



 Print whole section

Help and support to lodge your tax return

If you need help lodging your tax return our Tax Help program is free and helps individuals with simple tax affairs.

Tax Help program

Our Tax Help program is free and helps eligible people earning \$70,000 or less lodge their tax return online.

Become a Tax Help volunteer or open a Tax Help centre

Become a Tax Help volunteer and help people in your community prepare and lodge their tax returns online using myTax.

National Tax Clinic program

The National Tax Clinic program can help eligible individuals and small businesses with their tax affairs.

Lodge your tax return with a registered tax agent

Use a registered tax agent to prepare and lodge your tax return.

QC 102103

Tax Help program

Our Tax Help program is free and helps eligible people earning \$70,000 or less lodge their tax return online.

Last updated 5 February 2025

Media: About the Tax Help program

<https://tv.ato.gov.au/ato-tv/media?v=bi9or7odo7ji6u>  (Duration: hh:mm)

About the Tax Help program

From July to October each year, our accredited volunteers help people lodge their tax returns online. Our volunteers can also help you to:

- create a myGov account
- lodge an amendment to your tax return
- claim a refund of franking credits
- tell us if you don't need to lodge a tax return.

You can speak to a Tax Help volunteer:

- online
- by phone
- in person at Tax Help centres across Australia.

Eligibility for Tax Help

You are eligible for Tax Help if your income is around \$70,000 or less, have simple tax affairs for the income year and you **didn't**:

- work as a contractor – for example, a contract cleaner, taxi or uber driver
- run a business, including as a sole trader

- have partnership or trust matters
- sell shares or an investment property
- own a rental property
- have capital gains tax (CGT)
- receive royalties
- receive distributions from a trust, other than a managed fund
- receive foreign income, that is not a foreign pension or annuity.

If you are not eligible for Tax Help you may qualify for assistance from the [National Tax Clinic program](#).

Make an appointment

If you're eligible for the Tax Help program, you will need to make an appointment. You will also need to [create a myGov account and link it to the ATO](#).

When you are ready to make an appointment, phone us on **13 28 61** (select option **3**, then option **2**) for Tax Help services near you.

You will need to bring the following with you for your appointment:

- your myGov username or email you use for myGov and password – if you are unable to locate or remember your myGov sign in details, or don't have a myGov account, our volunteers can help
- your mobile phone to receive your myGov SMS security code
- your bank account details (BSB and account number)
- your tax file number (TFN)
- an original or amended notice of assessment from any one of the last 5 years
- income statements or payments summaries from all sources
- all your receipts for gifts, donations and work-related expenses
- details of any child support payments made
- details of your spouse's (married or de-facto) taxable income or a reasonable estimate if you had a spouse at any time during the

financial year.

For easy-to-read information about doing your tax or linking the ATO to your myGov account, go to:

- [How to create a myGov account and link to your tax and super](#)
- [Get ready to do your tax](#)
- [How to do your tax.](#)

QC 32082

Become a Tax Help volunteer or open a Tax Help centre

Become a Tax Help volunteer and help people in your community prepare and lodge their tax returns online using myTax.

Last updated 13 January 2026

About the Tax Help program

Tax Help is a free service to help [eligible people earning \\$70,000 or less and with simple tax affairs](#) manage their tax obligations.

From July to October each year, our Tax Help community volunteers work with community centres, to help prepare and lodge tax returns using myTax. Volunteers can also help clients to:

- create a [myGov account](#)
- lodge amendments
- claim a refund of franking credits
- tell us if clients don't need to lodge a return.

Volunteers can help clients online or by phone. They also provide help in person from Tax Help centres across the country.

Eligibility to be a Tax Help volunteer

We're looking for volunteers to join our [Tax Help program](#). You don't need any special experience to become a Tax Help volunteer. We provide training and support to assist you.

You can become a Tax Help volunteer if you:

- are at least 18 years old
- have lived in Australia permanently for the last 2 years
- pass a pre-engagement check (which includes a police records check)
- complete online training.

Training for Tax Help volunteers

Tax Help will provide training between March and July each year. We will introduce you to [myGov](#) and our online platform for lodging tax returns, myTax. We will show you how to prepare and lodge tax returns online.

Training is self-paced and online so you will need access to a computer and the internet.

Benefits to volunteering

There are many benefits to volunteering, not least of which is that it makes you feel good! By becoming a Tax Help volunteer, you'll also:

- learn and share new skills
- build your resume with real work experience
- create professional networks and make new friendships
- benefit your local community
- boost your self-esteem and self-confidence.

How to apply to volunteer

Applications for Tax Time 2026 volunteers are now open.

If you are interested in becoming a Tax Help volunteer, send your expression of interest by email to ceataxhelp@ato.gov.au. Include your:

- name
- contact number
- suburb
- postcode
- State or Territory.

Media: That's how Tax Help helps

<https://tv.ato.gov.au/ato-tv/media?v=bd1bdiunih5ufh>  (Duration: hh:mm)

Become a Tax Help centre

We're also looking for community centres that want to support our face-to-face Tax Help service.

Tax Help centres are located nationwide at venues such as libraries, community centres and multicultural and other community organisation sites.

If you or your organisation would like to assist people in your community, the Tax Help program is one way you can help.

From July to October every year Tax Help volunteers work with Tax Help centres to assist people with simple individual tax affairs to lodge online.

If you are interested in being a Tax Help centre, send your expression of interest to ceataxhelp@ato.gov.au. Include:

- the name of your organisation
- a contact person
- contact number
- suburb
- postcode
- State or Territory.

QC 45963

Tax Help centre information

Tax Help centre information for Tax Help centres only.

Last updated 1 September 2025

What is Tax Help?

Tax Help is a community program that helps and educates people with low income with their individual income tax affairs. People seeking help from a Tax Help centre are clients. Clients' tax affairs are kept private and confidential.

Community volunteers are trained to give free help to people to prepare and lodge their tax returns online during tax time. Tax Help volunteers are not ATO employees. Volunteers and centres can't accept payment or other recompense for providing this service. Penalties apply for anyone other than registered tax agents charging a fee for a service.

The Tax Help program encompasses the principles of the [ATO Charter](#) – the relationship between the ATO and clients which is based on mutual trust and respect. Key elements include:

- clients' expectations of the ATO
- their rights and obligations, and
- what they can do if not satisfied.

Tax Help centres

To participate in Tax Help as a Tax Help centre, your organisation must agree to conditions of participation.

Clients must register with myGov before their Tax Help appointment and bring their myGov username and password to the appointment. You may help clients register with myGov.

Centrelink clients will not be supplied with a paper payment summary, the ATO pre-fill service will complete this information for tax returns prepared online.

Administration

The centre's nominated contact phone number must be available and attended during your opening hours for bookings.

If the centre's opening hours change during tax time, notify Tax Help so we can avoid unnecessary referrals. For example, the centre may close during school holidays or be fully booked for Tax Help appointments.

The centre must use forms supplied by the ATO. These include specific forms for recording appointments and making reimbursement claims.

Advertising

We will provide posters and flyers promoting Tax Help. Posters are available in 2 designs. One includes our phone number and the other has provision for you to include the centre contact information. You can choose the design which best suits your needs or use both.

We suggest placing posters and flyers at strategic points in your centre as well as around other local community areas, such as libraries and community centres. If you need more, contact Tax Help.

Stationery and publications

You must use the stationery, publications and forms we provide. We deliver these to Tax Help centres in early July.

[Tax Help appointment confirmation \(PDF, 130KB\)](#) – provide the appointment confirmation sheet to clients when they make an appointment. The confirmation sheet advises the client what they need to bring to their appointment.

[Tax Help appointment record \(PDF, 573KB\)](#) – this shows the names of the clients that Tax Help volunteers in your centre will be helping. Tax Help volunteers hand these back to the centre manager (or nominee) at the end of the day.

[Tax Help disclaimer \(PDF, 164KB\)](#) – each Tax Help client must complete the disclaimer, which places the responsibility of the information in the tax return with them.

[Tax help volunteer reimbursement claim form \(PDF, 206KB\)](#) –

accredited Tax Help volunteers will be reimbursed for eligible out-of-pocket expenses they incur while participating in the Tax Help program.

[Tax Help centre reimbursement claim \(PDF, 193KB\)](#) – Tax Help centres will be reimbursed for eligible out-of-pocket expenses they incur while participating in the Tax Help program.

We provide new forms each year so please destroy any previous years' stock. Return *Appointment records, Disclaimers* for online lodgments and *Reimbursement claims* to Tax Help at the end of each month. Paper returns and forms are supported by Tax Help.

Envelopes

We provide **Reply paid envelopes** for use by the centre. This is to send *Appointment records, Disclaimers, Reimbursement claims* and any other information we request to Tax Help at the end of the month.

Neither the centre nor volunteer can post clients' printed tax returns or forms to the ATO. The client is responsible for providing the postage and posting the documents.

Contact Tax Help if you need more envelopes.

Appointment confirmation

You must issue the appointment confirmation sheet to clients when they make an appointment. It advises clients what to bring to the interview.

To provide the form to the client:

1. Complete the [Tax Help appointment confirmation](#).
2. Select 'Print form'.

This form confirms the time, date and place of the Tax Help appointment with the client. It includes information about what the client needs to do to prepare for, and bring to, the appointment. For example, creating a myGov account and linking to the ATO.

It is important each client is provided with an appointment confirmation form. It is available in either paper or electronic form and should be given to the client either in person, or by email or post.

Remember to allow enough time for the client to receive the confirmation and prepare for the appointment.

Appointment record

Record client bookings made for each volunteer. Give the appointment record to the volunteer when they arrive.

The Tax Help appointment record form must be used to record booked appointments. You may use a version you develop to record booked appointments, but it **must** have the same fields on it as the Tax Help appointment record form provided to you.

The volunteer records statistical data about the appointments on this form and returns it to the centre when they have finished their appointments for the day.

At the end of each month, forward the appointment records along with disclaimers to Tax Help in the supplied reply-paid envelopes. This enables Tax Help to record client interactions and promptly process volunteer reimbursement claims. For privacy reasons, you must keep completed appointment records in a secure location at all times.

You can't use the client information on appointment records for anything other than Tax Help.

Disclaimer

The [Tax Help disclaimer](#) is a declaration by the client that a Tax Help volunteer has helped them complete their tax return and that the volunteer is not responsible for the information provided. This also includes an acknowledgment by the client that any interactions after lodgment of the tax return or form will be directly with the ATO.

The disclaimer is signed by both the client and the volunteer. For online lodgments, the volunteer attaches the disclaimer to appointment record and gives them to you at the end of the day.

At the end of each month the centre is to forward the disclaimers (with the appointment records) to the client liaison officer (CLO) in the supplied reply-paid envelopes.

For privacy reasons, completed disclaimers must be kept in a secure location at all times.

Disclaimers for any printed tax returns or forms are attached to the tax return or form to be posted to the ATO by the client.

Providing feedback

We encourage Tax Help centre coordinators, staff and Tax Help volunteers to provide feedback.

Tax Help may also ask you to provide statistical information. We value your input and rely on this information to improve the Tax Help program and plan for the future.

Discussion groups, informal mid-season meetings and the annual Tax Help presentation are opportunities to provide feedback. Tax Help will let you know prior to any of these events.

You may be invited to complete an evaluation questionnaire on topics that affect your centre. Tax Help volunteers are also invited to participate in evaluations on topics such as Tax Help training and accreditation.

Recognition of service

To mark our appreciation of the centre's involvement in this community program, we issue a certificate of participation.

At the end of tax time, if an end of season presentation is held in your area, a representative will be invited to attend.

Role of the centre coordinator

The centre coordinator's role is to oversee the operation of Tax Help in the centre and to ensure that the following requirements are met:

- Volunteers have a private room or workspace to conduct their appointments. The area should be clean, comfortable, and safe.
There should be a:
 - desk and at least 2 chairs
 - shelf or drawer for the volunteer to store spare stationery items and personal belongings
 - phone (if there is no phone in the room, make sure there is one in a private area nearby).
- Safety of volunteers is maintained by ensuring they are not left alone at the centre and that they are aware of the centre's security and health and safety policies.

- ATO equipment is securely stored, used appropriately, and returned in good working condition at the end of tax time.
- Maintain regular contact and raise issues with Tax Help as they occur.

Before tax time

The following requirements should be met:

- In consultation with Tax Help, recruit volunteers.
- Introduce volunteers to key people within the centre.
- Liaise with volunteers to confirm hours of attendance, length of appointments and arrange rosters.
- Ensure those responsible for booking Tax Help client appointments are aware of their responsibilities.

During tax time

The following requirements should be met:

- Promote Tax Help in the centre and community.
- Ensure privacy of Tax Help clients.
- Give volunteers access to stationery items supplied by the ATO.
- Request additional stationery as required.
- Ensure timely submission of administrative documents:
 - appointment records and disclaimers
 - reimbursement claims for out-of-pocket expenses.

After tax time

The following requirements should be met:

- Return ATO equipment as per Tax Help instruction.
- Provide feedback to Tax Help.
- Where possible, attend ATO end of season function.

Reimbursement claim

The [Tax Help centre reimbursement claim form](#) is for claiming eligible expenses incurred by the centre while participating in Tax Help. To make a claim, forward the completed form to Tax Help at the end of the month.

The [Tax Help volunteer reimbursement claim form](#) is for accredited Tax Help volunteers claiming eligible out-of-pocket expenses they incur while participating in the Tax Help program.

The forms are updated each year, so ensure you use the correct form for the year you are claiming. If you are unsure if an expense is eligible, contact Tax Help **before** incurring the expense.

To avoid delays in processing, complete all information requested and return the claim to Tax Help by email.

We will only reimburse claims relating to the current tax time. Final claims must be submitted by 30 November in the year they were incurred.

Office Supplies

To claim a reimbursement for office supplies, you must provide information about the expense and a justification, along with the supporting tax invoice.

Phone

We will reimburse phone calls made from the centre's landline to:

- confirm client appointments
- contact volunteers about Tax Help
- phone Tax Help.

You will be reimbursed at the rate charged by your service provider. You must provide documentation, such as a copy of the phone bill, highlighting the calls relating to Tax Help and call costs.

Landline phone calls to the **1800 Tax Help Hotline** are free. Mobile phone calls to the hotline incur normal mobile phone charges.

Phone calls should only be made from a mobile phone if a landline is unavailable. If you are on a plan that includes phone calls, work out your claim at 30c per call. If your claim exceeds your plan cap, talk to Tax Help.

Photocopying and printing

Photocopying will be paid at a per page amount. You must supply justification for the amount you claim which shows costs, amounts and calculations.

Online lodgments have removed the need for printing or photocopying client tax returns or forms.

Tax Help clients can access their tax return, amendment or notice of assessment through ATO online. Tax Help does not provide copies of forms. To obtain a copy, the client can phone the ATO.

Postage

Check regularly that you have enough Tax Help envelopes and contact the Tax Help team if you need extra envelopes.

If you are paying for postage, you must provide a tax invoice for the stamps purchased.

We will reimburse centre postage costs incurred in administering the Tax Help program. This includes posting Appointment confirmations to clients.

When posting Appointment confirmations to clients, it is important to allow enough time for the confirmation to be received. For regular post this may be from 2 to 6 days depending on the destination.

If necessary, use priority post to send Appointment confirmations.

Translating and interpreting service

We won't reimburse the cost of these services unless prior written approval is obtained from Tax Help.

Other items

There may be circumstances where additional expenses occur, discuss these with the Tax Help team before you make the purchase.

Note that we don't reimburse the following costs:

- electricity costs for charging laptops
- internet account charges for emails or submitting tax returns
- costs to shred paperwork

- costs for purchasing printers or ink cartridges.

Volunteers

Tax Help volunteers receive training, are integrity checked (including a police check) and accredited by the ATO before they are assigned to work at a Tax Help centre.

While participating in Tax Help, accredited volunteers are covered by the Commonwealth's insurance policy in the event of any loss or injury.

Role

The responsibilities of a Tax Help volunteer include:

- abiding by the conditions of participation
- keeping within the scope of the program
- providing Tax Help services only at an authorised location and at authorised times
- maintaining confidentiality and professionalism in all dealings with clients
- abiding by the Tax Help centre's code of conduct
- protecting the privacy of clients
- returning all documents that clients bring with them to the appointment
- notifying their client engagement officer (CEO) immediately if they become aware of any legal action taken against them
- not advising or calculating a client's tax liability or refund
- correctly identifying tax returns lodged online as Tax Help returns
- confirming appointments with their centre at least the day before
- ensuring that appointment records are completed and returned to their Tax Help centre coordinator on completion of each day's appointments
- maintaining regular contact with Tax Help
- ensuring reimbursement claims are submitted to Tax Help at the end of each month

- submitting statistical information to Tax Help on time
- distributing tax or other community information provided by Tax Help.

Recruiting volunteers

Volunteer recruitment occurs each year in March. We will provide information to help you recruit your own Tax Help volunteers. Tax Help centre representatives have the best local knowledge of how to find suitable Tax Help volunteers. If you are unable to recruit a volunteer, Tax Help can provide assistance.

Once you have a prospective volunteer, refer their details to Tax Help who will arrange applicant assessment.

Rostering

Consult with your Tax Help volunteers and negotiate available days, times and appointment length before preparing an appointment roster.

We suggest that at the beginning of Tax Help or when a volunteer is new, that the allocated time for each appointment is longer- for example, 45 minutes. However, as tax time progresses, and after consultation with the volunteer, this time may be reduced.

If you wish to offer the Tax Help service outside the hours of 8:00 am to 6:00 pm, Monday to Friday, discuss this with Tax Help. Our support is not available to volunteers outside these hours.

A minimum of 3 or 4 appointments should be scheduled for each half day. Don't forget to include time for meal or refreshment breaks if the appointments span several hours.

The method of notifying volunteers of appointments should be discussed directly with them. You should establish an appropriate course of action (a back-up plan) in case a Tax Help volunteer is unable to keep their appointments.

We are unable to provide ATO staff to take the place of a volunteer who is unable to keep their appointments, these appointments will need to be rescheduled. In some circumstances, Tax Help may be able to arrange for another volunteer to assist. Please let Tax Help know if a volunteer is unavailable for a significant period of time.

Identifying Tax Help prepared returns and forms

Tax returns and forms lodged online are identified by the volunteer entering their ID during preparation of the tax return or form.

An orange sticker with the volunteer ID and centre ID is placed on the front of a printed tax return or form before it's given to the client to lodge.

Disclaimer

A disclaimer must be completed for each tax return, claim or form you complete on behalf of a client. Disclaimers will be supplied to you by Tax Help. A completed disclaimer places all responsibility for the information provided on the tax return, claim or form with the client.

If you complete more than one tax return, claim or form for a client, each must have its own disclaimer. Ask the client to read the [Tax Help disclaimer](#) before they sign it. You should read it to them if they are unable to read it themselves.

Attach the disclaimer:

- to the appointment record sheet for tax returns lodged online
- to the tax return for printed prior year returns and forms.

Amendments

Tax Help volunteers can help clients submit amendments online where the:

- item being amended is in the Tax Help scope
- client has supporting documents.

myGov

Where a client is unable to create a myGov account – for example, they have no email address or computer access, Tax Help volunteers can still help them lodge online. Tax Help volunteers have an alternative means of accessing ATO online. It is not an alternative to myGov but for those who don't have online access. Clients should be encouraged to have their own myGov account and link to the ATO.

First time lodger

Clients lodging their first tax return may require additional help. They may be able to create a myGov account but are unable to link to ATO

online. The Tax Help volunteer can help them link myGov to ATO online. Advise the client to bring their birth certificate, passport or citizenship certificate to their appointment.

Clients

How to assist clients using the Tax Help program.

Referring clients to Tax Help

The ATO promotes Tax Help on our website, through media releases, and social media channels.

Clients may be referred by other Tax Help centres (who don't have a suitable appointment time) or by a referral centre – for example, a Centrelink office. Referral centres do not provide Tax Help but assist clients by directing them to a Tax Help centre in their area.

When clients contact the ATO, we refer them to their most convenient or closest Tax Help centre. We provide the centre's contact details so that they can phone the centre and make an appointment.

To help us do this, your centre's name, location, contact details and opening hours are listed on a Tax Help data base and shared with other Tax Help centres.

We also identify centres that cater to specific groups, such as people from culturally and linguistically diverse backgrounds.

Occasionally, you may find that you do not have an appointment time that suits the client or your volunteers may be fully booked for the Tax Help season. In these circumstances, you may need to refer a client to another Tax Help centre in the area.

To ensure the client has the best chance to secure another appointment, give them the contact details of at least 2 other centres nearby. You will find these details on your centre contact list provided by Tax Help.

Assessing client eligibility

In most cases, clients interested in using Tax Help contact the ATO directly and are screened to ensure they are eligible for the service.

If a client contacts a Tax Help centre directly, it is important the person who is taking appointments assesses the client's eligibility for Tax

Help.

Tax Help volunteers are only allowed to assist with simple tax returns and must stay within the scope of the Tax Help program.

If a client attends an appointment and their matters are not within the Tax Help scope, the volunteer can't assist them.

Assessing eligibility can be difficult when relying on the client to provide the correct information based on the questions asked.

Use the steps to determine if a client is eligible to use Tax Help.

Step 1: Is your income \$70,000 or less?

- Yes – go to step 2
- No – Tax Help can't help you.

Step 2: Did you receive income from these sources during the financial year?

Did you receive income from:

- running or owning your own business
- operating under a labour hire agreement quoting your ABN
- royalties
- from either a public unit trust or a public trading trust
- owning or share ownership in a rental property
- making a capital gain or capital loss by selling shares or other capital assets.

If you answer:

- Yes – Tax Help can't help you
- No – Tax Help can help you, make an appointment.

If you are unsure of a client's eligibility, contact Tax Help.

Universities across Australia run [National Tax Clinics](#) in every state and territory. Tax Clinics help people who may not be able to afford professional advice and representation with their tax affairs and is available to eligible individuals, small businesses, not-for-profit organisations and charities. Refer ineligible clients to Tax Clinics if they qualify.

Making the appointment

Once you work out the client is eligible for Tax Help, you can make an appointment.

All Tax Help appointments should be conducted at an approved Tax Help centre unless there are exceptional circumstances. If a request is made to have an appointment at a different location, contact Tax Help.

Appointment checklist

- Know when the volunteers are available, referring to the volunteer roster.
- At the beginning of tax time, appointments will be for 45 minutes unless the volunteer indicates otherwise. As tax time progresses, the appointment time may reduce. Discuss this with the volunteer.
- Do not make appointments more than one month in advance – clients often forget about appointments booked too far in advance.
- If a client has a family member who also needs assistance, a separate appointment should be made for the other person.
- Similarly, extra time needs to be allocated for clients who need assistance with more than one tax return or form.
- Speak to the client about what to bring.
- Reinforce that the client needs to bring their myGov username and password, mobile phone for SMS authentication code and bank account details. They will not be able to lodge without these details.
- Give the client a [Tax Help appointment confirmation](#). This includes a list of what to bring. This can be provided in person, by email or by post.
- Record the client's details on the [Tax Help appointment record](#).
- Use a separate appointment record for each volunteer. More than one day's appointments can be recorded on each appointment record.
- Ask the client to contact the centre if they are unable to attend their appointment.
- If a client cancels their appointment, let the volunteer know as soon as possible.

How to prepare and what to bring

This information is included in the appointment confirmation. This must be handed to, emailed or posted to the client. It can also be read to the client if they are making the appointment by phone.

A client needs a myGov account to lodge online. If they do not have a myGov account, they should register at my.gov.au before the Tax Help appointment.

A client must bring the following information (where applicable) to the appointment:

- myGov username or email and password
- mobile phone for myGov SMS security code (2 factor security authentication)
- tax file number
- an original or amended notice of assessment from any one of the last 5 years
- BSB and bank account details
- Medicare card or number
- private health insurance statement showing their fund details
- all statements from banks and financial institutions showing interest received during the income year
- all payment summaries from super funds
- details of all income from Centrelink or Department of Veterans' Affairs (including details of any tax-free pensions or benefits)
- all dividend, super and managed fund statements
- all foreign income details and pension statements or details of the amounts received
- all receipts for gifts, donations, and work-related expenses
- details of any child support payments made by them
- details of any losses on investments in shares and rental properties (net investment losses).

If the client had a spouse – married or de-facto – at any time during the income year, they also need to bring details of their spouse's

taxable income. This includes any of their spouses' income documents, to the appointment. We need this information to complete certain labels on the client's tax return. If they do not know their spouse's exact taxable income, they will need to make a reasonable estimate of the amounts received by their spouse.

If the volunteer needs to phone the ATO during the appointment, the client may need to prove their identity. The client should bring with them at least 3 of the following documents:

- Australian drivers license or learner permit
- Australian passport
- Australian birth certificate
- Australian marriage certificate (issued by Births Deaths and Marriages)
- Australian citizenship certificate
- overseas passport with Australian visa
- Immicard
- Change of name certificate
- recent letters from the ATO
- previous tax return not more than 5 years old
- Centrelink CRN (Customer reference number)
- superannuation account statement.

Medicare card, drivers licence and learner permit can't be used together for proof of identity.

Online services

MyTax is the ATO's free online tax return. To use myTax, a client needs to create a myGov account and link to the ATO.

ATO app

The ATO has several online tools clients can use.

The ATO app makes it easier for clients to conduct tax and super affairs from a tablet or smart phone. They can:

- login to access online services including myTax

- enrol and use a voiceprint for fast, easy and secure access to ATO online services
- search for lost super
- access several other tools and calculators including the myDeductions tool.

Use the myDeductions tool

Clients can use the [myDeductions tool](#) to:

- capture and classify work-related expenses
- gifts and donations
- record the cost of managing their tax affairs
- store photographs of receipts
- record car trips
- upload deductions to their myTax return.

After the appointment

The Tax Help centre's and volunteer's responsibility to a client ends once the client's tax returns or forms are complete.

A client may return to the centre with an enquiry about their tax return or notice of assessment. Explain to the client that Tax Help can't provide any further assistance and advise them to:

- go to myGov to track the progress of their tax return
- contact our Individuals enquiries on **13 28 61**.

A client wanting to add to or correct their lodged tax return can lodge an amendment.

Tax Help volunteers can help clients submit amendments online where:

- the item being amended is in the Tax Help scope
- the client has supporting documents.

The client will need to make an appointment with the centre.

Tax Help volunteers – using Alternative Access Process (AAP)

The Alternative Access Process allows Tax Help volunteers to help clients with online lodgment of returns or amendments.

Last updated 16 June 2025

Tax Help clients

Most Tax Help clients will have a myGov account linked to the ATO. However, if the client doesn't have or can't access their myGov account, Tax Help volunteers can assist them to access their online account through the Alternative Access Process (AAP).

Tax Help volunteers can also help clients link their myGov account to the ATO so they can view their own tax information and lodge online.

Using AAP to assist clients

AAP allows Tax Help volunteers to assist clients to lodge online without a myGov account.

As a Tax Help volunteer, you access the AAP through your own myGov account, using a dedicated web address. The dedicated web address will be sent to volunteers in late June.

You will need to log in each day as a Tax Help volunteer and on each device you use.

There are 2 main steps to using AAP:

- [Step 1: Logging on to AAP as a volunteer](#)
- [Step 2: Logging the client into ATO online services](#)

Step 1: Logging on to AAP as a volunteer

To log on to AAP as a volunteer:

- enter the AAP web address in your web browser
- choose to login as a 'Tax Help volunteer' and select 'Sign in'
- at the myGov 'Welcome' page, sign in with your myGov username and password or your myID Digital Identity
- you may need to enter an SMS security code that will be sent to your mobile device (so make sure you take it with you to Tax Help appointments).

If you've logged in successfully, the client login page will appear (see image below).

At this screen, Tax Help volunteers can assist clients to log on to ATO online.

Note: Before continuing, close and reopen your browser and re-enter the AAP web address into your web browser.

You are now signed into AAP. To assist a Tax Help client, continue to [Step 2: Logging the client into ATO online services.](#)

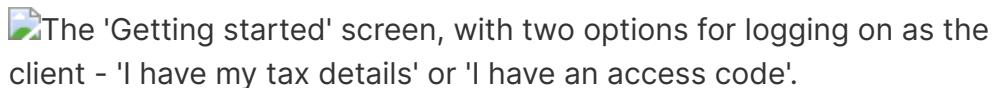
When you've finished your Tax Help session, make sure you log out of AAP using **THV sign out** in the top right corner of the screen. Then, close the browser.

Step 2: Logging the client into ATO online services

Once you've logged on as a volunteer, you can enter the Tax Help client's details into the AAP. The steps are:

- Select **Individual (THV assisted)** from the 'Login as' drop-down menu.
- From the 'Getting started' screen, select from the following 2 options
 - [I have my tax details](#) – select this when the Tax Help client can provide sufficient information to confirm their identity online
 - [I have an access code](#) – first-time lodgers will generally use this option.

The image below shows how these 2 options appear on the 'Getting started' screen.



I have my tax details

If you select 'I have my tax details', enter the client's:

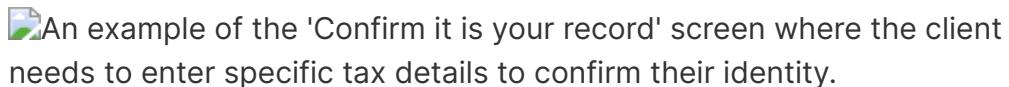
- tax file number (TFN)
- name
- date of birth.

The client will be asked to confirm their identity by answering 'questions specific to you'. They must answer 2 out of 6 questions from the following categories:

- bank account statement from an interest-bearing account you've declared to the ATO or an account that we paid your tax refund into
- a dividend statement
- a notice of assessment
- superannuation account statement
- Centrelink payment summary
- PAYG payment summary.

Questions will appear only for categories where the ATO holds information about the client. For example, if the client does not own shares, you will not see a question about the dividend statement.

Below is an example of the 'Confirm it is your record' screen, with questions specific to the client.



Once the questions have been answered, the client's ATO online services account will open in the browser. You can now open the client's *myTax* return.

I have an access code

Clients who are unable to provide sufficient tax details can confirm their identity by entering a THV access code.

The **THV access code** is for clients who:

- do not have a myGov account
- are unable to create a myGov account
- do not have or remember their myGov sign in details
- are unsuccessful linking their myGov account to the ATO.

Getting a THV access code

To request a THV access code:

- make sure you have the client's identity documents ready
- phone the Tax Help hotline on **1800 644 104**
- identify yourself as a Tax Help volunteer
- state that you have a Tax Help client with you
- ask for a THV access code.

Note that the THV access code is **not** a linking code (linking codes are explained in [Helping clients link myGov to the ATO](#)).

Once the client's identity has been confirmed, a THV access code will be issued (the code will expire after 24 hours).

Sometimes the officer may not be aware of Tax Help or access codes.

When you phone 1800 644 104, make sure you are requesting a **THV access code**. You may need to direct the officer to the relevant scripting, make sure they are looking for **access codes**.

If the officer doesn't know about Tax Help or what a THV (AAP) access code is

If the officer doesn't know about Tax Help or THV access codes, ask them to:

- search their scripting with the term 'Tax Help'
- read the information and follow the links for
 - 'THV requesting THV access code', and then
 - 'myGov Support Tool and THV access or myGov one time linking code'
- follow the directions on the page to issue a THV access code.

The officer will undertake a proof-of-record ownership (PORO) identity check with the client. If this is successful, they will issue a THV access code.

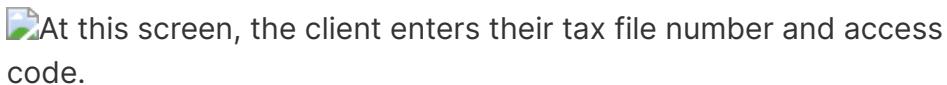
Using the THV access code

Once you have obtained a THV access code:

- enter the client's TFN and access code
- agree to the terms and conditions
- select 'Submit'.

The client's ATO online services account will open in the browser and you can open their *myTax* return.

Below is an example of the 'Your access code' screen.



Helping clients link myGov to the ATO

If the client already has a myGov account but is having trouble linking it to the ATO, they will need a linking code.

The **linking code** is for:

- clients with a myGov account but unable to link to the ATO
- first time lodgers
- people new to Australia.

Getting a linking code

To get a linking code:

- phone the Tax Help hotline on **1800 644 104**
- identify yourself as a Tax Help volunteer
- state that you have a Tax Help client with you
- ask for a linking code.

Once the client's identity has been confirmed, a linking code will be issued (the code will expire after 24 hours).

Sometimes the officer may not be aware of Tax Help or linking codes.

When you phone us, make sure you are requesting a **linking code** for the client to link their myGov account to the ATO. You may need to direct the officer to the relevant scripting.

If the officer doesn't know about Tax Help or linking codes

If the officer doesn't know about Tax Help or linking codes, ask them to:

- search their scripting with the term 'Tax Help'
- read the information and follow the links for
 - 'THV requesting THV linking code', and then
 - 'myGov Support Tool and THV access/myGov one time linking code'
- follow the directions on the page to issue a linking code.

The officer will undertake a proof-of-record ownership (PORO) identity check with the client. If this is successful, they will issue a THV access code.

Phoning us on other matters

Your identity as a Tax Help volunteer is not always essential when you phone us about other matters.

However, if the officer questions having a three-way conversation with you and the client, refer them to the Tax Help information in their scripting. Ask the officer to search their scripting using 'Tax Help' and read the Tax Help information.

The scripting explains your role as Tax Help volunteer and that you may act as an intermediary in conversations between clients and the ATO.

Tax Help reimbursement guidelines

Find out what you can claim a reimbursement for as a Tax Help volunteer and how to make a claim.

Last updated 1 September 2025

Reimbursement

Accredited Tax Help volunteers will be reimbursed for eligible out-of-pocket expenses incurred while participating in the Tax Help program.

If you incur eligible expenses, each month you will need to complete a [Tax Help volunteer reimbursement claim form \(NAT 72658, PDF 206KB\)](#).

This reimbursement claim form is a **legal document which substantiates the payment of governments funds**.

The form must be completed correctly. If the details are incomplete or incorrect, we will return the form to you to correct and re-submit.

Tips to correctly complete a reimbursement claim form:

- Fields with an 'asterisk' are **mandatory** and must be completed.
- 'Total' and 'Subtotal' fields must be completed.
- 'Total travel claim' must be in whole numbers – for example, 0.7 km is rounded up to 1 km.
- All bank details must be provided on each form (this is an ATO reimbursement requirement).
- Check the dates you enter match the dates you provided Tax Help services.
- Sign and date the form. If the form is posted to us, ensure it has a written signature (not an electronic one).
- Include your correct volunteer number on the form.

We can't process your claim for reimbursement of out-of-pocket expenses until the relevant appointment records and disclaimers have

been received from your Tax Help centre, and we have cross-checked the data.

Reimbursement claims must be accompanied by scanned copies of receipts or supporting evidence for each expense. You will need to submit your claim at the end of each month unless advised otherwise. If you don't provide sufficient details and justification for your claim, there may be delays in processing your reimbursement request.

Please keep your original documentation.

We can only reimburse claims for the current Tax Help calendar year.

Final claims for the year must be submitted by 30 November in the year they were incurred. You can complete the reimbursement claims form online or print the PDF form.

Send the completed form to the Tax Help team by [email](#).

The ATO's service standard for processing reimbursements can vary depending on the specific circumstances and type of reimbursement. Generally, the ATO aims to process reimbursement claims within 28 days of receiving all necessary information.

If you are unsure whether an expense is eligible, please contact Tax Help before incurring the expense.

Use the reimbursement form to claim:

- [Travel](#)
- [Phone calls](#)
- [Other items](#)

Travel

When attending a Tax Help centre for Tax Help appointments, you can claim reimbursement for:

- return travel from the registered home address on the tax help application (or relevant departure point such as place of work), to the centre or venue, via the most direct route
- public transport costs, return trip
- reasonable parking and road toll fees – include receipts.

A reimbursement will only be paid when leaving Tax Help appointments for direct travel to your registered home address, or the equivalent distance if not going directly home – for example, to an appointment or workplace.

You can only claim car travel costs when you are the driver.

You must fill in electric or hybrid car claims on the reimbursement form using the cents per kilometre rate shown on the form.

We may reimburse eligible travel expenses for **one** induction at a Tax Help centre.

We can't reimburse you for:

- taxi fares
- parking fines
- traffic infringements
- travel costs to your Tax Help centre when you conduct Tax Help appointments as part of your paid employment
- travel costs to your Tax Help centre if you were recruited directly by the centre (unless you have contacted the Tax Help team and got approval for the claim **before** incurring the expense)
- expenses you incur when you mentor another volunteer (unless you have contacted the Tax Help team and got approval for the claim **before** incurring the expense).

Phone calls

You will be reimbursed for phone expenses for:

- landline phone calls made from your home to a Tax Help client or Tax Help centre for Tax Help purposes
- mobile phone calls made to a Tax Help client or Tax Help centre for Tax Help purposes, but only if you don't have an unlimited call plan.

Note: Landline phone calls to the Tax Help hotline are free. There is no reimbursement for these phone calls.

Rate of reimbursement for phone calls

You will be reimbursed at the rate charged by your service provider.

If you have an unlimited plan, you will not be reimbursed as there is no additional out of pocket expense.

You must provide documentation, such as a copy of the phone bill, highlighting the calls relating to Tax Help and call costs.

Tax Help centres are reimbursed separately for phone calls made from their phones.

Other items

Check regularly that you have enough Tax Help supplies and contact the Tax Help team if you need extra items.

There may be circumstances where additional expenses do occur, so please discuss with the Tax Help team prior to making the purchase.

Photocopying will be paid at a per page amount, and only claimable by the Tax Help centre, not the volunteer. You must claim a reasonable amount and supply supporting documentation to show your costs.

We don't reimburse electricity costs for charging your phone or laptop. We also don't reimburse internet account charges – for example, for emails or to submit tax returns.

If you are making a reimbursement claim for office supplies, you must provide sufficient details of the expense and justification.

How to make a claim

The [reimbursement claim form](#) is available as an online PDF. You can:

- complete the form on screen and email or print it
- send the form to Tax Help by the end of the month in which the expenses were incurred.

You must include copies of receipts or supporting evidence for each expense you claim.

If you are sending your claim by email, include a statement that you incurred the expenses performing your Tax Help duties. Your full name must appear in the signature block of your email.

To ensure that the claim is processed quickly, ensure all details are recorded correctly. This includes your financial institution BSB and account details.

Note: If your bank details change you need to indicate this on the form or advise us by email.

Reimbursement claims will be processed when appointment records have been received from the centre and cross-checked.

Virtual volunteers only

You must be a registered virtual volunteer with the Tax Help program to claim a reimbursement for working from home. You can only be reimbursed the fixed rate of 70c per hour of worktime.

Note: If you choose to claim the work from home fixed-rate option, you can't claim reimbursement of any further expenses. This includes photocopying, stationery, travel, or other out-of-pocket expenses.

You need to meet several criteria to claim reimbursement expenses related to virtual appointments. You must:

- carry out the virtual appointments from your home only
- be a registered virtual Tax Help volunteer to provide virtual Tax Help services and claim relevant expenses
- not already have been reimbursed in any capacity for the expenses incurred
- have incurred additional out-of-pocket expenses
- provide evidence to substantiate your reimbursement claim.

Return to: [Tax Help program training.](#)

QC 102527

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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