



# Key Outcomes – Practitioner lodgment service working group

**Venue:** Teams  
**Date:** 25 March 2025  
**Start:** 1.00pm AEDT **Finish:** 1.22pm AEDT  
**Chair and facilitator:** Karen Greaves  
**Secretariat:** Kaethe Seidel-Wynne  
**Secretariat contact:** 02 9354 3014

**Attendees:**

Karen Greaves, Julie Huynh, Carl Bennett, Bhumi Mandalia

**Guest Speakers:**

**Apologies:**

ATO – Felicity-Ann Stokes, Anupama Duggirala, Ziva White

## Agenda item 1 – Welcome

The chair opened the meeting and welcomed the group.

## Agenda item 2 – Action item updates

There are 2 open [action items](#).

**21/11/2023 – 01**

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

Still on pause to ensure no adverse impacts. Last update to [ATO BIC](#) page was made on 18 February 2025.

**03/12/2024 – 02**

**Exempting lump sum payments in arrears from Medicare Levy - calculation and eligibility details required**



Examples are being developed and will be provided for DSPs to review ASAP. Feedback provided by DSPs on the web content and guidance information already provided, has led to additional examples being created.

### Agenda item 3 – Tax time related documentation

Further [2025 draft forms and instructions](#) continue to be published in 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.

Updates to the draft TRT and AMIT form are expected and will be republished as soon as they're available.

Note: Forms are in draft when published to the DSP Hub at this time of year, and are all subject to change. Please continue to raise Jira tickets if you think there is an issue or if changes that you were expecting are missing. Please note "PLSwg" on the ticket so it will get to us quickly to resolve.

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

There were no general matters or Tax time delivery updates to share with the group

### Agenda item 5 – Delivery update

#### April EVTE:

- ASMT2018 rollover with CS, also includes update to:

Exempting lump sum payments in arrears from the Medicare Levy, based off a 2023–24 Budget measure. It will ensure low-income taxpayers do not pay higher amounts of the Medicare levy as a result of receiving an eligible lump sum payment.

- AS2025 - improved error messaging in the external Validation Rules
- NITR2025 - Validation rules updates and code deployment for Housing build to rent for TRT, TRTAMI, and TRTAMIS
- IITR2025 - Removable fields associated with obsolete preservation age label from 2025

**Agent reports bug update:** the following bugs are slated for a May EVTE and June prod release:

- ASLRPT 2023 - Conformance Suite Test Misalignment - [INC004964291]
- [SBR2] [EVTE3] [ITCRPT -2023 Get] [MST/XSD discrepancy: Accounting Year Information Xpath] [INC004513589]
- SBR2 EVTE3 - ASLRPT 2023 Get - MST/XSD discrepancy: Client Activity Centre Xpath - INC004430842
- [ITP] [PROD2 & EVTE3] [2014 ODRPT] [ODRPT Validation rule CMN.ATO.ODRPT.000013] [INC005107940]

**Reminder:** CLNTCOMM update relating to the ATO's Counter Fraud Program went into February EVTE, with a June production. This will allow users to view official secure ATO messages originating from a new communications channel 'ATO App' for a client.



## Agenda item 6 – Platform update

There were no critical platform issues in the last fortnight.

## Agenda item 7 – Agent online environment update

Integrated March release occurred between 14 March 2025 and 17 March 2025. See [Key changes | Australian Taxation Office](#) for agents.

Changes included:

- [Card payment system upgrades](#) to enhance security and fraud detection, removing card payment options in Online services for agents (payment options such as BPAY and electronic funds transfer remain available).
- The 'Make payments' permission was removed in Access Manager for Tax and BAS agents to support the removal of credit/debit cards from payment options for one-off payments.

The final Transition to exchange (T2E) also occurred over these dates, introducing an additional screen for users to consent to sharing their details with the ATO online services they are accessing i.e., Online Services for Agents (OSFA).

Internal reviews of the PLS user guide and BIGs are underway in preparation for Tax Time.

## Agenda item 8 – DSP communications update

Further information on the below topics can be found in [issue 10](#) and [issue 11](#) of the DSP newsletters:

- [Updated small business benchmarks for 2022-23](#)
- Reminder: updated login process for online services
- Reminder: DSP service desk – raise the right ticket to avoid delays
- Reminder: Updated ISO/IEC 27001:2022 standard

## Agenda item 9 – DSP feedback

DSPs were advised to raise a ticket to have the following items investigated:

- A discrepancy in BICs in CTR and TRT, leading zeros are missing, resulting in breaking validation rules
- Inconsistencies in numerical references across draft PDF forms. Some draft forms are using words rather than numerals, or vice versa. Will there be consistent updates made across forms?
  - Update: The latest version of the ATO style guide instigates a change to the style used for numbers and measurements, improving accessibility and readability.



Numerals for 2 and above in text

Previously in general text, we wrote 'one' to 'nine' in words (except when accompanied by a symbol) and used numerals for 10 and above. Research shows that numerals are generally easier to read and scan, so this advice has changed.

In general text, including headings and subheadings, we now use:

- numerals for '2' and above
- words for 'zero' and 'one' (to avoid confusion with the letters O and I).

These changes will progressively filter through to all forms.

- SMSFAR now includes additional questions, however, there have been no updates made to the MST. DWIS to investigate and provide update.