



Key Outcomes – Practitioner lodgment service working group

Venue: Teams
Date: 11 February 2025
Start: 1.00pm AEDT **Finish:** 1.30 pm AEDT
Chair and facilitator: Karen Greaves
Secretariat: Kaethe Seidel-Wynne
Secretariat contact: 02 9354 3014

Attendees:

Karen Greaves, Felicity-Ann Stokes, Adrian Romano, Anupama Duggirala, Ziva White, Scott Rumford

Guest Speakers:

Apologies:

ATO – Anusha Young

Agenda item 1 – Welcome

The chair opened the meeting and welcomed the group.

Agenda item 2 – Action item updates

There remains 2 action items.

Action item update:

03/12/2024-02: Investigation to be conducted into provision of basic calculation and eligibility details for LSPIA.

Web content documents providing information as a guide to help determine basic calculations and eligibility have been published on the [PLS draft documentation and specifications for review](#) page in the DSP.



Please review and **provide feedback by Friday 21 February 2025**.

The project team will attend the next PLS meeting, 25 February 2025, to discuss feedback and answer questions.

Action item closed:

19/11/2024-01: Proposed EST fix: TRT 2024 schema update to address trust return 2024 – Mandatory business name issue - INC004447404 ATO

Fix deployed successfully on 29 January 2025. DSP confirmed that they have had customers successfully lodge TRT without business name ie. business name is no longer a mandatory field.

This action item will be closed.

Agenda item 3 – Tax time related documentation

[2025 NRFI schedule occupation deduction ratios](#) have been published in the DSP Hub.

The spreadsheet containing the WRE ratios that are used for the NRFI schedule, is provided by the ATOs Revenue Analysis Branch (RAB) who are responsible for calculations, format and naming conventions. Note that the source year used for the calculations is always two years behind. So, for 2025, the calculations are based on the 2023 Individual income tax return, which is why the spreadsheet is also referred to as “WRE calcs 2023”.

Note: A decision has been made to continue using the previous name for publishing in the DSP hub, for consistency.

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

Please log a ticket for EVTE whitelisting for SMSFAR 2025.

Agenda item 5 – Delivery update

March EVTE date has been updated from 28 February to now occur on 6 March 2025.

March EVTE updates were shared with the group and are available on the [system release updates](#) page in the DSP Hub.

A walkthrough of the updated [DWIS Product and Program Delivery Roadmap](#), including April and future releases was shared with the group.

Agenda item 6 – Platform update

All platforms are operating well with no issues to report.



Agenda item 7 – Agent online environment update

There were no updates from the Agent online environment to share.

Agenda item 8 – SBR2 EVTE/PROD system release updates – DSP hub page feedback discussion

Feedback is being sought on the [SBR2 EVTE / PROD system release updates](#) page to ensure it continues to provide DSPs with valuable information. Please submit [feedback](#) about any aspect of the page (e.g. content, structure etc.) via the DSP service desk by **5pm Friday 28 February 2025** so it can be incorporated it into the current review of the page.

As suggested in the meeting, definitions to explain the difference between integrated and standard releases will be added.

Agenda item 9 – DSP communications update

Further information on these topics can be found in issues [4](#) and [5](#) of the DSP newsletter:

- Check your DSP profile is up to date
- DSP content map
- March EVTE release rescheduled
- 2025 Non-resident foreign income (NRFI) schedule
- Safer Internet Day 2025
- IITR, NITR and CLNTCOMM conformance suite packages
- Java 21 ADK/SDK correction.

Agenda item 9 – Other business

- The Modernisation of Trust Administration Systems (MTAS) project team will attend the next PLS meeting on 25 February 2025. An EOI for involvement in MTAS Phase 2 consultation will issue shortly.
- The Better targeted superannuation concessions (BTSC) measure is scheduled to be tabled at the next Parliamentary sitting. The group will be updated on the outcome of this at the next PLS meeting.
- The final FBT specs are anticipated to be released 13 March 2025.
- The PLS meeting of 25 February will be extended to 45 minutes to allow for additional agenda items.