



How to get ready to do your tax return

Doing your tax return involves 3 steps: Collect, Prepare and Lodge.

1. Collect

Collect the information you will need.

Follow the checklist below to make sure you include the right information in your tax return.

You need information for the income year from 1 July to 30 June.

2. Prepare

Decide how you will do your tax return.

If you're doing your own tax return you can lodge it online using [myTax](#) (in English) or use a [paper tax return](#) (in English).

To use myTax you'll need your myGov user ID and password. If you don't have a myGov account, you can set one up and link to the ATO at [my.gov.au](#) (in English).

If you're using a registered tax agent to lodge, you should make an appointment to talk with them.

3. Lodge

Lodge your tax return by the due date.

If you're doing your own tax return, you need to lodge it by 31 October every year.

If a registered tax agent is helping you, you need to start working with them before 31 October.

What information do I need for my tax return?

You'll need your:

- tax file number (TFN)
- bank account details (BSB and account number) in case you're owed money back
- details about your income:
 - income statements from all your employers or in your myGov account
 - government (e.g. Centrelink) payment summaries
 - investment income (e.g. interest on bank statements, statements of share dividends)
 - foreign income (e.g. overseas work or investments)
 - any other income (e.g. cash jobs, rental properties)
- details about your deductions and expenses:
 - records for work-related expenses (e.g. receipts, logbooks, work from home evidence)
 - receipts for gifts or donations you made to eligible charities and other organisations
- spouse (married or de-facto) details including their taxable income.

Registered tax agents are the only people allowed to charge a fee to lodge your tax

return. You can check whether your tax agent is registered at tpb.gov.au (in English).

When is the best time to lodge?

Employers, banks and other businesses give us details about the income they pay to taxpayers. If you wait until late July, we include these details in your tax return for you. This makes lodging your tax return quicker and easier.

If you're doing your own tax return, you have from 1 July to 31 October to lodge.

Good record keeping makes tax time easier

Keeping records from the start of each income year will make it easier to do your tax return. Keep your pay slips and receipts for all the deductions you want to include. A bank statement (on its own) generally isn't enough evidence to claim a deduction for work-related expenses.

Store your records in a safe place. The myDeductions tool in the ATO app can help you. Find out more at ato.gov.au/app (in English).

Where to get help

For more information, visit the ATO website at ato.gov.au/TaxTimeResources (in English).

You can also talk to a registered tax agent for help.

Disclaimer: This information is a general summary only and was current at 26 March 2024.

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