



# myTax 2018 How to personalise your tax return

How to personalise your return using myTax.

**Last updated** 28 June 2018

## On this page

[Want to lodge a nil return?](#)

[Watch our video](#)

[Can't see an item to select?](#)

Use the **Personalise return** screen to select items that apply to you.

Based on pre-fill information, we may have made some selections for you. You cannot remove any selections we made for you, even if you think the circumstances do not apply to you. For more information, read [Can't remove a selection?](#) below.

You can delete any pre-filled information that is not relevant to you from the **Prepare return** screen.

You can make other selections that may apply to include them in your tax return. This will tailor your tax return to your situation.

If you [can't see an item to select](#), it's because it will already be shown on the **Prepare return** screen or is not required to be included in your tax return.

[Watch our video](#) for a demonstration on how to personalise your tax return.

If you are unsure which items apply to you, or to read more about those items, select from the left hand side table of contents or from

the links below:

- [Residency](#)
- [Did you have a spouse?](#)
- [Salary, wages or other income on a payment summary, or Australian Government payments](#)
- [Income from Australian super and annuity funds](#)
- [Australian interest, or other Australian income or losses from investments or property](#)
- [Sole traders or you had business income or losses, partnership or trust distributions \(not from a managed fund\)](#)  
This includes [Personal services income](#).
- [Foreign income](#)
- [All other income, including employee share schemes](#)
- [Deductions](#)
- [Tax losses of earlier income years](#)
- [Tax offsets, adjustments or credit for early payment](#)

## Want to lodge a nil return?

If you don't need to select any items because you wish to lodge a nil return, then select **Next** at the bottom of the **Personalise return** screen, and follow the instructions.

## Watch our video

This video shows you how to personalise your tax return.

## Can't see an item to select?

Certain items apply to everyone and they are always displayed on the **Prepare return** screen.

These items are:

- [Medicare levy and Medicare levy surcharge](#)
- [Private health insurance](#)
- [Income tests](#)

Also, you are not required to make a selection on the **Personalise return** screen for any of the following:

- low income tax offset
- PAYG instalments
- Higher Education Loan Program (HELP), Student Financial Supplement Scheme (SFSS), Trade Support Loan (TSL) debt, Student Start-up Loan (SSL) or ABSTUDY Student Start-up Loan (ABSTUDY SSL).

We use the information in your tax return and our records to include these in your notice of assessment.

**Can't remove a selection?**



Understand why we have made a selection for you.

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## **Residency**



How to complete the residency section including how to determine if you are an Australian resident for tax purposes.

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## **Did you have a spouse?**



Understand how a spouse is defined so you can correctly complete this question.

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## **Salary, wages or other income on a payment summary, or Australian Government payments**



How to report salary, wages or other income.

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## **Income from Australian super and annuity funds**



How to complete the Income from Australian super and annuity funds section.

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## **Australian interest or other Australian income or losses from investments or property**



Complete this section to report relevant Australian investment, property and CGT related items.

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## **Sole traders or business income/losses, partnership or trust distributions (not from a managed fund)**



Complete this section to report on business income or losses and partnership or trust distributions.

## Foreign income

How to complete the foreign income section of your tax return.

## All other income, including employee share schemes

Select this item if you received any other income or payments.

## Deductions

How to complete the Deductions section including using the ATO app's myDeductions tool.

## Tax losses of earlier income years

Information to complete the tax losses section of your tax return.

## Tax offsets, adjustments or credit for early payments

Complete the tax offsets and adjustments section and work out whether you to select additional items.

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## Can't remove a selection?

Understand why we have made a selection for you.

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Where we made a selection for you, it is based on the information we have on our records (such as from your last year's tax return) or the information provided to us by various organisations including employers/payers, financial institutions and other government departments. You will not be able to remove the selection but can delete any pre-filled information that is not relevant to you from the **Prepare return** screen.

If we made a selection for you but you believe it does not apply to you, it may be because the information was provided to us incorrectly or you may not be aware of how the payment was made to you.

### Example - Business payment summary

The **Business/Sole trader income or loss** may be pre-selected if you received payments made:

- under a voluntary agreement
- under a labour-hire arrangement, or
- that are other specific payments.

Whilst you may think you are not in business or a sole trader, the payment was made as business and personal services income instead of employment income, which is what you might have expected. You should review the pre-filled information on the **Prepare return** screen and make any necessary adjustments (if required). If you believe the payment was made incorrectly, contact the payer so they can update their records and provide us with correct information.

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## Residency

How to complete the residency section including how to determine if you are an Australian resident for tax purposes.

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Based on pre-fill information, we have made the selection for you. If your circumstances are different for 2017–18, you may need to change your answer.

If you were an Australian resident for tax purposes from 1 July 2017 to 30 June 2018, select **Yes**. Otherwise, select **No** and enter only the dates when you were a resident.

Generally, we consider you to be an Australian resident for tax purposes if you:

- have always lived in Australia or you have come to Australia and live here permanently
- have been in Australia continuously for six months or more, and for most of that time you worked in the one job and lived at the same place
- have been in Australia for more than six months during 2017–18, unless your usual home is overseas and you do not intend to live in Australia
- go overseas temporarily and you do not set up a permanent home in another country, or
- are an overseas student who has come to Australia to study and are enrolled in a course that is more than six months long.

If you need help in deciding whether or not you are an Australian resident for tax purposes, we have online tools to help you. For more information, see [Work out your residency status for tax purposes](#).

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## Did you have a spouse?

Understand how a spouse is defined so you can correctly complete this question.

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Based on pre-fill information, we have made the selection for you. If your circumstances are different for 2017–18, you must change your answer.

If you had a spouse at any time between 1 July 2017 and 30 June 2018, select **Yes**. You will then need to provide your spouse details on the **Prepare return** screen.

Your spouse includes another person (of any sex) who:

- you were in a relationship with that was registered under a prescribed state or territory law
- although not legally married to you, lived with you on a genuine domestic basis in a relationship as a couple.

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## Salary, wages or other income on a payment summary, or Australian Government payments

How to report salary, wages or other income.

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If you received income or payments from one of the following sources, shown on a payment summary, you will need to select the items that are relevant to you:

- Employment related income
  - [Salary, wages, allowances, tips, bonuses etc.](#)
  - [Employment termination payments](#)
  - [Foreign employment income \(on a payment summary\)](#).  
Show all other foreign income in the [Foreign income](#) section.
- Australian Government payments, allowances and pensions, such as



- [Newstart, Youth Allowance and Austudy](#)
  - [pensions and carer payments](#)
  - [special payments](#)
- Other income shown on a payment summary
    - [Attributed personal services income](#)

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## Income from Australian super and annuity funds

How to complete the Income from Australian super and annuity funds section.

**Last updated** 28 June 2018

If you received income or payments from one of the following sources, shown on a payment summary, you will need to select the items that are relevant to you:

- [Australian super income streams](#) (including lump sum in arrears)
- [Australian annuities](#)
- [Australian super lump sums](#)

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## Australian interest or other Australian income or losses from investments or property

Complete this section to report relevant Australian investment, property and CGT related items.

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Australian investment and property related items you will need to select if they are relevant to you:

- [Australian interest](#) or [Australian dividends](#) - if you had any amount paid or credited to you.
- [Managed fund distributions](#) - if you received any distributions from a managed fund.
- [Rent \(Australian properties\)](#) - if you earned Australian rental income or your property was available for rent.

## Capital gains tax (CGT) related items

If you:

- had a CGT event and you made a capital gain or capital loss, select [Capital gains or losses that are not from a managed fund](#)
- only had a capital gain from a managed fund and no other CGT events, and you had no carried forward capital losses from prior years to apply against the current year capital gain, select **Managed fund distributions (including where distribution has capital gains and foreign income)**
- had a capital gain from a managed fund and a separate CGT event, OR a capital gain from a managed fund and a carried forward capital loss from a prior year, select **Managed fund distributions (including where distribution has capital gains and foreign income)** and [Capital gains or losses that are not from a managed fund](#)
- only had **Unapplied net capital losses from earlier years to carry forward but no CGT event this year**, only select this item.

# Sole traders or business income/losses, partnership or trust distributions (not from a managed fund)

Complete this section to report on business income or losses and partnership or trust distributions.

**Last updated** 28 June 2018

If you were a sole trader or had business income or losses, or you received partnership or trust distributions, you will need to select the items that are relevant to you:

- You had **Business/Sole trader income or loss**, then select either
  - [Personal services income](#)
  - [Business income or loss](#)
- You received distributions from
  - [Partnerships](#)
  - [Trusts](#)

You will be able to enter loss details relating to all of the above except trusts. Loss details section will be automatically displayed in the **Business/sole trader, partnership and trust income (including loss details)** section.

If you made [farm management deposits or had repayments](#), you will also need to select this item.

If you select any of the above items (except **Personal services income**), the [Small business income tax offset](#) will automatically be displayed in the **Offsets** section that you can complete if you qualify for the offset.

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## Foreign income

How to complete the foreign income section of your tax return.

**Last updated** 28 June 2018

If you received income or payments from one of the following foreign sources, you will need to select the items that are relevant to you:

- [Foreign pensions or annuities](#)
- [Foreign employment income \(not on a payment summary\)](#)
- [Other foreign income](#)

You will be able to enter loss details relating to carrying on a business overseas. **Loss details** section will be automatically displayed.

If you select this item, the [Small business income tax offset](#) will be automatically displayed in the **Offsets** section that you can complete if you qualify for the offset.

- [Foreign entities](#)

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## All other income, including employee share schemes

Select this item if you received any other income or payments.

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If you received any other income or payments not listed elsewhere, you will need to select this item. It includes:

- [Employee share schemes](#)
- Any other income, which includes
  - [Bonuses from life insurance companies and friendly societies](#)
  - [Forestry managed investment scheme income](#)
  - [Other income](#)

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## Deductions

How to complete the Deductions section including using the ATO app's myDeductions tool.

Last updated 28 June 2018

### On this page

[The following deductions are automatically displayed](#)

[Deductions you will need to select if they are relevant to you](#)  
[myDeductions tool](#)

Based on the selections on the **Personalise return** screen, myTax will automatically display some deductions.

## The following deductions are automatically displayed

If you have salary or wage income:

- [Work-related car expenses](#)
- [Work-related travel expenses](#)

- [Work-related uniform, occupation specific or protective clothing, laundry and dry-cleaning expenses](#)
- [Work-related self-education expenses](#)
- [Other work-related expenses](#)

If you have a foreign pension or annuity:

- [Undeducted purchase price \(UPP\) of a foreign pension or annuity](#)

Always displayed:

- [Interest deductions](#)
- [Dividend deductions](#)
- [Gifts or donations](#)
- [Cost of managing tax affairs](#)

## **Deductions you will need to select if they are relevant to you**

- Work-related expenses
- [Income protection, sickness and accident insurance premiums](#)
- Other deductions, which includes
  - [Personal super contributions](#)
  - [Deduction for project pool](#)
  - [Forestry managed investment scheme deductions](#)
  - [Low value pool deduction](#)
  - [Any other deductions](#)

## **myDeductions tool**

If you have used our ATO app's [myDeductions](#) tool during the year, you can upload your data to the ATO and we can then pre-fill your tax return.

To upload your data to the ATO:

1. Open **myDeductions** in the ATO app
2. Go to 'Settings'
3. Select 'Upload to tax return' and complete the process.

If you have completed the upload process after starting your myTax return, select **Get myDeductions** on the **Personalise screen** to pre-fill your return with your data.

For more information, see [myDeductions - FAQs](#).

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## Tax losses of earlier income years

Information to complete the tax losses section of your tax return.

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If you wish to claim [tax losses of earlier income years](#), you will need to select this item.

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## Tax offsets, adjustments or credit for early payments

Complete the tax offsets and adjustments section and work out whether you to select additional items.

**Last updated** 28 June 2018

Based on the information available in your return, myTax will automatically display some tax offsets and adjustments.

To work out whether you need to select additional items on the **Personalise return** screen, see:

- [Tax offsets](#)
- [Adjustments](#)

If you wish to claim a [credit for interest on early payments](#), you will need to select this item.

## Tax offsets



Based on the information available in your return, myTax will automatically display some tax offsets.

## Adjustments



Based on the information available in your return, myTax will automatically display some adjustments.

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## Tax offsets

Based on the information available in your return, myTax will automatically display some tax offsets.

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### On this page

[Tax offsets you will need to select if they are relevant to you](#)

[National rental affordability scheme tax offset](#)

## Tax offsets that are automatically displayed



- [Seniors and pensioners](#) (including self-funded retirees) - if you have an Australian Government pension or allowance, or are over 60 years old.
- [Foreign income tax offset](#) - if you have foreign income and have paid foreign tax.
- [Australian super income stream offset](#) - if you have income from Australian super income streams.

## Tax offsets you will need to select if they are relevant to you

- [Zone or overseas forces](#)
- [Small business income tax offset](#)
- Other tax offsets, which includes
  - [Super contributions on behalf of your spouse](#) (if you had a [spouse](#))
  - [Net medical expenses tax offset](#) (if you are an [Australian resident](#) for tax purposes)
  - [Invalid and invalid carer](#)
  - [Landcare and water facility](#)
  - [Early stage venture capital limited partnership](#)
  - [Early stage investor](#), and
  - any other [non-refundable](#) or [refundable](#) offsets.

## National rental affordability scheme tax offset

If you wish to claim the national rental affordability scheme tax offset, you will need to select [Partnerships or Trusts](#), even if you have not received any partnership or trust distributions. While the myTax section is specific to partnerships and trusts, all individuals making a claim for this offset must use this section.

# Adjustments

Based on the information available in your return, myTax will automatically display some adjustments.

Last updated 28 June 2018

## On this page

[Adjustments that are automatically displayed](#)

[Adjustments you will need to select if they are relevant to you](#)

## Adjustments that are automatically displayed

- Under 18 - if you were under 18 years old on 30 June 2018.
- [Part-year tax-free threshold](#) - If you were an [Australian resident](#) for tax purposes for part of the income year.

## Adjustments you will need to select if they are relevant to you

- [Government super contributions](#)
- [Working holiday maker net income](#)
- [Amount on which family trust distribution tax has been paid](#)

## **Our commitment to you**

We are committed to providing you with accurate, consistent and clear information to help you understand your rights and entitlements and meet your obligations.

If you follow our information and it turns out to be incorrect, or it is misleading and you make a mistake as a result, we will take that into account when determining what action, if any, we should take.

Some of the information on this website applies to a specific financial year. This is clearly marked. Make sure you have the information for the right year before making decisions based on that information.

If you feel that our information does not fully cover your circumstances, or you are unsure how it applies to you, contact us or seek professional advice.

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