# Completing a tax return



Scenario 1: Hospitality worker

So now you get to have a go at completing a tax return yourself. The ATO has an online services simulator for educational purposes. This includes myTax.

Go to ato.gov.au and search for 'online services simulator'.

Select the following options on the landing page and select Start.

Tell us about you \*

School student	$\sim$
Choose a client scenario *	
2. Under 18 years - lodge myTax	$\sim$

2 This is the home page of ATO online services. Before you complete a tax return, browse the information you can get from this page.

3 In the For action box you will see an Overdue message. It tells you that this taxpayer's tax return is overdue. Select the Prepare link to complete this tax return.

You are now in myTax.

# Step 1: Contact details

This is where you update your details if necessary. Note that myTax pre-fills the information. It is your responsibility to check it is correct and change it if it is not.



# Step 2: Financial institution details.

You need to make sure this information is accurate. because if you are owed a refund, it will be deposited directly into your bank account.



# Step 3: Personalise your return.

This is where you can personalise your return. Most of it is pre-filled, but you need to check the information is accurate. You can also upload information on the myDeductions app if you have used it.

1 Select Next.

# Step 4: Prepare your return

The ATO pre-fills information into myTax as it becomes available. You shouldn't rely solely on prefilled information. You need to check all the information and add any missing information to ensure your tax return is accurate.





CO 34.



1 Select Add/Edit to enter your deductions.



2 Add the following deductions to the tax return.

Your deductions	Amount
Compulsory uniform	\$120
Safety boots	\$124.45
Course on safe food handling	\$190.00
Donation to the Salvation Army	\$40.00

- 3 When you have entered your deductions, select Save and continue.
- 4 Check the details and if you know they are correct, select Calculate.
- 5 MyTax will tell you if you have errors to fix.
  - a. The first relates to income statements and payment summaries. In this example, you need to choose the occupation where you earned most income. Select Add/Edit and search 'Farm' in the Search occupations field and select an occupation. Select Save and continue.
  - b. The second has to do with Medicare and private health insurance. Select Add/Edit and under Medicare levy surcharge (MLS) select 'Yes' you are covered by private patient hospital cover. Then you will need to enter your Policy details; for the purpose of this exercise choose some codes and rebate figures. Select Save and continue.

6 Select Calculate to generate your Tax estimate.

> MyTax gives you an estimate of how much tax you will be refunded or if you have a tax bill.

7 You now indicate that the tax return, including pre-filled information, is true and correct, that you included all your income and you have proof of your deductions.

8 Select Lodge and print the tax return.







Scenario 2: Retail worker



So now you get to have a go at completing a tax return yourself. The ATO has an online services simulator for educational purposes. This includes myTax.

Go to **ato.gov.au** and search for 'online services simulator'.

Select the following options on the landing page and select **Start**.

Tell us about you \*

School student	$\sim$
Choose a client scenario *	
2. Under 18 years - lodge myTax	$\sim$

2 This is the home page of ATO online services. Before you complete a tax return, browse the information you can get from this page.

3 In the For action box you will see an Overdue message. It tells you that this taxpayer's tax return is overdue. Select the **Prepare** link to complete this tax return.

You are now in myTax.

# **Step 1: Contact details**

This is where you update your details if necessary. Note that myTax pre-fills the information. It is your responsibility to check it is correct and change it if it is not.



## Step 2: Financial institution details.

You need to make sure this information is accurate, because if you are owed a refund, it will be deposited directly into your bank account.



#### Step 3: Personalise your return.

This is where you can personalise your return. Most of it is pre-filled, but you need to check the information is accurate. You can also upload information on the myDeductions app if you have used it.

1 Select Next.

#### Step 4: Prepare your return

The ATO pre-fills information into myTax as it becomes available. You shouldn't rely solely on prefilled information. You need to check all the information and add any missing information to ensure your tax return is accurate.





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1 Select Add/Edit to enter your deductions.



2 Add the following deductions to the tax return.

Your deductions	Amount
Compulsory uniform	\$120.00
Union fees	\$195.00
Donation to the Mission Australia	\$40.00
Course on customer service	\$190.00

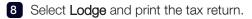
- 3 When you have entered your deductions, select Save and continue.
- 4 Check the details and if you know they are correct, select Calculate.
- 5 MyTax will tell you if you have errors to fix.
  - a. The first relates to income statements and payment summaries. In this example, you need to choose the occupation where you earned most income. Select Add/Edit and search 'Farm' in the Search occupations field and select an occupation. Select Save and continue.
  - b. The second has to do with Medicare and private health insurance. Select Add/Edit and under Medicare levy surcharge (MLS) select 'Yes' you are covered by private patient hospital cover. Then you will need to enter your Policy details; for the purpose of this exercise choose some codes and rebate figures. Select Save and continue.



6 Select Calculate to generate your Tax estimate.

> MyTax gives you an estimate of how much tax you will be refunded or if you have a tax bill.

7 You now indicate that the tax return, including pre-filled information, is true and correct, that you included all your income and you have proof of your deductions.



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# Completing a tax return

Scenario 3: Apprentice tradesperson or trainee



So now you get to have a go at completing a tax return yourself. The ATO has an online services simulator for educational purposes. This includes myTax.

Go to ato.gov.au and search for 'online services simulator'.

Select the following options on the landing page and select Start.

Tell us about you \*

School student	$\sim$
Choose a client scenario *	
2. Under 18 years - lodge myTax	$\sim$

2 This is the home page of ATO online services. Before you complete a tax return, browse the information you can get from this page.

3 In the For action box you will see an Overdue message. It tells you that this taxpayer's tax return is overdue. Select the Prepare link to complete this tax return.

You are now in myTax.

# Step 1: Contact details

This is where you update your details if necessary. Note that myTax pre-fills the information. It is your responsibility to check it is correct and change it if it is not.



# Step 2: Financial institution details.

You need to make sure this information is accurate. because if you are owed a refund, it will be deposited directly into your bank account.



# Step 3: Personalise your return.

This is where you can personalise your return. Most of it is pre-filled, but you need to check the information is accurate. You can also upload information on the myDeductions app if you have used it.

1 Select Next.

# Step 4: Prepare your return

The ATO pre-fills information into myTax as it becomes available. You shouldn't rely solely on prefilled information. You need to check all the information and add any missing information to ensure your tax return is accurate.







1 Select Add/Edit to enter your deductions.

Deductions 😧	Add/Ee



2 Add the following deductions to the tax return.

Your deductions	Amount
Tool belt	\$65.45
Safety boots	\$124.95
TAFE fees	\$295.00
Donation to World Vision	\$40.00

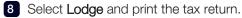
- When you have entered your deductions, select 3 Save and continue.
- 4 Check the details and if you know they are correct, select Calculate.
- 5 MyTax will tell you if you have errors to fix.
  - a. The first relates to income statements and payment summaries. In this example, you need to choose the occupation where you earned most income. Select Add/Edit and search 'Farm' in the Search occupations field and select an occupation. Select Save and continue.
  - b. The second has to do with Medicare and private health insurance. Select Add/Edit and under Medicare levy surcharge (MLS) select 'Yes' you are covered by private patient hospital cover. Then you will need to enter your Policy details; for the purpose of this exercise choose some codes and rebate figures. Select Save and continue.



6 Select Calculate to generate your Tax estimate.

> MyTax gives you an estimate of how much tax you will be refunded or if you have a tax bill.

7 You now indicate that the tax return, including pre-filled information, is true and correct, that you included all your income and you have proof of your deductions.



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# Completing a tax return



Scenario 4: Yourself

So now you get to have a go at completing a tax return yourself. The ATO has an online services simulator for educational purposes. This includes myTax.

Go to ato.gov.au and search for 'online services simulator'.

Select the following options on the landing 1 page and select Start.

Tell us about you \*

School student	$\sim$
Choose a client scenario *	
2. Under 18 years - lodge myTax	$\sim$

2 This is the home page of ATO online services. Before you complete a tax return, browse the information you can get from this page.

3 In the For action box you will see an Overdue message. It tells you that this taxpayer's tax return is overdue. Select the Prepare link to complete this tax return.

You are now in myTax.

# Step 1: Contact details

This is where you update your details if necessary. Note that myTax pre-fills the information. It is your responsibility to check it is correct and change it if it is not.



# Step 2: Financial institution details.

You need to make sure this information is accurate. because if you are owed a refund, it will be deposited directly into your bank account.



# Step 3: Personalise your return.

This is where you can personalise your return. Most of it is pre-filled, but you need to check the information is accurate. You can also upload information on the myDeductions app if you have used it.

1 Select Next.

# Step 4: Prepare your return

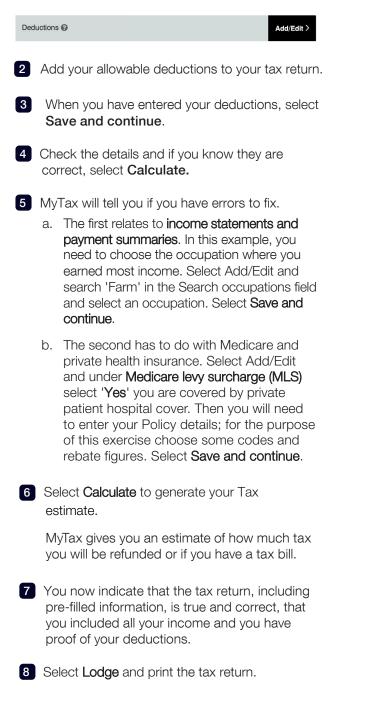
The ATO pre-fills information into myTax as it becomes available. You shouldn't rely solely on prefilled information. You need to check all the information and add any missing information to ensure your tax return is accurate.



CO 34.



1 Select Add/Edit to enter your deductions.



CO 34

