

### Australian Government

Australian Taxation Office

# NFP self-review return - update, connect and lodge

4

Do you have access to ATO Online services for business?

NOYESStart at Step 1Start at Step 4

3

#### Update ABN details

If ABN details are current, go to **Step 2** 

Your NFP's **associate** details must be up to date in ATO records, to set up your access to Online services for business.

An associate is usually a public officer, director or office bearer. See abr.gov.au/associates

If you've been appointed as an associate but don't know the previous associate, download a **Change of registration details form** from ato.gov.au/NFPchangesform

You must then complete:

- Section A with your NFP's information
- Section D with your postal and email address
- Section F with new associate details
- Section H as the new associate you must sign the declaration and attach evidence of your appointment.

**Note:** It can take 4 to 8 weeks for us to notify you by email that your details have been updated.

 Tip: Can't find your NFP's ABN? Search the ABN Lookup at abr.business.gov.au

ABN details updated? If yes, go to **Step 2** 

#### **Get your myID** If you already have a myID, go to **Step 3**

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The associate listed against the NFP's ABN must set up a myID with a Standard or Strong identity strength. For instructions to set up your myID, see www.myID.gov.au/setup Your myID is unique to you

and you should not share it with other people.

Tip: To achieve the minimum Standard identity strength, you need 2 identity documents such as a driver's licence and Medicare card.

Successfully set up myID? If yes, go to **Step 3** 

If no, go to Step 4

#### Link your myID to your NFP in RAM

If your myID is already linked, go to **Step 4** 

If you have a **Strong** myID and are listed as an associate on the ABN in the ABR, you can link your NFP online in Relationship Authorisation Manager (RAM). Follow the instructions at info.authorisationmanager.gov.au/ onlinelinking

If you have a **Standard** myID or can't link online, phone the RAM support line to link. Follow the instructions at info.authorisationmanager.gov.au/ phonelinking

Linking your myID to your NFP's ABN does not allow other authorised users in your NFP to access your personal tax records.

Once linked, you can **authorise other users** to access Online services for business. For instructions, see info.authorisationmanager.gov.au/ authorisations

Successfully linked in RAM? If yes, go to **Step 4** 

If you can't link your myID in RAM, you can still lodge, go to **Step 4** 

## Review income tax exemption eligibility

Your NFP should self-review every 12 months or when its governing documents change.

To prepare your NFP for lodgment, review the self-review return questions at ato.gov.au/ NFPselfreviewguide

Good governance is part of running a successful organisation. Help your NFP stay up to date with your tax, super and registry obligations by running through our checklist at ato.gov.au/ NFPgoodgovernance

5B

 Tip: Note down your responses to the self-review questions. This will help you when lodging via our 13 72 26 self-help phone service

Access to Online services for business? If yes, go to **Step 5A** 

If no, go to Step 5B

#### Lodge the NFP self-review return using Online services for business

Go to ato.gov.au/OSB and log in to Online services for business with your myID:

- Select NFP self-review return from the Lodgment tab and select return for the reporting period.
- Follow the guided process and use the help text if you need clarification about a question.

For more instructions on how to lodge the NFP self-review return, see ato.gov.au/NFPonlineservices

## Lodge the NFP self-review return using our 13 72 26 self-help phone service

If you can't successfully complete Steps 2 and 3, lodge using our **13 72 26** automated self-help service.

Be ready with your NFP's **ABN** and **reference number** from a letter we sent your NFP confirming it needs to lodge an NFP self-review return.

If you don't have a letter and have completed Step 1, phone us on 1300 130 248 for a reference number.

For more information, go to

ato.gov.au/NFPtaxexempt



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