			EOFY - Indivi	dual Tax Return Checklist			
	Yes	No	NI/A		Sources (reference/link)		
	res	No	N/A	LodgeiT	QBO	XERO	MYOB AR Live
Basic details and settings		ı	1			1	1
				https://help.lodgeit.net.au/support/soluti			
Import ATO prefill report in LodgeiT				ons/articles/60000682228-how-to-see-			
				the-prefill-button			
				https://help.lodgeit.net.au/support/soluti			
Check contact and Bank EFT details				ons/articles/60000609122-where-to-add- bank-detail-fee-from-refund-electronic-			
				funds-transfer-eft-			
Check the residency status and consider part year tax free				https://help.lodgeit.net.au/support/soluti			
threshold				ons/articles/60000609400-part-year-tax-			
inestiola				free-threshold-individual-tax-return-itr-			
				https://help.lodgeit.net.au/support/soluti		+	
				ons/articles/60000609433-how-to-report-			
				holiday-makers-wages-in-individual-tax-			
Check if the taxpayer in Australia was on a working holiday visa				return-itr-			
417 or 462							
7.7.5.1.102				https://help.lodgeit.net.au/support/soluti			
				ons/articles/60000701502-medicare-			
				calculation-visa-417-and-482-			
Income (Provide supports wherever applicable)			<u>'</u>				
				https://help.lodgeit.net.au/support/soluti			
				ons/articles/60000690645-how-to-add-			
				employment-termination-payments			
				https://help.lodgeit.net.au/support/soluti			
Salary and wage income - PAYG Payment summary (Including				ons/articles/60000694899-	NA		
Salary, commission, bonus, other allowances)				superannuation-income-stream		NA	
				https://help.lodgeit.net.au/support/soluti			
				ons/articles/60000609456-how-to-show-			
				estimated-payg-instalments-on-itr-			
				individual-tax-return-estimate			
Occupation details							
				https://help.lodgeit.net.au/support/soluti			
Government payments (Allowances or Pension)				ons/articles/60000691453-d11-deductible-			
coreens payments (rinowantees or rension)				amount-of-upp-foreign-pension-or-			
				<u>annuity</u>			
Occupation details							
				https://help.lodgeit.net.au/support/soluti			
Termination payments received				ons/articles/60000690645-how-to-add-			
				employment-termination-payments			

		https://help.lodgeit.net.au/support/soluti		
		ons/articles/60000609405-personal-		
		superannuation-deductions-in-individual-		
Superannuation benefits and annuities		tax-return-itr		
		https://help.lodgeit.net.au/support/soluti		
		ons/articles/60000694899-		
		superannuation-income-stream		
Interest income with TFN tax, if any		saperarmadion moone seream.		
Dividend Income and Franking gradit attached to such		https://help.lodgeit.net.au/support/soluti		
Dividend Income and Franking credit attached to such dividend		ons/articles/60000690546-accounting-		
aividend		and-tax-facts-for-dividends		
		https://help.lodgeit.net.au/support/soluti		
		ons/articles/60000609361-individual-tax-		
		return-itr-with-partnership-with-20k-loss-		
Distribution received from Partnership, with details of		assessable-income-		
Partnership firm along with their Financial and Tax return			NA	
reports.		https://help.lodgeit.net.au/support/soluti	IVA	
теротсь.		ons/articles/60000609398-partnership-		
		losses-individual-tax-return-itr-		
Distribution received from Private Trust, with details of Trust		https://help.lodgeit.net.au/support/soluti		
along with their Financial and Tax return reports.		ons/articles/6000609494-trust-capital-		
		gains-in-individual-tax-return-itr- https://help.lodgeit.net.au/support/soluti		
		ons/articles/60000609293-fag-how-do-i-		
		enter-multiple-trust-distribution-capital-		
		gain-amounts-in-an-individual-itr-		
Distribution and other income from Managed funds - Annual		gani-amounts-in-an-individual-iti-		
Tax Statement from the funds required.		https://help.lodgeit.net.au/support/soluti		
		ons/articles/60000672685-managed-fund-		
		individual-tax-return-itr-		
		mainadi tax retari is		
Business Income (including primary production)				
- ABN, nature of business, number of business activity (in case				
of more than one business)				
- Details of Income and expenses from each business				
		10. 10. 10. 10. 10. 10. 10. 10. 10. 10.		
		https://help.lodgeit.net.au/support/soluti		
Personal Service Income (PSI)		ons/articles/60000701502-medicare-		
- Attibuted income from Personal services Entity (PSE)		calculation-visa-417-and-482-		
- Dedutible net PSI Loss from PSE		hadron of the land of the second of the second		
		https://help.lodgeit.net.au/support/solutions/articles/60000609148-business-psi-		
Capital gains or losses (from Real estate, managed funds,	+	income-individual-tax-return-itr-		
foreign investments)		https://help.lodgeit.net.au/support/soluti		
- Details of asset, its purchase and sale values with dates,		ons/articles/60000609359		
other incidental expenses occurred, if any		טווא/מו נוכופא/טטטטטטטאס		
other incluental expenses occurred, if any				

			T	<u></u>	
Assets aquired during the year along with settlement					
documents / copy of invoice for costbase records					
			https://help.lodgeit.net.au/support/soluti		
			ons/articles/60000629970-foreign-		
			income-individual-tax-return-itr-		
			https://help.lodgeit.net.au/support/soluti		
			ons/articles/60000609358-foreign-source-		
Foreign source income			income-individual-tax-return-itr-		
- Rental income;					
- Foreign investments funds;			https://help.lodgeit.net.au/support/soluti		
- interest;			ons/articles/60000615716-non-resident-		
- Employment etc.			foreign-income-nrfi-schedule-individual-		
			tax-return-itr-		
			https://help.lodgeit.net.au/support/soluti		
			ons/articles/60000609388-non-australian-		
			resident-with-interest-income-individual-		
			tax-return-itr-		
			https://help.lodgeit.net.au/support/soluti		
			ons/articles/60000609270-rental-		
			property-low-value-pool-individual-tax-		
			return-itr-		
			- CCUTTO		
Rental Income			https://help.lodgeit.net.au/support/soluti		
- Address			ons/articles/60000609276-depreciation-		
- Acqusition date			rental-property-itr-capital-works-rental		
- Acquisition amount			rental property for capital works rental		
- Owners details (if co-owned, supply details) along with			https://help.lodgeit.net.au/support/soluti		
percentage of ownership			ons/articles/60000688124-depreciation-		
- Finance details, if renegotiated this year			for-individual-tax-return-form-itr-		
- Date when the property earned first Rent			TOT-III dividual-tax-return-torni-itr-		
- Number of weeks property was rented this year			hadron of the standard and a standard and the standard		
- number of weeks property was available for Rental			https://help.lodgeit.net.au/support/soluti		
- income and expense statement (agent sumamary and			ons/articles/60000609431-rental-		
expenses paid personally)			property-split-individual-tax-return-itr-		
- Depreciation report					
- Interest on loans			https://help.lodgeit.net.au/support/searc		
			h/solutions?term=rent		
			https://help.lodgeit.net.au/support/soluti		
			ons/articles/60000609432-rental-		
			schedule-from-quickbooks-individual-tax-		
			return-itr-		
	 				
Any other income not included above	<u> </u>				
Deductions					

Motor vehicle used for work purposes (and not reimbursed) consider log book or cents per km method		https://help.lodgeit.net.au/support/solutions/articles/60000609158-car-expense-for-business-individual-tax-return-itr-https://help.lodgeit.net.au/support/solutions/articles/60000609158-car-expense-for-business-individual-tax-return-itr-		
Travel expenses for work (air fair/accommodation / meals etc)				
Clothing, uniform, laundry, or protective gear (indicate Compulsory/non-compulsory/protective)				
Self-education expenses (books, material, fees, seminar, travel etc)		https://help.lodgeit.net.au/support/soluti ons/articles/60000691653-depreciation- for-self-education-expenses		
Other expenses (union fees, overtime meals, telephone, internet, home office expenses, books, journals, subscriptions, workshops, tools and equipment, depreciation on work equipment, etc)		https://help.lodgeit.net.au/support/soluti ons/articles/60000688124-depreciation- for-individual-tax-return-form-itr-		
Home Office expenses (phone, internet, elctricity etc. with work related percentage)				
Gifts or donations				
Other costs incurred in order to receive Interest or Dividend income (management fees, bank fees, borrowing costs, etc)				
Low value pool deductions		https://help.lodgeit.net.au/support/solutions/articles/60000609270-rental-property-low-value-pool-individual-tax-return-itr-https://help.lodgeit.net.au/support/solutions/articles/60000609373-low-value-pool-business-related-individual-tax-return		
Costs of managing tax affairs (Accountant's fees, ATO interest etc)		https://help.lodgeit.net.au/support/solutions/articles/60000698465-cmn-ato-ddctns-000209		
Deductible personal superannuation contributions - name of the Fund, account number, date of payement and amount.		https://help.lodgeit.net.au/support/solutions/articles/60000694899-superannuation-income-stream		

Income protection, sickness or accident insurance	https://help.lodgeit.net.au/support/solutions/articles/60000676875-calculating-off-set-for-private-health-insurance-rebate-non-resident-individual-tax-return-itr-https://help.lodgeit.net.au/support/solutions/articles/60000609423-private-health-codes https://help.lodgeit.net.au/support/solutions/articles/60000676875-calculating-off-set-for-private-health-insurance-rebate-non-resident-individual-tax-return-itr-	
Any other expense	https://help.lodgeit.net.au/support/soluti ons/articles/6000609511-validating- work-expenses-for-individual-tax-return- itr-	https://help.lodgeit.net .au/support/solutions/a rticles/60000615718-q- a-myob-import
Other tax offsets		
Maintenance of a relative (including invalid spouse, carer spouse, invalid relative (child, brother or sister 16 years old or older), spouse's invalid relative, parent, or spouse's parent		
Landcare or water facility tax offset brought forward from an earlier year	https://help.lodgeit.net.au/support/soluti ons/articles/60000609505	
Contributions to a complying superannuation fund on behalf of a spouse		
Zone offset for individuals living in remote area of Australia or working overseas with Australian Defence Force		
Other items		
Carried forward Revenue Losses	https://help.lodgeit.net.au/support/soluti ons/articles/6000609505	
Consider excepted income of minors		
Spouse details	https://help.lodgeit.net.au/support/searc h/solutions?term=private+trust	
Private Health Insurance details	https://help.lodgeit.net.au/support/soluti ons/articles/60000666936-medicare-levy- surcharge	
check if eligible for a Medicare levy reduction or exemption?	https://help.lodgeit.net.au/support/soluti ons/articles/60000666936-medicare-levy- surcharge	
Super co-contribution for eligible personal superannuation contributions (only relevant where taxpayer was under 71 on 30 June 2021 with taxable income less than \$54,837)	https://help.lodgeit.net.au/support/soluti ons/articles/60000668991-senior-tax- offset-sapto-for-individual-tax-return-itr-	
Consider eligibility for a credit for interest where tax repayments more than 14 days before the due date		
Tax estimate		

		eit.net.au/support/soluti	
nsider outstanding HELP, TSL or SFSS debts		<u>0615715-help-debt-</u>	
	individual-tax-ret		
		eit.net.au/support/soluti	
YG Installments payments	ons/articles/6000	0609456-how-to-show-	
TO Installments payments	estimated-payg-ii	nstalments-on-itr-	
	individual-tax-ret	<u>urn-estimate</u>	