



# Key Outcomes – Practitioner lodgment service working group

**Venue:** MS Teams  
**Date:** 1 July 2025  
**Start:** 1.00pm AEST **Finish:** 1.40pm AEST  
**Chair and facilitator:** Sonia Lark  
**Secretariat:** Kaethe Seidel-Wynne  
**Secretariat contact:** 02 9354 3014

## Attendees:

Sonia Lark, Julie Seiver, Felicity-Ann Stokes, Adrian Romano, Craig Willox, Ziva White, Bhumi Mandalia

## Guest Speakers:

Tracy Procter

## Agenda item 1 – Welcome

The chair opened the meeting and welcomed the group.

Last meeting we were still awaiting a response to the question raised as to whether [ato.gov.au](https://ato.gov.au) will be updated to advise when taxpayers can expect their 2025 notice of assessments (NOA), as per the [Important information 2024 content](#).

Following the meeting we were advised there will not be a version of this page for Tax Time 2025, the current information for Tax Time 2025 can be found by visiting [How to track the progress of your tax return | Australian Taxation Office](#) on [ato.gov.au](https://ato.gov.au).

A specific date of when Tax Time 2025 NOA's will start to issue is still to be determined. However, subject to the outcomes of validating, it's estimated that NOA's may start to issue around mid-July.

As Tax Time 2025 draws to a close, internal preparations for the 2026 financial year commence bringing with it several collaboration opportunities via expressions of interest (EOI).

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The MTAS phase 2 EOI has now closed and the EOI for co-design opportunities relating to ATO rules as code, closes tomorrow, 2 July 2025.

In addition, we're seeking expressions of interest from DSPs to be part of the consultation on the agent authorisation process for individuals and sole traders. This is the next phase of the Client-to-Agent Linking project, which forms part of a suite of new protections against identity-related fraud and theft. The EOI period is open until 11 July 2025 and if you are interested in participating, [submit an expression of interest \(EOI\)](#) via the DSP service desk.

## Agenda item 2 – Action item updates

There is 1 open [action item](#). Still on pause to ensure no adverse impacts. Last update to [ATO BIC](#) page was made on 11 June 2025.

## Agenda item 3 – Tax time related documentation

As mentioned in the last PLS meeting, all 2025 tax time forms and instructions are now available on [ato.gov.au](#), as such there no documentation recent updates to share.

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

[Tax Time 2025 PLS additional information FAQs](#) has been updated with the details of 5 new bugs. Recent tickets are currently being reviewed to determine if they are also bugs and need to be added to the page.

## Agenda item 5 – Mandating FID (financial Institution details) provision in PLS for IITR and FBT lodgments

In November 2024 the Australian Government announced the Cheques Transition Plan. This plan provides a pathway to winding down Australia's cheques system with two key date callouts:

- By **30 June 2028** Cease issuance of personal, commercial, government and bank cheques. Cheques written after this date will not be accepted, and no payment will be made.
- On **30 September 2029** Cease acceptance of personal, commercial, government and bank cheques. Cheques will no longer be accepted for payment by financial institutions. Close the cheques system.

To prepare ATO systems for the transition to issuing refunds exclusively via EFT by 30 June 2028, Financial Institution Details (FID) are required from as many taxpayers as possible.

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Provision of FID warning or nudge messages have been recommended in Business Implementation Guides for individual ITRs since 2023, however lodgments continue to be made without FID, causing cheques to issue.

The ATO are proposing to mandate FID in the individual ITR and FBT forms as they represent the highest volume of PLS lodgments resulting in a refund by cheque. With agents supportive of cheque elimination, the ATO are targeting the implementation of mandating FID for agent lodgments for Tax Time 2026.

This transition will align with the ATO service offer and client/agent experiences as provision of FID for original ITR lodgments is already mandated in MyTax (ATO Online Services Individuals) and for BAS refunds.

Decreased Australia Post delivery schedules and rising numbers of financial institutions ceasing production of cheques, with only the 'big 4' banks compelled by government to continue to service cheques until the end date, all pose a risk to the client experience and reverse workflow.

## Agenda item 6 – Delivery update

There are no changes anticipated for July EVTE, the update provided at the last PLS meeting remains current.

The group received a presentation on two topics for discussion:

- **LDG List implementation for OECD Pillar 2 changes**

As the result of implementing the OECD Two Pillar solution for multinational businesses in Australia, starting 1 July 2026, clients and their authorised agents are to electronically lodge the Combined Global and Domestic Minimum Tax Return. As such, account type code and form category codes are to be implemented within LDG.List request/response services.

The group were presented with an overview of two options for consideration, update to prior year and rollover of 2026.

Upon an initial assessment, one DSP indicated their preference for option 1, given it having the least impact to the AS service. A pack containing further details about these changes was emailed to the group for their review and feedback by 10 July 2025.

- **XBRL to XML conversion for 25-26 Financial year**

Raising acknowledgement of services to still be migrated.

A review of ATO capacity and services to still be migrated is underway to determine whether or which services may be converted in the new financial year.

DSPs noted the importance of early visibility to enable their own forecasting and planning.

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## Agenda item 7 – Platform update

As expected, platforms have seen an increase in traffic, however all are performing well with no issues to report.

## Agenda item 8 – Agent online environment update

The agent online environment is operating as expected with no matters to raise.

## Agenda item 9 – DSP communications update

Further information on the below topics can be found in [issue 24](#) and [issue 25](#) the DSP newsletters:

- EOI for client-to-agent linking consultation
- Save the date – annual tax time event
- Updating ato.gov.au information on OTE
- Software developer's website improvements
- Enquiries outside the DPO's scope
- AS2025 service now available in production
- ATO Rules as Code API EOI closes 2 July
- DSP roadmap
- Reminder: Change Freeze for Tax Time 2025

## Agenda item 10 – Other business

Membership finalisation of the recent MTAS Phase 2 and ATO rules as code EOI processes is anticipated by the end of the week.

The outcome of EOI memberships are generally finalised within the first 2 weeks of the EOI closing.