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# STANDARD INCOME TAX RETURN CHECKLIST

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## INCOME

- ☐ PAYG Summary Statements (in most cases we will be able to access these via the ATO)
- ☐ Australian Government Allowances (i.e. Newstart, Youth Allowance etc.)
- ☐ Other Income (Director Fees, allowances, bonuses, tips, consulting fees etc.)
- ☐ Bank Statements
- ☐ Trust or Partnership Distribution Statement
- ☐ Lump Sum Payment Statements (i.e. Eligible Termination Statements)

## DEDUCTIONS

- ☐ Receipts for Donations to charities
- ☐ Receipts for Work Related Car Expenses
- ☐ Receipts for Work Related Travel Expenses
- ☐ Receipts for Work Related Self Education Expenses (i.e. fees, books, computer costs, travel etc.)
- ☐ Receipts for Work Related Expenses (i.e. home office expenses, laundry, memberships, overtime meals, seminars, subscriptions, telephone, tools & equipment, union fees)
- ☐ Depreciable Items (i.e. Purchase of assets work > \$300 for work, any assets sold)
- ☐ Receipts for Income Protection Insurance
- ☐ Personal Superannuation Contributions

## OTHER INFORMATION

- ☐ Private Health Insurance Statement



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# FREQUENTLY ASKED TAX QUESTIONS

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***Q What if I have had to work from home due to COVID-19?***

***A*** Due to COVID-19 your working arrangement might have changed and you had to work from home. You might be able to claim deductions for additional running expenses such as electricity, phone and internet. You can also read more about what the ATO lists of what you can and can't claim [here](#).

***Please check with your tax advisor for further details***

***Q Can I claim travelling to and from work?***

***A*** No travelling between home and work is considered being private travel.

But you can claim travel expenses you incur in the course of performing your work duties.

For example, you can claim the cost of travelling:

- Directly between two separate workplaces – for example, when you have a second job (if one of these places isn't your home)
- If you had shifting places of employment – you regularly work at more than one site each day before returning home
- If you need to carry bulky tools or equipment that your employer requires you to use for work which you can't leave at your workplace – for example, an extension ladder or a cello.

*If you are in title to claim travel expenses and use the 'cent per kilometer method', you need diary entries showing how you calculated the kilometers you travelled*

***Please check with your tax advisor for further details***

***Q Can I claim work related uniform***

**A** You can claim a deduction for the cost of buying and cleaning occupation-specific clothing, protective clothing and unique, distinctive uniforms.

*For example*

- Chef specific clothing – checked pants
- Nurse uniform

*Clothing is unique if it has been designed and made only for the employer/ employee. Clothing is distinctive if it has the employer's logo permanently attached and the clothing is not available to the public.*

*You can not claim the cost of purchasing or cleaning a plain uniform.*

**Q Can I claim work related self-education expenses?**

**A** You may be able to claim a deduction for self-education expenses if your self-education relates to your current work activities as an employee or if you receive a taxable bonded scholarship.

*Examples of eligible expenses might include:*

- Course Fees
- Computer consumables
- Purchase of equipment or technical instruments (costing \$300 or less)
- Internet usage/ phone calls
- Postage/ stationery
- Textbooks
- Trade, professional or academic journals

***Please check with your tax advisor for further details***

**Q What other deductions might I be able to claim?**

**A** Home office expenses

*If you're an employee who regularly works from home, you may be able to claim a deduction for expenses relating to that work. These are generally home office running expenses, and phone and internet expenses.*

**Union fees, subscriptions to professional associations**

*You can claim a deduction for the above-mentioned expenses, provided the costs were paid in the year of claim and have supportive documents.*

**Mobile phone, internet and home phone expenses**

*If you use your phone or internet for both work and private use, you will need to work out the percentage that reasonably relates to your work use.*

*To claim a deduction of more than \$50, you need to keep records for a four-week representative period in each income year. These records may include diary entries, including electronic records, and bills. Evidence that your employer expects you to work at home or make some work-related calls from home will also help you show that you are entitled to a deduction.*

***Q Can I claim donations made to Charities?***

***A*** *You can only claim a tax deduction for gifts and donations made to organizations that have DGR status.*

*DRGs are organizations that are entitled to receive tax deductible gifts and are called "deductible gift recipients". If you are unsure if the organization you donated to is a DRG, please see one of our tax advisor.*

***Q Can I claim cost of managing tax affairs?***

***A*** *Yes fees to a recognized tax adviser are deductible in the year you incur them, as well as the travelling costs to obtain tax advice from a recognized tax agent.*

***Q. Can I claim a deduction for personal super contribution?***

**A** You may be able to claim a tax deduction for personal super contributions that you made to your super fund from your after-tax income, for example, from your bank account directly to your super fund.

Before you can claim a deduction for your personal super contribution you must have given your superfund a “Notice of intent to claim a deduction for personal super contribution” form and received an acknowledgement from your fund.

**Please check with your tax advisor for further details**

**Q Can I claim the costs of my Income Protection Insurance?**

**A** Yes you can claim the cost of premiums you pay for insurance against the loss of your income. But you cannot claim a deduction for

- Life insurance premiums
- Trauma insurance premiums
- Critical care insurance premiums

**Q How long does it take to process my tax return / when can I expect my refund?**

**A** The ATO states that their standard processing time allowed is 28 days; however usual expected processing time is between 7-10 days. No refunds will be issued from the ATO prior to the 16<sup>th</sup> July 2020.