



Australian Government
Australian Taxation Office

Short tax return for individuals 2007

The form for people with simpler tax affairs

DO YOU HAVE TO LODGE A TAX RETURN?

If you are not sure whether you need to lodge a tax return, see page 49 of the *Short tax return instructions 2007*.

THIS FORM IS FOR PEOPLE WITH SIMPLER TAX AFFAIRS.

We consider that you have simpler tax affairs if you can answer 'yes' to questions 1 to 4, and 'no' to questions 5 to 8:

1 Were you an Australian resident for tax purposes for all of 2006-07?

2 Was your income only from the following sources?

- Employment, and you were **not** paid
 - lump sum amounts shown at A, B or E on your payment summary
 - travel or transport allowances other than car allowance
- Centrelink, Veterans' Affairs or other Australian Government payments
- Australian superannuation pensions or annuities
- Interest
- Dividends paid by Australian companies **and** your total franking credits were \$5,000 or less
- Small payments you received for your services (totalling less than \$5,000)

3 Are the following the only deductions you wish to claim?

If you do not wish to claim any deduction, answer 'yes' to this question.

- Work-related expenses for:
 - your car (using the cents per kilometre method with a maximum of 5,000 business kilometres)
 - special clothing
 - union fees or subscriptions to associations
 - overtime meals
 - protective items
 - seminars and conferences
 - trade publications
 - phone
 - minor expenses

- Bank account fees
- Gifts and donations of money
- Deductible amount of the undeducted purchase price (UPP) of an Australian annuity or superannuation pension
- Cost of managing your tax affairs

4 Are the following the only tax offsets you wish to claim?

If you do not wish to claim any tax offset, answer 'yes' to this question.

- Dependent spouse, no dependent children
- Senior Australians
- Pensioner
- Annuity and superannuation pension
- Private health insurance
- Zone (remote area) – one zone only, for 183 days or more in 2006-07
- Ongoing baby bonus – and you were not a transferee
- 30% child care tax rebate for approved child care during 1 July 2005 to 30 June 2006

If you are entitled to the following tax offsets we will calculate them for you automatically when we receive your short tax return:

- Low income
- Mature age worker
- Franking credits
- Beneficiary (for government support payments)

We consider that you have simpler tax affairs if you answer 'no' to all the following questions.

If you tick any box at questions 5 to 8, your answer to that question is 'yes' and you do not have simpler tax affairs. Go directly to **Other ways to prepare your tax return.**

5 Did you receive taxable income from any of the following sources?

- Travel or transport allowances (other than car)
- A capital gain or capital loss (for example, on the sale of shares or other assets)
- Running a business
- Rent you received
- An eligible termination payment
- Dividends from shares where your franking credits were more than \$5,000
- Amounts treated as dividends from a private company
- A lump sum for unused annual or long service leave or a lump sum payment in arrears
- A managed fund
- A foreign pension or other foreign income
- A distribution or interest from a trust or partnership
- Dividends from a managed fund or cash management trust
- A bonus from a life company or friendly society
- Any other taxable income not mentioned at question 2

6 Do you wish to claim any of the following deductions?

- Work-related car expenses (using a method other than the cents per kilometre method)
- Work-related travel or transport expenses (other than car)
- Work-related self-education expenses
- Work-related computers or software, professional libraries or home office expenses
- Interest charged on money or loans to buy shares
- Gifts and donations of property
- Gifts and donations to approved cultural or environmental organisations
- Gifts or donations for which you wish to spread your deduction over several income years
- Contributions relating to fund-raising events
- Australian film industry incentives
- Personal superannuation contributions
- Any other deductions not mentioned at question 3

7 Do you wish to claim any of the following tax offsets?

- Dependent spouse tax offset if you had any dependent children (see page 20 of the *Short tax return instructions 2007* to see if you can claim)
- Housekeeper, child-housekeeper, parent, spouse's parent, invalid relative
- Superannuation contributions you made on behalf of your spouse
- Net medical expenses over \$1,500
- Zone (remote area) tax offset for living or working in more than one zone, using qualifying days from previous years, or for defence service overseas
- Any other tax offsets not mentioned at question 4

8 Do any of the following apply to you?

- You had tax file number (TFN) amounts withheld on interest or dividend income because you did not provide your TFN.
- You wish to make your first baby bonus claim or you are a transferee.
- You had more than two private health insurance policies in 2006–07.
- Your health fund statement shows amounts based on projected figures which differ from the amounts paid.
- Your spouse is likely to have a Family Assistance Office debt (such as a family tax benefit overpayment or a child care benefit debt) and you wish to use your tax refund to repay the debt.
- Your spouse received an eligible termination payment (ETP).
- Your spouse received a lump sum payment in arrears.
- You have a prior year tax loss.
- You received emergency and general assistance payments from Centrelink.
- You wish to claim a credit for interest on early payments to the Tax Office.

If you ticked any of the boxes at questions 5, 6, 7 or 8, you cannot use the short tax return, as it does not cover all your circumstances.

OTHER WAYS TO PREPARE YOUR TAX RETURN

If you cannot use the short tax return because the questions do not cover all of your tax affairs, you can use either:

- e-tax to prepare and lodge the *Tax return for individuals 2007* online (download e-tax at www.ato.gov.au), or
- *TaxPack 2007*, and you may need *TaxPack 2007 supplement*.

From 1 July to 31 October 2007 you can get copies of *TaxPack 2007* and *TaxPack 2007 supplement* from most newsagents. Copies are also available from our Publications Distribution Service on **1300 720 092** and from Tax Office shopfronts all year.

COMPLETING YOUR SHORT TAX RETURN

You may need the following:

- payment summaries
- a notice of assessment issued in the last five years (needed if lodging by phone)
- bank statements and dividend statements
- evidence for deductions (such as receipts and car logbooks)
- health insurance details
- details of your spouse's income.

How to fill in your short tax return

- Use a black or blue pen.
- Use crosses (X) where applicable.
- If a question does not apply to you, leave the answer space blank.
- Print neatly using BLOCK LETTERS. (If you are mailing this short tax return and we cannot read your writing, we may have to contact you and this may delay the processing of your short tax return.)
- Do not show cents.

 Lodge your 2007 short tax return by 31 October 2007.

CHECKLIST

Check that you have:

- written your sequence number in the boxes provided at item **2** if you are lodging by phone
- completed item **45** – everyone must complete this item
- completed item **46** – if you had private health insurance of any type in 2006–07
- completed item **47** – if you were under 18 years old on 30 June 2007
- completed all the other items which apply to you
- provided totals (if more than zero) at items **19, 24, 32, 33** and **42**
- signed and dated the declaration at item **55**.

If lodging by mail, check that you have also attached your FTB claim, if you wish to claim it through the tax system.

NOTE

You no longer need to attach payment summaries to your short tax return.

LODGING YOUR SHORT TAX RETURN

You can lodge your short tax return either by phone or by mail. **If you lodge by phone we will process your short tax return within 14 days.** Our standard time for processing mailed short tax returns is up to six weeks.

LODGING BY PHONE

You can lodge your completed short tax return by phoning **13 28 65**.

This service is available 24 hours a day, seven days a week. To avoid busy periods phone before midday, after 5.00pm or on weekends.

What is the phone lodgment service?

Phone lodgment uses a speech recognition service. You will hear automated questions – simply answer each question by saying your response.

Generally, most calls are finished within 12 minutes and short tax returns processed within 14 days.

Your call will be recorded in case anything needs to be checked later.

IMPORTANT

You can ask a family member or friend to help you prepare your short tax return, but they cannot lodge your short tax return by phone on your behalf unless you have given them written consent. This must be attached to your short tax return which you retain for your records.

How to lodge your short tax return by phone

- 1** If any of your personal details, such as your name or postal address, have changed, phone us on **13 28 61** to have them updated before proceeding.
- 2** Write the sequence number from your notice of assessment in the boxes provided on the front page of the short tax return. The sequence number is located in the top right hand corner of your notice of assessment.

You can use the sequence number from one of your notices of assessment issued in the last five years.

See the example on page 3 of the *Short tax return instructions 2007*.

NOTE

If you cannot locate your notice of assessment from one of the last five years, phone the Personal Infoline on **13 28 61**.

- 3** Complete the enclosed short tax return, then read, sign and date the declaration at item **55**.
- 4** When you phone to lodge you must have **your completed short tax return** in front of you. Phone **13 28 65**, press **2** and **2** again.
- 5** When you phone to lodge, listen to each question asking for the information you have already written on your short tax return. Make sure you have heard the whole question before you begin to answer. Speak naturally, as in normal conversation – there is no need to slow down.
- 6** The service refers to letters in grey shaded boxes (for example, **D**) as 'label D'.
- 7** Listen carefully. At certain questions the system will repeat the information you have given it and ask you to confirm that the information is correct. If you made a mistake, or if the service is having a problem understanding you, the service will give you the option to say 'adjust' or 'restart' to correct any details.
 - To verify or change any of the amounts you have already entered say 'adjust'.
 - If you have missed a question say 'restart' and the service will start again from the Income section.
 - If you don't understand a question say 'help' and the service will give you more information.
- 8** If the service has trouble understanding your answer, you will be asked to repeat the information or the service may ask you to use the phone keypad instead.

See **What if something goes wrong?** on the next page for more information.
- 9** Once you have successfully lodged your short tax return, you will be given a receipt number at the end of your call. **Write the receipt number in the box on the bottom of the last page of the short tax return.** This receipt number is your official acknowledgment that you have lodged your short tax return. The phone lodgment service will then estimate your refund or tax payable while you are on the phone.

If you wish to confirm your lodgment, phone **13 28 65**, press **2** and **2** again, and say your tax file number (TFN) and sequence number. The service will acknowledge your lodgment and read out your receipt number. This is the only information you will be given.

IMPORTANT

Once you have lodged your short tax return over the phone and received a receipt number, you can't lodge your short tax return again. If you made a mistake, you will need to write to us and request an amendment – see page 51 of the *Short tax return instructions 2007*.

Do not mail us the short tax return if you have used the phone lodgment service. Keep it for your records.

What if something goes wrong?

If you don't understand a question, say 'help' and the service will give you more information.

NOTE

During your call you won't be connected to an operator. If you need help using the service, have difficulties, have any feedback or can't get through to lodge your short tax return, phone us on **13 28 61**.

What if the service doesn't understand me?

If the service doesn't understand you, try saying the information in a different way – for example, saying the amount of \$1,235 can be either 'one, two, three, five dollars' or 'one thousand, two hundred and thirty-five dollars'.

NOTE

Our service may have trouble understanding you if you are calling from a cordless or mobile phone because of interference. If you have trouble being understood, use a fixed landline phone.

What if I didn't get a receipt number?

If you don't get a receipt number at the end of your call, **your short tax return hasn't been lodged**. Phone back and you will be asked whether you wish to use the details from your previous call. You can either say 'no' and restart your lodgment, or say 'yes' and start from where your previous call ended.

How long will it take?

We expect it will take no longer than 12 minutes to lodge your short tax return by phone. However there is no time limit, should you need to take more time.

What if I have made a mistake on my short tax return?

If you have completed your lodgment and received a receipt number, then realised you made a mistake or omitted some information, you will need to correct it as soon as possible by requesting an amendment – see page 51 of the *Short tax return instructions 2007*.

Can I phone more than once?

Once you have finished lodging your short tax return over the phone you can't lodge another tax return for 2007.

How do I know I have finished?

You have finished lodging your short tax return only when you have been issued with a receipt number. If you don't receive a receipt number, or you could not complete your call because you need to update your personal details, you can phone back and reuse the details from the original call. To update personal details, phone **13 28 61**. If you wish to confirm your lodgment, phone **13 28 65**, press **2** and **2** again. Then enter your tax file number (TFN) and the sequence number. The service will acknowledge your lodgment.

How do I check the progress of my short tax return?

We will process your short tax return lodged by phone within 14 days, and the standard time for processing mailed short tax returns is up to six weeks. Allow three weeks if you lodged by phone or seven weeks if you mailed your short tax return before you phone to check its progress.

You can then phone our personal self-help service on **13 28 65**, press **1** and **1** again to use the 'Where's my refund' service. You will need your TFN to do this.

STOP

Do not send us the paper copy of your short tax return if you have lodged by phone and received a receipt number. Keep it for your records.

LODGING BY MAIL

Use the pre-addressed envelope that came with the short tax return and instructions. If you do not have the envelope, the postal address is:

**AUSTRALIAN TAXATION OFFICE
GPO BOX 9845
IN YOUR CAPITAL CITY**

The address must appear on your envelope as shown. Do not replace the words IN YOUR CAPITAL CITY with the name of your capital city. Because of a special agreement with Australia Post there is no need for you to include the name of your capital city or a postcode.

KEEP YOUR RECORDS

You must keep your records, usually for **five years**, unless you are subject to the shorter period of review (for more information, see **Keeping records** on page 51 of the *Short tax return instructions 2007*).

If lodging by mail, you should also keep a copy of your completed short tax return.

If you are lodging by phone, do not send us your short tax return – keep it for your records.

FAMILY TAX BENEFIT (FTB)

If you do not receive FTB as fortnightly payments from the Family Assistance Office (FAO), and you wish to claim FTB through the tax system, attach your FTB claim to your short tax return and lodge by mail.

If you need a claim form and instructions for FTB, phone the Publications Distribution Service on **1300 720 092**. For more information about FTB, phone the FAO on **13 61 50** or visit the FAO website at **www.familyassist.gov.au**