



Key Outcomes – Practitioner lodgment service working group

Venue: MS Teams
Date: 4 August 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, Craig Willox

ATO Guest Speaker:

Laura Bagnato

Apologies:

Kelly Collins



Agenda item 1 – Welcome

The chair opened the meeting and welcomed the group.

The draft program for the Annual DSP Tax Time Event has now been released and is available to view on the [DSP hub](#). 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 following change advices have been published to the [DSP hub](#):

- CA2027-001 CGT label changes for Crypto-Asset reporting
- CA2027-002 Tax reform – Making tax simpler for businesses – \$20,000 instant asset write-off
- CA227-003 Standard deductions for work-related expenses

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

We are closing PVT tickets, with most individual-related tickets now resolved and only a few individual ones remaining open. One open ticket relates to how a zero PAYG withholding tax withheld amount is returned in pre-fill data, this may require additional information on the PLS FAQs page. The second open ticket relates to elements out of order in the request message, this is not currently expected to generate a bug.

Agenda item 5 – TFN reporting for closely-held trusts

- From 1 July 2026, TFN reporting for closely held trusts will be moving from the one-off TFN Report to an annual obligation in the Statement of distribution within the Trust Tax Return.
- Tax time 2027 changes will include:
 - A new label around 'Are you a closely held trust?'
 - A new label to the Statement of distribution around 'TFN not provided' – where a beneficiary has not provided their TFN to the trustee.
 - Additional validations to support the new reporting requirements.
- The final TFN Reports covered distributions up to 30 June 2026 and were due by 31 July 2026.



- TFN Reports will be de-whitelisted from 1 October 2026, with all future reporting undertaken through the Statement of distribution.
- A change advice outlining Tax Time 2027 impacts will be published shortly and presented at the Annual DSP Tax Time event in September.

The following questions were raised:

- Are both the closely held trust lodgments and the beneficiary equivalent being decommissioned?
 - It was confirmed that both will be decommissioned as part of the transition.
- What advice will be going out to tax agents who expect to lodge but are unable to find the TFN Report?
 - A communications strategy is underway to provide guidance. Web content has been updated, and an article has been issued in the Business Bulletin. There will also be Tax Time communications, and additional messaging ahead of the next reporting cycle.
- What will happen to late or prior year TFN Report lodgments once the service is decommissioned on 1 October 2026?
 - The ATO has adopted a risk-based approach and has made an administrative decision that prior year TFN Reports for closely held trusts will not be required following the decommissioning of the TFN Report service. This approach supports the de-whitelisting of the service, with relevant information expected to be captured through the annual Statement of Distribution from 2027.
 - The intent is to prevent lodgments after 1 October 2026 through de-whitelisting. Where lodgment attempts are made after this date, users can expect to receive a "Service Action Denied" error. Any reports received after decommissioning will be placed on file, and no further correspondence is expected to be issued.
 - While specific figures on late TFN Report lodgments between October 2025 and 30 June 2026 are not available, the ATO considers the residual risk associated with ceasing the service to be low.
- The following links provide information reflecting the change in obligation:
 - [Changes to beneficiary TFN reporting for closely held trusts](#)
 - [What trustees need to do](#)
 - [TFN report](#)



Agenda item 6 – Delivery update

August 13th EVTE updates:

- SMAT 2015 – Updated TFNs in conformance suite package as a part of TFN remediation
- ETIC 2015 – Updated TFNs in conformance suite package as a part of TFN remediation
- VDS 2027 – New 2027 service to support voluntary disclosure statement reporting
- CRS 2027 – New 2027 version of CRS domestic lodgments to support crypto asset reporting
- LDG 2023 – Rollover updates for get individual income tax return for 2026
- CUDEMOGR 2016 – Added logic for mobile/phone number being returned with area codes
- LDGPRGM 2018 – Updated code implementation packages to align with updated SBR2 standardisation.
Updates to conformance suites to align to current standards
- DD 2018 – Updated code implementation packages to align with updated SBR2 standardisation.
Updates to conformance suites to align to current standards

Agenda item 7 – Agent online environment

There was no update to provide.

Agenda item 8 – DSP communications

Information about the following topics can be found in [issue 29](#) of the DSP newsletter:

- Have your say on DSP news
- Support channels: reminder
- Reminder: Annual DSP Tax Time Event

Information about the following topics can be found in [issue 30](#) of the DSP newsletter:

- Payday Super LCRs
- Share your feedback on DSP news
- Fuel tax credit rates changed on 3 August
- Annual DSP Tax Time Event: Draft Program now available
- SBR Service Desk email update



For previous editions of the DSP newsletter:

[January 2026 – December 2026](#)

[DSP newsletter archive](#)

Agenda item 9 – Platform update

All systems remain stable, with continued high traffic volumes associated with tax time. No issues or concerns were identified.

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 18 August** at **1.00pm AEDT**.