Key Outcomes –
Practitioner lodgment service working group

Venue: Teams

Date: 30 January 2024

Start: 1.00pm AEDT   **Finish:** 2.00pm AEDT

Chair and facilitator: Stacey Wilson

Contact: Corina Noble

Contact details: 07 3213 8109

Attendees:

Stacey Wilson, Felicity-Ann Stokes, Anusha Young**,** David Baker

Guest Speakers:

Ben Woolfe, Tiffany Waters

Apologies:

ATO - Sonya Summers, Sangitha Sivayogaraj, Anupama Duggirala, Chanara Fraser

Agenda item 1 – Welcome

Stacey opened the meeting and welcomed the group.

Agenda item 2 – Action item updates

There is currently 1 open action item.

There are no further updates on the BIC code action item at this stage as business are working on generating the list for data.gov.au. Once this is available, the appropriate pages on the DSP Hub will be updated.

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Agenda item 3 – Tax time related documentation

Tax Time 2024 - Draft Instructions

25 January

The following draft Business & Referred publications were published on the DSP Hub:

- Attribution Corporate Collective Investment Vehicle sub-fund tax return instructions 2024
- Attribution managed investment trust tax return instructions 2024
- Company tax return instructions 2024
- Consolidated groups losses schedule instructions 2024
- Franking account tax return and instructions 2024
- Fund income tax return instructions 2024
- Guide to depreciating assets 2024
- Guide to foreign income tax offset rules 2024
- Life insurance companies taxation schedule instructions 2024
- Losses schedule instructions 2024
- Partnership tax return instructions 2024
- Personal investors guide to capital gains tax 2024
- You and your shares 2024

30 January

The following draft IND Tax Return Instructions were published on the DSP Hub:

- Q01 - Salary or wages
- Q03 - Employer Lump sum payments
- Q04 - Employment termination payments
- Q07 -Australian annuities and superannuation income streams
- Q08 - Australian superannuation lump sum payments
- Q09 - Attributed personal services income
- Total tax withheld

2024 Tax Time draft forms and further draft instructions will be published as soon as they become available.

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

No items were raised for discussion.

Agenda item 5 - Delivery update

The upcoming EVTE release is scheduled for 8 February 2024. The delivery teams are planning a tentative timeline for the March, April and May 2024 EVTE releases to include:

- April EVTE
  IITR profile compare, Outcome of assessment, and the new LCMSF v4 service

- April and May EVTE
  Standard cyclical services

A walkthrough of the updated Delivery Roadmap is anticipated at the next PLS working group on 13 February 2024.

Agenda item 6 – Platform update

There have been no incidents or updates to report.

Agenda item 7 – Agent online environment update

There have been no incidents or performance issues to report.

Agenda item 8 – Activity Statement service (AS.2023) update

The group was provided an update on the AS.2023 service change. Further details about this update can be found on the 30 January 2024 PLS working group meeting page on the DSP Hub.

Agenda item 9 – DSP communications update

New version of the .NET SDK available in Sharefile
A new version of the .NET SDK has been uploaded to ShareFile.

SMS hyperlinks are being removed

To help combat ATO impersonation scams and make it easier for the community to identify our legitimate SMS communications, we will be removing hyperlinks from unsolicited outbound SMS by Tax Time 2024.

Upcoming certificate updates
The Upcoming certificate updates page has been updated with changes to SBR ebMS3 PROD2 outbound signing certificates and updates to the ATO SBR Physical End Points document.

ATO Artefacts and locations file update notification emails
The ATO Artefacts and locations spreadsheet available on the SBR website is a valuable resource that provides a high level synopsis of any changes to development artefacts.
To receive timely notifications of when this spreadsheet is updated, you can select 'watch' at the top of the ATO Artefacts and Locations publication updates page. We will send you a notification via Online services for DSPs when a new spreadsheet is available.

Agenda item 10 – DSP feedback

The group discussed the data migration requirements for DSPs who will be transitioning from SBR1 to SBR2 for the Activity Statement service.

Once a product has transitioned to the new AS.2023 service on SBR2, an agent would need to run the new list (LDG.2023.list) and get (AS.2023.get) services to retrieve data which would have previously been obtained from the AS.2009 service on SBR1.

Agenda item 11 – Close

The group was thanked for their valuable discussion during the session.