



# Key Outcomes – Practitioner lodgment service working group

**Venue:** Teams      **Date:** 8 April 2025  
**Start:** 1.00pm AEDT      **Finish:** 1.30pm AEDT

**Chair and facilitator:** Karen Spicer

**Secretariat:** Kaethe Seidel-Wynne

**Secretariat contact:** 02 9354 3014

**Attendees:**

Karen Spicer, Felicity-Ann Stokes, Julie Huynh, Cara Ly, Ziva White, Bhumi Mandalia

**Guest Speakers:**

**Apologies:**

ATO – Karen Greaves

## Agenda item 1 - Welcome

The chair opened the meeting and welcomed the group.

In the 25 February PLS working group meeting, discussions regarding rescheduling the 22 April meeting were held due to the timing of the Easter and Anzac Day holidays. It has been confirmed that the next PLS working group will be Tuesday 6 May 2025. The meeting invite has now been updated.

## Agenda item 2 - Action item updates

There were no updates to share on the 2 open [action items](#) since the last meeting.

## 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.



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 to report an issue or if expected changes are missing. Please note "PLSWG" on the ticket so it will get to us quickly to resolve.

An updated Change advice was published on the DSP Hub 8 April 2025:

[CA2025-011 Better Targeted Superannuation Concessions - Total Superannuation Balance.pdf](#)

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

FBT 2025 whitelisting has been relatively smooth. DSPs are to log a ticket if there are any issues. NITR and IITR whitelisting tickets can be logged from late-May.

[PLS FAQ](#) page has been updated with a bug relating to the 2024 and 2025 SMSF Annual return. 2025 will be resolved in April EVTE and June PROD, and 2024 will be resolved in May EVTE and June PROD.

## Agenda item 5 - Delivery update

April EVTE deployment is scheduled this week.

Updates from previous PLSWG:

- Business industry code list inconsistent between CTR and TRT in the validation rules spreadsheets – this is being rectified for April EVTE.
- Removal of 'Portugal' from IDS 2025 Double Tax Agreement field due to legislation not passing is also going into April EVTE
- SMSFAR PDF form has a new question – this change has not proceeded, so no change to SMSFAR2025.

May EVTE:

- Finalisation of cyclical rates and thresholds e.g. LITO, DTO, DIV 6AA, SAPTO and WHM expect for this release however these rates are currently being confirmed
- IITR2025 - Defined benefit Income Cap, ETP cap for life benefit and death benefit term payment, super lump sum lifetime and death benefit low-rate cap, Super lump sum untaxed plan cap, Co-contribution rates changes TBC
- Bug fixes for agent reports (2 x bugs for ASLRPT2023, 1 x ITCRPT2023, 1 x ODRPT 2014) with June production deployment
- Bug fix for INC005292203 to fix up IITR2025 CS issue

## Agenda item 6 - Platform update

Minor issue experienced in PROD and EVTE this week, follow up is being carried out to ensure there are no aftereffects.

SBR1 error experienced due to an error message relating to the planned mainframe outage over the



weekend.

### Agenda item 7 - Agent online environment update

Publishing of the IITR BIG was brought to the attention of the group.

Changes to processes regarding taxpayer financial institution details (FIDs) and the need to encourage agents to complete FID fields was highlighted. Null fields will be accepted and when they are, any existing details are over-written with that null. This results in a cheque being produced which is a greater cost, and potentially inconvenient for the agent and taxpayer.

In scenarios where the taxpayer only has an overseas bank account; agents may still need to leave the FID field blank, in order to have the return processed.

DSPs were given the opportunity to raise questions and discuss this change, however there were no issues raised.

### Agenda item 8 - DSP communications update

Further information on the below topics can be found in [issue 12](#) and [issue 13](#) of the DSP newsletters:

- Small business support – \$20,000 instant asset write-off extension
- Changes to deductibility of ATO interest
- Changes to luxury car tax definitions and thresholds
- New SBR ebMS3 EVTE3 outbound signing certificate
- Access to Tax Time 2025 services – IITR and NITR
- Reminder: EVTE is for testing conformance data only, it is not designed to support load or performance testing. Submitting large transaction volumes in our EVTE will significantly impact the environment, potentially resulting in degradation or an outage.

### Agenda item 9 - DSP feedback

DSP noted they have raised a ticket on behalf of an agent, for I&I to consider their involvement in the Client to Agent linking for Individuals consultation.