



# Supporting documents for myTax

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# myTax Before you begin

How to begin preparing and lodging your tax return using myTax.

1 June 2023


## Self-assessment

### You are responsible for your tax return

Under the self-assessment system, you take responsibility for declaring all your income and for being able to support 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.

## **We will pre-fill your myTax return**

### **What you need to do**

We'll 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 late July.

All you have to do is:

- review the pre-filled information by checking it against your records
- 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.

If you delete your pre-fill data, you can select to 'Restart' your tax return to see all of your pre-fill data. If you do this, you will lose any information that you have manually entered into your tax return.

## **Why you may want to wait until late July to lodge using myTax**

Historically, most information is reported to us and available for pre-filling by late July. 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 income statements and payment summaries have been pre-filled, but not all of them
- your income statement is 'Not tax ready'
- interest from one financial institution has been pre-filled but interest from another one hasn't been.

You can complete myTax from 1 July if you prefer not to wait for all your information to be pre-filled. If you do, 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 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 income statements or payment summaries
- 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 an income statement or payment summary including

- voluntary agreements
  - labour hire
  - other specified payments
- information reported on a Taxable payments annual report (TPAR), such as
  - payments and grants reported by government entities
  - payments reported by businesses providing
    - building and construction services
    - cleaning services
    - courier services
    - road freight services
    - information technology (IT) services
    - security, investigation or surveillance services
    - mixed services (a business that provides one or more of the services listed above)
- a reminder about possible capital gains tax events for
  - details of share disposals
  - transfers of property
  - crypto assets
- amounts received through a partnership distribution
- a reminder you received interest or dividends from a foreign financial investment in previous income years
- private health insurance policy details
- spouse details, if you indicated you had a spouse on 30 June 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, generally 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.

## TPAR payments or grants

You will not be able to change or delete the TPAR pre-filled information.

If the pre-filled TPAR record does not belong to you, or you have entered the income in another section of your return, you can ignore the record.

To ignore a TPAR record and lodge your tax return:

- When myTax requires you to select **Type of income**, select 'Other income'.
- At Prepare your return, select **Add/Edit** at **Other income**.
- At the **Other income** section, myTax will ask you to review your information at this section.
- Enter any information you must include at this section (excluding the pre-filled payments and grants that don't belong to you).
- When you are finished, select **Save and continue**.

The incorrect data will not be included in your tax return.

Otherwise, [contact us](#) on the individuals enquiries phone number, select option **3** and then option **2** so the matter can be investigated. Wait for the pre-filled record to be removed before restarting and lodging your tax return.

## Business transactions shown in Business income or losses

You will not be able to change or delete the business transactions information.

If the pre-filled business transaction record does not belong to you, or you have entered the income in another section of your return, you can ignore the record.

At the **Business/sole trader, partnership and trust income (including loss details)** section, select **Save and continue**.

The incorrect data will not be included in your tax return.

Otherwise, [contact us](#) on the individuals enquiries phone number, select option **3** and then option **2** so the matter can be investigated. Wait for the pre-filled record to be removed before lodging your tax return.

### **Capital gains or losses**

You will not be able to change or delete the following information only pre-fill for:

- details of share disposals
- transfers of property
- crypto assets.

If the information only pre-filled record does not belong to you, or you have entered the income in another section of your return, you can ignore the record.

At the **Capital gains or losses** section, select **Save and continue**.

The incorrect data will not be included in your tax return.

Otherwise, [contact us](#) on the individuals enquiries phone number, select option **3** and then option **2** so the matter can be investigated. Wait for the pre-filled record to be removed before lodging your tax return.

### **Foreign income, assets and entities**

You will not be able to change or delete the pre-filled reminder you received interest or dividends from a foreign financial investment in previous income years.

If the information only pre-filled record does not belong to you, or you have entered the income in another section of your return, you can ignore the record.

At the **Foreign income, assets and entities** section, select **Save and continue**.

The incorrect data will not be included in your tax return.

Otherwise, [contact us](#) on the individuals enquiries phone number, select option **3** and then option **2** so the matter can be investigated.

## Self-help in myTax

**Note:** Help for myTax will open in a new tab of your browser. When you have finished in a topic, close the help tab or click the tab in your browser that contains your return to return to myTax.

At times, preparing your tax return can be confusing, so we offer help within myTax which can be accessed via:

- myTax help button which can be seen on the right-hand side or top of the screen depending on the device you are using
- links within our screens to
  - myTax help
  - other resources on the ATO's website.

In myTax help, you will see help topics that:

- are relevant to the screen you can see
- are tailored to your personalisation selections
- generally present information with common headings, such as
  - **Things to know** – which covers
    - important background that you should know before you start to complete that part of your tax return
  - **Completing this section** – which covers
    - the documents and information that you might need
    - explanation of what may pre-fill your return
    - steps to complete that section of your return



- include links to other pages on our ATO website that may provide further detail.

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## myTax Contact details

How to check or update your contact details when completing your tax return using myTax.

1 June 2023

### Completing this section

We pre-fill myTax with contact details from your ATO records.

1. Are your **Phone and email** details in myTax up to date?
  - **Yes** – go to step 4.
  - **No** – go to step 2.
2. Provide one or more of the following (you need at least one)
  - Email address
  - Mobile phone number
  - Home phone number
  - Work phone number.
3. Select **Save** and go to step 4.
4. Are your **Residential address** and **Postal address** details in myTax up to date?
  - **Yes** – go to step 10.
  - **No** – go to step 5.
5. To update your address to an address

- in Australia – go to step 6.
- outside Australia – go to step 7.

6. In **Search address** field, enter an address and make a selection from the drop-down menu.

If your address is not listed in the drop-down menu, select **Use entered address** and enter your full address in the fields provided. Go to step 9.

7. If the address that requires updating is outside Australia, in the **Country** field make a selection from the drop-down menu. Go to step 8.

8. Enter your full address in the fields provided. Go to step 9.

9. Select **Save**.

10. Select **Next**.

## Using a 'care of' address


You can enter a 'care of' address as a postal address.


To enter a 'care of' address, enter 'C/-' into the **Search address** field and then select **Use entered address** from the drop-down menu.

Then enter 'C/-' and the applicable name into Address line 1 (for example, C/- John Simons) and a street address or 'post office' term in Address line 2 (for example, **22 Field Lane, SYDNEY, 2000 or GPO Box 9990, BRISBANE, 4000**).

## Update contact details with other agencies

If you update your contact details in myTax you will only be changing your contact details recorded with the ATO.

To update your contact details for other myGov member services, go to [myGov Update your details](#) .

To update your contact details for myGov security codes (to sign in to myGov) and your myGov Inbox notifications, go to [myGov Account settings](#) .

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## myTax Errors

This information can assist you with myTax errors you may encounter.

1 June 2023

### Auto save not available

If you see a message in myTax that auto save is not available, this means your tax return can't be automatically saved using your current browser.

MyTax saves the tax return to your local device storage (browser storage). The following may help resolve this issue.

- If you are using Safari, don't activate Private Browsing when accessing myTax.
- Increase your local device storage (browser storage) space.
- Enable browser storage to save your tax return on this device.
- Change your browser's settings to enable local storage to save your tax return on this device.

Alternatively, you could select **Save and exit** and myTax will attempt to save your tax return to the ATO server. If this is unsuccessful you will lose the information you have entered and will need to start again.

For more information, [contact us](#).

### Tax return unable to be saved

If you see a message in myTax that your tax return was unable to be saved, this means both our server and the save function on your device have failed.

This may be an intermittent issue. Return to your tax return and try again.

If the issue persists you will lose the information you have entered and will need to start again.

## Online amendments not available

If our online amendment function is not available and you can't wait for the online service to resume, you can use our [Request an amendment of income tax return for individuals](#) form.

Amendment requests made in writing using this form take up to 50 business days to process. Online requests are generally processed within 20 business days.

You can check the progress of your lodgments and amendments in our online services. From the home page select Manage tax returns, then select the financial year you are checking.

## Online form not available

If our online refund of franking credits form is not available and you:

- **can wait** for the online service to resume we can complete your form with your personal details, dividend records and the managed fund distributions that have been reported to us. This will save you time and make your claim more accurate. Forms lodged online are usually processed within 2 weeks.
- **can't wait** for the online service to resume, you can still use your [Application for refund of franking credits for individuals](#) form.

You can check the progress of your lodgments and amendments in our online services. From the home page select Manage tax returns, then select the financial year you are checking.

## Unable to view lodged tax return

If we are unable to display your lodged tax return on ATO online services for individuals, please check back in the next 24–48 hours.

# myTax Financial institution details

How to update or check your financial institution details when using myTax.

1 June 2023

## Things to know

It is important you provide your correct financial institution details as we will pay any tax refund into this account.

We will only pay tax refunds into recognised financial institution accounts located in Australia.

We accept financial institution account details held by:

- you, either solely or jointly – for example, Alan White, White's Widgets, or Alan & Mary White
- your registered tax agent
- your legal practitioner acting as trustee or executor for you.

You can't choose to have your refund sent to your spouse's account.

## Completing this section

We pre-fill myTax with financial institution details from your ATO records.

1. Are your financial institution details displayed in myTax up to date?

- **Yes** – go to step 4.
- **No** – go to step 2.

2. Provide your current financial institution details. We require

- Bank State Branch (BSB) – this number has six digits (don't include spaces or hyphens).
- Account number – this number has no more than nine digits (don't include spaces or hyphens).

- Account name – when entering the account name, include spaces between each word and initials where required. For example, JQ Citizen. If there are more than 32 characters in the account name, provide the first 32 only. Don't show the account type, such as cheque, savings or mortgage offset.
- Go to step 3.

3. Select **Save**.

4. Select **Next**.

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## myTax Privacy notice

Find out about our privacy notice for myTax and why we collect your personal information.

1 June 2023

We are authorised by the *Taxation Administration Act 1953* to request your tax file number (TFN). We will use your TFN to identify you in our records. It is not an offence not to provide your TFN. However, if you do not provide your TFN, you will be unable to use the ATO online lodgment option.

We are also authorised to ask for the information on your income tax return by the:

- *Income Tax Assessment Act 1936*
- *Income Tax Assessment Act 1997*
- *A New Tax System (Family Assistance) (Administration) Act 1999*
- *Superannuation (Government Co-contributions for Low Income Earners) Act 2003*
- *Superannuation (Unclaimed Money and Lost Members) Act 1999*

We need this information to help us administer taxation and super laws. If the information is not collected, it could increase the chance of

a delay or error in the processing of your assessment.


Certain information about your device/computer, your browser and the authentication process will also be logged when you authenticate online and use myTax.

Where authorised by law, we may collect certain information about you from third parties, such as financial institutions, health insurers and employers. We will use this information, and other information already held by us, to pre-fill certain items in myTax. You will remain responsible for the accuracy of the information that you submit through myTax, including any information which has been pre-populated for you. Therefore, you should check the accuracy of any information carefully before you submit your income tax return.

Where authorised by law, we may give information collected as a result of your lodgment, to other government departments and agencies, including:

- Department of Education
- Department of Employment and Workplace Relations
- Services Australia
- Department of Social Services
- Department of Veterans' Affairs
- Australian Bureau of Statistics
- Reserve Bank of Australia

We provide some taxpayer information to [treaty partners](#) overseas under international tax agreements.

If you have an Australian Business Number, some information on this form may be collected under the *A New Tax System (Australian Business Number Act) 1999* and will be used to update your details on the [Australian Business Register \(ABR\)](#) . Where authorised by law, selected information may be made publicly available and some may be disclosed to a wide range of government agencies, which include Commonwealth, state and local government agencies.

Our [privacy policy](#) contains important information about your privacy. This includes:

- information about how you can access and seek correction to information we hold about you; and
- how to make a complaint if you think we have breached the Australian Privacy Principles including how we will deal with any privacy complaints.

Should you have a privacy concern or need more information, [phone our privacy hotline or write to us](#).

To report an instance where you suspect your privacy has been compromised, see [Data breach guidance for individuals](#).

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## myTax Request an amendment for a refund of franking credit

Amend a refund of franking credits application when it can't be completed through ATO Online Services.

1 June 2023

### How to request an amendment

If you have forgotten to include some dividend information or made a mistake in the dividend information you provided on the form you lodged with us, it's important you request an amendment promptly.

There are two ways to request an amendment:

- complete the [Application for refund of franking credits for individuals form](#) with the new information and write 'Amendment' at the top of the form
- write a letter detailing the changes.
  - Include all the relevant information including:
    - your tax file number
    - your name



- your address
- a daytime phone number (if convenient)
- the year of the application for refund of franking credits you want to amend
- reason for amendment
- amount of amendment.
- Sign and date the letter and include the following declaration  
'I declare that all the information I have given in this letter is true and correct.'

Once you've completed the form or letter, submit your amendment by either:

- fax  
**1300 730 239**
- post  
**Australian Taxation Office**  
**GPO Box 9845**  
(insert the name and postcode of your nearest capital city)

If you claim too much franking credit, you might have to repay the extra amount with interest.

If your income has increased, check whether you need to lodge a tax return as a result of the increase. If you are unsure, see [Do I need to lodge a tax return?](#)

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## myTax Request an amendment

Request an online amendment to your tax return when the return was lodged between two and four years ago.

1 June 2023

Complete this section if you submitted a tax return between two and four years ago and you want to amend it online.

## Things to know

You can request an amendment to [fix a mistake or amend a return](#) to ensure that you pay the right amount of tax.

### Time limits on income tax amendments

The law sets time limits for amending your tax assessment.

The time limit is generally two years from the day after we give you the notice of assessment (taken to be the date on the notice). If you select a tax return that is within this time frame you will be eligible to lodge an amendment.

In limited circumstances the time limit is increased to four years, this applies where:

- you carried on a business, were a partner in a partnership that carried on a business or you were a beneficiary of a trust **and** the business, partnership or trust was **not** a [small business entity](#) in the income year you want to amend
- your amendment relates to [foreign income](#) received from a foreign transaction **and** the income was **not** from a [resident investment vehicle](#).

## Completing this section

You have selected a tax return to amend that is outside the usual two year [time limit on income tax amendments](#).

You can amend the tax return for up to four years if you meet one of the eligible scenarios.

1. On the **Request an amendment** screen, select the scenario that applies to you using the radio buttons
  - You carried on a business, were a partner in a partnership that carried on a business or you were a beneficiary of a trust – go to step 2.
  - Your amendment relates to income received from a foreign transaction – go to step 3.

If you didn't select any of the radio buttons – go to step 4.

2. Answer the question Was the business, partnership or trust a [small business entity](#) in the income year you want to amend?

- **Yes** – go to step 4.
- **No** – you are taken to the tax return online to lodge an amendment.

**Note:** If you select this scenario and your original tax return or amendment does not include a business, partnership or trust, your amendment may be cancelled.

3. Answer the question Was the income from a resident investment vehicle?

- **Yes** – go to step 4.
- **No** – you are taken to the tax return online to lodge an amendment.

**Note:** If you select this scenario and your amendment does not relate to income received from a foreign transaction, your amendment may be cancelled.

4. You can't submit an online amendment for this tax return. If you still want to pursue a change to your tax return, see [after the time limit has passed](#).

## Processing your amendment

If your amendment reduces the tax you owe, you'll receive a tax refund (unless you have other tax debts). If it increases the tax you owe, we generally treat it as a voluntary disclosure. You'll still have to pay any outstanding tax, but you're likely to receive concessional treatment for any penalties and interest charges that apply.

If you think we've made a mistake or want to dispute the law or facts relating to your return, see [other types of amendments or changes](#).

For more information, see [How we process your voluntary disclosure](#).

## Further information

### After the time limit has passed

If you want to amend a tax return after the time limit has passed, you may be able to lodge an objection. While the time limit for lodging amendments and objections is the same, you can request an extension of time to lodge an objection in some circumstances.

For more information, see [Decisions you can object to and time limits](#).

## Other types of amendments or changes

If you think we've made a mistake processing your tax return, you should contact us to see if we can sort it out without the need for an amendment.

If you want to dispute the law or the facts we have used to come to a decision about your tax affairs (including your income tax assessment) you'll need to lodge an objection.

If you do not wish to submit your amendment online, remember that time limits and eligibility rules for amendments apply regardless of how you submit your amendment request.

For more information, see:

- [Request an amendment to a business or super tax return](#)
- [How to object to a decision](#)
- [Contact us](#)

## Record keeping

You need to keep all your records and information relevant to your correction for at least five years from the date you lodge your amended tax return. If your time limit to amend a return is extended you need to keep the records until the end of the extension. If you are in a dispute with us keep the records for the later of five years from the date:

- you lodge your amended tax return
- the dispute is resolved.

For more information, see [Records you need to keep](#).

## Resident investment vehicle

Residential investment vehicle can be summarised as a company or fixed trust that:

- is an Australian resident
- doesn't have total assets exceeding \$50 million
- doesn't have property development or ownership in land as its primary activity at any time.

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## myTax Tax Help volunteer

Need help completing your individual tax return using myTax?

1 June 2023

What to do if you receive help from a Tax Help volunteer to complete your tax return using myTax.

### What is the Tax Help program?

If you need help lodging your tax return, you may be eligible for the [Tax Help program](#).

Tax Help is a network of accredited volunteers who provide a free and confidential service to help people complete their tax returns online using myTax.

Tax Help is available from July to October in all capital cities and many regional areas across Australia.

### What can volunteers help me with?

Volunteers can help you lodge your tax return or amendment online or claim a refund of franking credits.

If our volunteers work out that you don't need to lodge a tax return, they can help you complete a non-lodgment advice.

## Completing this section

Answer the question **How did you complete this tax return?**

- Select **Tax Help volunteer** if this tax return was completed with the assistance of an ATO accredited Tax Help volunteer.  
The Tax Help volunteer will then need to enter
  - Tax Help volunteer identifier
  - Tax Help centre identifier.
- Select **Prepared myself** for help received from all other sources.

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## Commonwealth Super Corporation lump sum in myTax

Use these steps if you get an error when you add your Commonwealth Super Corporation (CSC) lump sum payment in myTax.

26 August 2022

### Why you get an error

There are 2 reasons you may receive an error when adding your Commonwealth Super Corporation (CSC) super lump sum payment into your myTax return:

1. Your [tax withheld is greater than the gross payment](#) – which is the total of your **Taxed element** and **Untaxed element** amounts.
2. Your [tax and untaxed elements are both \\$0](#).

You don't need to contact CSC if you get one of these errors – instead follow the steps below. You will not be adversely impacted by this.

If you lodge via a registered tax agent, they will not get these errors and will be able to lodge your return with the correct CSC super lump

sum payment information.

If you need help lodging your tax return, [contact us](#).

## Tax withheld is greater than the gross payment

Follow these steps in myTax to lodge your tax return.

### Step 1: Personalise your return

- On the **Personalise return** screen
  - select **You had income from Australian superannuation or annuity funds**
  - select **Super lump sums**
  - select any other options that apply to you
  - select **Next**.

### Step 2: Prepare your return

- On the **Prepare return** screen
  - find **Income statements and payment summaries** and select **Add/Edit**
  - select **Add** at **Super lump sums** and enter the information from your CSC payment summary, including the Taxable and Tax-free components
  - for **Tax withheld** enter '\$0' – we will update this field with the correct amount when we process your tax return.

### Step 3: Ignore the tax estimate

- Enter all your other information in myTax.
- When you submit your tax return, **ignore the tax estimate** as it will not accurately reflect your tax information.

### Step 4: What we will do

- We will adjust the super lump sum section with your correct information before processing your tax return. This will ensure you

receive the correct tax outcome.

## Taxed and untaxed elements are both \$0

Follow these steps in myTax to lodge your tax return.

### Step 1: Don't include your CSC payment

- Don't enter any details from your CSC payment summary.

### Step 2: Ignore the tax estimate

- Enter all your other information in myTax.
- When you submit your tax return, **ignore the tax estimate** as it will not accurately reflect your tax information.

### Step 3: What we will do

- We will adjust the super lump sum section with your correct information before processing your tax return. This will ensure you receive the correct tax outcome.

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## myTax capital gains or losses digital resources

These videos show you how to enter information when you're using myTax to report capital gains or losses.

18 May 2023

These videos show you how to enter information when you're using myTax to report capital gains or losses.

## Disposing of a rental property

This video explains how to enter your capital gains and losses when you have disposed of a rental property or are applying the main residence exemption.



## **Managed funds and carried forward losses**

This video explains how to enter your capital gains or losses for managed funds and carried forward losses.

## **Disposing of shares**

This video outlines how to enter your capital gains or losses when you have sold or given away shares.

## **Disposing of crypto assets**

This video outlines how to enter your capital gains or losses for when you have disposed of crypto assets. Disposing of crypto assets can include trading, gifting or selling crypto.

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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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