



Key Outcomes – Practitioner lodgment service working group

Venue: MS Teams
Date: 21 July 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, Sharna Maltman, Julie Seiver, Felicity-Ann Stokes, Adrian Romano, Noah Osborne, Craig Willox

ATO Guest Speaker:

Mark Elwell

Apologies:

Kelly Collins, Bhumi Mandalia, Carl Bennett



Agenda item 1 – Welcome

The chair opened the meeting and welcomed the group.

The group was reminded that this year's tax time event is being held on 15 & 16 September in Canberra. The event will cover matters of interest for DSPs on Tax Time 2027 changes and future work initiatives. The first two confirmed topics to be covered at the event are:

- Tax Loss Carry-back
- Standard deduction for work-related expenses.

To register your attendance please [raise an EOI ticket](#) in the DSP service desk.

Agenda item 2 – Action item

There were no open action items.

Agenda item 3 – Tax time related documentation

The [Tax Time rates and thresholds](#) table on the DSP Hub has recently been updated.

Key updates include:

- [Study and training loan repayment thresholds and rates](#)
- [CGT discount](#)
- [Fuel tax credit rates](#)

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

Over the coming weeks PVT tickets for IITR and NITR will be closed.

Several fixes were deployed over the weekend via transformation. Any issues raised through calls or tickets that DSPs were contacted about have now been resolved, and lodgments can proceed without any changes required.

A query regarding deductions rule VR.ATO.DDCTNS.000155, was discussed. It was confirmed that the 2025 implementation was incorrect; however, the 2026 implementation is correct and no fix is required. Consistent with established practice, no changes will be made to the prior year. This will be added to the [PLS FAQs](#) page and DSPs are encouraged to watch the page for updates.

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Agenda item 5 – Pre-fill for individuals in business

- Almost 5,000 returns have been lodged, with over 102,000 TPAR records available in pre-fill, reflecting strong early uptake.
- Feedback has highlighted friction caused by inactive/cancelled ABNs appearing in pre-fill, creating additional work for agents needing to remove address details where no business income exists.
- Inactive ABNs were intentionally included as taxpayers may still have earned business income, but some pre-filled ABNs are older than expected.
- Potential improvements are being explored, including clearer guidance in the BIG, limiting older inactive ABNs, and simplifying record removal.
- Around 250 returns have already been lodged with inactive ABNs, indicating pre-fill data is successfully identifying business income in some cases.
- Some agents are deleting pre-filled data entirely, bypassing validation requirements and creating suspense items where no reason code is provided.
- Early results show strong acceptance of pre-filled data, although some taxpayers are lodging before all income information is available, resulting in omitted income in some returns.
- Upcoming forums and August communications will encourage lodgment once pre-fill data is available and reinforce the intended use of pre-filled information.
- A DSP queried whether further tax agent communications are needed on the requirement to re-add deleted pre-fill data and providing adjustment reasons, noting agents may incorrectly delete records they believe do not belong to the client.
- The scale of the issue is currently low, with around 80 cases identified since implementation, but it will continue to be monitored and improvements to EM0075 will be considered.

Agenda item 6 – Delivery update

It was noted that deployment and publication for the July EVTE release occurred over the weekend.

The 26/27 roadmap is currently being updated and once available, a walkthrough of the changes will be provided.

Agenda item 7 – Agent online environment

A minor issue was noted within the Online Services environment regarding agents experiencing difficulties receiving copies of EFT reconciliation reports. This has generated some enquiries over the past one to two

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weeks; however, the issue is consistent with the increased transaction volumes typically experienced around tax time. Most cases were due to report retrieval failures or subscriptions being set up incorrectly by the agent.

Agenda item 8 – DSP communications

Information about the following topics can be found in [issue 27](#) of the DSP newsletter:

- The new Super product register is live
- Supporting employers to pay super every payday
- SMSF Alias (ESA) lookup table reminder
- Reminder: system monitoring dashboards

Information about the following topics can be found in [issue 28](#) of the DSP newsletter:

- The ATO corporate plan 2026–27 has been released
- SBR EVTE keystore password issue
- MVR readiness does not prevent contributions

For previous editions of the DSP newsletter:

[January 2026 – December 2026](#)

[DSP newsletter archive](#)

Agenda item 9 – Platform update

System performance remained stable over the past few weeks, with no significant issues reported. While transaction volumes would typically begin trending downward by this stage, SBR2 traffic has remained higher than usual. More than 12 million records were processed on 1 July. Overall, systems remain healthy, and year-on-year channel volumes continue to show growth of more than 10%.

Agenda item 10 – DSP feedback/issues

There were no issues raised for discussion.

Agenda item 11 – Close

The next PLS working group meeting is scheduled for **Tuesday 4 August** at **1.00pm AEDT**.