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Key Outcomes –
Practitioner lodgment service working group

Venue: MS Teams

Date: 2 December 2025

Start: 12.00pm AEDT **Finish:** 12.35pm AEDT

Chair and facilitator: Julie Seiver

Secretariat: Kaethe Seidel-Wynne

Secretariat contact: 02 9354 3014

Attendees:

Sonia Lark, Julie Seiver, Adrian Romano, Craig Willox, Carl Bennett, Bhumi Mandalia, Vijayender Gangapuram, Ben Duggan, Nathan Booth

ATO Guest Speaker:

Mark Elwell, Steven Irving

Apologies:

Kelly Collins, Ziva White

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Agenda item 1 – Welcome

The chair opened the meeting and welcomed the group.

The group was reminded that the annual PLS survey was distributed the week prior and participants were encouraged to provide feedback. This input is essential to ensure that the work undertaken, and the information shared continue to deliver meaningful value and address the priorities that matter most.

An update of the Modernisation of Tax Administration Systems (MTAS) Phase 2 working group was provided:

- The group met on 1 December, with discussions focused on design considerations.
- Key topics included interactive validations, pre-fill functionality, and nudge messaging for non-individuals.

Version 14 of the DSP roadmap is now available on the DSP hub. Developed in consultation with the DSP Strategic Working Group, the roadmap outlines initiatives that may impact stakeholders and their clients.

Agenda item 2 – Action item updates

There are currently no open action items.

Agenda item 3 – Tax time related documentation

On 20 November, the 2026 Child Support and the Protected Earnings Amount was published on the DSP Hub and software developers website.

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

The Activity Statement 2025 Business Implementation Guide (BIG) has been published, and participants are encouraged to read through the document if they have not already done so.

An update to the prefill ITR BIG will address an additional error. This will be published again soon.

Work is progressing on resolving an ongoing issue with the TRTAMI 0004 22 error. There will be an electronic workaround for this. More information will be provided soon regarding whether the 2025 rule can be removed. Updates will be provided on the PLS FAQs page.

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Agenda item 5 - Pre-fill changes for individuals in business

The following Small Business Prefill enhancements were presented:

Key Changes for Tax Time 2026:

- Expanded Prefill Data:
    - Business name, ABN, and primary business address will now be included in the Individuals in Business pre-fill service.
    - This ensures the primary business address is captured rather than the tax agent's address.
- Closing Stock Field Update:
    - The closing stock field will be split into primary production and non-primary production categories.
    - This change enables direct mapping to tax return labels, improving accuracy and reducing manual adjustments.
- Taxable Payments Annual Report (TPAR):
    - Work is underway to include TPAR data in pre-fill, further streamlining reporting for businesses.

Supporting Changes and Messaging:

- Address Updates:
    - Messaging is being developed to remind businesses to keep their address details current.
- ABN Cancellation Process:
    - When business status is selected as ceased, this will support downstream activities connected to ABN cancellation for individuals.
    - Existing processes are already available to support taxpayers with reactivation if required, providing flexibility for businesses.

Expected Outcomes:

- Improved data accuracy in pre-fill services.
- Reduced manual intervention for tax agents and businesses.
- Enhanced user experience through clearer messaging and streamlined workflows.

Agenda item 6 – Use of BBRP instead of SRP for trust return services (TT27)

The group was informed of the proposal to transition trust tax return lodgments from Single Request Processor (SRP) to Bulk Request Processing (BBRP), driven by MTAS Phase 2 changes. This transition is expected to deliver richer validations against ATO systems rather than simple delivery confirmations.

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The proposed change applies to trust tax returns from 2027 onwards; prior years remain accessible via SRP. Software will need to support both SRP and BBRP during the transition period.

SRP may remain for small lodgments (limited distributions), but this is not guaranteed, options are under investigation.

Feedback was requested on:

1. Design concerns with moving from SRP to BBRP.
2. Estimated time required to transition.
3. Whether retaining SRP for small lodgments is worthwhile.

An email was sent to the group requesting feedback on these points.

Agenda item 7 – Delivery update

December EVTE deployment (12 December):

- NITR 2024
  - Code update to address INC005717695 returning exception error
- NITR 2026
  - Rollover of TRT, TRTAMI & SMSFAR services for 2026
  - Code implementation for MTAS Phase 2 changes (Previously published artefacts in October EVTE)
  - Improvements to SMSFAR 2026 service (Detailed in PCN)
  - Updated report guidance for TRT464
  - Conformance suite updates for TRT, TRTAMI & SMSFAR
- IITR 2026
  - Rollover of IITR and Prefill services for 2026
  - Updates for Deductions schedule
  - Addition of IITR prefill labels for Small Business project
  - Conformance suite updates for IITR and prefill
- FVS 2026
  - Updated conformance suite payloads
- PayEvent 2020
  - Updates for the introduction to QE reporting as a part of Payday Super project
- GIR 2026
  - Updated package and schema for OECD Pillar 2 GloBE Information Returns (GIR)
- Message Repository Tax Time 2026
  - Updated messages for IITR and Deductions Schedule

Agenda item 8 – Platform update

There were no platform updates to provide.

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Agenda item 9 – Agent online environment update

Christmas holidays – System availability

- Over the Christmas holidays all our systems will be available. We are not planning any maintenance or outages. Agents will be informed via OSfA notifications and this week's agent newsletter.

25IRNov Integrated Release: 14-17 November 2025

- Changes were made to OSfA. See Key changes | Australian Taxation Office for details.
    - ATO app registration status – ATO app registration status indicates whether your individual client has registered their device using the ATO app.
    - Account lock status indicator – Account lock status indicates whether your individual client's account has been locked – either by the client or by the ATO.
    - Requesting alternative stapled super funds – We've added an option to request an alternative super account when a previously supplied stapled fund cannot accept contributions, ensuring employers receive valid account details.

- Bugs identified post release we are working on. Once they're resolved we'll update our Key changes | Australian Taxation Office webpage. Where appropriate we'll add workarounds to our Troubleshooting for businesses and tax practitioners | Australian Taxation Office.
    - Client details missing – Occasionally when a client is brought into focus the client name, TFN and ABN are not displaying – Under investigation.
    - Activity statement account transactions – Role descriptions are not displaying in 'Print-friendly version,' or when downloading to CSV format – Under investigation. See Troubleshooting for businesses and tax practitioners web page.
    - Transfer requests SPA – Modified to only show eligible accounts and amounts that can be transferred. Correct amounts are not always visible – Under investigation.

Saturday 29 Nov changes

- Client debit\credit card details – Final changes were made to OSfA in relation to blocking agents from adding and updating client debit\credit details. Agents can still view the details.
- Enablement for agents to lodge SERR forms via OSfA file transfer – The ability for agents to lodge the Shared Economy Reporting regime (SERR) file via OSfA file transfer. Pending agent BDV.

Agenda item 10 – DSP communications update

Information about the following topics can be found in issue 46 of the DSP newsletter:

- End-of-year closure: support and system availability
- Reminder: Change to SMSF gateway impacting payroll DSPs
- Don't miss the STP changes for Payday Super webinar
- Reminder: SuperStream product register refresh and SBSCH closure

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- Final API product for Pillar Two is now available
- TLS 1.3 transition support
- Cybersecurity tip: manage employee access
- Recording available: Tax professionals conversions webcast
- ATO consultation report

Information about the following topics can be found in issue 47 of the DSP newsletter:

- Activity Statements (AS.0004) 2025 BIG
- Payday Super STP Q&A available
- Transition to TLS 1.3
- System releases for 2026
- Changes to when SOAs will issue
- Dual cab utes and FBT

Information about the following topics can be found in issue 48 of the DSP newsletter:

- DPO 2025 wrap-up
- Deploying changes to STP for Payday Super in EVTE
- Final updates for SuperStream standard and Fund Validation Services
- Fund Validation Service alerts
- STP changes for Payday Super webinar: recording available
- Reminder: get ready for Payday Super
- Unintentionally duplicated income statements
- End-of-year closure reminder: support and system availability

For previous editions of the DSP newsletter:

January 2025 – December 2025

DSP newsletter archive

Agenda item 11 – DSP feedback

A query was raised regarding the preferred testing channel for Public Country-by-Country (CBC). It was noted that this matter will be addressed offline, and an update will be provided to the group at a later time.

Agenda item 12 – Close

The next PLS working group meeting was proposed for 20 January 2026.