

Name:	
Year Ended:	

**2020 MOTOR VEHICLE CLAIM – You MUST adjust this to take into Account periods working from home and NOT Travelling like you normally would to visit Clients or run errands etc**

Are you Driving a CAR or NON CAR? – Determining factor is RATED CARRYING CAPACITY

Type of Vehicle	CAR or NON CAR	Method(s) Available
Sedan/ Station wagon/ Hatch back / SUV	CAR	Per Km or Logbook method
4 wheel drive (5 seater FWD SUV FWD Station Wagon)	CAR	Per Km or Logbook method
Single/Dual cab Ute – carrying capacity under 1 tonne	CAR	Per Km or Logbook method
Single/Dual cab Ute – carrying capacity OVER 1 tonne	NON-CAR	Actual Basis
Motor cycle – 2 or 4 wheels	NON-CAR	Actual Basis
Mini-van – 9 seater passenger van	NON-CAR	Actual Basis
Truck with OVER 1 tonne capacity	NON-CAR	Actual Basis
Bus designed to carry over 9 passengers	NON-CAR	Actual Basis
Larger Van – eg 1.6 tonne capacity van	NON-CAR	Actual Basis

**CAR EXPENSES CLAIM - PER KM METHOD**

Must be able to:

1. Calculate the distance travelled – Google Maps is a great help
2. Prove that you were required to travel for work – employer letter or confirmation
3. Prove you owned the car in the year being claimed–keep you registration papers – even after selling the car

MV Regn Number	
Car Type	Eg Holden commodore
Number of Kilometres	
Method of Calculation of kms Please provide explanation of how you calculated your total Eg Work diary / Logbook	

Name:	
Year Ended:	

**CAR EXPENSES CLAIM - LOGBOOK METHOD**

MV Regn Number	
Car Type Eg Holden commodore	
Odometer reading at start of year / start of logbook period	
Odometer reading at end of year / end of logbook period	
TOTAL KMS - A	
Business kms - B	
Private kms - C	
Business percentage – calculation - B/A May need to make adjustment to Business percentage for holidays etc	

Motor Vehicle Fuel	
MV Registration	
Green Slip insurance	
Motor Vehicle Registration	
Motor Vehicle Registration and Insurance Total	
Repairs	
TOTAL EXPENSES	

**TRAVEL EXPENSES - NON-CAR EXPENSES**

Must be claimed of 'Actual Basis' – to the extent that the Vehicle is used for income producing purposes  
Should have on file:

1. Details of employment duties, including requirement to carry heavy/bulky tools to /from work
2. Letter from employer advising that employee was required to use vehicle in cause of employment
3. Purchase / lease / Registration documents
4. Details of how the claim was made
5. Logbook /other record to show extent of use where vehicle used privately as well as for employment
6. Receipts /other reasonable documentary proof – Consider using Receiptbank

Motor Vehicle Fuel	
MV Registration	
Green Slip insurance	
Motor Vehicle Registration	
Motor Vehicle Registration and Insurance Total	
Repairs	
TOTAL EXPENSES	

Name:	
Year Ended:	

**2020 TRAVEL EXPENSES – You MUST adjust this to take into Account periods working from home and NOT Travelling like you normally would to visit Clients or run errands etc.**

<b>TRAVEL EXPENSES</b> – not allowable if employer reimbursement has been made	
Tolls	
Parking	
Accommodation	
Other travel expenses you incurred for meals, accommodation and incidentals while away overnight for work, such as going to an interstate work conference (generally, you can't claim for meals if your travel did not involve an overnight stay)	
the costs you actually incur (such as fuel costs) when using a borrowed car or a vehicle other than a car for work purposes	
Car hire fees	

The information I need is the number of days you are in each place and the meals you had whilst there.

CITY/TOWN	Number of Breakfast	Number of Lunch	Number of Dinner	Number of Incidental	TOTAL	GRANDTOTAL

**PROTECTIVE CLOTHING – ATO are now insisting on receipts – Consider using Receiptbank**

**NOTE: COVID Changes – be sure to make adjustments for any COVID issues**

**If you were under lockdown for a number of weeks, then you will need to make adjustments to your claim for the fact that you WERE NOT actually at work wearing your Protective Clothing**

Separate/Combined Washing		Number of washes per week	Number of weeks	TOTAL
Separate washing	\$1.00 per load			
Washing combined with other clothes	\$0.50 per load			
			TOTAL	
Purchase of Protective / Compulsory clothing				
Purchase of Protective footwear				
Purchase of protective eyewear				
Purchase of protective Sunglasses if you are required to work outdoors and are exposed to risk of eye damage from sunlight				

Name:	
Year Ended:	

<b>SELF EDUCATION EXPENSES</b>	If you have undertaken work related education
Name of course	
Institution name	
Fees expense	
Books expenses	
Other study expenses – details	

**WORKING FROM HOME – you MUST Adjust this for any EXTRA WORKING FROM HOME**

Home office running expenses		Hours/week x no.weeks	TOTAL
Hours claim at STANDARD RATE	\$ 0.52 per hour		
Hours claimed – using COVID19 Special rate – only available from 1 March 2020 to 30 June 2020	\$ 0.80 per hour		
Less Annual Leave 4weeks	per hour		

Tools, equipment and other assets		
	Tools purchased – where they don't form part of a set that together cost more than \$ 300	
	TOTAL	

Computer Equipment		
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Stationery		
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Name:	
Year Ended:	

Books, periodicals and digital information	Books	
	Periodicals	
	Digital information – includes online subscriptions, electronic published information eg e-books or e-journals	
	TOTAL	

NOTE: you must be paid a Meal Allowance on your Payment Summary in order to claim this

Overtime Meal Allowance	Total Allow paid	Amount per meal	Number of Meals	Multiple by 30.05

Airline employees - Rehydrating moisturisers and conditioner	
<p>A deduction is not allowable for the cost of items, such as:</p> <ul style="list-style-type: none"> <li>• cosmetics</li> <li>• shaving products</li> <li>• deodorant</li> <li>• general hair products</li> <li>• nail polish</li> <li>• toiletry bags</li> <li>• general skin care products</li> <li>• expenditure on hairdressing.</li> </ul>	
TOTAL	

Cash shortages or client bad debts	<p>If you deal with money as part of your employment and you are required to repay your employer amounts (you can substantiate) in respect of cash shortages or client bad debts, then:</p> <ul style="list-style-type: none"> <li>•you have incurred a deductible loss or outgoing in earning employment income</li> <li>•you are entitled to claim a deduction for those amounts.</li> </ul>	
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Union fees, subscriptions to associations and bargaining agents fees	
Trade / Teachers Registration	
Working with children check	
Police Check	
RSA / RCG	

Name:	
Year Ended:	

**MOBILE PHONES** – you have 2 choices in claiming Mobile phone – Incidental usage or logbook

Mobile Phones – METHOD 1 – Incidental usage – claiming maximum of \$50 per year

Mobile phone, internet and Home phone expenses – incidental claim		Number of items per week	Number of Weeks	TOTAL
Work calls from landline	\$ 0.25 per call			
Work calls from mobile	\$ 0.75 per call			
Work calls from landline	\$ 0.10 per text message			
			TOTAL	

Mobile Phone – METHOD 2 - Logbook method

You need to keep records for a 4 week period during the financial year for a claim of more than \$50.

If you receive an itemised bill, you need to determine your percentage of work use over a four-week representative period which can then be applied to the TOTAL of your Mobile phone bill for the WHOLE YEAR

Mobile phone – logbook method	TOTAL
Total of Monthly Bill – B	
- for bundled services – determine amount of work related portion first	
Multiple by 11 months - which reduces the amount of Annual Leave taken	
TOTAL Amount Available for claim for YEAR	
Percentage of calls that are work related- A	
CLAIM for the YEAR	

Seminars, conferences and education workshops	
LESS: Private portion Reduction: If attendance involves travel, you may have to show that you have reduced your claim to exclude any private portion of any trip.	
TOTAL	

Apps purchased for work related purposes	
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Item D15 - Income protection insurance	
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Name:	
Year Ended:	

Item D8 Interest, dividend and other income deductions	Interest paid on share purchases	
	cost of specialist investment journals and subscriptions	
	Account keeping fees	
	Ongoing management fees or retainers and amounts paid for advise relating to change of investment mix	

Item D9 – Donations - you need to have receipts and a listing of charities	

Item D10 Tax agent expenses	Tax agent fees		
	Number of kms to tax agent		\$0.68/km
	Tolls, Travel and accomodation		
	GIC charged by ATO		
	Litigation Costs		

**NOTE: In order to claim this a Superannuation Deduction to your Super Fund  
You MUST Provide a copy of the letter from the Super Fund agreeing to the Tax Deduction**

Superannuation contributions	
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**ZONE ALLOWANCE – Rebate Schedule**

City / Town	Number of Days in Zone	Zone – Office Use only