

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

Superannuation benefits and annuities				https://help.lodgit.net.au/support/solutions/articles/60000609405-personal-superannuation-deductions-in-individual-tax-return-itr https://help.lodgit.net.au/support/solutions/articles/60000694899-superannuation-income-stream			
Interest income with TFN tax, if any							
Dividend Income and Franking credit attached to such dividend				https://help.lodgit.net.au/support/solutions/articles/60000690546-accounting-and-tax-facts-for-dividends			
Distribution received from Partnership, with details of Partnership firm along with their Financial and Tax return reports.				https://help.lodgit.net.au/support/solutions/articles/60000609361-individual-tax-return-itr-with-partnership-with-20k-loss-assessable-income- https://help.lodgit.net.au/support/solutions/articles/60000609398-partnership-losses-individual-tax-return-itr-	NA		
Distribution received from Private Trust, with details of Trust along with their Financial and Tax return reports.				https://help.lodgit.net.au/support/solutions/articles/60000609494-trust-capital-gains-in-individual-tax-return-itr-			
Distribution and other income from Managed funds - Annual Tax Statement from the funds required.				https://help.lodgit.net.au/support/solutions/articles/60000609293-faq-how-do-i-enter-multiple-trust-distribution-capital-gain-amounts-in-an-individual-itr- https://help.lodgit.net.au/support/solutions/articles/60000672685-managed-fund-individual-tax-return-itr-			
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							
Personal Service Income (PSI) - Attributed income from Personal services Entity (PSE) - Deductible net PSI Loss from PSE				https://help.lodgit.net.au/support/solutions/articles/60000701502-medicare-calculation-visa-417-and-482- https://help.lodgit.net.au/support/solutions/articles/60000609148-business-psi-income-individual-tax-return-itr-			
Capital gains or losses (from Real estate, managed funds, foreign investments) - Details of asset, its purchase and sale values with dates, other incidental expenses occurred, if any				https://help.lodgit.net.au/support/solutions/articles/60000609359			

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

Motor vehicle used for work purposes (and not reimbursed) <i>consider log book or cents per km method</i>				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/solutions/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/solutions/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 payment and amount.				https://help.lodgeit.net.au/support/solutions/articles/60000694899-superannuation-income-stream			

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Consider outstanding HELP, TSL or SFSS debts				https://help.lodgeit.net.au/support/solutions/articles/60000615715-help-debt-individual-tax-return-itr-			
PAYG Installments payments				https://help.lodgeit.net.au/support/solutions/articles/60000609456-how-to-show-estimated-payg-instalments-on-itr-individual-tax-return-estimate			