

Key Outcomes – Practitioner lodgment service working group

Venue: MS Teams
Date: [23 April 2024](#)
Start: 1.00pm AEDT **Finish:** 1.31pm AEST
Chair and facilitator: Sonya Summers
Contact: Kaethe Seidel-Wynne
Contact details: 02 9354 3014

Attendees:

Sonya Summers, Felicity-Ann Stokes, Sangitha Sivayogaraj, Katrena Cawthorne, David Baker

Guest Speakers:

Stephanie Long, Emily Worthing

Apologies:

Chanara Fraser

Agenda item 1 – Welcome

Sonya opened the meeting and welcomed the group.

Agenda item 2 – Action item updates

There is one open [action item](#). There are no further updates to provide on the BIC code action item. It will remain on pause until Tax Time so we can see if the updates have improved the experience.

Agenda item 3 – Tax time related documentation

There have been several draft forms and instructions, as well as final forms published since our last meeting. We continue to upload Tax time forms and instructions to the DSP Hub as they become available. To view published documentation, visit the [2024 Tax Time documentation page](#).

EXTERNAL

OFFICIAL

International Dealings Schedule update

A document providing a summary of expected changes to the International Dealings Schedule was published 22 April on the [Changes to International Dealings Schedule focus group page](#) in the DSP Hub. We are anticipating an official draft form to be available this week.

Post script: The draft IDS is now available

Budget Measure tracker

At the last PLS working group meeting, the group was asked about their interest in a resource to provide visibility of the journey between the Budget measures impact assessment, the wait for Change advices and updates to associated rates and thresholds.

A draft table was shared with the group for their feedback and consideration.

Several means to support the Tax Time process were referenced in the table, with a short description and link to the associated page in Online Services for DSPs, for ease of access to additional information.

Questions were posed to the group to assist in developing a resource of value and ensuring relevant information. Feedback included the addition of legislation stage and size of change, updating the tax year impacted to expected start date, and when items can be removed from the table.

A new page and table will be uploaded to the DSP Hub shortly.

DSPs were encouraged to provide feedback at any stage, especially as we move through the Budget cycle.

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

Unfortunately pre-filling of Private Health Insurance policy dates to IITR will not be deployed this year as previously advised. The earliest this will be able to be delivered is Tax time 2025.

The group were advised to raise a ticket for any questions related to the EVTE deployment that occurred on 19 April.

For DSPs who have tickets relating to AS2023, these will be updated once a decision has been made on a path forward.

Agenda item 5 – LCMSF update

There are changes coming to the LCMSF (local file master file) service next week that will impact DSPs who produce a local file service. The MST and validation rules will be published on sbr.gov.au Thursday 2 May. Once this change is made available, our team will be supporting the DPO for anything DSPs may need.

EVTE will be available from 1 June with PROD expected in Nov 2024. The earliest lodgments will occur in early 2025.

Agenda item 6 – Delivery update

The next EVTE deployment will occur in May. There will be some changes to the International Dealings Schedule due to the amendments to the Thin Capitalisation measure; We also have defects for TRT as a result of the XML conversion, and changes to the Trust and Partnership tax returns as a result of MTAS.

Agenda item 7 – Agent online environment update

Noteworthy dates in the Agent online environment space were shared with the group:

- 18 April – updates to the 2024 ITR BIG to correct the title and footer
- 18 April - the final payevent.list 2023 was published, and
- 2 May – SMSF 2024 BIG will be published.

Online services for Agents will be updated to assist with client to agent linking. Nudge messaging will be updated to ensure Agents are linking at the correct account level, and when they add a client that they don't remove another Agent unless they have the authority to do so.

There may be an update with the working from home rate per hour that people can use to calculate their working from home cost. Should this occur, any calculators to assist in software may need to be updated.

Agenda item 8 – DSP communications update

[RAM – April update](#)

We've made some updates to Relationship Authorisation Manager (RAM) to improve usability and functionality when [linking online in RAM](#).

[DSP content map](#)

To help you find the information you need, we developed the DSP content map. It provides a general overview of the channels available to you and helps you navigate our controlled (secure) and non-controlled (public) systems.

One of the main channels is Online services for DSPs, which is made up of the DSP hub and the DSP service desk. Online services for DSPs contains secure information only available to registered DSPs. Once you're logged in as a registered DSP, you can:

- explore the [DSP hub](#), which contains information and resources to assist you through the various stages of your product development, and is organised by function so you can navigate only the content related to your product
- raise tickets in the [DSP service desk](#)
- search all content.

[DSP roadmap](#)

A new version of the DSP roadmap (v10) is now available in the DSP hub.

[FBT rates from April](#)

The Tax Determination for fringe benefits tax (FBT) rates from 1 April is now available in the DSP hub.

[SBR AU taxonomy](#)

We've implemented changes to support the Individual Income Tax Return for Tax Time 2024 and International Dealings Schedule. Refer to the [18 April release notes](#) for the list of changes.

[MTAS webinar recording now available](#)

The Modernisation of Trust Administration Systems (MTAS) webinar held on 21 March covered the MTAS project and deliverables, including the technical design and new and updated services and features. The recordings, transcripts and presentation are now available in Online services for DSPs.

Agenda item 9 – DSP feedback