



# Key Outcomes – Practitioner lodgment service working group

**Venue:** MS Teams  
**Date:** 14 April 2026  
**Start:** 1.00pm AEDT **Finish:** 1.30pm AEDT  
**Chair and facilitator:** Julie Seiver  
**Secretariat:** Kaethe Seidel-Wynne  
**Secretariat contact:** 02 9354 3014

## **ATO Attendees:**

Stacey Wilson, Julie Seiver, Felicity-Ann Stokes, Adrian Romano, Bhumi Mandalia, Noah Osborne, Cara Ly,

## **ATO Guest Speaker:**

Laura Bagnato

## **Apologies:**

Kelly Collins, Sonia Lark



## Agenda item 1 – Welcome

The chair opened the meeting and welcomed the group.

## Agenda item 2 – Action item

There were no open action items.

## Agenda item 3 – Tax time related documentation

There have been several more TT2026 draft forms and instructions published to the [DSP Hub](#) over the past fortnight. We will continue to update the hub as additional draft forms and instructions become available.

We have been advised that the machine readable [ATO Salary and Wage Occupation Codes](#) for 2025-26 that are published on data.gov.au have not changed from 2024-25 and this page will be updated shortly.

The following change advices have also been published:

- [CA2026-003](#) Reportable Tax Position Schedule expansion to large superannuation funds and collective investment vehicles
- [CA2026-011](#) Better Targeted Superannuation Concessions.  
Business have invited feedback on this change advice, if you wish to share feedback, please [submit a ticket](#) in the DSP service desk.

## Agenda item 4 – Update on general matters and tax time delivery

An update was provided on TPAR pre-fill, addressing queries about field mapping, consolidation of records, validation rules, amendment reasons, and mandatory fields. TPAR questions and answers will be published shortly on the [PLS FAQs](#) page prior to the business implementation guide release.

## Agenda item 5 – MTAS Phase 2 update

A project update was provided on MTAS Phase 2 outlining Tax Time 2026 and 2027 changes to the trust tax return.

Tax Time 2026 will introduce three new labels to the trust tax return's statement of distribution to support IT5 section for individual beneficiaries, with changes focused on data integrity and beneficiary details.

A pre-fill service for individual beneficiaries will be implemented, uploading high-quality statement of



distribution data from trust returns into the pre-fill service, with end-to-end testing underway and live lodgments planned before broader rollout.

Tax Time 2027 will introduce significant changes, including 20 new labels, family trust election/interpose entity election specified individual details, and interactive validations requiring error correction before lodgment; mock-ups and early design/testing are in progress.

Queries regarding Tax Time 2026 changes were raised by the group. It was clarified that values for the new fields are calculated by tax agents and provided to beneficiaries for their completion. Software implementation and data flow relating to IT5 label completion was also of interest to the group. Guidance will be provided to assist in accurate completion of the label.

Pre-fill data will be available after trust returns have been processed (anticipated to be within half to three days); unlike TPARS, trust distribution pre-fills can be altered or deleted without amendment codes.

## Agenda item 6 – Delivery update

### April EVTE

Over the weekend our April EVTE release was performed. All systems should now have their updated services that was previously called out available in EVTE to consume. Further details on the changes can be found in their appropriate PCN.

### Reportable Tax Position (RPTTAXPOS) for Trust Return 2026

RPTTAXPOS has now been included as a reportable schedule to the trust tax return for 2026, based off the latest measure for Extending the Reportable Tax Position Schedule for Funds and Collective Investment Vehicles. This was previously release to FITR and AMIT/CCIV but was not updated for the trust return. There are no new labels for the trust return for this change as opposed to FITR/AMIT/CCIV which had an additional label introduced. This change will come into our May EVTE release with further communication on that in its appropriate PCN.

### Conformance Suite Scenario for TPAR Pre-fill

Based on feedback, a new conformance suite test case for TPAR pre-fill will be included in the May EVT release, with publication details to follow.

## Agenda item 7 – Agent online environment update

On 1 April, significant digital environment instability impacted service availability for ATO Online services and resulted in degraded performance for SBR. Root cause analysis was conducted, and remediation strategies were implemented, resulting in improved stability, with no further issues to flag since.



## Agenda item 8 – DSP communications

Information about the following topics can be found in [issue 13](#) of the DSP newsletter:

- SBR 1 channel decommission
- SBR2 MAS-ST expiry timeframe
- Qualifying earnings: a new way of calculating super
- Fact or fiction? Busting Payday Super myths
- Update to electric vehicle (EV) home charging rate

Information about the following topics can be found in [issue 14](#) of the DSP newsletter:

- Replace your M2M EVTE keystore for SBR1 and SBR2
- DSP roadmap
- Payday Super STP testing
- Reminder: guidance for employers on the SBSCH closure and quarterly super payments
- Recording available: Payday Super webinar for DSPs

For previous editions of the DSP newsletter:

[January 2026 – December 2026](#)

[DSP newsletter archive](#)

## Agenda item 9 – Platform update

Annual disaster recovery testing for SBR2 was completed successfully over the weekend of 11 April, with internal certification pending; testing for SBR1 and bulk data exchange is scheduled for May.

An update to the Global and Domestic Minimum Tax API was deployed to sandbox last Friday, however, there was an issue with the release which was raised by DSPs. The issue was fixed on Monday, and the API can now be tested.

## Agenda item 10 – DSP feedback/issues

No issues were raised for discussion.

## Agenda item 11 – Close

The next PLS working group meeting is scheduled for Tuesday 28 April at **1.00pm AEDT**.