



## Home Office Questionnaire

Taxpayer's name \_\_\_\_\_

Tax file number \_\_\_\_\_

Year ended \_\_\_\_\_

Address of property \_\_\_\_\_

1. Nature of your business/occupation:

\_\_\_\_\_  
\_\_\_\_\_

2. What work activities are performed at home?

\_\_\_\_\_  
\_\_\_\_\_

3. Would your employer (if you have one) support the need for you to maintain a home office?

**YES/NO**

If **no**, why do you believe a claim can still be made?

\_\_\_\_\_  
\_\_\_\_\_

4. Under which method is the home office running expenses being claimed?

- Fixed rate (**67 cents per hour**) method;
- Actual cost method;

What records have been maintained in order to substantiate your claim?

\_\_\_\_\_  
\_\_\_\_\_

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5. Do you understand the difference between occupancy and running expenses?

**YES/NO**

If a claim is being made for “occupancy expenses”, please describe why you believe your home is a “place of business”.

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**Taxpayer’s home office declaration**

- A. *I confirm that I wish to make the above claim for home office expenses on the basis that I have incurred the above expenses in deriving my assessable income and I have the necessary records to substantiate my claim;*
- B. *My tax agent has explained to me the law as it relates to claims for home office 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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## Home Office Running Expenses:

These include the following:

- energy expenses (i.e. gas and electricity)
- internet expense
- mobile and home telephone expenses
- stationery and computer consumables

### Method 1: Fixed rate

Number of Hours home office used      x      Rate      Running expense claim

\_\_\_\_\_ Hours      x      **67c per hour**      =      \$ \_\_\_\_\_

**Total Claim**      =      \$ \_\_\_\_\_

### Records you need to keep when using the ATO's fixed-rate method:

- You will need to keep some receipts, bills or invoices of the running expenses you have incurred in order to verify your claim.
- You will also need to keep a **record** (e.g., a timesheet, diary or similar record) of the **number of hours** you worked from home during the year, basically as follows:

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**Method 2: Actual cost method**

**Running costs**

Gas	\$		
Electricity	\$		
Lighting	\$		
Heating	\$		
Other:	\$	_____	\$ _____
Business use percentage		x	_____ %
<b>Home office running expenses claim</b>			<b>\$ _____</b>


**Occupancy expense**

Provide details of the total occupancy expenses


_____		\$	
_____		\$	
_____		\$	_____
<b>Total occupancy expenditure</b>		\$	
<b>Floor area of home office</b>	x	_____	m <sup>2</sup>
<i>(Expressed in square metres)</i>			
		\$	
<b>Total floor area</b>	÷	_____	m <sup>2</sup>
<b>Occupancy expense</b>		\$	_____
<b>Running expenses</b>	+	\$	_____
<b>Total home office expenses</b>		\$	_____

Signed.....

Dated.....

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