



## Before you begin....

Instructions on completing your individual tax return using myTax.

**Last updated** 13 March 2024

## What's new this year?

*myTax* is now available for everyone, regardless of how easy or complex your tax affairs are. This includes individuals in business (sole traders), those who have rental properties and anyone else not eligible to use *myTax* in previous years.

For information on tax related changes see [What's new this year? 2016](#).

QC 48434

## Self-assessment

You are responsible for your tax return.


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Under the self-assessment system, you take responsibility for declaring all 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 also take responsibility for the

correctness of that information when you sign your tax 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](#) .

## Will you be penalised if something is missing?

We routinely compare information between what you include in your tax return and the information provided to us by employers and other organisations. If we detect discrepancies or other 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 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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## We will pre-fill your myTax return

What types of information are pre-filled and what you need to do.

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## What information can we pre-fill?

### What you need to do

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. This information is reported to us from 1 July, with most of it available by mid-August.

All you have to do is:

- review the pre-filled information by checking it against your records, and
- enter any other missing details to complete your tax return.

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

### Why you may want to wait until mid-August to lodge using *myTax*

Historically, most information is reported to us and available for pre-filling by mid- 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
- interest from one financial institution has been pre-filled but interest from another one hasn't been.

You can complete *myTax* from 1 July 2016 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 information yourself to complete and lodge your return.

### What information 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:

- Australian Government allowances, pensions and payments

- salary, wages, foreign employment income and other amounts that are shown on payment summaries by employers
- Australian superannuation income streams, annuity payments and lump sums
- interest from financial institutions including ATO imposed interest
- public company dividends including exploration credits
- managed fund distributions
- employee share scheme interests
- business and personal services income amounts that are shown on a payment summary including, voluntary agreements, labour hire and other specified payments
- contractor payments information reported by businesses in the building and construction industry
- details of share disposals as a reminder about possible capital gains tax events
- amounts received through a partnership distribution
- private health insurance policy details
- spouse details, if you indicated you had a spouse on 30 June 2015 in the previous year's tax return
- deductions that you have uploaded to your tax return via the myDeductions tool.

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


If you have checked the pre-filled information against your own records or statements and it doesn't match, you can change or delete the pre-filled information in *myTax*.

If you do this, it is important to resolve any discrepancies with the third-party provider before you lodge; they may need to send new or amended information to us to ensure our records are accurate.

# Contact us

How to contact us if you need help.

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For help with ...	you can phone ...
Tax or system-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> .
myGov	Go to the myGov site and look for your answer in <a href="#">need help?</a>   <b>or</b>  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 - Saturday and Sunday 10:00am to 5:00pm (local time).

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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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