

Domestic and Overseas Travel Questionnaire

Taxpayer's name _____
Tax file number _____
Year ended _____
Employer _____

1. Why did your employment duties demand the need for business travel?

2. Will your employer support the need for the overnight business travel?

YES/NO

If **no**, please explain why you believe that you are still entitled to claim your travel expense:

3. Please specify the destination of the business travel and the dates on which the travel was undertaken:

	Destination		Travel dates
1.	_____	_____	to _____
2.	_____	_____	to _____
3.	_____	_____	to _____
4.	_____	_____	to _____

4. Please provide details of the nature of the above mentioned business travel:

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*Other than for the acts or omissions of financial services licensees.

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5. Substantiating domestic business travel:

Did the following conditions apply to you during your domestic overnight business travel?

- You received a bona fide travel allowance for overnight business travel; and
- Your travel claim is in accordance with the reasonable limits specified in TD 2016/13?

YES/NO

If **yes**, then you can claim your overnight business travel expenses without the need to provide documentary evidence. Please note that you must have actually incurred the expense to be able to claim a tax deduction.

If **no**, then full substantiation will apply to your claim for overnight business travel.

6. If you are required to substantiate your domestic overnight travel claim, then what records did you maintain to substantiate your travel claim?

Substantiating overseas business travel

7. Did the following conditions apply to you during your overseas overnight business travel:

- You received a travel allowance for overnight business travel;
- The overseas business travel was for less than six nights; and
- Your travel claim is in accordance with the reasonable limits specified in TD 2016/13?

YES/NO

If **yes**, then you can claim your overnight business travel expenses without the need to provide documentary evidence for your meals and incidental expenses. Written evidence of accommodation expenses is always required.

If **no**, then full substantiation will apply to your claim for overnight business travel.

In addition, a travel diary will be required where the overseas travel was for more than five nights.

8. If you are required to substantiate your overseas overnight travel claim, then what records did you maintain to substantiate your travel claim?

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9. General expenses of business travel

Expenses	Nights/ meals away		Actual expense but not exceeding per diem rates	Claim
Accommodation	_____ nights	x	\$ _____	= \$ _____
Meals: Breakfasts	_____ b/fast	x	*\$ _____	= \$ _____
Lunches	_____ lunches	x	*\$ _____	= \$ _____
Dinner	_____ dinners	x	*\$ _____	= \$ _____
Incidentals:	_____ incidentals	x	\$ _____	= \$ _____
Total business travel expenses				\$ _____
Plus: Other expenses not mentioned above				
_____			\$ _____	
_____			\$ _____	\$ _____
Less: private component of the trips (i.e., if spouse or family member accompanying)				(\$ _____)
Total work related travel claims (claim to be made at label B of Item D2)				<u>\$ _____</u>

* If the meal costs incurred while on business travel vary from day to day and your deductions vary accordingly, please provide a separate schedule of those expenses.

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Travel Diary

Details of overseas or domestic trip:

Reason for trip _____

 Duration _____
 Business portion/period _____

Details of:

- a) The nature of the activity

- b) The day and approximate time when it began _____
- c) How long it lasted

- d) Where you engaged in it

Details of expenses incurred:

	Business	Private	Total
Airfares	_____	_____	_____
Accommodation	_____	_____	_____
Incidentals	_____	_____	_____
Meals	_____	_____	_____
Other (specify)	_____	_____	_____
Total expenses	_____	_____	_____

Please note:

1. That before any claim can be made for travel expenses, you must have actually incurred the relevant expense.
2. Taxpayers undertaking overseas travel must keep written evidence with respect to accommodation, regardless of whether they receive a travel allowance and their claim is within the reasonable limits.

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Taxpayer's domestic and overseas travel questionnaire declaration

- A. *I confirm that I wish to make the above claim for domestic or overseas travel on the basis that I have incurred the above expenses in deriving my assessable income and I have the necessary written evidence and also travel records (where required) to substantiate my claim;*
- B. *My tax agent has explained to me the law as it relates to claims for local and overseas travel expenses; 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

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Travel allowance expense declaration

Taxpayer's name

Tax file number

Year ended

I, of

declare that during the year ended 30 June I was required to travel away from home overnight for the purposes of performing my work duties.

As a result, I understand that I may be entitled to claim a deduction for travel-related expenses up to the daily amount prescribed by the Commissioner of Taxation ('Commissioner') for without having to substantiate my claim (e.g., without having to obtain receipts or similar documents).

In making such a claim, I also declare the following:

- (a) An allowance was paid to me during the year (by my employer) to compensate me for the cost of in relation to each overnight work trip undertaken during the year.
- (b) The amount being claimed has actually been incurred by me in the course of performing my work duties whilst travelling away from home overnight, and I understand that I cannot simply claim a deduction up to the Commissioner's daily amount just because I have received an allowance from my employer.
- (c) The purpose of the daily reasonable allowance amounts prescribed by the Commissioner is to simply set a limit on the amount that can be claimed as a tax deduction for travel-related expenses covered by an eligible travel allowance without having to provide receipts (or a travel diary in some cases).
- (d) I may be required by the Commissioner to reasonably demonstrate how the amount being claimed for was determined.

Signed.....

Dated

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