

Employee allowances – questionnaires and worksheets

Employee allowances questionnaire

Taxpayer's name _____

Tax file number _____

Year ended _____

Address _____

1. Have you received an allowance(s) during the income year? **YES/NO**

If **no**, you do not have to complete the remainder of this questionnaire and no amount is shown at **Item 2** of the income tax return.

2. Were any allowances included on your payment summary? **YES/NO**

If **yes**, go to question 3.

3. Please advise of any allowances that you received during the year of income which are not shown on the payment summary.

4. Do you realise some allowances (e.g., inconvenience or isolation) received do not entitle employees to claim a tax deduction? **YES/NO**

5. If you received a travel allowance, was it paid for specific trips? **YES/NO**

Please specify:

6. Is the travel allowance paid at a set amount or does it vary according to the distance travelled? **YES/NO**

If **yes**, how is the amount of the allowance calculated:

7. Is the travel allowance a bona fide travel allowance, (i.e., is it an amount that could reasonably be expected to cover your travel expenses)? **YES/NO**

If **no**, you must fully substantiate **all** expenses before any claim can be made.

8. Is the travel allowance otherwise payable to you reduced where your employer personally pays or reimburses any of your expenses? **YES/NO**

If **no**, you will be unable to claim any deduction for that part of the travel not completed.

Please provide details

9. If you have received a travel allowance during the year, was any of your travel interrupted or shortened prematurely? **YES/NO**

If **yes**, were you required to repay any of the allowance paid to you?

If **no**, you will be unable to claim a deduction for that part of the travel not completed.

10. Is a travel allowance that is paid for food costs you incur only paid when you are required to sleep away from home overnight? **YES/NO**

If **no**, then no claim exists for part-day travel.

Taxpayer's reasonable allowance declaration

- A. *I confirm that the above details in relation to income related to allowances received are correct;*
- B. *My tax agent has explained to me the law as it relates to allowances; and*
- C. *I understand that if I have any further queries it is my responsibility to raise them with my tax agent or request a Private Binding Ruling from the ATO.*

Signed

Dated