



Australian Government

Australian Taxation Office

Short tax return for individuals 2006

The form for people with simple tax affairs
Lodge your completed tax return by phone on **13 28 65** or by mail.

DO YOU HAVE TO LODGE A TAX RETURN?

If you are not sure if you need to lodge a tax return see page 49 of the *Short tax return instructions 2006*.

TO CHECK WHETHER YOU CAN USE THE SHORT TAX RETURN FOR INDIVIDUALS 2006, ANSWER THE FOLLOWING QUESTIONS:

1 Were you an Australian resident for tax purposes for all of 2005-06?

2 Was your income only from the following sources?

- Employment, and you were **not** paid
 - lump sum amounts shown at A, B or E on your payment summary
 - travel or transport allowances other than car allowance
- Centrelink, Veterans' Affairs or other Australian Government payments
- Australian superannuation pensions or annuities
- Interest
- Dividends paid by Australian companies **and** your total franking credits were \$5,000 or less
- Small payments you received for your services (totalling less than \$5,000)

If you have income from any other source, you cannot use the short tax return – to check, see **Were your financial affairs more complex?** on the next page.

3 Are the following the only deductions you wish to claim?

- Work-related expenses for:
 - your car (using the cents per kilometre method with a maximum of 5,000 business kilometres)
 - special clothing
 - union fees or subscriptions to associations
 - overtime meals
 - protective items
 - seminars and conferences
 - trade publications
 - phone
 - minor expenses

- Bank account fees and debits tax
- Gifts and donations of money
- Deductible amount of the undeducted purchase price (UPP) of an Australian annuity or superannuation pension
- Cost of managing your tax affairs

If you have any other deductions, you cannot use the short tax return – to check, see **Were your financial affairs more complex?** on the next page.

If you do not wish to claim any deduction, answer yes to this question.

4 Are the following the only tax offsets you wish to claim?

- Low income (we calculate this for you automatically when we receive your tax return)
- Mature age worker (we calculate this for you automatically when we receive your tax return)
- Franking credits (we calculate this for you automatically based on dividend information you provide)
- Beneficiary (we calculate this for you automatically based on any payments shown at item **16** on your short tax return)
- Dependent spouse, no dependent children
- Senior Australians
- Pensioner
- Annuity and superannuation pension
- Private health insurance
- Zone (remote area) – one zone only, for 183 days or more in 2005-06
- Ongoing baby bonus – and you were not a transferee

If you claim any other tax offset, you cannot use the short tax return – to check, see **Were your financial affairs more complex?** on the next page.

If you do not wish to claim any tax offset, answer yes to this question.

If you answered 'yes' to all four questions, see Do you have any of the following? on the next page before you proceed to use the *Short tax return for individuals 2006*.

DO YOU HAVE ANY OF THE FOLLOWING?

- You had tax file number (TFN) amounts withheld on interest or dividend income because you did not provide your tax file number.
- You wish to make your first baby bonus claim or you are a transferee.
- You had more than two private health insurance policies in 2005–06.
- Your health fund statement shows amounts based on projected figures which differ from the amounts paid.
- Your spouse is likely to have a family tax benefit (FTB) overpayment and you wish to consent to using part or all of your tax refund to repay the overpayment.
- Your spouse received an eligible termination payment (ETP).
- You have a prior year tax loss.
- You wish to claim a credit for interest on early payments to the Tax Office.

If you had any of these, you **cannot** use the short tax return.

WERE YOUR FINANCIAL AFFAIRS MORE COMPLEX?

Did you receive taxable income from any of the following sources?

- Travel or transport allowances (other than car)
- A capital gain or capital loss (for example, on the sale of shares or other assets)
- Running a business
- Rent you received
- An eligible termination payment
- Dividends from shares where your franking credits were more than \$5,000
- A lump sum for unused annual or long service leave or a lump sum payment in arrears
- A managed fund
- A foreign pension or other foreign income
- A distribution from a partnership or trust
- A bonus from a life company or friendly society
- Any other taxable income not already mentioned above or on the previous page

If you received taxable income from any of these sources, you **cannot** use the short tax return.

Do you wish to claim any of the following deductions?

- Work-related car expenses (using a method other than the cents per kilometre method)
- Work-related travel or transport expenses (other than car)
- Work-related self-education expenses
- Work-related computers or software, professional libraries or home office expenses
- Interest charged on money or loans to buy shares
- Gifts and donations of property
- Gifts and donations to approved cultural or environmental organisations
- Contributions relating to fund-raising events
- Australian film industry incentives
- Non-employer sponsored superannuation contributions
- Any other deductions not mentioned on this page or the previous page

If you want to claim any of these deductions, you **cannot** use the short tax return.

Do you wish to claim any of the following tax offsets?

- Dependent spouse tax offset if you had any dependent children (see page 20 of the *Short tax return instructions 2006* to see if you can claim)
- Housekeeper, child-housekeeper, parent, spouse's parent, invalid relative
- Superannuation contributions you made on behalf of your spouse
- Net medical expenses over \$1,500
- Zone (remote area) tax offset for living or working in more than one zone, using qualifying days from previous years, or for defence service overseas
- 30% child care tax rebate for approved child care during 1 July 2004 to 30 June 2005
- Any other tax offsets not mentioned on this page or the previous page

If you want to claim any of these tax offsets, you **cannot** use the short tax return.

OTHER WAYS TO LODGE YOUR TAX RETURN

If you cannot use the short tax return because the questions do not cover all of your tax affairs, you can use either:

- e-tax to prepare and lodge the *Tax return for individuals 2006* electronically, available at www.ato.gov.au or
- *TaxPack 2006*; and you may need *TaxPack 2006 supplement*.

From 1 July to 31 October 2006 you can get copies of *TaxPack 2006* and *TaxPack 2006 supplement* from most newsagents. Copies are also available from our Publications Distribution Service on **1300 720 092** and from Tax Office shopfronts all year.

COMPLETING YOUR SHORT TAX RETURN

You may need the following:

- payment summaries
- a notice of assessment issued in the last five years (needed if lodging by phone)
- bank statements and dividend statements
- evidence for deductions (such as receipts and car log books)
- health insurance details
- details of your spouse's income.

How to fill in your tax return

- Use a black or blue pen.
- Use crosses (X) where applicable.
- If a question does not apply to you, leave the answer space blank.
- Print neatly using BLOCK LETTERS. (If you are mailing this tax return and we cannot read your writing, we may have to contact you and this may delay the processing of your tax return.)
- Do not show cents.

 Lodge your 2006 tax return by 31 October 2006.

CHECKLIST

Check that you have:

- written your sequence number in the boxes provided at item **2** if you are lodging by phone
- completed item **44**—everyone must complete this item
- completed item **45**—if you had private health insurance of any type in 2005–06
- completed item **46**—if you were under 18 years old on 30 June 2006
- completed **all** the other items which apply to you
- provided **totals** (if more than '0') at items **19, 24, 32, 33** and **41**
- signed and dated the declaration at item **54**.

If lodging by mail, check that you have also:

- attached **all** your payment summaries
- attached your FTB claim if you wish to claim it through the tax system.

LODGING YOUR TAX RETURN

You can lodge your tax return either by **phone** or by mail. If you **phone** your tax return through, **we will process it within 14 days**. Our standard time for processing mailed tax returns is up to six weeks.

LODGING BY PHONE

You can lodge your completed tax return by phoning **13 28 65**.

This service is available 24 hours a day, 7 days a week. The best times for you to lodge are mornings, late evenings or weekends to avoid busy periods.

What is the phone lodgment service?

Phone lodgment uses a speech recognition system. You will hear automated questions – simply answer each question by saying your response.

Generally, most calls are finished within 12 minutes and returns processed within 14 days.

Your call will be recorded in case anything needs to be checked later.

IMPORTANT

You can ask a family member or friend to help you to prepare your short tax return, but they **cannot lodge** your tax return by phone on your behalf unless you have given them written consent. This must be attached to your copy of your tax return.

How to lodge your short tax return by phone

- 1** If any of your personal details, such as your name or postal address, have changed, contact the Tax Office on **13 28 61** to have them updated before proceeding.
Note: If your financial institution account details have changed since you last contacted the Tax Office, or you would like your refund paid directly into your account, you will need to tell us your correct details by phoning the Personal Tax Infoline on **13 28 61** before you lodge by phone. Otherwise, you can elect to have any refund payable sent to your postal address.

- 2** Write your sequence number in the boxes provided on the front page of the short tax return. Your sequence number is located in the top right hand corner of your notice of assessment.

You can use a sequence number from one of your notices of assessment issued in the last five years.

See the example on page 2 of the *Short tax return instructions 2006*.

If you cannot locate your notice of assessment from one of the last five years, phone the Personal Tax Infoline on **13 28 61**.

- 3** Complete the enclosed short tax return, then read, sign and date the declaration at item **54**.
- 4** When you phone to lodge you must have your **completed** short tax return in front of you. Phone the Tax Office on **13 28 65**. Press **2** on your telephone keypad to make a lodgment, and then press **2** for income tax returns.
- 5** When you phone to lodge, listen to each question asking you for the information you have already written on your short tax return. Make sure you have heard the whole question before you begin to answer. Speak naturally, as in normal conversation – there is no need to slow down.
- 6** Letters in grey shaded boxes (for example, **D**) will be referred to as 'label D' when lodging by phone.
- 7** **Listen carefully** as at certain questions the information you have given will be read back to you so that you can confirm that it is correct. If you have **made a mistake**, the system will give you the option to say 'adjust' or 'restart' to correct any details. 'Adjust' will allow you to change the amounts you have already given. **Note:** 'Adjust' will not let you enter amounts for missed questions. If you think you have missed any amounts say 'restart' and the system will begin again from the income section.
- 8** If the service has trouble understanding an answer, you will be asked to repeat the information or the service may ask you to use the keypad instead.
See **What if something goes wrong?** on the next page for more information.
- 9** Once your tax return has been successfully lodged, you will be given a **receipt number** at the end of your call. Write this in the box on the bottom of the last page of the short tax return. This receipt number is your official acknowledgment that you have lodged your tax return. The phone lodgment service will then **estimate** your refund or tax payable while you are on the phone.
If you wish to **confirm your lodgment**, phone **13 28 65**, press **2** for lodgment, then press **2** for income tax returns, and say your tax file number (TFN) and sequence number. The system will acknowledge your lodgment and read out your receipt number. This is the only information you will be given.

STOP

Once you have lodged your tax return over the phone and received a receipt number, you can't lodge your tax return again. If you made a mistake, you will need to write to the Tax Office and request an amendment – see page 51 of the *Short tax return instructions 2006*.

Please **do not** mail us the short tax return if you have used the phone lodgment service. Keep it for your records.

What if something goes wrong?

If you don't understand a question, say 'help' and the system will give you more information.

Note: During your call you won't be connected to an operator. If you need help using the service, have difficulties, have any feedback or can't get through to lodge your tax return, phone us on **13 28 61**.

What if the system doesn't understand me?

If the system doesn't understand you, try saying the information in a different way – for example, saying the amount of \$1,235 can be either 'one, two, three, five dollars' or 'one thousand, two hundred and thirty-five dollars'.

Important: Our system may have trouble understanding you if you are calling from a cordless or mobile phone, because of interference. If you have trouble being understood, please use a fixed landline phone.

What if I didn't get a receipt number?

If you don't get a receipt number at the end of your call, your short tax return hasn't been lodged. Please phone back and you will be asked if you wish to use the details from your previous call. You can either say 'no' and restart your lodgment, or say 'yes' and start from where your previous call ended.

How long will it take?

We expect it will take no longer than 12 minutes to lodge your tax return by phone. However there is no time limit, should you need to take more time.

What if I have made a mistake on my tax return?

If you have completed your lodgment and received a receipt number, then realised you made a mistake or omitted some information, you will need to correct it as soon as possible by requesting an amendment – see page 51.

Can I phone more than once?

Once you have completed lodgment of your short tax return over the phone you can't lodge another tax return for 2006.

How do I know I have finished?

You have completed lodgment of your tax return only when you have been issued with a receipt number. If you don't receive a receipt number, you can phone back to have another try. If you wish to confirm your lodgment, please phone **13 28 65** and enter your tax file number (TFN) and the sequence number. The system will acknowledge your lodgment.

STOP

Do not send the paper copy of your tax return to the Tax Office if you have lodged by phone and received a receipt number. Keep it for your records.

LODGING BY MAIL

Use the pre-addressed envelope that came with the short tax return and instructions. If you do not have the envelope, the postal address is:

**AUSTRALIAN TAXATION OFFICE
GPO BOX 9845
IN YOUR CAPITAL CITY**

The address must appear on your envelope as shown. Do not replace the words IN YOUR CAPITAL CITY with the name of your capital city. Because of a special agreement with Australia Post there is no need for you to include the name of your capital city or a postcode.

KEEP YOUR RECORDS

You must keep your records, usually for **five years**, unless you are subject to the shorter period of review (for more information, see **Keeping records** on page 51 of the *Short tax return instructions 2006*).

If lodging by mail, you should also keep a copy of your completed tax return.

If you are lodging by phone do not send your tax return to the Tax Office – keep it for your records.

FAMILY TAX BENEFIT (FTB)

If you do **not** receive FTB as fortnightly payments from the Family Assistance Office, and you wish to **claim FTB through the tax system**, attach your claim to your short tax return and lodge by mail.

If you need a claim form and instructions for FTB, phone the Publications Distribution Service on **1300 720 092**. For more information about FTB, phone the Family Assistance Office on **13 61 50**.