



## Frequently asked questions

Answers to frequently asked questions about lodging using myTax.

**Last updated** 25 March 2024

### Who can use *myTax*?

You can lodge your 2014–15 tax return using *myTax* regardless of how you lodged your tax return for 2013–14 (or even if you didn't lodge), as long as you meet the **eligibility criteria**. It does not matter, whether or not you previously lodged:

- using *e-tax*
- on paper
- using a tax agent
- through a Tax Help volunteer, or
- at an ATO shopfront.

As long as you are **eligible**, you can use *myTax*:

- at work, the local library, café or other public computer
- on any mobile device including a tablet or smartphone
- at an ATO Shopfront (make an appointment)
- through Tax Help
- from overseas
- even if you are lodging for the first time, or
- even if you started preparing your return using *e-tax* (as long as you haven't lodged it).

Find out whether you're eligible.

## Getting started



How to access myTax and how to change method of lodgment.

## Completing your myTax return



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## Saving, lodging and printing



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## Getting started

How to access myTax and how to change method of lodgment.

Last updated 25 March 2024


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## How do I get access to *myTax*


*MyTax* is available through our online services, accessed through [myGov](#)  – a convenient way to access a range of government services online, all in one place.

Find out how to:

- create a myGov account (if you already have one you can skip this step)
- link the ATO to your myGov account.


## What if I start and then realise I am not eligible?

If you begin your tax return using *myTax*, and then realise you are not eligible or don't want to use it, you can simply exit or log out prior to lodging, and use an alternative lodgment method such as *e-tax*.

If you have already lodged your return using *myTax*, but forgot to include some of your details, you will need to request an amendment. You can do this by logging in to our [online services](#) .

## I have started my return in *e-tax*, can I still use *myTax*?

If you begin your tax return using *e-tax*, and change your mind, you can exit *e-tax* prior to lodging, and then start your return again using *myTax*.

If you have already lodged your return using *e-tax*, but forgot to include some of your details you can't lodge again using *myTax* or *e-tax*. You will need to request an amendment, by logging in to our [online services](#) .

# Completing your myTax return

Personalising your tax return and information about pre-fill.

Last updated 25 March 2024

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## Personalise your *myTax* return

You can personalise your *myTax* return – this:

- allows you to decide which sections you need to complete
- saves you having to answer questions that aren't relevant to you.

## We pre-fill your *myTax* return

We'll automatically pre-fill your return with all the available information reported to us by organisations, such as banks, employers, government agencies and private health insurers. Most of the information is available by early August.

After that, all you have to do is:

- review the pre-filled information, and

- enter any other missing details to complete your tax return.

Remember, **you** must make sure all the information on your return is correct before you lodge it, including all the pre-filled information.

If you think any pre-filled information is wrong, contact the relevant organisation to check the information before you make any change.

## **Why you should wait until early August to lodge using *myTax***

Historically, most information is reported to us and available for pre-filling by early August. All of your information may be available before this, but sometimes it takes a little longer.

For example, you may find that:

- some of your payment summaries have been pre-filled, but not all of them, or
- interest from one financial institution has been pre-filled but interest from another one hasn't been.

You can complete *myTax* from 1 July 2015 if you prefer not to wait for all your information to be pre-filled, but you will need all your records and statements to enter all your information yourself to complete and lodge your return.

## **What data can we pre-fill?**

We will automatically pre-fill for you all the information provided to us at the time you do your *myTax* return, including:

- most Australian Government allowances, pensions and payments
- salary, wages and other amounts that are shown on payment summaries by employers
- Australian superannuation income streams, annuity payments and lump sums
- interest from financial institutions
- public company dividends
- managed fund distributions

- private health insurance policy details.

## **What if all your data doesn't pre-fill?**

There are a few reasons why all your data might not pre-fill.

### **We haven't received the information yet**

We receive information from third-party providers from 1 July, with most information available by early August. Most information is ready to pre-fill within a couple of days of us receiving it.

### **We could not match the information to your record**

This can happen when information sent to us by third-party providers, such as name, date of birth, address and tax file number (TFN), does not match our records.

### **The information did not pass all processing checks**

There may be some errors in the information sent to us by the third-party provider, for example, there may be alphabetical characters in a 'dollars and cents' field.

## **What if you don't agree with the pre-filled information?**

You can change or delete pre-filled information if you have more current information in your statements or records.

If you don't understand or agree with the pre-filled information, you should:

- check the pre-filled information against your own records or statements, and
- clarify the discrepancy with the third-party provider – they may need to send amended information to us.

## **Avoid an audit – resolve discrepancies before you lodge**

If you amend the pre-filled information on your return, it is important to resolve any discrepancies with the third-party provider before you

lodge. This is because we routinely do information matching to identify discrepancies between the information in a lodged tax return and the information provided to us by the third-party providers.

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## Saving, lodging and printing

Questions about saving and submitting your tax return.

Last updated 26 March 2024

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## You can save and come back to myTax

You can save your *myTax* return by selecting the save and exit button at the bottom of the 'Personalise return' and 'Prepare return' screens.

To access your saved return log into our [online services](#) .

If new pre-filling data is available when you resume your *myTax* return, you will have the option to import this new data. If you select this option, you will be prompted to review it. Your return will show all the information previously pre-filled, changed and manually entered.

There could be duplicated data if you manually entered some information and elect to pre-fill new data. If this is the case, delete one of the entries.

You can save and exit, and resume your *myTax* return on any device.

## **We will tell you when you have lodged successfully**


After you select the 'Lodge' button, you will receive a 'Receipt' screen confirming that you have successfully lodged your return. The screen gives you an ATO receipt number, an estimate of your refund or amount owing.

Keep a copy of your receipt number for future reference.

## **Print or save the summary of your *myTax* return**

Select the 'Print or save' button. From here you can print or save the summary of your *myTax* return.

To save a copy using a mobile device, use the settings and functions particular to your device. You may need to use the screen capture facility if your device is not connected to a printer or able to save the file.

You have only one opportunity to print or save a copy of the summary of your lodged *myTax* return from the 'Receipt' screen. You can view your tax return later at any time by logging in to our [online services](#) .

## **What happens after you lodge your *myTax* return**

After you lodge your *myTax* return, it goes to processing. We process most tax returns within 2 weeks. You can check the progress of your return [here](#).


When your *myTax* return is processed, you will receive an email or SMS notification that you have a myGov mail item. Go to your myGov Inbox to read the mail item and view your notice of assessment. Your notice will confirm the amount of the refund we have deposited into your



bank account or the amount you have to pay, including payment options.

There may be scenarios where the amount of your estimate differs from the amount on the notice of assessment. These are outlined [here](#).

## **I have lodged but didn't save or print a copy of my tax return**

You can view your lodged *myTax* return by logging into our [online services](#) .

## **Where do I put income, deductions and tax offsets that *myTax* doesn't cater for?**

Although *myTax* has been expanded for 2015, there are still types of income, deductions and tax offsets that aren't catered for. If you have any of these, you will have to use e-tax.

We expect to incorporate all types of income, deductions and tax offsets into *myTax* for 2016.

## **I have lodged on e-tax or paper, but haven't received my assessment yet. Can I lodge on *myTax* to get it more quickly?**

No. Once you have lodged your return you can't lodge it again.

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## **Self-assessment**

Questions about self-assessment, pre-fill and penalties.

Last updated 1 January 1



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## **Is myTax still self-assessment?**

Yes, *myTax* is still self-assessment. Under the self-assessment system, you take responsibility for declaring all of your income and for all your claims for deductions and tax offsets when you sign your tax return. This includes when you sign it using an electronic signature.

If we pre-fill your tax return with information provided to us by your employer or other organisations, you are also taking responsibility for the correctness of that information when you sign your return.

We will issue a notice of assessment to you, usually without adjustment. However, your return may still be subject to review.

If you become aware that your tax return is incorrect, you need to request an amendment by logging in to our [online services](#) .

## **We match the information you include in myTax against the information provided to us**

We routinely match information to identify discrepancies between what is on your tax return and the information provided to us by employers and other organisations.

If the information that we pre-fill into your return is different to your statements and records, you should follow this up with your employer or the organisation that provided the information to us. They may need to report amended information to us.

## **Will you be penalised if something is missing?**

If we detect errors after we have issued your notice of assessment, we will contact you and may issue an amended assessment. You will be

obliged to repay any tax owing, and any interest and penalties we may impose.

If you make an honest mistake when following our information in *myTax* and you owe us money as a result, we will not charge you a penalty. However, you must pay the money owed, and we may also charge you interest. If correcting the mistake means we owe you money, we will pay it and pay you any interest you are entitled to.

If you voluntarily disclose mistakes in your return, we will take that into consideration in deciding what interest and penalties to impose.

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## System-related questions

System requirements and information about accessibility.

Last updated 26 March 2024

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## Can I use *myTax* from work, a library, a café, and the like?

Yes. If you are eligible to use *myTax*, you can log into [myGov](#)  and lodge your return from a device in any location where there is access to the internet.

For your own security, if you are using a computer or device in a public place, make sure:

- your personal information cannot be seen by others
- you log out of your myGov account when you are finished.

## **Like *e-tax*, do I have to use a laptop or personal computer?**

No, you can use *myTax* on a tablet, smartphone or any computer.

## **How is *myTax* different to *e-tax*?**

### **Fewer screens**

You can personalise your *myTax* return – only completing those parts of the tax return that are relevant to you. This makes the process shorter and easier.

*MyTax* 2015 is suited to people with simpler tax affairs. *MyTax* 2015 is not for people with less common types of income, deductions and tax offsets.

*E-tax* on the other hand, is a complete tax return to cater for any individual with even the most complex tax affairs. *E-tax* can be longer and more complicated.

### **Fully online product**

*MyTax* is fully online. You can use it on a tablet, smartphone or any computer.

*E-tax* needs to be downloaded and installed and can only be used on a PC or Mac.

## **Is my information secure when using *myTax*?**

Yes. Our online services provide you with an interactive and secure way to access information, services and functions. Find out more at [online security](#).

# What are the system requirements for *myTax*?

There are no special system requirements for *myTax*. You access it online and do not have to download it. As long as you have access to the internet, you can use *myTax* from any computer, tablet or smart phone.

You may experience issues if you are using an old version of Internet Explorer.

We suggest you update your browser to a newer version. Additional troubleshooting information is available [here](#).

# Is *myTax* accessible and suitable for the vision impaired?

We developed *myTax* with accessibility in mind, and we are working towards making it fully WCAG 2.0 compliant.


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# Contact us

How to contact us if you need help.

**Last updated** 26 March 2024

For help with ...	you can phone ...
Tax-related enquiries	Within Australia: <b>13 28 61</b> and select option <b>5</b>  From overseas: <b>+ 61 2 6216 1111</b>  Details about our business hours are available <a href="#">here</a> .
The device you are using	Within Australia: <b>1300 13 00 17</b>  From overseas: <b>+ 61 2 6216 2982</b>

myGov	<p>Go to the myGov site and look for your answer in <a href="#">need help?</a> </p> <p><b>or</b></p> <p>Contact the myGov Help Desk: dial <b>13 23 07</b> and select option <b>1</b>, Monday to Friday 7:00am to 10:00pm, and Saturday and Sunday 10:00am to 5:00pm (local time).</p>
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## 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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