



Key Outcomes – Practitioner lodgment service working group

Venue: Teams
Date: 19 November 2024
Start: 1.00pm AEDT **Finish:** 1:37pm AEDT
Chair and facilitator: Karen Greaves
Secretariat: Kaethe Seidel-Wynne
Secretariat contact: 02 9354 3014

Attendees:

Karen Greaves, Felicity-Ann Stokes, Anusha Young, Anupama Duggirala, Ziva White, Chanara Fraser

Guest Speakers:

David Baker

Apologies:

ATO –

Agenda item 1 – Welcome

The chair opened the meeting and welcomed the group.

Agenda item 2 – Action item updates

There are 3 open [action items](#) including an item raised during the meeting:

21/11/2023 – 01

Business Industry Codes (BIC) - discrepancy across ATO sources:

Action item will remain on pause until after Tax Time so we can determine whether BIC tool updates have improved the experience.



06/11/2024-01

TRT business name - mandatory, should be optional

19/11/2024-01

Proposed EST fix: TRT 2024 schema update to address trust return 2024 – Mandatory business name issue.

Agenda item 3 – Tax time related documentation

Since the last PLS working group meeting, the following were published in the DSP Hub:

[2025 Child Support and the Protected Earnings Amount \(PEA\)](#)

[2025 Fringe Benefits tax return \(NAT 1067\)](#)

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

There is a bug with each of the new ITCRPT and ASLRPT 2023 services. Both relate to elements appearing in the MST in a different tuple to the conformance suite. There are 2 options which have been identified to resolve these bugs:

- Update MST to match the current conformance suite
- Update both MST and conformance suite

A number of DSPs are already in production for these services and Option 1 would be the simpler option to resolve. DWIS will discuss in a later PLS meeting once a date for the fix is agreed and further information is available.

DSPs wanting to move into production for either service, should raise a [Request production Access](#) ticket in the DSP service desk.

Agenda item 5 – IITR BIG updates

Proposed IITR BIG updates were shared with the group for feedback.

Remote zone tax offset:

Taxpayers are failing to claim the remote zone tax offset. To improve the tax experience and increase accessibility for those eligible, the ATO are considering updates to the BIG to alert taxpayers by the way of a pop up, to check eligibility if their postcode falls within the range.

DSP suggestions for consideration included:

- Interactive warning displayed to agents on pre-lodge if taxpayer falls into postcodes provided by ATO, similar to occupation codes. It was noted that using the list of postcodes currently available on the ATO website is a manual task.



- Warning message in validation as some DSPs won't be using pre-lodge. For example, there is no amount claimed here, however XXXX postcode has been entered.
- Push message out in prefill. For example – offset was claimed last year or taxpayer falls within post code areas.

Financial institution details (FID):

ATO are looking to mandate the FID field by way of using the BIG to instruct, removing the ability to leave FID fields blank. There was general agreement to make the field mandatory and no concerns were raised.

Agenda item 6 – Delivery update

Client Communication 2020 List service updated to return a new delivery channel code "ATO App" in the response. February 2025 EVTE and production in May 2025.

Deactivation dates for Activity statement 2009 services, Lodgment List 2016, Activity Statement Lodgment Report (ASLRPT) 2014 service and Income Tax Client Report (ITCRPT) 2014 service extended to **31st December 2026**. ATO Service Registry will be updated to reflect this date and published on the 21st of November 2024.

Contingency for Self-Managed Superannuation Annual Return (SMSFAR) 2025 BTSC changes

The Better Targeted Superannuation Concessions measure was announced on 28 February 2023 and confirmed in the 2023-24 Federal Budget on 9 May 2023. The outcome of Treasuries consultation on the regulations is not yet known. The intent of this change is to improve the equity and sustainability of the super system by reducing the tax concessions available to individuals with a total super balance exceeding \$3 million at the end of the financial year. The dependent legislation has not been made law.

Contingent on law, from the 2024-25 SMSFAR onwards the wording of labels X1 and X2 will change to:

- X1 – "Accumulation phase value" to "Value of Accumulation account"
- X2 – "Retirement phase value" to "Value of Retirement account"

The critical dates from a legislation perspective:

- The last sitting day of the Senate this year is 28 November.
- Based on provisional dates set by government, the next sitting periods are 4 Feb 2025 to 13 Feb 2025, and then 25 to 27 Mar 2025.
- If the law is passed on or before this date, no change.
- If law is not passed by 27 Mar 2025, it will not pass in this parliament the bill will lapse, and the bill would have to be re-introduced by a new government.

If the law does not pass legislation by 27 March 2025, the changes including the report label and report guidance changes will be rolled back from SMSFAR 2025 service and the changes will be available in **May 2025 EVTE**.



Trust Return 2024 – Mandatory business name issue - INC004447404

It is anticipated that over 9,500 lodgments will be impacted by the mandatory business name issue. The ATO are concerned of the consequences of a paper lodgment workaround and not being able to provide a digital solution for Tax Agents. The issue is already being resolved for the 2025 TRT. After considering the risk to reputation, the impacts of manual review and keying, and that the trust lodgment peak is expected from March 2025 to May 2025, the ATO have proposed that the issue also be resolved for TRT 2024. A minor version update will be made to the TRT 2024 schema to make “TRT161 – Business name of main business” optional. EVTE and production release timelines will be communicated in the coming weeks.

It was noted that DSPs would like both the current version and anticipated new version of the TRT 2024 schema to be accepted. DWIS will confirm and advise – see [action item 20241119-01](#)

An updated Digital Wholesale & Integration Services (DWIS) [Product and Program Delivery roadmap](#) is now available in the DSP hub.

Agenda item 7 – Platform update

An EVTE P1 issue occurred on 13 November, with the cause of the 2-hour outage deemed to be an infrastructure issue, which is now rectified. All platforms are currently performing well.

Agenda item 8 – Agent online environment update

There were no issues or updates to raise.

Agenda item 9 – DSP communications update

Further information on the below topics can be found in issues [44](#) and [45](#) of the DSP newsletter:

- myGovID is now myID
- From 1 November, SBR1 and SBR2 stopped accepting TLS 1.0 and TLS 1.1 in EVTE. We've extended the PROD date to 1 February based on DSP feedback. If you are using TLS 1.0 or TLS 1.1 you must update before 1 February, when these changes will be implemented into PROD. After this date, only transmissions using a minimum of TLS 1.2 will be accepted. Transmissions using TLS 1.0 or TLS 1.1 will receive an error and will not be accepted.
- In 2025, we'll deliver 5 production system releases:
 - 14 March, 13 June and 14 November will be full weekend integrated releases
 - 10 May and 13 September will be smaller, standard releases within the regular scheduled weekly maintenance windows from Saturday 10:00 pm until Sunday 10:00 am AEST
- Deprecation dates for the AS2009, LDGLST.0002 2016, ASLRPT and ITCRPT 2014 services have been extended to 31st December 2026.



- Direct communication issued to LCMSF DSPs – service available in PROD from 2 Jan 2025
- MATS BIG v2.0 published
- Trust tax return 2024 – trouble shooting message will be added to the trouble shooting and PLS message pages by end of this week. A highlight will be included in next week's newsletter with website details of where clients can be directed for further information.

Agenda item 10 – Other business/issues

- Tax Practitioner Board RAN Branching changes are underway and anticipated to near completion by end of 2025.
- The group was reminded that feedback and insights on AS2025 technical artefacts is due by 20 November 2024.
- Next meeting will be held on 3 December. This is the final PLS working group meeting for 2024.

Meeting closed.