



Key Outcomes – Practitioner lodgment service working group

Venue: Teams
Date: 20 May 2025
Start: 1.00pm AEDT **Finish:** 1.23pm AEDT
Chair and facilitator: Sonia Lark
Secretariat: Kaethe Seidel-Wynne
Secretariat contact: 02 9354 3014

Attendees:

Sonia Lark, Felicity-Ann Stokes, Adrian Romano, Kelly Collins, Carl Bennett, Bhumi Mandalia

Guest Speakers:

Apologies:

ATO – Ziva White

Agenda item 1 – Welcome

The chair opened the meeting and welcomed the group.

Recently there have been requests from DSPs to switch from BBRP to SRP, the ATO would like to investigate the reasoning behind this and will be setting up a session at the next PLS working group to discuss in further detail.

Until the ATO provides a different position, DSPs are to maintain using their current channels, as switching may cause adverse impacts to the tuning of the environments during pre-tax time and tax time lodgment cycles.



Agenda item 2 – Action item updates

There is now 1 open [action item](#) – Business Industry Codes (BIC) – discrepancy across ATO sources, which is currently on pause to ensure there are no adverse impacts.

To be closed:

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

DSP feedback has been taken into consideration and led to additional examples being created to assist with the LSPIA calculations and IITR estimates.

Information has been published to the DSP Hub under [PLS draft documentation and specifications for review](#) and the action item will now be closed.

Agenda item 3 – Tax time related documentation

Additional [2025 Tax Time documentation](#) has been published in the DSP hub.

The DPO will continue to update the page as further forms and instructions become available and will regularly progress the availability of the remaining forms and instructions.

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

A reminder was provided to include evidence of testing in PROD whitelisting tickets, one ticket is required for IITR and one ticket is required for NITR as a group. Reminder calls will be made in the coming weeks to DSPs who haven't been whitelisting for EVTE as yet.

Deployment in EVTE took place over the weekend, where a number of bugs were fixed, if any issues have been identified, please lodge a ticket.

PROD whitelisting is anticipated to take place around 20 June 2025, consistent with 2024, however the date will be confirmed at the next PLS meeting.

Agenda item 5 – Delivery update

June EVTE release:

- Updates to IITR package
 - Update validation checks for Foreign tax paid to include Foreign Lump Sum amounts for income details schedule (INCDTLS)



- Fixed validation rule incorrectly triggering after it has been removed from prior release (Code removed from rule implementation zip)

Release on a page (ROAP) roadmap is currently being updated and will be published soon. A walk through will be provided in the next PLS working group meeting.

The group were provided and overview of two bugs recently identified and the proposed fix:

Bug 1: TRTAMI2025 - Some cross form validation reports do not contain required labels and values in error messages.

- Identification of approximately 25 cross form rules where not all the labels and values are present in the error messages that are sent back in the validation reports.
- Currently impacting 2023, 2024 and will also impact 2025 TRTAMI service
- Understanding the implications to DSPs that have built their software for TRTAMI and how they display/utilise the parameters present in the event items as clients would not be able to see labels and values if errors were to occur
- Currently looking at resolving and fixing this between Aug-Sept 2025
- Further details will be provided in next release of TRTAMI in NITR PCN

For example, for VR.ATO.TRTAMI.000199, there are not parameters for required labels and values. But expected parameters should be: TRTAMI47, TRTAMI48, TRTAMI49, TRTAMI50 according to VR artefacts.

⊟ a:BusinessEvents		
⊟ tns:Event		
tns:MaximumSeverity.Code	Error	
⊟ tns:EventItems		
⊟ tns:EventItem		
tns>Error.Code	CMN.ATO.TRTAMI.010199	
tns:Severity.Code	Error	
tns:Short.Description	International Dealings Schedule is not required	
tns:Detailed.Description	When the value of dealings with international related parties...	
⊟ tns:Parameters		
⊟ tns:Parameter		
tns:Parameter.Identifier	RuleIdentifier	
tns:Parameter.Text	VR.ATO.TRTAMI.000199	
⊟ tns:Locations		
⊟ tns:Location		
tns:Location.Instance.Identifier	1	
tns:Location.Path.Text	/tns:TRTAMI/tns:RP/tns:TrustDetails/tns:InternationalDealings...	
⊟ a:BusinessGeneratedIdentifier		(xsd:string)
@:inil	true	
a:DocumentPartIdentifier	1	(xsd:string)
⊟ a:GovernmentGeneratedIdentifier		(xsd:string)
@:inil	true	
⊟ a:Document		
@:inil	true	
a:DocumentUri	http://sbr.gov.au/taxonomy/sbr_au_reports/ato/trtami/trta...	(xsd:string)

Bug 2 - TRT2025/TRTAMI2025 - Some cross form validation reports show invalid Boolean values.



- Identification of some Boolean values in parameter texts for True and False are capitalised rather than lower case (true and false)
- Impact is of cosmetic appearance but functionally should still work as per normal
- If the values being capitalised rather than lower case are a cause for concern amongst DSPs, the ATO can aim to resolve this, or else will keep as a low priority watch item.

DSPs are to consider if this poses an issue and raise a ticket if required.

Agenda item 6 – Platform update

In preparation for tax time, a refresh on guidance material and standards for usage of platforms, and a reconfirmation of how systems operate will be provided in the next PLS meeting. DSPs are encouraged to consider relevant people in their organisation who might need to be across the refresher for the next PLS working group.

Agenda item 7 – Agent online environment update

There were no DSP relevant updates to share with the group.

Agenda item 8 – DSP communications update

Further information on the below topics can be found in issue [18](#) and [19](#) of the DSP newsletters:

- New contact registrations
- 2025-26 Budget impact assessment available
- Reminder: updated ISO/IEC 27001:2022 standard
- Change freeze for Tax Time 2025
- Partnership tax return 2025 (PTR.0013) Business Implementation Guide
- 2025 PAYG withholding tax tables

Agenda item 9 – DSP feedback

Estimated availability of the remainder of the final forms was queried, specifically the Trust annual return and SMSF annual return.

The SMSFAR was published on 8 May 2025 and the Trust annual return 21 May 2025. The DPO will continue to pursue any outstanding forms, however if there are any specific final forms which DSPs consider a priority, please raise a ticket.