Tax XML TASC conference call notes.

Date: Oct 28, 2004
Time: 11:00 EDT / 16:00 BST

Participants:
- Andy Greener (Chair)
- David Chambers
- John Glaubitz
- MichaelRoytman
- Andrew Webber
- UK Inland Revenue
- UK HMCE (Customs & Excise)
- Vertex
- Vertex
- CCRA

Action Items
1. Update Class Diagram as a result of comments received and discussion at face-to-face meeting [John Glaubitz] – largely done, remainder carried over to candidate Reference Model doc – now done, action closed.
2. Detailed comments on Reference Model document [all]
4. Update Scope Document as a result of discussion about excluding excise duties and taxes from the first iteration of the reference model [Andy Greener].
5. Obtain CCRA view of GST coverage in the Reference Model [Andrew Webber]
6. First draft of a Glossary by the next call [Andrew Webber]

Work in Progress
1. An innocent comment regarding the second paragraph of section 1 of the Reference Model doc led to a much deeper discussion of the scope of the model and the coverage we need to achieve to fulfill the aims of the working group to produce a reference model against which implementations can be reviewed. After some debate it was decided we should learn to walk before we run and exclude excise duties and taxes. The implications for the existing process and class models are huge if these taxes are included, introducing intermediaries, the classification of goods, and excise taxes being raised at points other than the date of the related transaction. There are no known XML standards that cover these aspects of Indirect Taxation currently.
2. The first iteration, or version, of the Reference Model will cover VAT, Sales Taxes on consumption and use taxes. A subsequent extension to the model will cover excise taxes and duties. The current Scope document will be amended to reflect the initial limitation of scope.
3. A number of written comments on the substance of the model are currently passing amongst members of the group and will have been incorporated in the Reference Model by the next call.
4. Coverage from a US Sales Tax and European VAT perspective is considered to be good, but a (Canadian) GST perspective would be welcome – Andrew Webber volunteered to find reviewer(s) within CCRA.
5. Owing to holidays little progress has been made on the Indirect Tax Glossary – work to continue for review at next call.
6. Owing to pressure of work little progress has been made on the bottom-up analysis work. Position to be reviewed at the next call.

End of Conference Call

The call terminated at 12.05 EDT / 17.05 BST.

Next Meeting

Conference call, 18th November 2004, 11:00 EDT / 16:00 BST. 
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