

Key Outcomes – Practitioner lodgment service working group

Venue: MS Teams
Date: 16 January 2024
Start: 1.00pm AEDT **Finish:** 1.49pm AEDT
Chair and facilitator: Sonya Summers
Contact: Corina Noble
Contact details: 07 3213 8109

Attendees:

Sonya Summers, Felicity-Ann Stokes, Anusha Young, Anupama Duggirala, Katrena Cawthorne, David Baker

Guest Speakers:

Kirstyn Carlisle

Apologies:

ATO - Sangitha Sivayogaraj, Chanara Fraser

Agenda item 1 – Welcome

Sonya opened the meeting and welcomed the group.

Thank you to those who have taken the time to provide a response to the annual PLS participant survey that was sent out in December. We would encourage those who have not yet completed the survey to do so as your feedback will continue to contribute to the on-going value of the group for all who are involved.

In addition to this, we have also refreshed the [Terms of Reference](#) (ToR) to be more relevant with the direction of ATO wholesale services and Digital services gateway offerings. The group provided their endorsement of the 2024 ToR during the meeting.

Working and focus group recap for 2023:

A summary of the following working groups which convened late last year was provided:

Modernisation of Trust Administration Systems (MTAS) - 7 December 2023

- Next meeting 7 February 2023

Changes to the International Dealing Schedule (IDS) – 15 November 2023

- Next meeting 5 February 2024

Australia's adoption of the Implementation of global minimum tax and domestic minimum tax working group – 6 December 2023

- Next meeting 5 February 2024

Upcoming focus group for 2024:

On demand Activity Statement lodgment report (ASLRPT) focus group was on track to be closed at the end of 2023, however, due to the technical issues within the updated service, we are reconvening the group on 5 February 2024. If you would like to be involved in these discussions, please log an [expression of interest ticket](#).

The 2023-24 Mid-Year Economic and Fiscal Outlook (MYEFO) was released on 13 December 2023. The group was taken through the [summary](#) of the measures affecting DSPs for discussion.

Agenda item 2 – Action item updates

There is currently 1 open [action item](#) - (BIC) Business Industry Codes (BIC) - discrepancy across ATO sources.

With the revamp of the ATO website, the new Sitecore version is expected to provide an improved and much more effective tool than it was previously, giving better search results and addressing complaints made in the past.

One of the original criticisms was that the Tax Time link took you to the tool and not the instructions which was on a separate page. This has now been rectified under the new version. Also, the new website has been improved and gives better guidance on how to use the tool.

TaxTime 2024 will be a telling point as to how effective these improvements are for DSP's and Tax Agents.

The group discussed the outstanding issue with providing the accurate list of BIC codes for their software implementation. Work remains in progress at this stage and the group will be kept updated.

Agenda item 3 – Tax time related documentation

Rates & Threshold table update:

DSPs may have received notifications that the [Rates and Thresholds page](#) was updated. A review was conducted prior to the Christmas break to check for any updates.

[2023-24 Federal Mid-Year Economic and Fiscal Outlook \(MYEFO\) measures and start dates](#)

The [Mid-Year Economic and Fiscal Outlook \(MYEFO\)](#) was released on 13 December 2023. A summary of the measures affecting digital service providers is provided on this page for use in developing software.

Change Advice updates:

[CA2024-012 Housing \(Build to Rent Developments\) accelerating tax deductions and reducing managed investment trust withholding tax rate](#)

[CA2023-015 Enhanced Prefill Welfare Income](#)

[CA2024-016 Enhanced Prefill Bank Interest](#) (previous version CA2022-009)

Agenda item 4 - Update on general matters and Tax time delivery

The technical issues with the new Activity Statement service (AS.2023) will be remediated by the end of January 2024. Reminder to [log a ticket in OS4DSPs](#) if you wish to gain access to EVTE.

[Tax Time 2024 FAQ page](#) has been updated with a new issue around ITCRPT 2023. ITCRPT11 Lodgment status - incorrect values are being returned in EVTE response messages and MST Report Definition is incorrect. This is to do with the status that are reflecting from the conformance suite and the MST. This will be fixed in the February EVTE release.

The [On demand activity statement lodgment report \(ASLRPT\) focus group](#) will be reconvened on 5 February to discuss aligning terminology of status between ASLRPT and LDG.list services.

Agenda item 5 - CA2023-015 Enhanced Prefill Welfare Income CA2024-016 Enhanced Prefill Bank Interest

The group was provided with a presentation of the updated Enhanced Prefill Change advice's:

[CA2023-015 Enhanced Prefill Welfare Income](#)

- Enhanced prefill will see a new certainty indicator added to both the OSFA prefilling report and the SBR prefill service within PLS to alert the agent to high confidence welfare data.

- In addition, two new elements within the Australian government benefit payment summary tuple will be added to the Income Details (INCDTLS) Message Structure Table as follows:
 - o INCDTLS131 Australian government benefit adjustment reason
 - o INCDTLS132 Australian government benefit adjustment reason description
- This change will apply from 1 July 2024 on tax return form years 2024 and later and only on Welfare Payments that are mapped to Question 5 and Question 6 of the tax return.

CA2024-016 Enhanced Prefill Bank Interest

- The Interest Enhanced Prefill solution will now include bank accounts where the investor count is greater than 1. This change will apply from 1/7/2024 on form years 2024 and later.
- A reason code is only ever required on those interest or welfare fields where the amount has been changed from ATO prefill against those records with a certainty indicator.

Agenda item 6 – Delivery update

The key service changes in the upcoming February 2024 EVTE release include:

- IITR
- CTR
- FITR
- PTR
- TRT and TRTAMI

AS.2023 issues in PROD will be remediated by the end of January and will resolve the current issue.

Other notes to be aware of in the upcoming release are:

- Inclusion of Digital Games Tax Offset
- Small Business Technology Boost removal, this was only applicable for the 2023 service
- Inclusion of Small Business Energy Boost
- Enhanced Prefill for IITR
- New trust beneficiary income schedule.

An updated version of the DSP Product Roadmap including Release on a Page will be published in early February 2024 reflecting updates with the EVTE release.

Agenda item 7 – Platform update

Platforms have been stable so far in 2024. An outage was experienced on 11 December for 1 hour and 45 minutes due to firewall changes. A post implementation review was conducted to develop mitigation strategies.

Agenda item 8 – TPDIG and Agent online environment updates

An overview of the [Tax Profession Digital Implementation Group \(TPDIG\)](#) meeting held on 21 November 2023 was provided to the group:

- New website platform
- Strengthening digital systems: Online access strength
- Cyber working group – Introduction and workshop
- Digital Activity Statement transition
- User access in software
- Improve Small Business tax performance
- Client-to-agent Link
- Data minimisation and outcomes from DSPANZ focus group
- Environmental Scan

Click the above link for full details of the TPDIG key messages.

Agent Online Environment update:

There was myGovID degradation with the team conducting a reboot of the system and meeting on Wednesday 17 January for a review.

The 2024 rollover Business Implementation Guides (BIG) are currently being updated and will be released as they become available.

Agenda item 9 – DSP communications update

The first issue of the DSP newsletter for 2024 will be 17 January.

Agenda item 10 – DSP feedback

The [Tax Time 2024 page](#) will be progressively updated as the TT2024 draft forms and instructions become available.

Confirmation is being sought on expected DSP impacts from the legislative change with Trade Support Loans moving to Australian Apprenticeship Support Loans from 1 January 2024 (<https://www.dewr.gov.au/skills-support-individuals/trade-support-loans>).