Key Outcomes –
Practitioner lodgment service working group

Venue: Teams

Date: 11 March 2025

Start: 1.00pm AEDT   **Finish:** 1.30pm AEDT

Chair and facilitator: Sonia Lark

Secretariat: Kaethe Seidel-Wynne

Secretariat contact: 02 9354 3014

Attendees:

Sonia Lark, Felicity-Ann Stokes, Julie Huynh, Anupama Duggirala, Ziva White, Joshua Corlett

Guest Speakers:

Apologies:

ATO – Karen Greaves, Anusha Young, Bhumi Mandalia

Agenda item 1 – Welcome

The chair opened the meeting and welcomed the group.

Agenda item 2 – Action item updates

There is 1 open action item.

Action item update:
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.

Action item closed:
03/12/2024-02: Exempting lump sum payments in arrears from Medicare Levy - calculation and eligibility details required.

The project team attended the PLSWG meeting on 25 February 2025 to discuss feedback on the draft web content guidance documents for review and answer questions. and received examples to consider for publishing.

Agenda item 3 – Tax time related documentation

There have been several TT2025 draft forms and instructions published to the DSP Hub, this page will be updated as additional draft forms and instructions become available. The DPO will continue to regularly progress the availability of the remaining forms and instructions.

Updated change advice published on the DSP Hub 7 March 2025:
CA2025-003 – Small Business Support – Extension of $20000 Instant Asset Write-off

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

DSPs were reminded about FBT whitelisting and to log a ticket for PVT. Whitelisting date is to be confirmed, however go live will be 1 April 2025.
A DSP noted when attempting to raise a ticket for FBT whitelisting, they received a return message to try again after 1 April 2025. This issue has now been resolved and learnings have been passed on for future reference.

Bugs for ASLRPT/ITCRPT are being discussed internally, clarity surrounding the dates for EVTE and PROD are anticipated to be shared in the next PLSWG.

Agenda item 5 – Delivery update

March EVTE deployed over the weekend, with publication occurring on 5 March 2025:

- Updates to TRT, TRTAMI, PTR, CTR, SMSFAR, IDS, AS 2025 services.
- FBT - finalisation of artefacts. Going into production this weekend.
- Service Registry was also updated to reflect 'fit for build' status for FBT2025

An internal planning day is scheduled for 12 March 2025, any relevant updates, or information relating to April EVTE release will be shared in the next PLSWG meeting.

Agenda item 6 – Platform update

All platforms are operating as intended with no issues to report.

Agenda item 7 – Agent online environment update

OFFICIAL

The ATO Common Business Implementation and Taxpayer Declaration Guide has been updated due to a DSP query regarding the flow of a return and who can sign the declaration last. The update provides guidance and clarity on the legal requirements and end-to-end process for making declarations.

Consultation on Client agent linking and what this will look like for sole traders and individuals is anticipated to commence soon.

Agenda item 8 – DSP communications update

Further information on the below topics can be found in issue 8 and issue 9 of the DSP newsletters:

- Chief Information Officer and branch realignment:
  On 11 March 2025, Mark Sawade commenced as the Chief Information Officer and Chief Security Officer. Mark brings a wealth of expertise and experience from across the broader APS, making him well placed to lead the ATO's technology and security functions.

- Lump sum E reporting: $1,200 threshold removal from 1 July 2025.

- ASLPRT and ITCRPT version 1 validation rule error:

  VR.ATO.ODRPT.000013 (Report Type is invalid) is being returned in error when requesting client specific reports in version 1 of the on-demand reports ASLRPT and ITCRPT. Until a fix can be implemented, the report should only be requested for whole-of-practice.

  We're working on implementing a fix to enable client specific report requests.

- Logging in to our online services will soon be a little different.

Agenda item 9 – DSP feedback

DSPs queried when EVTE whitelisting for AS2025 will be available to request in Jira. This has since been investigated and the service type is now available to select.