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'.

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

Tell us about you *
School student ⌄

Choose a client scenario *
2. Under 18 years - lodge myTax ⌄

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

1 Select **Next**.

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.

1 Select **Next**.

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 pre-filled information. You need to check all the information and add any missing information to ensure your tax return is accurate.

CO34.3

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Australian Government
Australian Taxation Office

Income statements and payment summaries

MyTax has pre-filled the salary you earnt as an Apprentice Hospitality worker at MACDONALD FARM

1 Select **Add/Edit** for Income statements and payment summaries

2 Enter 'Hospitality' in Occupation where you earned the most income

3 Select HOSPITALITY EMPLOYEE - COOK from the drop down box

4 Select **Save and continue**

Deductions

You will now need to enter some items that are allowable tax deductions relating to your employment.

1 Select **Add/Edit** for **Deductions** to enter your deductions.

2 Add the following deductions to the tax return.

Deduction category	Deduction type	Amount
Add: Work-related clothing, laundry and dry-cleaning expenses	**Select**: Compulsory work uniform	$120
Add: Work-related clothing, laundry and dry-cleaning expenses	Safety boots **Select**: Protective clothing	$124.95
Add: Work-related self-education expenses (The self-education maintained or improved a skill or specific knowledge required for your work activities as an emplyee	**Select**: Self-education type (The self-education maintained or improved a skill or specific knowledge required for your work activities as an employee **Select**: General expenses **Enter**: Donation to the Salvation Army	$190.00
Add: Gift or donation	**Enter**: Donation to the Salvation Army	$40.00

3 When you have entered your deductions, select **Save and continue**.

Medicare and private health insurance

You will notice a 'Required' message under Medicare and private health insurance.

1 Select **Add/Edit** and under **Medicare levey surcharge (MLS)** select **'Yes'** you are covered by private patient hospital cover.

2 You will notice a **Private health insurance** policy has been pre-filled but has an error. Select the **drop down arrow**.

3 At the **BUP policy line 1** section:

   a. Enter **Tax claim code** 'A'

   b. Enter $400 as **Your premiums eligible for Australian Government rebate**

   c. Enter $100 as **Your Australian government rebate received**

   d. Select **Benefit code** 30

   e. Select **Save and continue**

Calculate Tax Estimate and Lodge

1 Check that all your details are correct, select **Calculate** to generate your estimate.

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

2 You now tick a box to sign a declaration that the information you have entered, including the pre-filled information, is true and correct, that you have included all your income and you have the necessary receipts and records, including proof of your deductions.

3 Select **Lodge** and print the tax return.

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Completing a 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'.

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

Tell us about you *

School student

Choose a client scenario *

2. Under 18 years - lodge myTax

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

1 Select **Next**.

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.

1 Select **Next**.

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 pre-filled information. You need to check all the information and add any missing information to ensure your tax return is accurate.

CO34.3

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Australian Government
Australian Taxation Office

Income statements and payment summaries

MyTax has pre-filled the salary you earnt as a Retail Assistant at MACDONALD FARM

1 Select **Add/Edit** for Income statements and payment summaries

2 Enter 'Retail' in Occupation where you earned the most income

3 Select RETAIL ASSISTANT - CASHIER from the drop down box

4 Select **Save and continue**

Deductions

You will now need to enter some items that are allowable tax deductions relating to your employment.

1 Select **Add/Edit** for **Deductions** to enter your deductions.

2 Add the following deductions to the tax return.

Deduction category	Deduction type	Amount
Add: Work-related clothing, laundry and dry-cleaning expenses	**Select**: Compulsory work uniform	$120
Add: Other work-related expenses	**Enter**: Union fees	$195
Add: Work-related self-education expenses (The self-education maintained or improved a skill or specific knowledge required for your work activities as an emplyee	**Select**: Self-education type (The self-education maintained or improved a skill or specific knowledge required for your work activities as an employee **Select**: General expenses **Enter**: Course on customer service	$190.00
Add: Gift or donation	**Enter**: Donation to Mission Australia	$40.00

3 When you have entered your deductions, select **Save and continue**.

Medicare and private health insurance

You will notice a 'Required' message under Medicare and private health insurance.

1 Select **Add/Edit** and under **Medicare levy surcharge (MLS)** select **'Yes'** you are covered by private patient hospital cover.

2 You will notice a **Private health insurance** policy has been pre-filled but has an error. Select the **drop down arrow**.

3 At the **BUP policy line 1** section:

   a. Enter **Tax claim code** 'A'

   b. Enter $400 as **Your premiums eligible for Australian Government rebate**

   c. Enter $100 as **Your Australian government rebate received**

   d. Select **Benefit code** 30

   e. Select **Save and continue**

Calculate Tax Estimate and Lodge

1 Check that all your details are correct, select **Calculate** to generate your estimate.

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

2 You now tick a box to sign a declaration that the information you have entered, including the pre-filled information, is true and correct, that you have included all your income and you have the necessary receipts and records, including proof of your deductions.

3 Select **Lodge** and print the tax return.

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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'.

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

Tell us about you *

School student ⌄

Choose a client scenario *

2. Under 18 years - lodge myTax ⌄

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

1 Select **Next**.

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.

1 Select **Next**.

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 pre-filled information. You need to check all the information and add any missing information to ensure your tax return is accurate.

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Australian Taxation Office

Income statements and payment summaries

MyTax has pre-filled the salary you earnt as an Apprentice Electrician at MACDONALD FARM

1 Select **Add/Edit** for Income statements and payment summaries

2 Enter 'Apprentice' in Occupation where you earned the most income

3 Select APPRENTICE - ELECTRICIAN from the drop down box

4 Select **Save and continue**

Deductions

You will now need to enter some items that are allowable tax deductions relating to your employment.

1 Select **Add/Edit** for **Deductions** to enter your deductions.

2 Add the following deductions to the tax return.

Deduction category	Deduction type	Amount
Add: Work-related clothing, laundry and dry-cleaning expenses	Tool belt **Select**: Occupation specific clothing	$65.45
Add: Work-related clothing, laundry and dry-cleaning expenses	Safety boots **Select**: Protective clothing	$124.95
Add: Work-related self-education expenses (The self-education maintained or improved a skill or specific knowledge required for your work activities as an emplyee	**Select**: Self-education type (The self-education maintained or improved a skill or specific knowledge required for your work activities as an employee **Select**: General expenses **Enter**: TAFE fees	$295.00
Add: Gift or donation	**Enter**: Donation to World Vision	$40.00

3 When you have entered your deductions, select **Save and continue**.

Medicare and private health insurance

You will notice a 'Required' message under Medicare and private health insurance.

1 Select **Add/Edit** and under **Medicare levey surcharge (MLS)** select **'Yes'** you are covered by private patient hospital cover.

2 You will notice a **Private health insurance** policy has been pre-filled but has an error. Select the **drop down arrow**.

3 At the **BUP policy line 1** section:

a. Enter **Tax claim code** 'A'

b. Enter $400 as **Your premiums eligible for Australian Government rebate**

c. Enter $100 as **Your Australian government rebate received**

d. Select **Benefit code** 30

e. Select **Save and continue**

Calculate Tax Estimate and Lodge

1 Check that all your details are correct, select **Calculate** to generate your estimate.

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

2 You now tick a box to sign a declaration that the information you have entered, including the pre-filled information, is true and correct, that you have included all your income and you have the necessary receipts and records, including proof of your deductions.

3 Select **Lodge** and print the tax return.

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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'.

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

Tell us about you *

School student

Choose a client scenario *

2. Under 18 years - lodge myTax

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

1 Select **Next**.

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.

1 Select **Next**.

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 pre-filled information. You need to check all the information and add any missing information to ensure your tax return is accurate.

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Australian Taxation Office

Income statements and payment summaries

MyTax has pre-filled the salary you earnt at MACDONALD FARM

1 Select **Add/Edit** for Income statements and payment summaries

2 Enter your actual occupation or an occupation of your choice at **Occupation where you earned the most income**

3 Select **Save and continue**

Deductions

You will now need to enter some items that are allowable tax deductions relating to your employment.

1 Select **Add/Edit** for **Deductions** to enter your deductions.

2 Add some deductions you can claim from your actual job or might claim for your choice of employment.

3 When you have entered your deductions, select Save and continue.

Medicare and private health insurance

You will notice a 'Required' message under Medicare and private health insurance.

1 Select **Add/Edit** and under **Medicare levey surcharge (MLS)** select **'Yes'** you are covered by private patient hospital cover.

2 You will notice a **Private health insurance** policy has been pre-filled but has an error. Select the **drop down arrow**.

3 At the **BUP policy line 1** section:

   a. Enter **Tax claim code** 'A'

   b. Enter $400 as **Your premiums eligible for Australian Government rebate**

   c. Enter $100 as **Your Australian government rebate received**

   d. Select **Benefit code** 30

   e. Select **Save and continue**

Calculate Tax Estimate and Lodge

1 Check that all your details are correct, select **Calculate** to generate your estimate.

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

2 You now tick a box to sign a declaration that the information you have entered, including the pre-filled information, is true and correct, that you have included all your income and you have the necessary receipts and records, including proof of your deductions.

3 Select **Lodge** and print the tax return.

3 When you have entered your deductions, select **Save and continue**.

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