Tax Time Tips

Hi, I’m Hannah from Services Australia.

And I’m Rob from the Australian Taxation Office.

Hannah: We’re here to make tax time as easy as possible and help you get your tax return right.

Rob: We’ve got information on how to prepare, lodge or not lodge a tax return, and what to expect next.

Hannah: At the end of each section, you’ll find helpful links like these to other videos or web pages. Choose a topic to get started.

**Preparing for tax time**

Rob: When you prepare for tax time there are things you’ll need to know. Like:

* do you need to lodge a tax return?
* what details you need to lodge, and
* information on Family Tax Benefit and Child Care Subsidy.

Choose a topic to learn more.

**Do I need to lodge a tax return?**

Rob: Usually need to lodge a tax return or tell the ATO why you don’t need to.

Use the ATO’s ‘Do I need to lodge a tax return?’ tool to check if you need to lodge. You can find this tool in your ATO online account through your linked services in myGov. For more information go to: [ato.gov.au/calculators-and-tools](http://www.ato.gov.au/calculators-and-tools)

**Why you may need to lodge a tax return**

Hannah: When you do your tax return, information about your income, and any dependents you might have is used to:

* Calculate the amount of Medicare levy you need to pay, and if you need to pay the Medicare Levy Surcharge.
* Work out if you had enough tax withheld from income, including any Government payments.
* Balance your Family Tax Benefit and Child Care Subsidy payments to make sure you were paid the right amount.
* And, calculate and confirm your child support assessment.

Each year is different so don’t assume your outcome will be the same as previous years. Getting a tax refund or family supplement payment can change based on your family income and circumstances. For more information go to: [my.gov.au/taxtime](http://www.my.gov.au/taxtime)

**What details you need to lodge**

Rob: Your online tax return will, by late July, automatically upload some information for you. You’ll need to check it before you lodge to ensure the amounts are correct and all your assessable income is included.

If you don't wait for your details to be pre-filled, you’ll have to find, calculate, and enter the information yourself. If you have a partner, you’ll need to include their income details too.

Services Australia: If you got any Government payments this financial year, these may need to be included in your return too.

If you got any Centrelink payments, most taxable payments will show on your Centrelink payment summary. There are some Centrelink payments that won’t appear on your summary. There’s more about this and how to find your information on the Services Australia website.

And if you paid child support, you’ll need to know how much. An easy way to find out is through your Child Support online account. Here’s some helpful links on getting your information together.

* [Use myGov to help prepare](https://my.gov.au/en/services/work/currently-employed/tax-when-you-work/getting-ready-for-tax-time/prepare-for-tax-time)
* [myTax instructions](https://www.ato.gov.au/individuals-and-families/your-tax-return/instructions-to-complete-your-tax-return/mytax-instructions)
* [Centrelink Payment Summary](http://www.servicesaustralia.gov.au/centrelink-payment-summary)
* [How tax time affects child support](https://www.servicesaustralia.gov.au/what-to-do-tax-time-if-you-pay-or-receive-child-support?context=60015)

**What to do at Tax Time**

Rob: Hi, in this section we’ll help you fill out and lodge your tax return or tell the ATO why you don’t need to lodge. Choose a topic to get started.

**When to lodge a tax return**

Rob: Your tax return is due by the 31 of October if you’re lodging yourself. Otherwise, you’ll need to engage a registered tax agent by that date.

Your online tax return will, by late July, automatically upload some information for you. You’ll need to check it before you lodge to ensure the amounts are correct and all your assessable income is included. If you don’t wait for your details to be pre-filled, you’ll have to find, calculate, and enter the information yourself.

If you’ve had an employer during the year, the ATO will tell you when your income statement is tax ready. Lodging too early could delay your tax return because the ATO might need to ask you for more information if you didn’t include something.

We find more people make mistakes if they lodge before all their information is pre-filled. If you’re having trouble with your tax obligations or you aren’t able to lodge by the 31 of October, contact the ATO. Even if you miss the due date, it’s important to lodge as soon as you can.

Hannah: If you get Family Tax Benefit or Child Care Subsidy, Services Australia gives you until the 30 of June of the following financial year to confirm your income. Remembering that the ATO deadline for tax returns is the 31 of October.

If you don’t need to lodge a tax return and you got Child Care Subsidy, you still need to tell Services Australia even if you’ve already told the ATO. For more information go to:

* [ATO contact details](ato.gov.au/contactus)
* [Balancing your family payments](servicesaustralia.gov.au/balancing)

**How to complete and lodge your tax return**

Rob: If you are lodging your tax return yourself, then the best way to do this is by using myTax in your ATO online account through myGov or the ATO app.

myTax has built in instructions to help you complete each section of your tax return. If you need help signing into your myGov account to lodge your tax return, you can contact the myGov helpdesk.

You can also get help lodging your tax return through the ATO’s free Tax Help program, National Tax Clinics or by using a registered tax agent. Here’s some helpful links on lodging your tax return.

* [Options when preparing and lodging a tax return](https://www.ato.gov.au/individuals-and-families/your-tax-return/how-to-lodge-your-tax-return)
* [myTax instructions](https://www.ato.gov.au/individuals-and-families/your-tax-return/instructions-to-complete-your-tax-return/mytax-instructions)
* [Tax Help Program](http://www.ato.gov.au/taxhelpprogram)

**If you don’t need to lodge**

Rob: If you don’t need to lodge a tax return, you’ll need to submit a non-lodgement advice to the ATO.

You can use your ATO online account through myGov, or the ATO app for this. A registered tax agent or the ATO’s Tax Help program can also help you.

Hannah: If you don’t need to lodge a tax return and you got Child Care Subsidy, you still need to tell Services Australia even if you’ve already told the ATO. Here’s some useful links on submitting a non-lodgement advice with the ATO and with Services Australia for Child Care Subsidy balancing.

* [Lodge a non-lodgment advice with the ATO](http://www.ato.gov.au/individuals-and-families/your-tax-return/how-to-lodge-your-tax-return/lodge-a-non-lodgment-advice)
* [Advise non-lodgement of a tax return with Services Australia](https://www.servicesaustralia.gov.au/advising-non-lodgement-tax-return?context=41186)

**After you lodge**

Hannah: Hi, this section has lots of helpful information for after you’ve lodged your tax return. Like tracking the progress of your return, your families balancing, or if you submitted a non-lodgement advice. Choose a topic to learn more

**Tracking the progress of your tax return**

Rob: You can check the progress of your tax return using your ATO online account through myGov, the ATO app, or the self-help phone line.

Most online returns process within 2 weeks, and paper returns, up to 10 weeks. If your tax return needs a manual check, it can take longer. You’ll get a message in your myGov Inbox when your tax return is complete.

If you get a suspicious email or text message claiming to be from us, don’t open it. If you think it might be a scam, there’s support available. Choose a link for more information.

* [How to track the progress of your tax return](https://www.ato.gov.au/individuals-and-families/your-tax-return/check-the-progress-of-your-return-and-refund#ato-Howtotracktheprogressofyourtaxreturn)
* [Report a scam](https://www.ato.gov.au/online-services/scams-cyber-safety-and-identity-protection/verify-or-report-a-scam)
* Self-help automated phone line, phone 13 28 65

**Tracking your families balancing or child support assessment**

Hannah: If you got Family Tax Benefit, Child Care Subsidy or have a child support assessment, Services Australia will get your income details from the ATO after you’ve lodged a return. The amount will be used to balance your family payments and to update your child support assessment.

You can track your Family Tax Benefit and Child Care Subsidy balancing outcomes in the Express Plus Centrelink app.

If you get child support, you’ll get a message with your updated child support assessment in your myGov app. Choose a link for more information.

* [Information about families balancing](http://www.servicesaustralia.gov.au/balancing)
* [Child support assessment information](https://www.servicesaustralia.gov.au/what-to-do-tax-time-if-you-pay-or-receive-child-support?context=60015)

**Your notice of assessment**

Rob: Before you get your notice of assessment, the ATO will check if you owe any tax or have any money owing to other government agencies, including Centrelink or Child Support. If you do, your tax refund may be used to pay this back first. The ATO will let you know if this happens.

After your tax return has been processed, you’ll get a notice of assessment sent to your myGov Inbox. You'll get an email, SMS, or notification from your myGov app.

This will show if you have a refund due or have a tax bill. If you did get a tax bill, there may be things you can do to avoid it in the future. Choose a link for more information.

* [How Services Australia recovers debts at tax time](http://www.servicesaustralia.gov.au/how-we-recover-debts-tax-time)
* [Your notice of assessment information](https://www.ato.gov.au/individuals-and-families/your-tax-return/check-the-progress-of-your-return-and-refund/your-notice-of-assessment)
* [Paying tax on multiple sources of income](https://www.ato.gov.au/individuals-and-families/jobs-and-employment-types/paying-tax-on-multiple-sources-of-income#undefined)
* [Deduct tax from your Centrelink payment](https://www.servicesaustralia.gov.au/deduct-tax-from-your-payment)

 **Information for families after you get your notice of assessment**

Hannah: Services Australia knows your family income, your Family Tax Benefit and Child Care Subsidy will be balanced. If you had a child support case and estimated your income, this will be updated too.

Services Australia will check if you’re owed money as a top up, or if you’re eligible for any supplements.

If you owe Centrelink or the ATO any money, these amounts will be used to reduce what you owe first. This is done even if you have a payment arrangement in place.

If we owe you money, we’ll pay this directly to you. If you did get a tax bill, there may be things you can do to avoid it in the future. Choose a link for more information on families balancing and your notice of assessment.

* [Information about families balancing](http://www.servicesaustralia.gov.au/balancing)
* [How Services Australia recover debts at tax time](http://www.servicesaustralia.gov.au/how-we-recover-debts-tax-time)
* [Your notice of assessment information](https://www.ato.gov.au/individuals-and-families/your-tax-return/check-the-progress-of-your-return-and-refund/your-notice-of-assessment)