



Key Outcomes – Practitioner lodgment service working group

Venue: Teams
Date: 3 December 2024
Start: 1.00pm AEDT **Finish:** 1.40pm AEDT
Chair and facilitator: Karen Greaves
Secretariat: Kaethe Seidel-Wynne
Secretariat contact: 02 9354 3014

Attendees:

Karen Greaves, Felicity-Ann Stokes, Adrian Romano, Anusha Young, Ziva White, Chanara Fraser

Guest Speakers:

David Baker, Rebecca Sherrin, Katrena Cawthorne

Apologies:

ATO – Anupama Duggirala

Agenda item 1 – Welcome

The chair opened the meeting and welcomed the group.

Agenda item 2 – Action item updates

[Action items](#) - we currently have 1 on pause and 4 open, including 3 items raised during this meeting:

21/11/2023 – 01 (on pause)

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 (to be closed)

An issue with TRT was raised regarding mandatory business names that should be an optional field. This is not a software issue. DSPs are getting queries as there is no known issue noted on ato.gov.au for agents to refer to. DPO to work with business to update web content.

Update:

The ATO website has now been updated so that DSPs can refer agents to the known issue:

[Troubleshooting common errors and issues – List of PLS and SBR issues](#)

Summary	Action required
When attempting to validate or lodge a 2024 trust tax return through PLS software that includes any Business and professional items (sections 37 to 52), the attempt fails due to the business name not being completed.	<p>We are aware of this issue and are working to resolve this as a priority.</p> <p>If you need to lodge urgently, you can submit a paper copy of the Trust tax return (NAT 0660).</p> <p>Refer to the ATO website for instructions on how to complete the paper Trust tax return.</p>

As the web content has been updated with useful information for DSPs to direct their clients to, it was put to the group that the item would be closed. No concerns were raised in relation to this action.

19/11/2024-01

Proposed EST fix: TRT 2024 schema update to address trust return 2024 – Mandatory business name issue - INC004447404 ATO

- DSPs would like both current version and anticipated new version of the TRT 2024 schema, containing minor update to make “TRT161 – Business name of main business” optional, to be accepted.

03/12/2024 update: Scheduling of the proposed fix is yet to be determined.

03/12/2024-01

Exempting lump sum payments in arrears from Medicare Levy - number of impacted taxpayers to be provided to DSPs

- Anticipated numbers of impacted taxpayers will be included in an updated version of the change advice that will be available soon.

03/12/2024-02

Exempting lump sum payments in arrears (LSPIA) from Medicare Levy - calculation and eligibility details required

- Investigation to be conducted into provision of basic calculation and eligibility details for LSPIA.

03/12/2024-03

XBRL to XML roadmap to be updated (Losses Schedule to be removed)

- An updated XBRL to XML roadmap will be published, removing the Losses Schedule (LS), as only PTR will be updated in 2025.



Agenda item 3 – Tax time related documentation

The following Change advices were published in the [DSP Hub](#) since the last meeting:

CA2025-011 Better Targeted Superannuation Concessions – Total Super Balance
CA2025-012 Reforming treatment of the Transfer Balance Cap for Successor Fund Transfers
CA2025-013 Partnership Return Statement of Distribution

We expect to receive updated Change advices as a result of Bills having passed in Parliament last week and will be published in the DSP Hub as soon as they are received.

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

As per action item update **06/11/2024-01**, the [trouble shooting page](#) on ato.gov.au has been updated with information relating to the TRT mandatory business name issue.

No further updates or issues to advise.

Agenda item 5 – Delivery update

December EVTE code deployment will occur on 7th December 2024 (with Publication on 5th December 2024) which will contain:

- Rollovers for:
 - IITR Prefill
 - IITR form
 - NITR services
 - FITR
 - PTR)
- XML conversion
 - Partnership validation rule updates
- Industry code realignment for:
 - Company tax return and
 - Partnership tax returns
- Removal of Labels for:
 - Small Business Skills and Training Boosts/Energy Incentive for:
 - CTR
 - TRT
 - TRTAMI

The standard release for December will occur weekend commencing on 13th December and will contain:

- Updates to LCMSF v4.0
 - Minor validation rule update and
 - additional warning message



From 1st January 2025, LCMSF v3.0 lodgments will be restricted to reporting period prior to 1st January 2024.

Build to Rent bills have passed. As such, MST and schema updates will be delivered for these measures in February EVTE as per roadmap.

Conformance suite document will version to 'Final' for LCMSF v4.0 on 12th December 2024.

- No functional changes

Agenda item 6 – Platform update

All platforms are operating well with no issues to report. EVTE operating environment will be available during ATO shutdown period.

Agenda item 7 – Agent online environment update

As per action item update **06/11/2024-01**, the [trouble shooting page](#) has been updated with information relating to the TRT mandatory business name issue.

Agenda item 8 – Exempting lump sum payment in arrears from the Medicare levy

The Bill relating to Exempting lump sum payments in arrears (LSPIA) from the Medicare levy, passed through the senate on 28/11/2024 and is now awaiting Royal Assent. Updates are being made to the 2025 ITR BIG to include a summary of the change and a new optional validation rule to help ensure LSPIA and relevant tax offsets are calculated correctly. The ATO are recommending the validation message to ensure current year lump sums are not included as LSPIA.

Effective from 1 July 2024, impacted returns will be processed offline for manual calculation to ensure taxpayers are not adversely affected by the measure. LSPIA calculations, like Lump Sum Payments are specific for each taxpayer and require manual intervention to calculate. This therefore makes it difficult to publish calculations, however, the project team are looking into options to see if any calculation information can be provided. Anticipated numbers of impacted taxpayers will be included in an updated version of the change advice that will be available soon.

A very early [draft of ATO ITR 2025 Business Implementation Guide](#) has been provided in the DSP Hub to enable DSPs to view the changes from this measure. This is a very early draft release of the draft ITR BIG. The only updates that have been made are draft content for the 'Exempting Lump Sum Payments in Arrears from Medicare Levy' bill that passed through the Senate on 28 November 2024, and is currently awaiting Royal Assent (as at date of publishing to the DSP Hub). This version is not an official version as published to sbr.gov.au.

The only relevant updates (to date) can be found in Sections:

1.3 Changes in 2025 ITR service

3.3 Lump sum in arrears payment section of INCDTLS

Caveat: Please do not take the other content as having been updated ready for build purposes. Further changes are likely throughout the document.



Agenda item 9 – Access Manager Permissions

The Digital Services Support team has been developing a draft Access manager best practice guideline for Online services for agents. Access manager is an integral part of managing access and permissions for ATO online services and the guideline will be designed to assist in the use of permissions and awareness of functionality. It is currently based on 4 personas (and matrix) for a tax agent and a BAS agent practice.

Feedback from consultation with agents at the TPDIG, and BASAAG in August and September, found the proposed guide to be a useful tool, especially to those new to industry.

The ATO are investigating how the guideline could potentially align/translate for SBR-enabled software. I&I are looking to this group to provide insights on how this framework translates to current software and how a similar product could be aligned to SBR-enabled software.

An EOI will be running in early January for DSP participation in one-on-one consultation sessions.

Agenda item 10 – DSP communications update

Further information on the below topics can be found in issues [46](#) and [47](#) of the DSP newsletter:

- A new ATO impersonation email [scam](#) has been identified which aims to steal people's personal identifying information. Learn how to spot this scam on our website.
- TRT 2024 – business name of main business validation error
- System monitoring dashboards
- Reminder: myGovID is now myID
- Planned service updates in December EVTE release
- End-of-year closure
- Delayed batch responses we have improved the SBR2 delayed batch response with automated reporting and remediation processes
- Important: SBR to stop accepting TLS 1.0 and TLS 1.1 in PROD by 1 February
- The last DSP newsletter for 2024 will issue on 11 December, with the first one in 2025 to issue on 15 January.



Agenda item 11 – DSP feedback

An updated XBRL to XML roadmap will be published, removing the Losses Schedule (LS), as only PTR will be updated in 2025. Has now been added as a [PLSWG action item](#).

Tax Time whitelisting has commenced. If services are showing in the service registry and in EVTE, however not available to select when completing the whitelisting ticket, please add a note.

Updates to ASLRPT and ITCRPT 2023 are anticipated for early 2025. A discussion on discrepancy solution options will be held on 14 January.

14 January 2025: The first PLS working group meeting for 2025 will be held.

Meeting closed.