



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 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.

- 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.

- 1 Select **Next**.



Step 5: Add deductions

- 1 Select **Add/Edit** to enter your deductions.

| | |
|--------------|----------------------|
| Deductions ⓘ | Add/Edit > |
|--------------|----------------------|

- 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.



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Scenario 2: Retail worker



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- 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 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.

- 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.

- 1 Select **Next**.



Step 5: Add deductions

- 1 Select **Add/Edit** to enter your deductions.

| | |
|--------------|----------------------|
| Deductions ⓘ | Add/Edit > |
|--------------|----------------------|

- 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.
- 8 Select **Lodge** and print the tax return.





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Scenario 3: Apprentice tradesperson or trainee



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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 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.

- 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.

- 1 Select **Next**.



Step 5: Add deductions

- 1 Select **Add/Edit** to enter your deductions.

| | |
|--------------|----------------------|
| Deductions ⓘ | Add/Edit > |
|--------------|----------------------|

- 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 |

- 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.

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Completing a tax return

Scenario 4: Yourself



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Tell us about you *

School student



Choose a client scenario *

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- 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.

- 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.

- 1 Select **Next**.



Step 5: Add deductions

- 1 Select **Add/Edit** to enter your deductions.

Deductions ⓘ **Add/Edit >**

- 2 Add your allowable deductions to your tax return.

- 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.

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- 8 Select **Lodge** and print the tax return.