



# myTax 2023 How to personalise your tax return

How to personalise your return using myTax.

Last updated 1 June 2023

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How to personalise your tax return when using myTax.

## Things to know

To complete the **Personalise return** screen, select items that apply to you.

We make some selections for you, based on:

- pre-fill information
- data we have on our records, such as
  - information from your last year's tax return
  - your uploaded data from the ATO app's myDeductions tool.

Make other selections that may apply to include them in your tax return.

The selections in the **Personalise return** screen will tailor your tax return on the **Prepare return** screen to your situation.

When you progress to the **Prepare return** screen, you may find that you have missed a selection. Even if you are part way through your return, you can simply return to the **Personalise return** screen and make further selections.

You can't remove any selections we make for you, even if you think the circumstances don't apply to you.

If you used **myDeductions** to keep records, you can upload your data. If you upload your data from myDeductions before you start your return in myTax, your data will pre-fill ready for use.

For a demonstration on how to personalise your return, [watch our tutorial](#).

## 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 tutorial

This video shows you how to personalise your tax return.

Media:Want to lodge a nil return?

<http://tv.ato.gov.au/ato-tv/media?v=bd1bdiuboiho6f>

We also have a range of [video tutorials](#)  that may assist you using myTax.

## Completing this section

Follow the steps below to make selections on the **Personalise return** screen that apply to you to include them in your tax return.

1. Check the answer to the question **Were you an Australian resident for tax purposes from 1 July 2022 to 30 June 2023?**

For more information, see **Are you an Australian resident for tax purposes?**

If **Yes**, go to step 3.

If **No**, go to step 2.

**Note:** We may have populated this for you based on information from your 2021–22 tax return. If your circumstances are different for 2022–23, you may need to change your answer.

2. If you were a resident for part of the year, enter the dates you were a resident.

If you were not a resident at any time during the year, leave both date fields blank.

3. Answer the question **Did you have a spouse at any time between 1 July 2022 and 30 June 2023?**

For more information, see **Spouse details**.

**Note:** We may have populated this for you based on information from your 2021–22 tax return.

4. Select the items that may apply to include them in your tax return.  
If you are unsure if an item applies to you, select the links for more information

- **Salary, wages or other income on an income statement/payment summary, Australian Government payments, or First home super saver (FHSS) scheme payment**
- **Income from Australian superannuation or annuity funds**
- **Australian interest, or other Australian income or losses from investments or property**  
This includes capital gains tax related items.
- **Sole trader or business income or losses, partnership or trust distributions (not from a managed fund)**  
This includes Personal services income.  
This includes Loss details (unless you only select Trusts or Net farm management deposits or repayments)
- **Foreign income**
- **All other income**

- Deductions
- Tax losses of earlier income years
- Tax offsets or Adjustments

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

5. Select **Next** to go to the **Prepare return** screen.

myTax will automatically display the selected items, and certain other items that apply, at the **Prepare return** screen.

## Can't see an item to select?

If you can't see an item to select, follow the links below to find out more:

- [Items always display](#)
- [Items automatically calculated for you](#)
- [Deductions displayed depending on your circumstance](#)
- [Tax offsets displayed depending on your circumstances](#)
- [Adjustments displayed depending on your circumstances](#)

## Items always displayed

No selections are necessary on the **Personalise return** screen for the following items, but they will display on the **Prepare return** screen.

These items are:

- Deductions for gifts, donations, interest, dividends, and the cost of managing your tax affairs
- Medicare and private health insurance
- Income tests

## Items automatically calculated for you

You aren't required to make a selection on the **Personalise return** screen for any of the following:

- low income tax offset

- PAYG instalments
- Study and training support loans including
  - Higher Education Loan Program (HELP)
  - Vocational and Educational Training Student Loan (VSL)
  - Student Financial Supplement Scheme (SFSS)
  - Trade Support Loan (TSL) debt
  - Student Start-up Loan (SSL)
  - ABSTUDY Student Start-up Loan (ABSTUDY SSL)

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

### **Deductions displayed depending on your circumstances**

Based on the information available in your return, myTax will display certain deduction items.

If you have salary or wage income, 'Work-related expenses' will be selected on the **Personalise return** screen, and the following items will display on the **Prepare return** screen

- Work-related car expenses
- Work-related travel expenses
- Work-related clothing, laundry and dry-cleaning expenses
- Work-related self-education expenses
- Other work-related expenses (includes working from home expenses)

If you have a foreign pension or annuity, no selection is necessary on the **Personalise return** screen, the following item will display on the **Prepare return** screen:

- Undeducted purchase price (UPP) of a foreign pension or annuity

### **Tax offsets displayed depending on your circumstances**

No selections are necessary on the **Personalise return** screen for the following items, but they will display on the **Prepare return** screen.

- **Seniors and pensioners** (including self-funded retirees) – if you have an Australian Government pension or allowance, or are over 60 years old
- **Foreign income tax offset** – if you have foreign income and have paid foreign tax.
- **Australian super income stream** – if you have income from Australian super income streams.

If you have business-related income selected on the **Personalise return** screen, the following item will display on the **Prepare return** screen.

- **Small business income tax offset**

If you wish to claim the **national rental affordability scheme tax offset**, you will need to select **Partnership** or **Trust** under **Sole trader or had business income or losses, partnership or trust distributions (not from a managed fund)**, 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.

## **Adjustments displayed depending on your circumstances**

No selections are necessary on the **Personalise return** screen for the following items, but they will display on the **Prepare return** screen:

- **Under 18** – if you were under 18 years old on 30 June 2023
- **Part-year tax-free threshold** – if you were an Australian resident for tax purposes for part of the income year.

## **Can't remove a selection?**

Where we make a selection for you, it is based on the information:

- provided to us by various organisations including employers, payers, financial institutions and other government departments
- we have on our records, such as from
  - your last year's tax return
  - your uploaded data from the ATO app's myDeductions tool

- the Depreciation and capital allowances tool or the Personal services income decision tool.

You will not be able to remove the selection.

If we make 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 – Business income statement/payment summary

The **Business/Sole trader income or loss** may be pre-selected if you received payments made:

- under a voluntary agreement
- under a labour-hire arrangement, or
- that are other specific payments.

Whilst you may think you are not in business or a sole trader, 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.

**Income earned through the sharing economy or other marketplaces**



**Cash income**



# Income earned through the sharing economy or other marketplaces

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## On this page

Ride-sourcing and food delivery

Renting out all or part of your home

Sharing assets (excluding accommodation)

Providing services or completing tasks

The sharing economy is economic activity through a digital platform (such as a website or an app) where people share assets or services (labour) for a fee. The income you earn through the sharing economy is assessable which means you:

- must declare all of your sharing economy income in your tax return
- can claim deductions for associated expenses.

For more information, go to [Sharing economy and tax](#).

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

## Ride-sourcing and food delivery

If you received income for 'ride-sourcing' or food delivery services, select:

- You were a sole trader or had business income or losses, partnership or trust distribution (not from a managed fund)
- Business/Sole trader income or loss
  - Business income or loss



## Renting out all or part of your home

If you received income from renting out a room or whole house or unit for a short-term basis, select:

- You had Australian interest, or other Australian income or losses from investments or property
  - Rent (Australian properties)

## Sharing assets (excluding accommodation)

If you received income from sharing assets (you own or lease) where you were:

- **not** carrying on a business, select
  - You had other income not listed above (including employee share schemes)
- carrying on a business, select
  - You were a sole trader or had business income or losses, partnership or trust distribution (not from a managed fund)
    - Business/Sole trader income or loss, then
    - Business income or loss

## Providing services or completing tasks

Your selection will depend on your relationship with the platform and other parties to the agreement.

### If you are not in business

If you received income for your services or completing tasks through a digital platform where you were:

- an employee of the platform, select

- You received salary, wages or other income on an income statement/payment summary, Australian Government payments, or First home super saver (FHSS) scheme payment
- Salary, wages, allowances, tips, bonuses etc. (including lump sum A, B, D or E payments)
- **not** an employee of the platform or carrying on a business, select
  - You had other income not listed above (including employee share schemes).

Additionally, if you want to claim deductions for expenses incurred related to your income, where you were:

- an employee of the platform, select
  - You had deductions you want to claim
    - Work-related expenses – You must have salary or wages income
- **not** an employee of the platform or carrying on a business, select
  - You had deductions you want to claim
    - Other deductions.

## **If you are in business**

If you received income for your services or completing tasks through a digital platform where you were carrying on a business, select:

- You were a sole trader or had business income or losses, partnership or trust distribution (not from a managed fund)
  - Business/Sole trader income or loss, then select either
    - Personal services income
    - Business income or loss.

This selection will enable you to show both your business income and expenses.

### Further information that may assist your choice

When earning income for services as a business, you need to consider whether personal services income (PSI) applies to you.

Income you earn mainly from your personal skills, efforts or expertise is classified as PSI. If the income is PSI, you will need to work out if special tax rules (the PSI rules) apply. If the PSI rules apply, they will affect how you report your income to us and the deductions you can claim.

You can use [our tool](#) to work out whether PSI was received and if the PSI rules apply.

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## Cash income

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If you are being paid cash, you must declare the cash as income when you lodge your tax return.

We use a range of tools to identify and take action against people and businesses that may not be correctly meeting their obligations.

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

If you receive cash for work you do as an employee, select:

- You received salary, wages or other income on an income statement/payment summary, Australian Government payments, or First home super saver (FHSS) scheme payment
  - Salary, wages, allowances, tips, bonuses etc. (including lump sum A, B, D or E payments).

If you want to claim deductions for expenses incurred related to your cash income as an employee, select:

- You had deductions you want to claim
  - Work-related expenses – You must have salary or wages income.

If you receive cash payments carrying on a business for goods or services, select:

- You were a sole trader or had business income or losses, partnership or trust distribution (not from a managed fund)
  - Business/Sole trader income or loss
    - Business income or loss.

This selection will enable you to show both your business income and expenses.

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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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