TaxXML TASC Conference Call Notes
Indirect Tax Project

Date: May 11, 2005
Time: 11:00 EDT / 16:00 GMT

Note Taker: John Glaubitz

Participants:
- John Glaubitz (chair) - Vertex
- Michael Roytman - Vertex
- Andrew Webber - Canada Customs & Revenue Agency
- Sylvia Webb - GEFEG

Regrets:
- Arndt Liesen - Office of Finance, Germany

Action Items:
1. Incorporate Canada Revenue Agency comments into Reference Model [Andrew W]
2. Complete updates of Reference model and submit to full TC for vote [John G]
3. Complete updates to Spreadsheets with requests and comments for UBL [John G]
4. Format spreadsheet information for submission to UBL [Sylvia W]

Notes:
1. Recent updates to the Reference model had been completed and distributed to the group shortly before the conference call. Since there was not enough time for a full review, it was agreed that we would allow a couple of days before the document was submitted to the full TC for formal approval. Since the submission has been delayed, there has been enough time for CRA to assemble their notes and comments. Andrew will incorporate these additions into the document as part of the final version. Since these notes and comments were simply to identify CRA specific nuances that did not otherwise affect the document content it was acknowledged that they would not need a preliminary review by the sub-committee prior to the vote.

2. The spreadsheet containing the requested inclusions for UBL 2.0 based on the Indirect Tax reference model has been split into two documents with the first containing those requests the group feels are critical and the second containing those where there are open questions whether they are critical or are already supported by UBL. The group reviewed these documents with the following recommendations:
   - Add additional explanation to the request that Delivery Terms be included on an invoice line item.
   - Identify example jurisdictions where tax structure details are required to be shown on an invoice.
   - Re-word example for Tier Range to be more intuitive.
- Move the Location elements from the Comments spreadsheet to the critical request spreadsheet and add jurisdiction requirements for location identification.

Sylvia will take the updated spreadsheet and format for submission to UBL

3. The group discussed expectations for the upcoming F2F in Philadelphia. Since the vote on the reference model and the submission to UBL should be completed before the meeting, the primary focus of the Indirect Tax work group session will be to determine what's next for the group. Suggestions include:

- Re-visit excise and duties to extend the existing work.
- Look at work within UN/CEFACT to generate PDF documents from XML
- Determine whether OAGIS should be re-visited for review now that version 9 is available.
- Identify other “Tax Messages” that may be looked at by the committee for possible inclusion in UBL. The scope for UBL messages is intended to go beyond the Supply Chain to include any business messages including B2G.

Next Meeting:

Conference Call, May 18, 2005, 11:00 EST / 16:00 GMT
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