

WHAT TO BRING

You need a myGov account to lodge your tax return online. If you do not have a myGov account, register at my.gov.au before your Tax Help appointment.

! It's easier to manage your tax and super in ATO online services. You will need a myGov account linked to the ATO. We can help you get started.

To prepare your tax return, you must bring the following information (where applicable) to your appointment:

- your myGov account sign in details
- your mobile phone
- your tax file number
- a notice of assessment received in the last five years
- your BSB and bank account details
- your Medicare card or number
- your private health insurance statement showing your fund details
- all your statements from banks and financial institutions showing interest you received during the income year
- all your PAYG summaries, income statements and **final payslip of the financial year** from all employers
- all your payment summaries and income statements from super funds
- details of all your income from Services Australia or Department of Veterans' Affairs (including details of any tax-free pensions or benefits)
- all your dividend, super and managed fund statements
- all your foreign income details and pension statements or details of the amounts you received
- all your employment termination payment summaries
- all your receipts for gifts, donations and work-related expenses
- your details of any child support payments made
- your details of any losses on investments in shares and rental properties (net investment losses).
- Should we need to call the ATO on your behalf, you will need to pass an identity check. Turn over for list of ID documents.

If you had a spouse – married or de-facto – at any time during the financial year, you also need to bring details of their taxable income, including any of their documents, to your appointment. We will need this information to complete certain labels on your income tax return. If you cannot find out your spouse's exact taxable income, you will have to make a reasonable estimate of the amounts received by your spouse.

Getting started

To get started with ATO online services for individuals you will need to create a myGov account and link to the ATO.

Create a myGov account

myGov is a fast, simple way to access government services online. A secure myGov account lets you link to a range of Australian Government services with one username and password, all in one place.

Step 1: Go to my.gov.au to create a myGov account and agree to terms of use

Step 2: enter an email address

Step 3: enter your mobile number

Step 4: create password

Step 5: create secret questions

Account created

To link the ATO to your myGov account you need to sign-in using security codes. To update your sign-in option, go to 'Account settings' in myGov, select 'Sign in-option', set as 'Receive a code by SMS' or if you're travelling overseas 'myGov Access app'.

Link your myGov account to the ATO

Select the Services tab on your myGov home page and select Australian Taxation Office. You will be prompted to update your sign-in option to use security codes if you did not add your mobile number when creating your myGov account.

You will need to provide additional information to identify your ATO record, including your given name, surname, TFN and date of birth. You will then need to confirm your identity by answering two questions specific to you, using information contained in two of the following:

- a notice of assessment received in the last five years
- a PAYG payment summary received in the last two years
- a super account statement from the last five years
- a dividends statement from the last two years
- a Services Australia payment summary from the last two years, or
- your bank account details. If you choose to use your bank account to confirm your identity, it must be an account you had your individual income tax refund paid into last year, or one that has earned interest in the last two years.

If you do not have enough information, you will need to call us on **13 28 61** to get a unique linking code to help you complete this process. When you call, make sure you have your identification information ready.

Go to ato.gov.au/online for help with creating a myGov account and linking to the ATO.

Proving your identity

You will need to identify yourself if we need to call the ATO. These documents help us prove your identity. Please bring as many of these items with you:

- Australian driver licence or learners permit
- Australian passport
- Australian birth certificate
- Australian marriage certificate
- Australian citizenship certificate
- Overseas passport with Australian visa
- Immicard
- Change of name certificate
- Any correspondence from the ATO
- Previous tax return not more than 5 years old
- Centrelink CRN
- Superannuation account statement