



Key Outcomes – Practitioner lodgment service working group

Venue: MS Teams
Date: 31 March 2026
Start: 1.00pm AEDT **Finish:** 1.30pm AEDT
Chair and facilitator: Kaethe Seidel-Wynne
Secretariat: Kaethe Seidel-Wynne
Secretariat contact: 02 9354 3014

ATO Attendees:

Sonia Lark, Felicity-Ann Stokes, Adrian Romano, Bhumi Mandalia, Carl Bennett, Cara Ly, Steven Holmes

ATO Guest Speaker:

Nick Passalis

Apologies:

Kelly Collins, Julie Seiver



Agenda item 1 – Welcome

The chair opened the meeting and welcomed the group.

The group was advised that the Project Lead for MTAS Phase 2 will attend the next PLS meeting on 14 April. The purpose of this attendance is to understand how DSPs are progressing with the Tax Time 2026 changes to the trust tax return, including the addition of three new labels to the statement of distribution to support ITR prefill.

DSPs are asked to consider whether they, or their developers, have any concerns or issues in implementing these changes. Any issues can be [raised via a ticket](#) in the DSP service desk, or discussed at the next PLS meeting, where the project team will be available to assist.

Agenda item 2 – Action item

There were no open action items.

Agenda item 3 – Tax time related documentation

There have been several more tax time 2026 draft forms and instructions published to the DSP Hub over the past fortnight, including the Salary and wage occupation codes for 2026. We will continue to update the hub as additional draft forms and instructions become available – [2026 Tax Time documentation - Online services for DSPs - DSP hub - Confluence](#)

The following documents were also published on the DSP hub 27 March 2026:

- FBT Rates commencing April 2026 – [FBT Rates commencing April 2026 - Online services for DSPs - DSP hub - Confluence](#)
- 2026 Dependant offset calculations – [2026 Dependant offset calculations - Online services for DSPs - DSP hub - Confluence](#)
- 2026 Seniors and pensioners tax offset – minor update with removal of Rebate amount and Tax-free threshold amounts – [2026 Seniors and pensioners tax offset - Online services for DSPs - DSP hub - Confluence](#)

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

FBT whitelisting is scheduled for 1 April. DSPs may have received follow-up communication via their tickets requesting confirmation that sufficient testing has been completed.



Where additional testing has been requested, DSPs were asked to either respond to the ticket, or complete the additional testing outlined.

PLS FAQs:

- One fix has been published relating to the April EVTE
- Additional FAQs are being worked through including
 - queries relating to TPAR in the new ITR
 - a question relating to functional currency codes
- Once responses to these items are confirmed they will be added to the [FAQs page](#).

Agenda item 5 – ITR Pre-fill BIG – pre-fill with more than 20 TPAR records

An update was provided on the Enhanced Prefill for Individuals in Business project, with a focus on upcoming changes to the BIGs for 2026.

The team is currently working with internal stakeholders, with the updated BIGs expected to be finalised by the end of next week. These updates will cover the below key changes for Tax Time 2026.

Enhanced pre-fill for business details

- Prefilling will be expanded to include
 - ABN
 - main business name
 - main business address
- Stock information
 - prior year closing stock balances will be prefilled
 - pre-filled closing stock will automatically flow through as the current year opening stock balance

Enhanced pre-fill for taxable payments and government grants

- Expanded pre-filling will be introduced for taxable payments and government grants
- Pre-filled amounts will be editable
- Where an edit of \$5 or more is made, a mandatory reason code must be selected
- If no reason code is selected, a validation error will prevent lodgment
- Up to five reason codes will be available:
 - incorrect amount or details
 - payment belongs to another linked ABN
 - amount is duplicated
 - amount does not belong to me
 - other reason (with a 200-character free text field)

EXTERNAL



- For taxable payments and government grants income there will be a maximum of 20 records per individual taxpayer that can be pre-filled and lodged
- Where records exceed this amount, consolidation will be required prior to lodgment
- TPAR records should be grouped based on:
 - payment type
 - production type (primary or non-primary)
 - income classification
 - ordering and adjustment reasons
- Records should be reported:
 - individually from highest to lowest gross income
 - with records containing adjustment reasons given priority
 - records with common adjustment reasons should be consolidated
 - income without adjustment reasons should be consolidated last.

Queries were raised relating to the overall TPAR pre-filling implementation approach and DSP impacts. Once responses to these items are confirmed they will be added to the [PLS FAQs page](#).

Agenda item 6 – SBR1 channel decommission

The SBR1 channel, planned for decommissioning over several years, has now entered the execution stage. Delivery will follow a four-phase approach, with DSPs engaged throughout.

Phase 1 – Inactive services

Services that have not been used in the past two years are being deactivated on 31 March 2026, as the first stage of the decommission. A full list of impacted services is available on the [DSP Hub](#).

Phase 2 – Non-individual income tax return (NITR) services

Services that have been used within the last two years will be deactivated in September 2026, with the following exceptions:

- Activity statement
- Payment summary
- ABN registration

Phase 3 – Activity Statement 2009 (AS 2009) service

The Activity Statement 2009 service will be deactivated in December 2026, in line with the Activity Statement 2025 project.

Phase 4 – Services with no equivalent solution

The other two services, payment summary and ABN registration, do not yet have replacement services.



We are looking to bring the payment summary to SBR2 and are engaging with DSPs that are currently using that in SBR1 to understand their required transition timeframes and lead times as we will be doing an XBRL to an XML conversion for that service.

We are still currently in the design phase for ABN registration and will advise DSPs when we have more information.

A query was raised regarding whether the project team will engage with DSPs on the migration of the payment summary service and whether it will continue to be supported past 31 December 2026. It was advised that timeframes have not yet been confirmed, however DSP engagement will occur to understand required timeframes and lead-in, while engagement for other services is not planned at this stage.

Agenda item 7 – Delivery update

April EVTE:

- 2026 NITR
 - Updates for JMEI labels for TRT/FITR/PTR/SMSFAR
 - Update to resolve validation exception for CTR RPTTAXPOS
 - Update RPT Validation rules in CTR due to child form not having the same start and end dates
 - Resolved issues with CMN.ATO.CTR.500002 and CMN.ATO.CTR.500005 being missing in validation rules and message repository
- 2026 IITR
 - Updates for JMEI labels in IITR Prefill
 - Update to WRE ratio for 2026
 - Updates for taxable payments enhanced prefill
 - Bug fixes for both IITR rollover and MTAS phase 2 prefill
- 2026 IITRPRFL
 - Resolve an issue where IITRPRFL7 was being triggered when it does not exist in a payload
- 2026 FVS
 - Resolved FVS Get response and Submit request containing invalid regex for various fields

A query was raised regarding the Trust tax return, noting that three fields were removed from the paper form but remained in the MST, and asking whether any fields are planned to be removed from the MST.

It was confirmed that these fields have been removed from the paper form; however, they continue to exist in the TRT MST, with additional validation rules in place to prevent them from being provided:

- Message Structure Table
 - TRT463 "Other refundable tax offsets" (54G)

EXTERNAL



- TRT464 "Other refundable tax offsets (CODE BOX)" (54G)
- TRT465 "Exploration credits distributed" (58M)

An additional query was raised regarding when the TRT will be finalised. It was advised that all artifacts will be finalised in the May EVTE release.

Agenda item 8 – Agent online environment update

An update was provided on an incident impacting online services that occurred on the evening of Monday 30 March. All online services were unavailable during the incident, however, are now fully restored. System unavailability messages were posted to the OSfA dashboard to inform users while the incident was occurring.

Agenda item 9 – DSP communications

Information about the following topics can be found in [issue 11](#) of the DSP newsletter:

- SBR2 MAS-ST expiry timeframe
- Payday Super webinar for DSPs
- Are your clients Payday Super ready? Act now
- Stay vigilant against emerging identity fraud threats
- Recording available: Tax professionals conversations live stream
- Guidance on SSID nomination

Information about the following topics can be found in [issue 12](#) of the DSP newsletter:

- Leadership update
- SBR1 channel decommission
- Reminder: SBR2 MAS-ST expiry timeframe
- Payday Super Regulations: key details DSPs need to know
- SuperStream Contribution standard v3.0 testing
- Guidance for employers on the SBSCH closure and quarterly super payments
- New tax on large total super balances

For previous editions of the DSP newsletter:

[January 2026 – December 2026](#)

[DSP newsletter archive](#)



Agenda item 10 – Platform update

There were no platform updates to share.

Agenda item 11 – DSP feedback/issues

No issues were raised for discussion.

Agenda item 12 – Close

The next PLS working group meeting is scheduled for Tuesday 14 April at **1.00pm AEDT**.