Key Outcomes –
Practitioner lodgment service working group

Venue: Teams

Date: 14 January 2025

Start: 1.00pm AEDT   **Finish:** 1:45pm AEDT

Chair and facilitator: Karen Greaves

Secretariat: Kaethe Seidel-Wynne

Secretariat contact: 02 9354 3014

Attendees:

Karen Greaves, Felicity-Ann Stokes, Anusha Young, Ziva White, Scott Rumford

Guest Speakers:

Apologies:

ATO – Anupama Duggirala

Agenda item 1 – Welcome

The chair opened the meeting and welcomed the group. A reminder to complete annual PLS survey, issued on 19 December 2024, by Friday 17 January 2025 was provided.

Agenda item 2 – Action item updates

An update was provided on the open action items.

Agenda item 3 – Tax time related documentation

Since the last PLS working group meeting, the following updated Change advices were published in the DSP Hub:
- 20 December 2024:
  CA2025-014 Legacy retirement product conversions has replaced CA2025-010 SMSF- legacy retirement product conversions due to a name change
- 23 December 2024:
  CA2024-012_Housing_(Build-To-Rent Developments)– accelerating_tax_deductions_and_reducing_managed_investment_trust_withholding_tax_rate
- 14 January 2025:
  CA2025-007 Personal income tax - Exempting lump sum payments in arrears from the Medicare Levy

The new Payday Superannuation information page is now live in the DSP Hub.

Agenda item 4 – Overview of MYEFO measures

The treasurer handed down the 2024-2025 MYEFO (Mid-year economic fiscal outlook) on Wednesday 18 December 2024. A Budget impact assessment, drafted in consultation with DPO, business and system area representatives, depicting early indicative assessments of ATO and DSP impacts, was published in the DSP Hub on 23 December 2024. The high-level assessment is subject to change, DPO will continue efforts to obtain as much information as possible, and related change advices will be published in the DSP Hub as soon as available.

A DSP noted that DSP impact can be across more than just gateway changes. The research and development incentive may prompt a developer to put questions up, to check for relevance and information, not just system changes. DSP impact is not just MST related or across the interface, it could also be question-based software for tax agents.
For example, In the R&D case, a developer may add a question which asks whether a claim can be made and point off to ATO information/links so the agent can check if the claim is legitimate, prior to completing the related form.

This approach can be applied to many areas of legislation. The careful thing is that the software is not making the decision but prompting the user to check the right things before proceeding, more like a checklist.

DSPs were encouraged to review and provide feedback on the Budget measures impact assessment raising a ticket via the DSP service desk.

Agenda item 5 - Update on general matters and Tax time delivery

DSPs wanting to move into production for either NITR or FBT, should raise a "Request production Access" ticket in the DSP service desk.

SMSFAR service will be available in EVTE from 6 February. DSPs wanting to apply for testing can do so after this date.

Agenda item 6 – Delivery update

2024 service: TRT 2024 – mandatory business name issue – Artefacts will be published on 16 January. EVTE on 16 January (non-outage) and production on 29 January 2025.

February EVTE: 6 February publication and 8 February code deployment.

Activity statement 2025 service: Artefacts Package – MSTs, VRs, and Schema

2025 ITR services:

- Housing build to rent changes– Artefacts – MST and schema will be available for CTR, PTR, MST only - TRT, TRTAMIS. TRTAMI changes and code for all impacted services in March EVTE.
- Thin capitalisation and debt deduction changes – IDS MST, schema, VR, CTR, TRT and TRTAMI MST changes. PTR – MST and VR changes. DTA country code changes for IDS planned for March EVTE.
- Small business energy incentive and skills and training boost removal for PTR.
- SMSFAR 2025 – Rollover of the initial SMSFAR 2025 service, Better Targeted Super Concession (BTSC) label changes – Accumulation phase value and Retirement phase value updated to Value of accumulation account and Value of retirement account - MST/taxonomy only.
- Currency code updates for CTR.
- Alignment of industry codes for CTR, TRT, TRTAMI and IITR.
- Removal of Obsolete preservation age Label F - From 1 July 2024 nobody will be 'above preservation age but below 60' when doing their 2025 tax return. Anyone born after 30 June 1964 has a preservation age of 60. Label F is now obsolete and needs to be removed. IITR MST and VR removal.
- 2 Bug fixes for IITR – Document updates only:
  - add $1 tolerance to validation rule VR.ATO.IITR.000200 – The $1 was addressed in 2024. The rollover into 2025 has carried into the code and internal versions. However, the External VR did not carry over, and is now fixed.

   o IITR801 tag (2024) incorrectly reinstated in 2025 - IITR801 label (removed in 2024 MST) is reinstated in the 2025 IITR MST. External MST fix only.

2020 service: Client communication 2020 List service changes to include a new delivery channel "ATO app" – Feb EVTE and Prod now in June 2025 (previously communicated as May 2025).

An updated Digital Wholesale & Integration Services (DWIS) Product and Program Delivery roadmap will be available in early February.

Agenda item 7 – ASLRPT and ITCRPT 2023 discrepancy solution options

A presentation of solution options to address the ASLRPT and ITCRPT 2023 MST/Conformance suite discrepancy issue was shared with DSPs for consideration and is available in the DSP Hub.

Understanding that some DSPs are already testing, DSPs were asked to review and consider the proposed options with their engineers and provide feedback at the next PLS meeting on 28 January.

Agenda item 8 – Platform update

- Platforms are operating well with no P1 or P2 incidents for SBR1 or SBR2.
- Scheduled SBR1 production and SBR2 production system maintenance was carried out on 14 and 15 December.
- SBR2 Prod planned outage on 11 and 12 January due to sbr.gov.au signing certificate renewal deployment.

Agenda item 9 – Agent online environment update

MyGov issue impacting Online services for Individuals (OSfI): There have been reports of users of OSfI experiencing intermittent issues logging in. This issue has since been resolved.

There were no issues or updates to report regarding the agent online environment.

Agenda item 10 – DSP communications update

Further information on these topics can be found in issue 1 of the DSP newsletter.

The first newsletter of the year issued on 15 January 2025 and contains the following:

- C version of SBR ADK
- Reminder: CbC reporting: Local File/Master File (LCMSF) service – PROD access
- Reminder: TRT 2024 – business name of main business validation error
- Important: SBR to stop accepting TLS 1.0 and TLS 1.1 in PROD by 1 February
- 2024–25 Federal Mid-Year Economic and Fiscal Outlook (MYEFO)
- 2024 and 2025 change advice updates
- SWG, AS 2023 service remediation working group and DARG outcomes.

Agenda item 11 – Other business/issues

- Next meeting will be held on 28 January 2025.
- Query raised regarding the Tax Time rates and thresholds page, DPO will endeavour to update this as soon as possible.

Meeting closed.