

Purpose

Use this procedure to enter a transfer of residential land transaction into **OSRconnect**.

Trigger

Perform this procedure when you are assessing transfer duty on your client's purchase of residential land.

Helpful Hints

- Ensure that all concession details reflect the client's declaration on their Form 2.1 or Form 2.7.
- Transfers assessed under section 22 that accompany the contract (pursuant transfers) are stamped with the same endorsement as for the contract. Do not enter these transfers separately into *OSRconnect*.

Procedure

1. In this scenario a buyer has entered into a contract for an established residence and is claiming a first home concession. A Form 1 Transfer accompanies the contract.
Start the transaction in the **Task Overview**.
2. Click the **Forms** tab.
3. Select **Lodge a New Form**.
4. Confirm the **Form Type** is **Transfer Duty Assessment**, and click **Next**.
5. The **Transaction Statement—Form 12.6** is displayed. Fields marked with a red asterisk * are mandatory.
6. Scroll to maximise the form view.
7. Enter **Your reference** for this transaction.
8. Scroll to the **Transaction details** section.
9. Select the **Transaction class** as **Transfer of Residential Land**.
10. Select the **Type of dutiable transaction** as **Agreement to transfer dutiable property** (for transactions documented by an agreement/contract/deed).
11. Select the **Type of dutiable property** as **Land in Queensland**.
12. Select the **Transaction/Document date** using the calendar.
13. Enter the **Unconditional date** (when the last allowable contract condition was satisfied). See [Public Ruling DA019.1](#) for further information.
14. Note if a **transfer under section 22** (a pursuant transfer) accompanies the contract.
15. Note if **duty has been previously paid on this agreement**.



16. Scroll to the **Lot and plan** section.
17. Enter the lot number in the **Lot from** field.
18. Use the **Lot to** field only when entering multiple consecutive lots on the same plan.



Form Process Framework

19. Select the **Plan type** from the drop-down list.
20. Enter the **Plan number**.
21. Enter the **Title reference**.
22. Select the **Transferor type** from the list.
23. Enter the transferor name.
24. For a company, enter the **ABN** and/or **ACN**.
25. Scroll to the **Transferee** section.
26. Select the **Transferee type** from the list.
27. Enter the transferee name details.
28. Complete all the name details in accordance with the [data entry standards](#).
29. For an individual, enter the **Date of birth**.
30. Enter the percentage **Interest acquired** by the transferee in this transaction.
31. Select the **Concession type** for this transferee. **Note:** If there is no concession, leave the field at the default **Select concession**.
32. Select the **Transfer date** (usually the settlement date).
33. Select the **Occupation date** as declared on your client's Form 2.1. For a first home vacant land claim, use the transfer date plus 2 years.

34. Complete all address details in the **Transferee address** section. Enter the **Suburb/Town** in CAPITALS.
35. Use the **Add Transferee** button to note additional transferees if required.
36. The **Assessment details** will auto-populate when the form is checked.
37. Scroll to the **Details** section.
38. Answer the question: **Are the transferor and transferee related?** If **Yes**, you must hold evidence of value on file.
39. Answer the question: **Is the consideration less than the unencumbered value ...** If **Yes**, you must hold evidence of value on file and assess duty on the unencumbered value.
40. Answer the question: **Is an exemption being claimed?**
41. If applicable, answer the question: **Is the acquisition wholly or partly by way of gift?** (This question displays when first home/first home vacant land concession claims are selected.)
42. Enter the **Consideration/Unencumbered value of ENTIRE property** (irrespective of whether a partial interest is being acquired).
43. Complete the **Value of any non-residential property** field where the property contains a non-residential component (e.g. a dwelling with shop attached). Otherwise leave this blank.
44. Answer the **Section 30** (aggregation) question.
45. Scroll to the **Acknowledgement** section.
46. Enter your full **Name** and **Contact phone** details in the **Acknowledgement** section.
47. Check the statement to complete your acknowledgement.
48. Click **Print Concession Forms** to produce the Form 2.1/2.7 for the concession claim/s.
49. Scroll to the top of the screen.
50. Click **Check Form Data** to validate the data entered.

51. The status message advises of any errors in the form.
52. The **Duty payable**, any **UTI** and the **Total liability** are calculated and displayed after the form is checked.
53. To print a hardcopy of the statement, use any of these methods:
 - Click in the form area and press **F8** to access the Adobe® print menu.
 - Press **Ctrl+P**.
 - Right-click on the form and select **Print**.
54. Click **print**  for a hardcopy.
55. Click **save**  for an offline PDF.
56. Click **Next** to start the lodgement process or **Save Draft** to save this transaction in **Filing** in the **Task Overview**.
57. End of process. Refer to the tutorial **Submitting a Transaction** for instruction on the lodgement process.