

Key Outcomes – Practitioner lodgment service working group

Venue: Teams
Date: 27 August 2024
Start: 1.00pm AEST **Finish:** 1.22pm AEST
Chair and facilitator: Sonya Summers
Contact: Kaethe Seidel-Wynne
Contact details: 02 9354 3014

Attendees:

Sonya Summers, Felicity-Ann Stokes, Anusha Young, Cara Ly, David Baker, Chanara Fraser

Agenda item 1 – Welcome

The chair 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 Business Industry 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 following change advice has been published in the DSP hub within the last fortnight:
[CA2025-004 Single Touch Payroll – Employer Standing Declaration](#)

The [Tracking budget measures](#) page in the DSP hub will be updated shortly.

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

Additional bugs will soon be added to the [Tax time 2024 PLS Additional Information FAQ](#) page. Please watch the page to receive notifications of new or updated issues.

Agenda item 5 – Delivery update

August 29th EVTE:

Trust 2024 validation rules changes for August 29th EVTE and September 14th-16th Production.

- a. **VR.ATO.TRT.433084** - Rule updated to account for trusts in an overall loss or net zero position.
- b. **VR.ATO.TRT.433089** - Rule updated to align with internal ATO processing rule. The type of trust must be a deceased estate in the validation rule logic.

September EVTE:

- Trade Support Loan (TSL) changes for the following services will be available as part of September EVTE and production in November 2024.
 - Outcome of Assessment (ASMT 2018)
 - Client Account 2017
 - Client Account Summary 2017
 - Payment Reference Number 2016
 - Client Communication 2020
 - Transaction List 2016
 - Tax File Number Declaration 2019
- Research and Development Tax Incentive Schedule 2023 – Code implementation issue will be resolved as part of September EVTE. No impact to validation rules or C#. Production release November 2024.

Unfortunately, ATO were unable to include the TSL changes as part of the Tax Time updates, resulting in production deployment midway (November 2024) through tax time.

Partnership 2025 xml conversion: Draft xml message structure table (MST) for Partnership 2025 will be made available for review in September.

Agenda item 6 – Platform update

RTVS Mocks in EVTE – to be fixed tonight during outage window

All platforms are currently stable with no high priority incidents in the last two weeks.

Agenda item 7 – Agent online environment update

Platform has been relatively stable throughout tax time, apart from initial impacts due to the fluctuation in loads.

This weekends release will include a change to the user feedback panel in OSFA, the panel will be removed as agents are using it to request technical systems support.

Some agents are experiencing issues with:

- Mailboxes remaining even after the person has been removed from RAM
- accessing historical NOAs, however they can access prefill information for the client
- removing a client where a TFN has been end dated and a new TFN has been created for the deceased estate. Agents are to contact ATO to have the client removed.

Agenda item 8 – DSP communications update

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

- When raising a ticket via the DSP service desk, it's important you select the right ticket type for your issue to avoid delays in processing your request:
 - Raise a [Report an incident](#) ticket when you want to report a technical issue or an error in a document e.g. specifications.
 - Raise an [Ask a question](#) ticket when you have a question about a system, service or consultation.
- Don't miss the 2025 Services for Tax Practitioners event Final reminder the annual Services for Tax. Presentation packs and recording will be made available after the event
- OSF annual review process has been updated.
- Reminder: Trust tax return 2024 – corrections required to validation rules

Agenda item 9 – DSP feedback

The 10 September meeting has been cancelled due to the close proximity of the Services for Tax Practitioners event.

The next PLS meeting will be 24 September.