



Key Outcomes – Practitioner lodgment service working group

Venue: MS Teams
Date: 13 October 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, Carl Bennett, Bhumi Mandalia, Cara Ly

ATO Guest Speaker:

Apologies:

Kelly Collins, Craig Willox



Agenda item 1 – Welcome

The chair opened the meeting and welcomed the group.

The group was advised to check this week's newsletter on 14 October for information on how to submit an expression of interest to participate in the Reforming negative gearing working group. This is an opportunity to contribute and support the implementation of the Government's negative gearing reforms ahead of Tax Time 2028, with the first meeting expected to be held in November 2026.

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:

- CA2027-014 Reforming Negative Gearing
- CA2027-015 Innovative Business CGT Concession (IBCC)
- CA2027-016 Better Targeting the Research and Development Tax Incentive

The updated [DWIS Product and Program delivery Roadmap](#) shared at the Tax Time event has been published on the DSP hub.

For those who were unable to join us at the Tax Time event, the presentation packs are now available on the [DSP Hub](#) for you to view at your convenience.

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

There was no update to share.

Agenda item 5 – Delivery update

October EVTE (16/10 – 19/10) changes:

- Individual income tax return (IITR)
 - Initial rollover publication for 2027 service
 - Rollover of Prefill service for 2027



- Addition of converted rental schedule
- Non-individual income tax return (NITR)
 - Initial rollover publication for 2027 services (TRT/SMSFAR/CTR/CCIV/AMIT)
 - Added converted rental schedule for NITR services
 - SMSFAR changes for BTSC as a part of DIV296 changes
 - CGTS schedule updates for crypto label changes
 - SMSFAR bug fix for discrepancy in pensions code
- Payment summary (PS)
 - Updating schema changes and validation rules as a part of SBR1 transition
 - Conformance suite package publication
- Voluntary disclosure statement (VDS)
 - Updated validation rules based off business and external consultation
 - Conformance suite package publication
- Common reporting standard (CRS)
 - Resolved mandatory and nil report schema issues

Agenda item 6 – Agent online environment

- We are reviewing the draft Business Implementation Guides (BIGs) for the Voluntary Disclosure Statement (VDS). A publishing timeframe is yet to be confirmed.
- ATO Online Services for Agents (OSFA) – No current issues to report.
- We are currently scoping Business Deployment Verification (BDV) requirements for any OSfA changes expected for the release November release scheduled for the weekend commencing 13 November 2026.

Agenda item 7 – DSP communications

Information about the following topics can be found in [issue 39](#) of the DSP newsletter:

- Introducing the Digital Partners Stewardship Group
- Physical end point transition
- Client-to-agent linking is expanding to individuals and sole traders
- Changes to credit card payments
- SBR1 channel decommission
- Cyber Security Awareness Month: Post-quantum cryptography
- Corporate tax transparency report for 2024–25 released



Information about the following topics can be found in [issue 40](#) of the DSP newsletter:

- EOI now open for the Digital Partners Stewardship Group
- EOI for the Reforming negative gearing working group
- Extended transition period for taxpayers using credit cards
- Payday Super PS LA 2026/2: exceptional circumstances determinations now available
- DWIS Product and Program Delivery Roadmap
- Explore APIs available through the ATO API Portal
- Cyber Security Awareness Month: Multi-factor authentication

For previous editions of the DSP newsletter:

[January 2026 – December 2026](#)

[DSP newsletter archive](#)

Agenda item 8 – Platform update

There was no update to provide.

Agenda item 9 – DSP feedback/issues

A query was raised regarding the pre-fill error (EM3001) that occurred between 26 and 29 September, specifically whether communications had been issued to agents and whether the error indicated that trust income data was unavailable.

It was advised that no communication was issued to agents at the time, as the issue was resolved quickly and communication was not released before the fix was implemented. The error was caused by a temporary system issue that prevented trust income data from being sourced. The issue affected all channels, including OSfA and DSP software. Agents who completed pre-fill requests during the affected period (26-29 September) should rerun pre-fill to ensure trust income information was correctly retrieved and to review any affected returns. Discussions are underway regarding communications to affected agents with relevant areas being consulted.



Agenda item 10 – Close

The next PLS working group meeting will be held on **Tuesday 27 October** at **1.00pm AEDT**.

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