

**NOTE: ISSUE MY OWN REPORT DO NOT ISSUE ON CYNTHIA'S BEHALF NEXT PERIOD**

Status Report

**Project:** Speculation Tax  
**Document:** Bi-weekly Status Report  
**Period:** June 25 – July 6, 2018  
**Team:** Business Team – RPT Levy  
**To:** Louise Lam  
**Author:** Toby Harris

**Accomplishments in the reporting period (June 25 – July 6, 2018)**

Project start-up

- Cynthia and Toby attended requirements meetings on Returns and on Letters, to discuss definition items
- Attended two Returns meetings which have been slightly stalled at the question of how to handle income tax credit for BC Resident spouses of foreign owners, and how to apply the credit in general – whether to automate the process of transferring income between spouses to generate the best reduction or to have taxpayers handle that part manually. Also dealing with IT question regarding web-logins: how to connect folios and owners without relying on cookies.

Requirements

- Attended meetings to come to consensus

Testing

- Nothing to test yet

Others

**Planned Activity for next reporting period (July 9 – July 20, 2018)**

Requirements

- Attend requirement definitions meetings:
  - Spec Tax Letters on Wednesday July 11
  - Demo meeting for proposed solution to Tax Credit based on income on Wednesday July 11

Testing

- Nothing to test yet, possibly work direction will coalesce enough to begin scenario construction

Others

**Issues:**

**Absences:** s.22

**Project:** Speculation Tax  
**Document:** Bi-weekly Status Report  
**Period:** July 9 – July 20, 2018  
**Team:** Business Team – RPT Levy  
**To:** Louise Lam  
**Author:** Toby Harris

**Accomplishments in the reporting period (July 9 – July 20, 2018)**

**Project start-up**

- Meetings are in full swing, coming to consensus on particular issues

**Requirements**

- Attended meetings on letters and mail, billing, and returns. Several issues remain outstanding such as when to kick returns process to manual review in the case that names do not match between databases.

**Testing**

- Nothing to test yet.

**Others**

**Planned Activity for next reporting period (July 23 – August 3, 2018)**

**Requirements**

- Attend requirement definitions meetings
- Hold initial meeting with Brian Ma and Donner Trinidad concerning scenario startup and possible priority subjects within our definitions list.

**Testing**

- Depending on outcome of meeting with developers on scenario initiation, possible we can begin scenario construction prior to the work items being assigned to us.

**Others**

**Issues:**

**Absences:** s.22

**Project:** Speculation Tax  
**Document:** Bi-weekly Status Report  
**Period:** July 23 – Aug 3, 2018  
**Team:** Business Team – RPT Levy  
**To:** Louise Lam  
**Author:** Toby Harris

**Accomplishments in the reporting period (July 23 – Aug 3, 2018)**

**Project start-up**

- Meetings are in full swing, coming to consensus on particular issues

**Requirements**

- Attended meetings on letters and mail, billing, and returns. Attended demos for registration and income credit.

**Testing**

- Held meeting with Brian Ma and Cynthia Kennedy about scenario writing startup: where to begin, which definitions have been actively developed for us to test with, which definitions must wait for further development.

**Others**

**Planned Activity for next reporting period (Aug 6 – Aug 17, 2018)**

**Requirements**

- Attend additional requirement definitions meetings for Letters

**Testing**

- Begin writing test scenarios for focus areas. Coordinate with Cynthia to share workload and cover all definitions where writing is possible. Repair written scenarios when development changes functionality within GenTACs target areas.

**Others**

- Keep in close contact with Brian regarding project updates and scenario questions and concerns, act as liaison between Steven for policy questions.

**Issues:**

**Absences:** s.22

**Project:** Speculation Tax  
**Document:** Bi-weekly Status Report  
**Period:** Aug 6 – Aug 17, 2018  
**Team:** Business Team – RPT Levy  
**To:** Louise Lam  
**Author:** Toby Harris

### **Accomplishments in the reporting period (Aug 6 – Aug 17, 2018)**

#### **Project start-up**

- Meetings are in full swing, coming to consensus on particular issues

#### **Requirements**

- Attended meetings on letters and mail. Could not attend demo session for declaration website.

#### **Testing**

- Wrote many scenarios and expanded some scenarios into additional items
- Wrote shells of scenarios for some definition items which are not fully developed yet
- Conferred with Cynthia about scenario writing and identified definition items to write scenarios for. Divided up work.

#### **Others**

### **Planned Activity for next reporting period (Aug 20 – Aug 31, 2018)**

#### **Requirements**

- Attend additional requirement definitions meetings for Letters and Returns

#### **Testing**

- Write additional scenarios, including for new definition items created by Brian, or spun-off from existing definition items
- Meet with developers to discuss upcoming development changes and additions. Discuss future scenarios and possibilities for writing. Review problem areas where scenarios are difficult to write. Confer with policy experts.

#### **Others**

- Keep in close contact with Brian regarding project updates and scenario questions and concerns, act as liaison between Steven for policy questions.

### **Issues:**

**Absences:** s.22

**Project:** Speculation Tax  
**Document:** Bi-weekly Status Report  
**Period:** Aug 20 – Aug 31, 2018  
**Team:** Business Team – RPT Levy  
**To:** Louise Lam  
**Author:** Toby Harris

### **Accomplishments in the reporting period (Aug 20 – Aug 31, 2018)**

#### **Project start-up**

- Meetings are in full swing, coming to consensus on particular issues

#### **Requirements**

- Attended many meetings on letters and mail.
- Many discussions around timing for NOFAs and SOFAs depending on circumstances
- Attended Reports meeting to discuss potential reports for rollout
- Met with developer Brian Ma, alongside Cynthia, to discuss returns development and potential scenarios, process development

#### **Testing**

- Wrote many scenarios and expanded some scenarios into additional items
- Wrote shells of scenarios for some definition items which are not fully developed yet
- Walked our tester David through some of the scenarios
  - Fixed scenarios which were unclear or which did not point to the correct Spec Tax account
  - Discovered some bugs and errors, reported them to developer Brian Ma
- Wrote new scenarios for changes made by developer

#### **Others**

### **Planned Activity for next reporting period (Sep 3 – Sep 14, 2018)**

#### **Requirements**

- Attend additional requirement definitions meetings for Letters
- Returns meetings mostly drying up

#### **Testing**

- Write additional scenarios, including for new definition items created by Brian, or spun-off from existing definition items
- Get to work on Letters scenario writing. Potentially larger amount of scenarios for that definition item than returns at this point in time, however Returns is not fully developed/defined yet so will need to write more for that definition item also.
- Meet with developers to discuss upcoming development changes and additions. Discuss future scenarios and possibilities for writing. Review problem areas where scenarios are difficult to write. Confer with policy experts.

#### **Others**

- Keep in close contact with Brian regarding project updates and scenario questions and concerns, act as liaison between Steven for policy questions.

#### **Issues:**

**Absences:** s.22

**Project:** Speculation Tax  
**Document:** Bi-weekly Status Report  
**Period:** Sep 3 – Sep 14, 2018  
**Team:** Business Team – RPT Levy  
**To:** Louise Lam  
**Author:** Toby Harris

### **Accomplishments in the reporting period (Sep 3 – Sep 14, 2018)**

#### **Mid Project**

- Awaiting further legislation revisions before GenTacs and eTaxBC implementations can be finalized.

#### **Requirements**

- Attended multiple meetings with Policy and Legislation to find consensus on the Credit Based on Income part of the Returns definition.
- Attended Letters meetings and two Language Of Work meetings

#### **Testing**

- Walked our tester David through some of the scenarios
  - Fixed scenarios which were unclear or which did not point to the correct Spec Tax account
  - Discovered some bugs and errors, reported them to developer Brian Ma
- Revised numerous scenarios which had become outdated due to changes within GenTacs, and changes in legislation
  - Some of these remain shells and cannot be finalized until updated legislation returns to the branch, expecting 1-2 week wait

#### **Others**

### **Planned Activity for next reporting period (Sep 17 – Sep 28, 2018)**

#### **Requirements**

- Meet with Returns developer Brian Ma, and our Policy and Legislation team, to hash out exact working of Credit Based on Income, and other pieces of the Returns Definition

#### **Testing**

- Write additional scenarios, including for new definition items created by Brian, or spun-off from existing definition items
- Write scenarios for fleshed-out definition items when their GenTacs counterparts have been implemented

#### **Others**

- Finalize library of letters for Returns and Billing and upload them to FCR
  - Determine list of Optional Paragraphs for populating form letters in GenTacs

#### **Issues:**

**Absences:** s.22

**Project:** Speculation Tax  
**Document:** Bi-weekly Status Report  
**Period:** Sep 17 – Sep 28, 2018  
**Team:** Business Team – RPT Levy  
**To:** Louise Lam  
**Author:** Toby Harris

### **Accomplishments in the reporting period (Sep 17 – Sep 28, 2018)**

#### **Mid Project**

- Awaiting further legislation revisions before GenTacs and eTaxBC implementations can be finalized.

#### **Requirements**

- Attended numerous meetings with policy experts to discuss legislation and interpretation of rules surrounding the Credit Based On Income
- Re-drafted definitions for Credit Based On Income and Spec Tax Calculation items in FCR. Notified Brian Ma that changes are on their way. Ran through scenarios with policy experts to determine flaws in legislation preventing implementation in the system.

#### **Testing**

- Touched up existing scenarios and created shells of future scenarios
- Was somewhat bound by work in GenTacs which prevented Returns from being generated, required developer-made slices which were released a few days ago

#### **Others**

- s.22

### **Planned Activity for next reporting period (Oct 1 – Oct 12, 2018)**

#### **Requirements**

- Meet with Returns developer Brian Ma, and our Policy and Legislation team, to hash out exact working of Credit Based on Income, and other pieces of the Returns Definition
- Confirm with Brian Ma our changes to the definitions, above.
- Confirm with Brian Ma exactly how certain information will be collected from eTaxBC for spouses who are not subject to the Spec Tax but still wish to transfer income to a related taxpayer.

#### **Testing**

- Write additional scenarios for new implementations

#### **Others**

- Finalize library of letters for Returns and Billing and upload them to FCR
  - Determine list of Optional Paragraphs for populating form letters in GenTacs

#### **Issues:**

**Absences:** s.22

**Project:** Speculation Tax  
**Document:** Bi-weekly Status Report  
**Period:** Sep 4 – 14, 2018  
**Team:** Business Team – RPT Levy  
**To:** Louise Lam  
**Author:** Cynthia Kennedy

### **Accomplishments in the reporting period (Sep 4 – 14, 2018)**

#### Requirements

- No meetings

#### Testing

- There has been a delay in the testing by Dave Chuttoo due to further information needed to verify the legislation requirements for Tax Credit for BC Residents and Tax Credit for Non-BC Residents. An answer from Tax Policy is expected within the next few weeks. This decision is holding development of returns and test scenarios.

#### Others

- Initial *Language of Work* meeting to identify Spec Tax process, timelines etc.
- Leadership meeting to discuss WES scores.
- Various meetings with Policy/Auditor/Director to discuss credits/avoidance penalties

### **Planned Activity for next reporting period (Sep 4 – 14, 2018)**

#### Requirements

- No meetings scheduled.

#### Testing

- Continue writing billing test scenarios in preparation for the Oct 10th testing commencement date.

#### Others

**Issues:** n/a

**Absences:** s.22  
s.22



**Project:** Speculation Tax  
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**Period:** Sep 17 – 28, 2018  
**Team:** Business Team – RPT Levy  
**To:** Louise Lam  
**Author:** Cynthia Kennedy

**Accomplishments in the reporting period (Sep 17 – 28, 2018)**

Requirements

- BCA equity type – 2 meetings
- Spec Tax Due estimator demo

Testing

- On Friday, Sep 28<sup>th</sup>, we have completed the review of the requirements for income based tax credits in accordance the legislation. We will be able to move forward with providing the requirements to the development team on Tuesday, Oct 2<sup>nd</sup>. Brian Ma has been made aware of this.

Others

- 6 hr. *Language of Work* meeting to identify Spec Tax process, timelines etc.
- WES Unpacking meeting – ½ day
- Various meetings with Policy/Auditor to discuss income based credits
- Spec Tax Business Procedures meeting
- Supervisor meeting with Director
- Declined 2 hour Leadership meeting

**Planned Activity for next reporting period (Oct 1 – 12, 2018)**

Requirements

- No meetings scheduled.

Testing

- Dave Chuttoo will continue to work through the scenarios written to test the calculator in eTaxBC.

Others

**Issues:** n/a

**Absences:** n/a