Key Outcomes –
Practitioner lodgment service working group

Venue: Teams

Date: 13 February 2024

Start: 1.00pm AEDT   **Finish:** 1.40pm 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, Chanara Fraser

Guest Speakers:

Stephen Dodshon

Apologies:

ATO - Sangitha Sivayogaraj, David Baker

Agenda item 1 – Welcome

Sonya opened the meeting and welcomed the group.

An overview of the working groups sessions held last week was provided:

ASLRPT changes focus group
The group discussed the 2023 version of the ASLRPT and ITCRPT services including the Flexible lodgment indicator returned in the response, as well as reduction of the IT Lodgement status reducing from 8 fields to 4. Updated details and guidance will be included in the TPCMR Business Implementation Guide (BIG).

Changes to the IDS working group
While law has still not passed for the remaining measures in relation to the International Dealings Schedule (IDS), a walkthrough of the new Message Structure Table (MST) showed changes to existing MST structure, updates to labels, business definitions, business guidance and full enumeration to support the new headings and tuples. The Bill containing this measure may be scheduled for debate in the Senate towards the end of February.

MTAS working group

The group was taken through the new validation rules to support the DISTBENTRT service being integrated to the remaining NITR services in the February EVTE release over the weekend. Business has prepared a document showing draft mapping of the Statement of Distribution (SoD) to the Trust Income Schedule (TIS) labels to the ITR and NITR return. A webinar on the upcoming Modernisation of Trust Administration Systems (MTAS) changes has been scheduled for Thursday 21 March 2024.

Agenda item 2 – Action item updates

An update on the action item was provided.

The Business Industry Code (BIC) page has been created on data.gov.au with an updated list which has the long dashes removed. This list does not include any ATO internal codes.

There is a link to the page on the Tax Time rates and thresholds table in the Tax Time page on DSP Hub.

This is the direct link on data.gov.au.

Agenda item 3 – Tax time related documentation

Since our last meeting, the following were published in the DSP hub:

7 February

Rates and Thresholds page updated to include the newly created BIC page containing the updated list.

8 February

2024 Non-Resident Foreign Income (NRFI) schedule: HELP, VSL and AASL simple self-assessment method occupation deduction ratios

12 February

CA2014-017 Luxury Car Tax – modernising LCT for fuel-efficient vehicles change advice.

The new draft Trust Income Schedule form was published just after this meeting.

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

The group was reminded that IITR, NITR and FBT 2024 services are available in EVTE, to begin testing, please log a ticket in Online Services for DSPs as per the usual whitelisting process.

Agenda item 5 – Update on the Legislation for Changes to IDS

As advised to the Changes to International Dealings Schedule (IDS) working group on 5 February, a Senate Committee was considering the thin capitalisation legislation. The Committee has now recommended that the legislation be passed by the Senate. The legislation was listed in Senate business but did not proceed to debate.

The next Senate sitting is likely to be on 26 February 2024. We anticipate the legislation being debated that week. If it does not pass, we will come back to the IDS working group to discuss mitigation as needed.

Agenda item 6 – Delivery update

Artefacts for the February EVTE release were published on 8 February with the code release on 10 February. This was a large release that included the rollover for the NITR services and an update to FITR which moved to the 2024 schema. The TPCMR MST was updated to address issues with the list of valid statuses returned.

The March EVTE release will occur in early March and will include:
- removal of the small business boost measure labels
- addition of the small business energy boost labels
- updates to income details schedule including removal of duplicate labels and redundant validation rules.

The April EVTE release will see:
- the implementation of new rules and warnings for the R&D schedule
- updates to LDG.list to include the new SAITE role and new activity statement form type
- updates to the outcome of assessment (ASMT) service
- updates to the ITRPRFL service to support MTAS nudge messaging
- updates to occupation codes.

The updated Delivery roadmap will be published shortly.

The group discussed the current deprecation date for the AS.2009 service and would like consideration to be given to extend the date as the AS.2023 service is still undergoing technical changes and investigations. The group was advised these conversations are ongoing and an update will be provided as soon as possible.

Agenda item 7 – Platform update

All systems are working as expected. Stuck messages experienced last week are being replayed.

Agenda item 8 – Agent online environment update

There was some degradation to SBR1 and Access Manager, after a reboot and node reset, these issues were resolved.

Agenda item 9 – DSP communications update

DSP newsletter will be issued as per normal. The key items to note from issues 4 and 5 are:

- Read the consolidated **DSP conditions of use**
- Activity Statements 2023 service error in PROD – update
- Updated references on API system maintenance page
- Check if your DSP profile role is up to date
- Stapled super fund bulk request process continuing
- Save the date for our Modernisation of Trust Administration Systems webinar
- Tax Time 2024 NITR, FBT and IITR – available in EVTE
- Reminder: Upcoming certificate updates.

Agenda item 10 – DSP feedback

The group have been advised that the DPO are working closely with the relevant business areas to have the Tax Time 2024 draft forms and instructions published on the DSP Hub as soon as available.