

Key Outcomes – Practitioner lodgment service working group

Venue: Teams
Date: 30 July 2024
Start: 1.00pm AEST **Finish:** 1.30pm AEST
Chair and facilitator: Sonya Summers
Contact: Kaethe Seidel-Wynne
Contact details: 02 9354 3014

Attendees:

Sonya Summers, Felicity-Ann Stokes, Julie Huynh, Katrena Cawthorne

Guest Speakers:

Apologies: David Baker, Anusha Young, Chanara Fraser

Agenda item 1 – Welcome

In line with best practice, the ATO is introducing a new requirement for members of all ATO consultation groups to complete an integrity declaration. Given the unique nature of consultation matters, a declaration is required for each group that a DSP is a member of. Members of ongoing groups will be asked to sign a declaration annually. Members of groups with a defined end date or outcome will sign one declaration to cover the duration of the consultation. Integrity declarations will be sent to DSPs shortly and need to be returned by 30 September 2024.

DPO will note DSPs request to allow sufficient time for their legal team to review the integrity declarations prior to signing and returning to the DPO.

The group was reminded of the upcoming 2025 Services for Tax Practitioners event being held in Canberra on 4 & 5 September this year. For members interested in attending, please lodge an expression of interest by [raising a ticket](#) in the DSP service desk.

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 Tax Time so we can see if the updates have improved the experience.

Agenda item 3 – Tax time related documentation

The [Tracking budget measures](#) page in the DSP hub has been updated to show changes in legislation stages and anticipated presentations for some measures at the Tax Time event.

Further updates will be made as information becomes available.

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

IITR and NITR PVT tickets will be closed shortly.

An update on when rule VR.ATO.TRT.433084 firing incorrectly for trusts in overall loss or net zero position will be fixed is expected shortly. A reminder was provided to subscribe to the [Tax time 2024 PLS additional information FAQs](#) page, where updates will be provided.

Agenda item 5 – Delivery update

August EVTE will include the following:

- LDG Get rollover for 2024 full EVTE package and Conformance Suite updates
- TSL rebranding updates for LDG Get, IITR and IITR Prefill

The Department of Employment and Workplace Relations expanded the Trade Support Loans (TSL) program to include apprenticeships and traineeships, now known as the [Australian Apprenticeship Support Loans](#) (AASL). This change came into effect on 1 January 2024, and we are currently updating our products and contents to reflect the new terminology for 1 January 2025.

To minimise DSP impacts to production services, the following changes are being made:

- IITR Prefill will have updated labels and guidance changes for the 2024 service. From 2025, a new generic SBR data element with specific guidance will be introduced to reflect this loan type. Draft artefacts for IITR Prefill will be available in August EVTE.
- Reference data for AASL will apply for all prior years and current year in ASMT Get.
- CLNTACC and CLNTACCSUM services will move the Tax Type Account Codes from enumerated lists in the schema to a validation rule. This change enhances flexibility for updates when necessary and minimises the impact on DSPs.

Timeline:

- Expected code release into EVTE for IITR Prefill, IITR Validate/Submit and Lodgment LDG Get artefacts: August 2024
- Expected code release into EVTE for all other services: September 2024
- Production: November 2024.

For further information, please refer to the [email](#) issued to DSPs on 31 July 2024.

Agenda item 6 – Agent online environment update

SMSFAR.0013 2024 Business Implementation Guide draft version 0.2, and the Partnership tax return 2024 (PTR.0012) as final v1 were published on 25 July.

Some agents are experiencing an issue with lodging general purpose financial statement lodgments in OSfA. There is no work around for this issue, work is underway to provide a resolution as a priority and communications are being developed. Though lodgments are due 31 July, failure to lodge penalties will not be applied in these cases.

Agenda item 7 – DSP communications update

For further information about the below topics, please see DSP newsletters in the [DSP Hub](#):

- Trade Support Loan (TSL) renaming changes and the anticipated timeline
- Internal realignment of our structure from the Digital Partnerships, Planning and Governance branch, to the Data, Integration & Service Management (DI&SM) portfolio, led by Deputy Commissioner Michael Rowell.
- Due date extension reminder for the M2M SDK update
- Updates to the ShareFile sign in experience

Agenda item 8 – DSP feedback