



# How to personalise your tax return

How to personalise your return using myTax.

Last updated 27 March 2024

## On this page

[Want to lodge a nil return?](#)

[Watch our video](#)

Use the **Personalise return** screen to select items that apply to you.

Based on pre-fill information, we may have made some selections for you. You cannot remove any selections we made for you, even if you think the circumstances do not apply to you.

You can delete any relevant pre-filled information from the **Prepare return** screen.

You can make other selections that may apply to include them in your tax return. This will tailor your tax return to your situation.

If you [can't see an item to select](#), it's because it will already be shown on the **Prepare return** screen or is not required to be included in tax return.

[Watch our video](#) for a demonstration on how to personalise your tax return.

If you are unsure which items apply to you, or to read more about those items, select from the cards at the bottom of the page.

**Note:** From 2015–16 an individual is entitled to the [small business income tax offset](#) on the tax payable on the portion of their income that is from net small business income from sole trading activities, share of net small business income from a partnership or trust, and

other amounts received because the individual is a partner or beneficiary in a small business entity, such as farm management repayments.

## Want to lodge a nil return?

If you don't need to select any items because you wish to lodge a nil return, then select **Next** at the bottom of the **Personalise return** screen, and follow the instructions.

## Watch our video

This video shows you how to personalise your tax return.

### Can't see an item to select?



Certain items apply to everyone and they are always displayed on the Prepare return screen.

### Can't remove a selection?



Understand why we have made a selection for you.

## **Residency**



How to complete the residency section including how to determine if you are an Australian resident for tax purposes.

## **Did you have a spouse?**



Understand how a spouse is defined so you can correctly complete this question.

## **Salary, wages, Government payments, and other income**



How to report salary, wages or other income.

## **Income from Australian super and annuity funds**



How to complete the Income from Australian super and annuity funds section.

## **Australian interest or other Australian income from investments or property**



Complete this section to report relevant Australian investment, property and CGT related items.

## **Sole traders or business income/losses, partnership or trust distributions (not from a managed fund)**



Complete this section to report on business income or losses and partnership or trust distributions.

## Foreign income



How to complete the foreign income section of your tax return.

## All other income, including employee share schemes



Select this item if you received any other income or payments.

## Deductions, or tax losses from earlier income years



How to complete the Deductions section including using the ATO app's myDeductions tool.

## Tax offsets, adjustments or credit for early payments



Complete the tax offsets and adjustments section and work out whether you to select additional items.

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## Can't see an item to select?

Certain items apply to everyone and they are always displayed on the Prepare return screen.

**Last updated** 27 March 2024

These items are:

- [Medicare levy and Medicare levy surcharge](#)
- [Private health insurance](#)
- [Income tests.](#)

Also, you are not required to make a selection on the **Personalise return** screen for any of the following:

- low income tax offset
- PAYG instalments
- Higher Education Loan Program (HELP), Student Financial Supplement Scheme (SFSS) or Trade Support Loan (TSL) debt.

We use the information in your tax return and our records to include these in your notice of assessment.

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## Can't remove a selection?

Understand why we have made a selection for you.

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Where we made a selection for you, it is based on the information we have on our records (such as from your last year's tax return) or the information provided to us by various organisations including employers/payers, financial institutions and other government departments. You will not be able to remove the selection but can delete any relevant pre-filled information from the **Prepare return** screen.

If we made a selection for you but you believe it does not apply to you, it may be because the information was provided to us incorrectly or you may not be aware of how the payment was made to you.

### Example

If **Business/Sole trader income or loss** is pre-selected but you think you are not in business or a sole trader, this may be because the payment was made as business and personal services income instead of employment income which is what you might have expected. You should review the pre-filled information on the **Prepare return** screen and make any necessary adjustments (if required). If you believe the payment

was made incorrectly, contact the payer so they can update their records and provide us with correct information.

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## Residency

How to complete the residency section including how to determine if you are an Australian resident for tax purposes.

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Based on pre-fill information, we have made the selection for you. If your circumstances are different for 2015–16, you may need to change your answer.

If you were an Australian resident for tax purposes from 1 July 2015 to 30 June 2016, select **Yes**. Otherwise, select **No** and enter only the dates when you were a resident.

Generally, we consider you to be an Australian resident for tax purposes if you:

- have always lived in Australia or you have come to Australia and live here permanently
- have been in Australia continuously for six months or more, and for most of that time you worked in the one job and lived at the same place
- have been in Australia for more than six months during 2015–16, unless your usual home is overseas and you do not intend to live in Australia
- go overseas temporarily and you do not set up a permanent home in another country, or
- are an overseas student who has come to Australia to study and are enrolled in a course that is more than six months long.

If you need help in deciding whether or not you are an Australian resident for tax purposes, we have online tools to help you.

- If you have recently arrived in Australia, see [Are you a resident?](#)
- If you have left Australia or intend to leave Australia soon, see [Determination of residency status - leaving Australia.](#)

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## Did you have a spouse?

Understand how a spouse is defined so you can correctly complete this question.

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Based on pre-fill information, we have made the selection for you. If your circumstances are different for 2015–16, you must change your answer.

If you had a spouse at any time between 1 July 2015 and 30 June 2016, select **Yes**. You will then need to provide your spouse details on the **Prepare return** screen.

Your spouse includes another person (of any sex) who:

- you were in a relationship with that was registered under a prescribed state or territory law
- although not legally married to you, lived with you on a genuine domestic basis in a relationship as a couple.

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## Salary, wages or other income on a payment summary, or Australian Government payments

How to report salary, wages or other income.

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If you received income or payments from one of the following sources, shown on a payment summary, you will need to select the items that are relevant to you:

- Employment related income
  - [Salary, wages, allowances, tips, bonuses etc. \(including lump sum A, B, D or E payments\)](#)
  - [Employment termination payments \(ETP\)](#)
  - [Foreign employment income \(on a payment summary\)](#).  
Show all other foreign income in the [Foreign income](#) section.
- Australian Government payments, allowances and pensions, such as:
  - [Newstart, Youth Allowance and Austudy](#)
  - [pensions and carer payments](#)
  - [special payments](#)
- Other income shown on a payment summary
  - [Attributed personal services income](#)

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## **Income from Australian super and annuity funds**

How to complete the Income from Australian super and annuity funds section.

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If you received income or payments from one of the following sources, shown on a payment summary, you will need to select the items that are relevant to you:

- [Australian super income streams](#) (including lump sum in arrears)
- [Australian annuities](#)
- [Australian super lump sums](#)

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## Australian interest or other Australian income from investments or property

Complete this section to report relevant Australian investment, property and CGT related items.

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Australian investment and property related items you will need to select if they are relevant to you:

- [Australian interest](#) or [Australian dividends](#) - if you had any amount paid or credited to you
- [Managed fund distributions](#) - if you received any distributions from a managed fund
- [Rent \(Australian properties\)](#) - if you earned Australian rental income or your property was available for rent

### Capital gains tax (CGT) related items

If you:

- had a CGT event and you made a capital gain or capital loss, select [Capital gains or losses that are not from a managed fund](#).
- only had **Unapplied net capital losses from earlier years to carry forward but no CGT event this year**, only select this item.

- wish to request an amendment to an earlier income year's tax return because you were **A seller who has received or provided a financial benefit, in this current income year, under a look-through earnout right created on or after 24/04/15**, select this item.

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## Sole traders or business income/losses, partnership or trust distributions (not from a managed fund)

Complete this section to report on business income or losses and partnership or trust distributions.

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If you were a sole trader or had business income or losses, or you received partnership or trust distributions, you will need to select the items that are relevant to you:

- You had **Business/Sole trader income or loss**, select
  - [Personal services income](#)
  - Business income or loss
- You received distributions from
  - [Partnerships](#)
  - [Trusts](#)

You will be able to enter loss details relating to all of the above except trusts. Loss details section will be automatically displayed in the **Business/sole trader, partnership and trust income (including loss details)** section.

If you made [farm management deposits or had repayments](#), you will also need to select this item.

If you select any of the above items (except **Personal services income**), the [Small business income tax offset](#) will automatically be displayed in the **Offsets** section that you can complete if you qualify for the offset.

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## Foreign income

How to complete the foreign income section of your tax return.

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If you received income or payments from one of the following foreign sources, you will need to select the items that are relevant to you:

- [Foreign pension or annuity](#)
- [Foreign employment income \(not on a payment summary\)](#)
- [Any other foreign income](#)

You will be able to enter loss details relating to carrying on a business overseas. **Loss details** section will be automatically displayed.

If you select this item, the [Small business income tax offset](#) will automatically be displayed in the **Offsets** section that you can complete if you qualify for the offset.

- [Foreign entities](#)

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## All other income, including employee share schemes

Select this item if you received any other income or payments.

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If you received any other income or payments not listed elsewhere, you will need to select this item.

Other income includes:

- [Employee share schemes](#)
- [Bonuses from life insurance and friendly societies](#)
- [Forestry managed investment scheme income](#)
- [Any other income](#)

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# Deductions, or tax losses from earlier income years

How to complete the Deductions section including using the ATO app's myDeductions tool.

**Last updated** 27 March 2024

Based on the information available in your return and if you uploaded your deductions from our [myDeductions tool](#), *myTax* will automatically display some deductions.

**The following deductions are automatically displayed**

If you have salary or wage income	<ul style="list-style-type: none"><li>• <a href="#">Work-related car expenses</a></li><li>• <a href="#">Work-related travel expenses</a></li><li>• <a href="#">Work-related uniform, occupation specific or protective clothing, laundry and dry-cleaning expenses</a></li></ul>
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	<ul style="list-style-type: none"> <li>• <a href="#">Work-related self-education expenses</a></li> <li>• <a href="#">Other work-related expenses</a></li> </ul>
If you have a foreign pension or annuity	<ul style="list-style-type: none"> <li>• <a href="#">Undeducted purchase price (UPP) of a foreign pension or annuity</a></li> </ul>
Always displayed	<ul style="list-style-type: none"> <li>• <a href="#">Interest deductions</a></li> <li>• <a href="#">Dividend deductions</a></li> <li>• <a href="#">Gifts or donations</a></li> <li>• <a href="#">Cost of managing tax affairs</a></li> </ul>

### **Deductions you will need to select if they are relevant to you**

- [Income protection, sickness and accident insurance premiums](#)
- other deductions which includes:
  - [Personal super contributions](#)
  - [Deduction for project pool](#)
  - [Forestry managed investment scheme deductions](#)
  - [Low value pool deduction](#)
  - [Any other deductions.](#)

### **Tax losses from earlier income years**

If you wish to claim [tax losses from earlier income years](#), you will need to select this item.

## **myDeductions tool**

If you have used our ATO app's [myDeductions](#) tool to record your deductions throughout the year, you can upload them to the ATO and we can then pre-fill your tax return.

To upload your deductions to the ATO:

1. Open the ATO app
2. Navigate to the *myDeductions* tool
3. Select 'Back up and upload'
4. Use your myGov login information to complete the upload process.

If you have completed the upload process after starting your *myTax* return, select **Get my deductions** on the **Personalise screen** to pre-fill your return with the recorded deductions.

For more information, see [myDeductions - FAQs](#).

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## Tax offsets, adjustments or credit for early payments

Complete the tax offsets and adjustments section and work out whether you to select additional items.

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Based on the information available in your return, myTax will automatically display some tax offsets and adjustments.

If you wish to claim a [credit for interest on early payments](#), you will need to select this item.

To work out whether you need to select additional items on the **Personalise return** screen, see:

### Tax offsets



Based on the information available in your return, myTax will automatically display some tax offsets.

## Adjustments



Based on the information available in your return, myTax will automatically display some adjustments.

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## Tax offsets

Based on the information available in your return, myTax will automatically display some tax offsets.

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The following tax offsets are automatically displayed

<p>If you</p> <ul style="list-style-type: none"><li>• have Australian Government pension or allowance, or</li><li>• are over 60 years old</li></ul>	<p><a href="#">Seniors and pensioners</a> (including self-funded retirees)</p>
<p>If you have foreign income and have paid foreign tax</p>	<p><a href="#">Foreign income tax offset</a></p>
<p>If you have income from Australian super income streams</p>	<p><a href="#">Australian super income stream offset</a></p>

Tax offsets you will need to select if they are relevant to you

- [Zone or overseas forces](#)
- [Small business income tax offset](#)
- other tax offsets, which includes
  - [Super contributions on behalf of your spouse](#) (if you had a [spouse](#))
  - [Net medical expenses tax offset](#) (if you are an [Australian resident](#) for tax purposes)

- [Invalid and invalid carer](#)
- [Landcare and water facility](#), and
- any other [non-refundable](#) or [refundable](#) offsets.

### National rental affordability scheme tax offset

If you wish to claim the national rental affordability scheme tax offset, you will need to select [Partnerships or Trusts](#) item, even if you have not received any partnership or trust distributions. While the *myTax* section is specific to partnerships and trusts, all individuals making a claim for this offset must use this section.

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## Adjustments

Based on the information available in your return, myTax will automatically display some adjustments.

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### The following adjustments are automatically displayed

If you were under 18 years old on 30 June 2016	<a href="#">Under 18</a>
If you were an <a href="#">Australian resident</a> for tax purposes for part of the income year	<a href="#">Part-year tax-free threshold</a>

### Adjustments you will need to select if they are relevant to you

- [Government super contributions](#)
- [Amount on which family trust distribution tax has been paid](#)



## **Our commitment to you**

We are committed to providing you with accurate, consistent and clear information to help you understand your rights and entitlements and meet your obligations.

If you follow our information and it turns out to be incorrect, or it is misleading and you make a mistake as a result, we will take that into account when determining what action, if any, we should take.

Some of the information on this website applies to a specific financial year. This is clearly marked. Make sure you have the information for the right year before making decisions based on that information.

If you feel that our information does not fully cover your circumstances, or you are unsure how it applies to you, contact us or seek professional advice.

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