

Key Outcomes – Practitioner lodgment service working group

Venue: Teams
Date: 8 October 2024
Start: 1.00pm AEDT **Finish:** 1.14pm AEDT
Chair and facilitator: Karen Greaves
Contact: Kaethe Seidel-Wynne
Contact details: 02 9354 3014

Attendees:

Karen Greaves, Felicity-Ann Stokes, Anusha Young, Chanara Fraser

Apologies:

ATO – Anupama Duggirala, David Baker

Agenda item 1 – Welcome

The chair opened the meeting and welcomed the group.

The [Pseudo Tuple presentation](#), shared at the 24 September meeting, was emailed on 30 September for review and feedback by developers. Responses to the 4 questions at the end of the slide pack would be appreciated when sending through any feedback.

To allow sufficient time for developers to review the information, the feedback discussion is anticipated to take place at the PLSWG on 22 October. Developers are encouraged to attend this meeting as both business and ATO technical will be available to discuss further and answer any questions.

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

The following Change advice was published in the DSP Hub on 30 September:

[CA2025-010 Self-managed Superannuation Funds – legacy retirement product conversions](#)

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

Two additional bugs have been added to the [PLS FAQ page](#):

- Rule VR.ATO.INCDTLS.00393 is firing incorrectly, and
- Interactive errors: CMN.ATO.IITR.EM0072 and CMN.ATO.IITR.EM0073 are firing incorrectly when no change is made to the:
 - Government allowance tax withheld amount
 - Government pension tax withheld amount

Updates to 4 outstanding bugs are anticipated in the coming weeks.

Agenda item 5 – Delivery update

October EVTE:

Fringe Benefit Tax Return 2025 - Initial release of the FBT.0004 2025 service

Updating conformance suites to rationalise and align testing data across common domains, and test scenarios of related services for:

- Communication preference (COMMPREF) 2019
- Self-Managed Super Fund Verify (SMSFVRFY) 2020
- Self-Managed Super Fund Member Verify (SMSMBRVERFY) 2020

November EVTE:

Company Tax Return (CTR) 2025, Trust (TRT) 2025, Individual Income Tax Return (IITR) 2025 (validate/submit) – Initial release of the services. Partnership (PTR) 2025 – artefact release only

December EVTE:

Trust attribution managed investment (TRTAMI) 2025, FITR 2025, Self- Managed Superfund Annual Report (SMSFAR) 2025, Partnership (PTR) 2025 - Initial release of the services

Trade Support Loan (TSL) changes for the following services will be available in 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

A new ROAP is anticipated for publishing in the coming weeks.

Agenda item 6 – Platform update

All platforms are currently stable with no issues to report.

Agenda item 7 – Agent online environment update

No issues to report in the Agent online environment, other than the degradation that occurred overnight on 7 October, and was resolved early 8 October.

The DPO are working directly with the Pre-fill team about the OSfA pre-fill software specification (Pre-filling report 2024) to import pre-filling data into tax agent software. The draft spec is anticipated shortly, with only a minor display change - TSL (Trade Support Loan) will change to AASL (Australian Apprenticeship Support Loan). Once available, the OSfA pre-fill software spec will be published to the DSP Hub and included in the DSP newsletter.

Agenda item 8 – DSP communications update

The group were reminded the draft XML specifications (MST and schema) for the 2025 Partnership tax return (PTR) are available for review on the [XBRL to XML Conversion Supporting Information](#) page in the DSP hub for review and feedback by 14 October.

The ITR Profile Compare [Business Implementation Guide](#) (BIG) IITRPRFL.0006 2024 was published on the SBR website on 26 September 2024 and includes an additional response message for trust distributions.

The SBR service desk phone number will be decommissioned on 18 October due to reduced demand. The afterhours contact number will remain available.

Agenda item 9 – DSP feedback & Close

A reminder regarding integrity requirements was provided to the group: *as members of the PLS working group, and as taxpayers, it is expected that we all understand the importance of setting an example for the community by meeting our own tax obligations, demonstrating integrity and professional behaviour, and maintaining confidentiality.*

The PLS meeting scheduled for 5 November 2024 has been moved to Wednesday 6 November to account for the Melbourne Cup holiday.