Key Outcomes –
Practitioner lodgment service working group

Venue: Teams

Date: 2 July 2024

Start: 1.00pm AEST   **Finish:** 1:37 pm AEST

Chair and facilitator: Kaethe Seidel-Wynne

Contact: Janette Zafiropoulos

Contact details:

Attendees:

Kaethe Seidel-Wynne, Felicity-Ann Stokes, Anusha Young, Sangitha Sivayogaraj, Anupama Duggirala, , David Baker, Chanara Fraser

Guest Speakers:

Apologies:

ATO – Sonya Summers,

Agenda item 1 – Welcome

Kaethe opened the meeting and welcomed the group.

Agenda item 2 – Action item updates

There is 1 open action item. There are no further updates to provide on the BIC code action item. It will remain on pause until after Tax Time so we can see if the updates have improved the experience.

Agenda item 3 – Tax time related documentation

Final forms and instructions continue to be published on the 2024 Tax time documentation page. They are also available on ATO website.

The Small Business Energy Incentive and $20,000 Instant Asset Write-off (IAWO) measures received royal assent over the weekend.

Since the meeting, updated change advices for both have been published in the DSP Hub:

[CA2024-003 Small Business $20,000 Instant asset write off](#)

[CA2024-005 Small Business energy incentive](#)

Additionally, the following Change advices have since been updated and published on the DSP Hub:

[CA2023-012 Small Business skills and training boost](#)

[CA2024-004 Non arms length expense rules for Superannuation Funds](#)

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

Everyone should now be whitelisted for 2024 services, including IITR Profile which went into PROD 1 July. If you have not yet requested this service for 2024 but have been whitelisted in a prior year, please [raise a request](#) via the DSP service desk.

There are a number of outstanding tickets that are awaiting technical change updates. If you have been informed that the issue is scheduled for a technical fix, we will advise you when this will be released into PROD via your ticket.

Agenda item 5 – Platform update

SBR2 PROD experienced an outage on 1 July from 9.40 to 10.40 pm as part of non-impacting change, which also resulted in required restarts. The platform experienced partial degradation post outage, however, monitoring was carried out to ensure no further outages occurred.

A post implementation review was undertaken and stuck messages are being replayed as a priority. We apologise for the inconvenience caused, especially during this busy period.

Agenda item 6 – Delivery update

The group received an overview for the JULY EVTE releases:

IITR 2023
- Change to the super income stream tax offset, as mentioned in last PLS meeting, aligning the threshold to the rates published on ATO site for 2023 (coming down from $11,875 to $10,625). Aiming for PROD in September 2024.

IITR 2024
- Change in IITR dependant tax offset threshold due to the increase from $104,432 to $112,578. This will be released in PROD on 23 July.

INCDTLS
- Income details schedule validation rule updates as per MTAS changes with the new capital gains trust labels.

- Addition of trust capital gains and non-resident income details into validation rules as well as Australian franking credits from NZ company and share of net small business income. This will be released in PROD on 23 July.
- MST document only updates for the income details schedule to align with the implementation.

LCMSF 2024
- Schema and validation rule changes
- The Package Content Note (PCN) that was published on 30 May 2024, in the future scope changes, will be addressed in July EVTE.

As part of July EVTE, the draft updated Conformance Suites and some payloads for SMSFVRFY 2020, SMSFMBRVRFY 2020 and COMMPREF 2019 will be published for feedback. DSPs will not be able to test in EVTE using the updated scenarios until they are deployed in October EVTE. To provide feedback, please raise a ticket via the DSP service desk.

Sangitha announced she has accepted a new role within the ATO and will soon depart DWIS. Sangitha expressed thanks to the DSPs for their collaboration and design input, she has enjoyed working together.

Agenda item 7 – Agent online environment

There were constraints in Online services for agents (OSFA) and Individuals platforms on 1 July due to the record high number of IITR returns sent to the ATO.

In OSFA, a waiting room was established to help with capacity and was closely monitored. Error rates being returned for agents were around 4-5% throughout the day, with services returning to normal by 2 July.

Tax Time is going well. There is a minor irritant with interest in Prefill when there is a null in the certainty indicator. There are no issues with the data, it is only a prompt that is not occurring when it should.

An update on the Tax Practitioner Digital Implementation Group (TPDIG) will be provided next PLS working group once the key messages have been published.

Agenda item 7 – DSP communications update

The **Small business energy incentive (SBEI)** passed through Parliament on 26 June and received Royal assent late on Friday. On 27 June, the mitigation validation rules were removed in EVTE and the changes deployed into production on 3 July. An updated change advice is now available.

The $20,000 instant asset write-off (IAWO) is now law and gives eligible businesses the opportunity to deduct the full cost of eligible assets which cost less than $20,000. An updated change advice is available in the DSP hub.
The due date has been extended until 6 August to complete the **M2M SDK update**, required for the machine credential renewal function.

Agenda item 8 – DSP feedback

A question was asked by a group member:

Small Business Energy Incentive - will the conformance suite payloads be updated by the ATO later?

DWIS advised they will look into this and provide an answer at the next PLS meeting.

Thank you.