while it’s travelling online.**TLS 1.2** is today’s standard lock, but advances in computing—especially **quantum computing**—could make that lock easier to pick in the future. **TLS 1.3** is the upgraded lock: faster, stronger, and designed to stay secure for the long term.

Plain English version:	TLS 1.3 keeps your data safer now and in the future. TLS 1.2 might be “bustable” one day by new kinds of super-fast computers, so the ATO wants everyone on TLS 1.3.

Note:	On Windows 11 and Windows Server 2022, **TLS 1.3 is enabled by default**. Older versions such as Windows 10 or Server 2016 don't support this.