



## Media release

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### Attention first-time lodgers: Your steps to tax success

The Australian Taxation Office (ATO) is guiding first-time lodgers on some simple things they can do right now to make lodgment quick, secure and easy at tax time.

“Tax may seem daunting, but it doesn’t need to be,” Assistant Commissioner Tim Loh said.

“There’s a lot of information out there about tax, so we’ve provided some basic steps to help you get started. The best advice for first-time lodgers is to be prepared – whether you choose to use the services of a registered tax agent or lodge your own return.”

#### 1. Check whether you need to lodge a return

“As a general rule, you’ll need to lodge if you’ve had tax taken out of your pay or earned over \$18,200 during the financial year,” Mr Loh said.

“You’ll need to either lodge your own return or get on the books of a registered tax agent by 31 October. If you lodge yourself, myTax is the way to go. Most people with simple tax affairs can lodge in under half-an-hour, with most refunds received in less than 2 weeks.”

If you’re unsure of whether you need to lodge a return, the ATO’s [‘Do I need to lodge’](#) tool will help you work that out. You can access the tool through the ATO website. If you don’t need to lodge, simply let us know by submitting a non-lodgment advice (through ATO online services in your myGov account).

#### 2. Track down your Tax File Number (TFN)

Your TFN is your personal identifier for tax and superannuation purposes; it’s an important part of your identity.

“It’s yours for life, even if you change your name, job, or where you live. It will stay the same – so it’s important to keep it secure,” Mr Loh said.

“Not sure what your TFN is? You can find it on documents such as super statements or ATO letters. You can also find your TFN in ATO online services accessed through your myGov account.”

You would have provided your TFN, amongst other details, to your employer when you started work in a [TFN declaration](#) – this is used by your employer to determine how much tax to withhold from your pay.

“If you don’t have a TFN, you can apply by filling in the form on our [website](#) and booking an appointment at a participating Australia Post outlet. It’s completely free.”

### 3. Create a myGov account and link it to the ATO

If you decide to lodge your return yourself, then you'll need to set up a myGov account if you haven't already.

Your myGov account opens the door to a range of Australian Government services, including the ATO. All you need is a secure email address. Remember, each myGov account must have a different email address and don't share your login details with anyone. Protect your myGov account as if it were your bank account.

You can now connect your myGov account using the flexible and secure [myGovID](#) app.

"Set yourself up for success by creating your myGov account and linking to the ATO now. When linking, you'll be prompted to answer two questions, based on records we have," Mr Loh said.

If we don't have enough information to confirm your identity, you'll need to phone the ATO to get a unique linking code which can be entered instead of answering the questions.

"If you need to call us, we encourage you to do so now to avoid any delays when you choose to lodge your tax return. We suggest having your identification information, such as your TFN, driver's licence, or Medicare card, ready to go," Mr Loh said.

"Once you've linked to the ATO, you can not only lodge your tax return online, but you can also track your refund, view your super balance, study loan amounts and income statements."

### 4. Lodge your return

"A common mistake we see when people lodge their returns is leaving out important information, such as income from dividends or your private health insurance information, which can slow down your return," Mr Loh said.

Whether you lodge yourself or with a registered tax agent, by late July, information from employers, banks, health funds, government agencies and more, will automatically be added to your tax return. If you want to lodge earlier, before this information is ready, you must take extra care to add all your income.

"Another mistake we see that can set you back is forgetting to keep receipts for any deductions you want to claim."

The most common deductions are expenses directly related to earning your income, such as steel capped boots for construction workers. You can also claim charitable donations you make to [deductible gift recipients](#).

### More information

We want to make tax as easy as possible. If you're lodging for the first time, visit [ato.gov.au/NewToTax](https://ato.gov.au/NewToTax)