



Key Outcomes – Practitioner lodgment service working group

Venue: MS Teams
Date: 9 June 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:

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

ATO Guest Speaker:

Bryan Cameron

Apologies:

Kelly Collins



Agenda item 1 – Welcome

The chair opened the meeting and welcomed the group.

An update was provided on XML conversion for Rental Property for individuals and Rental Schedule for non-individuals, which was discussed at the last meeting:

- The project team has advised that following further discussion, it has been agreed to incorporate DSP feedback and proceed with converting and combining both rental schedules into XML for the 2027 financial year. Any potential budget-related changes, along with refinements to validation rules and labels, will be addressed in the 2028 financial year.

Updates were given on some of the questions raised at the last meeting:

- The [2026 Pre-filing report – Importing data into tax agent software specification](#) has now been published to the DSP Hub.
- The [2026 Australia Zone offset](#) list has now been published to the DSP Hub.
- The question raised about a duplicated value in the Medicare levy threshold spreadsheet, thought to be due to a formula issue was checked with the business area:
 - It was confirmed it reflects the calculation – in some cases, the phase-in limit can equal the income level where the full rate applies due to rounding.
 - For administrative simplicity, the [2026 Medicare levy and Medicare levy surcharge thresholds spreadsheet](#) has been updated on the DSP hub so the full rate threshold is shown as \$1 more than the phase-in limit, aligning with system settings and testing.

We are progressing the outstanding queries from the last meeting and will provide a response as soon as one is available.

Agenda item 2 – Action item

There were no open action items.

Agenda item 3 – Tax time related documentation



We have published the final forms and schedules to the [DSP Hub](#). The DPO will continue to update the page as further forms become available, please advise the DPO if there are specific forms requiring follow up.

You may have also noticed that forms and instructions have started to become available on ato.gov.au

We also have an update on the Medicare levy threshold changes – these changes are included as a schedule to the *Treasury Laws Amendment (Delivering an Efficient and Trusted Tax System) Bill 2026*. The Bill has now passed the House of Representatives and is awaiting consideration by the Senate.

Based on the Bill digest, it has received bipartisan and cross-bench support and has been described as uncontroversial, with the Senate Economics Legislation Committee recommending it be passed.

The next Parliamentary sitting is scheduled for 22 June. While the timing for Senate consideration isn't yet confirmed and passage is ultimately a matter for Parliament, there's nothing at this stage to suggest the Bill will face significant delays.

We'll continue to monitor progress and keep DSPs updated as things move forward.

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

Several fixes are scheduled for deployment to EVTE on 11 June 2026, these updates have been added to the [PLS FAQs](#) page.

A documentation issue has been identified with validation rules VR.ATO.IITR.80003 and VR.ATO.IITR.80004 which were deleted in 2025. The 2 rules are not listed in the ATO IITR 2026 Rule implementation pack but have been mistakenly retained in the Validation rules spreadsheet. This issue requires a publishing update only and a fix will occur sometime in July.

Whitelisting was confirmed for 22 June. A reminder was issued to lodge NITR and IITR tickets within the next few weeks.

Agenda item 5 – Delivery update

- Walkthrough of updated 25/26 roadmap
 - Showcasing all remaining changes for the current tax year. A new roadmap will be provided for 2027 in the upcoming months.
- Capital Gains Tax Schedule (CGTS) conversion for 2027

EXTERNAL



- Considering recent budget changes, we will bring forward the work on converting the CGTS service in 2027, as was recently planned in our conversion roadmap for 2028.

Agenda item 6 – Upcoming non-individual prefill changes

A high-level overview was provided on proposed design approaches for a non-individual pre-fill API on DSG for Tax Time 2027, outlining three implementation options for consideration.

The group was invited to provide any feedback by 15 July by raising a ticket through the [DSP service desk](#). Further detail is available in the attached slide pack – Non-individual prefill API options.

This topic will be explored further at an upcoming DARG session.

Agenda item 7 – Agent online environment

- No environment issues to report this week.
- Business Deployment Verification (BDV) is scheduled for the TT26 OSFA release this weekend. Following successful completion, details of changes will be published on our [Key changes](#) page.

OSFA report rollover

- Pre-fill reports are expected to be available in the week prior to 1 July; however, minimal to no pre-fill data will be available – Monitor our [About Prefilling](#) page for pre-fill availability – TBC
- Pre-generated reports are expected to be rolled over on the weekend of 4–5 July – TBC
 - PAYG Instalments report 2022 – Remove
 - PAYG Instalments report 2023
 - PAYG Instalments report 2024
 - PAYG Instalments report 2025
 - PAYG Instalments report 2026 – New
 - Year to date interest summary report 2022/2023 – Remove
 - Year to date interest summary report 2023/2024
 - Year to date interest summary report 2024/2025
 - Year to date interest summary report 2025/2026 – New
 - Year to date revenue product summary report 2022/2023 – Remove
 - Year to date revenue product summary report 2023/2024
 - Year to date revenue product summary report 2024/2025



- Year to date revenue product summary report 2025/2026 – New

Agenda item 8 – DSP communications

Information about the following topics can be found in [issue 21](#) of the DSP newsletter:

- Tax Time 2026 production whitelisting
- Updates for Stapled super fund API now available
- Updates for Pillar Two API are now available
- It's the final countdown to Payday Super!
- Reminder: Super product register changes
- Reminder: Payday Super draft PS LA 2026/D3 consultation

Information about the following topics can be found in [issue 22](#) of the DSP newsletter:

- Action required to be listed on Super product register
- DWIS Product and Program Delivery Roadmap
- Payday Super resources in one place
- Clicking an email without checking – that's risky!

For previous editions of the DSP newsletter:

[January 2026 – December 2026](#)

[DSP newsletter archive](#)

Agenda item 9 – Platform update

There was no platform update to provide.

Agenda item 10 – DSP feedback/issues

Questions raised:

Should code V (CCIV Trust) be completely removed from the trust code drop-down? Noting that although guidance says not to use it, it still appears as an option.

This question was followed up with the relevant business area who have advised that the Table 1 Trust Code is not just used for label 8 Z to be completed, it is also required for completing the Type of trust label on page 2 of the Trust tax return, and code V CCIV sub- fund trust is still relevant as a trust type.

EXTERNAL

**When are the XML conversion specifications expected to be available?**

It was advised that some specifications are expected around July where possible. The capital gains tax work has not yet commenced so no timeline is available for that. However the delivery team is working through Rental property and Rental schedule, we expect to get artefacts out in the next couple of months, aiming to give 12 months lead time for any of these conversion work changes.

Will a fix for VR.ATO.IITR.731239 will be in a future release?

It was confirmed that both a publishing update and a code fix would occur on 11 June. This has been added to the [PLS FAQs](#).

When will the 2026/27 GDP uplift factor be published? Noting it is usually published but not yet available for the relevant year (previous year at this link - <https://softwaredevelopers.ato.gov.au/GDPupliftfactor>).

Publishing has been completed and it is now available on the Software Developer Website.

Are electronic service address providers required to register through the Super Product Register?

This was followed up with the relevant business area who have advised that an ESA provider is not required to be on the Super Product Register.

On 1 July both the contribution caps (Concessional and Non-concessional) and transfer balance caps will be indexed:

- **When will ATO update this in myGov?**
- **When will ATO update this in Online services for agents?**

The business area has responded with the below information from recent media article published on 21 May 2026 and promoted in Super and SMSF newsletters on 29 May 2026. See [Upcoming personal transfer balance cap changes](#).

- Although indexation of the general TBC takes effect on 1 July 2026, updated personal transfer balance caps are not expected to display until 13 July 2026.
- From 13 July:
 - Members will be able to view their updated personal TBC in ATO online services.
 - Agents will be able to view their client's details in Online services for agents.
- Members' personal TBC will be calculated based on the information reported to and processed by us.



Is it on the roadmap for Trust income schedule labels to update accordingly with the

- **U2 - Franked distribution related to investment**
- **B1 - Non - PP MIS amount**
- **H1 - Other assessable FSI from a financial investment amount**

It was advised that no changes are being made for the 2025–26 year. Some updates are planned for the 2026–27 year, but not all new labels will necessarily be included.

Agenda item 11 – Close

The next PLS working group meeting is scheduled for **Tuesday 23 June** at **1.00pm AEDT**.