

This help card is to assist you with creating and lodging GST Withholding Form one & two within PEXA, as an alternative to using the ATO website. You will need to be in the role of **Incoming proprietor** to create these forms.

Prepare the Workspace

- > Create/accept invitation to PEXA
Transfer workspace as per normal process

Note: The Transfer must be created to enable the ATO GST Withholding form.

For **VIC** Jurisdiction, a **Notice of Acquisition** must also exist.

For **NSW** Jurisdiction, a **Notice of Sale** must also exist.

Create Forms one & two

- > Navigate to ATO Screen



- > Click



Form one

- > Complete outstanding details
 - Check the pre-populated contact details
 - Add the Property Details, Transaction Details, Purchaser Details, and Supplier Details (refer to Supplier Notification of GST Withholding).
 - Complete declaration

Form two

- > Complete outstanding details
 - 'Would you like PEXA to lodge Form two on your behalf at settlement?'
Select **Yes** or **No**

Note: If you select **Yes**, you will no longer be required to submit Form two manually as PEXA will lodge this at settlement.

If you select **No**, you will need to submit Form two manually via the ATO website.

- Complete declaration

- > Click



Edit Form one

You can edit the Form one details at any time prior to it being lodged with the ATO

- > Click



arrow > **Edit**

Lodge Form one

Form one may be lodged any time prior to settlement

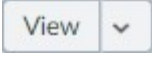
- > Click



Note: Upon successful lodgement of Form one, a **Destination Line Item** for the nominated Withholding Amount and ATO Provided Payment Reference Number is automatically generated. This can only occur when there is one participant representing the Proprietor on Title/s, otherwise a manual GST line item will need to be created. This line item is automatically allocated to the vendor. To remove the automatically created GST Withholding line item, you must do this via removing Form one. Note that a manually created GST Withholding line item can still be removed via the FSS.

Remove (if required)

You can remove Form one or Form two at any time prior to settlement

- > Next to the Form you wish to remove, click the  arrow > **Remove**

View

Once created, you can view the details submitted in Form one or Form two at any time

- > Next to the Form you wish to view,

click 

Note: Only the Incoming Proprietor and Proprietor on Title will have the ability to view the GST Withholding Forms.

Confirm Form two

One day prior, or on the day of settlement, you will receive a pop-up notification when you open the workspace to verify whether any details on Form one have changed since lodgement, excluding settlement date.

- > Select **Yes** if changes have been made since lodgement

Note: PEXA will automatically remove Forms one & two and notify the ATO. You will then need to complete Form one again.

- > Select **No** if no changes have been made

- > Click 

Form two Lodgement

Upon settlement, PEXA will **automatically** lodge Form two and supply the ATO with the latest settlement date. **Note that if Form two hasn't been confirmed prior to settlement, it will not be lodged in PEXA.** Form two will need to be lodged on the ATO website post settlement.

Successful Lodgement

- > If you have supplied an email address in the contact details section of Form one, the ATO will send a payment confirmation once Form two is lodged and payment is processed.

Unsuccessful Lodgement

- > You will receive an email from PEXA advising that Form two was unable to be lodged with the ATO. **You will need to manually lodge Form two directly with the ATO.**

For more information visit:

<https://community.pexa.com.au/t5/Help-Centre/ATO-Help-Centre/ba-p/22121>