



# Key Outcomes – Practitioner lodgment service working group

**Venue:** MS Teams  
**Date:** 28 April 2026  
**Start:** 1.00pm AEDT **Finish:** 2.00pm AEDT  
**Chair and facilitator:** Julie Seiver  
**Secretariat:** Kaethe Seidel-Wynne  
**Secretariat contact:** 02 9354 3014

**ATO Attendees:**

Sonia Lark, Julie Seiver, Felicity-Ann Stokes, Adrian Romano, Bhumi Mandalia, Carl Bennett, Cara Ly,

**ATO Guest Speaker:**

Mark Elwell, Ross Day

**Apologies:**

Kelly Collins



## 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 including:

- Company Tax Return instructions
- Trust income schedule instructions
- Trust tax return instructions

We will continue to update the hub as additional draft forms and instructions become available.

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

DSPs were encouraged to submit any outstanding issues, and responses will be provided as soon as possible. The PLS FAQs page will be updated shortly to incorporate the latest responses arising from recently received tickets. DSPs were advised to delay lodging production tickets until later in May to allow sufficient time to complete testing activities and address any remaining bug fixes.

## Agenda item 5 – Verify Call

Verify Call was introduced to help taxpayers confirm they are speaking with a legitimate ATO officer, addressing the growing problem of phone-based scams impersonating the ATO. The ATO is reducing reliance on SMS and email (easily spoofed by scammers) and instead using the authenticated ATO app as a trusted communication and security channel.

### How Verify Call works

- During an outbound ATO call, if a taxpayer is unsure, they can verify the caller.
- The taxpayer logs into the ATO app, selects Verify Call, and sends a verification request.
- The ATO staff member must confirm the request within 30 seconds using an internal tool.



- If verified, the app confirms the officer's name; if not, the taxpayer is warned to treat the call as a scam and hang up.

### Key message for agents and stakeholders

Encouraging clients to register for and use the ATO app is critical to improving protection, trust, and confidence in ATO interactions.

## Agenda item 6 – TPAR aliases and label mapping

It was noted that feedback from the previous meeting helped reshape how information is presented. Aliases and labels are being made consistent between income details schedule (INCDTLS) and Individual income tax return (IITR) improving usability and confidence in mapping. A clearer connection is being established between income classification, aliases and reporting behaviour.

It was acknowledged that additional context was required for income types determined through classification and that a mapping table is being prepared, with publication planned via a link in the BIG and on the DSP Hub. It was advised that the Business Implementation Guide (BIG) is currently progressing through endorsement, with publication anticipated within one to two weeks.

Clarification was provided regarding existing IITR numbers that reference the same data but are not technically linked. For example, IITR 932 relates to the payee ABN matched to the TPAR form, while the business details pre-filled in the P5 question reference IITR 426. These data elements operate independently despite referencing similar information.

Scenarios involving more than 20 records were also discussed, noting this affects a small number of cases and is often driven by a payer reporting each pay event. Engagement is occurring with affected reporters to encourage aggregation where appropriate. An existing warning indicator, IITR 878, flags the presence of TPAR data. Rather than introducing an additional indicator for record volumes exceeding 20, reference notes are being added to the BIG to direct users to the OSFA pre-fill report once 20 records are present.

It was noted that around 97 per cent of cases involve five or fewer payees, with very few involving substantially higher volumes. Efforts continue to reduce these cases to improve the pre-fill experience. Messaging is also being strengthened, including targeted engagement with high-volume bulk lodgers scheduled for early May, as part of broader tax time communications.

It was also clarified whether agents using private industry software may need to access the ATO retail channel to confirm additional items. The current build supports pre-filling up to 20 records due to system constraints, with a consolidation approach applied where record volumes exceed this limit. This scenario affects a small proportion of cases.



It was confirmed that removal of the need to access the retail channel is a future enhancement, with further improvements expected as backend capabilities mature, including through MTAS functionality.

A query was raised whether messaging should be presented to agents where pre-fill record limits are reached. It was acknowledged that providing a message advising agents to check OSfA would be beneficial.

Clarification was provided on why tax withheld amounts are excluded from pre-fill. This reflects data quality issues in prior years, including incorrect GST inclusion. As withholding directly affects assessments, it is not currently pre-filled. Only a small number of cases involve withholding, and improved digital lodgment may support reconsideration in future. A further consideration was that the 'other income' label doesn't support withholding.

## Agenda item 7 – Delivery update

May EVTE:

- IITR 2026:
  - Finalisation of artefacts for Individual Income Tax Return and Prefill Individual Income Tax Return (PIITR) for 2026
  - Resolved TPAR bugs for adjustment reason
  - Cyclical update to 4th threshold rates
  - Update to conformance suite scenario to add second TPAR example
- NITR 2026:
  - Finalisation of artefacts for Company tax return (CTR), Fund Income Tax return (FITR), Attribution Managed Investment Trust Income Tax Return (AMIT), Attribution Corporate Collective Investment Vehicle Sub fund Return (CCIV), Trust Income Tax return (TRT), Partnership Tax Return (PTR) and Self-Managed Super Fund (SMSFAR) for 2026
  - Addition of cross form validations for Reportable tax position (RPTTAXPOS) as a part of Reportable Tax Position Schedule for Funds and Collective Investment Vehicles in the Trust tax return
  - Added missing payload for Closely held trust withholding (CHTWTHHLD) in conformance suite
  - Updated conformance payloads for CTR, TRT and SMSFAR as a part of TFN remediation
- Lodgment List (LDG.List) 2023:
  - Updated conformance suite payloads to resolve BusinessDocumentCreationDt not aligned with MST and schema, as well as incorrect time format in response message

EXTERNAL



- Pay event (PayEvt) 2020:
  - Updated conformance suite payloads to resolve date of birth inconsistencies
- Client Communications (CLNTCOMM) 2020:
  - Updates to conformance suite payload attachments as some should be in .txt format
  - Update to response file names for consistency
- Government Contributions (GOVCONT)
  - Resolved validation rule bug associated with INC003960913
- FATCA 2017:
  - Updates to FACTA XML files for schema version 2.0.1. Removal of retired country codes and currency codes
- Sharing Economy 2024:
  - Additional validations to reject files where there is a zero (e.g. 0088/02/11) at the beginning of the year of birth in DOB fields.
- Local master file (LCMSF) 2024:
  - Resolved various bugs triggering for LCMSF50, LCMSF197 & LCMSF224

## Agenda item 8 – Agent online environment update

### Agent environment update

1. No system issues to report this week.

### Standard release

1. We have our Standard Release scheduled overnight on Saturday 9 May.
2. We are currently reviewing the Program of Work (POW) for OSFA changes to determine the BDV required with agents.
3. As usual, we will conduct regression testing of key OSFA functions to ensure everything is working as expected post the release.



## Agenda item 9 – DSP communications

Information about the following topics can be found in [issue 15](#) of the DSP newsletter:

- Readiness for the SSP model transition
- QE readiness required by 1 July
- Unintentionally duplicated income statements
- Changing over from quarterly super to Payday Super
- Reminder: Payday Super draft law companion rulings consultation

Information about the following topics can be found in [issue 16](#) of the DSP newsletter:

- Reminder: SBR2 MAS-ST expiry timeframe
- EOI for Dynamic PAYGI consultation
- Finalisation timing
- Watch our video: Managing the change from quarterly to Payday Super

For previous editions of the DSP newsletter:

[January 2026 – December 2026](#)

[DSP newsletter archive](#)

## Agenda item 10 – Platform update

There was no platform update to provide.

## 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 12 May at **1.00pm AEDT**.