



## Work Related Domestic and Overseas Travel Questionnaire and Schedule

<b>CLIENT NAME:</b>	<b>CLIENT SIGNATURE:</b>
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**PLEASE NOTE:**

1. That before any claim can be made under the per diem rates that are contained under TD 2007/21 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 under TD 2008/18.

**TAXPAYER’S DOMESTIC AND OVERSEAS TRAVEL QUESTIONNAIRE DECLARATION**

- A. I confirm that I wish to make this claim for domestic or overseas travel on the basis that I have incurred the 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.

### SUBSTANTIATION QUESTIONNAIRE

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

**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 expenses:**

**Please specify the destination of the business travel and the dates on which the travel was undertake-**

Destination	Travel Dates		
		to	
		to	

### Substantiating Domestic Business Travel

<p>Did the following conditions apply to you during your domestic business travel?</p> <ul style="list-style-type: none"> <li>You receive a bona fide travel allowance for overnight business travel; and</li> <li>Your travel claim is in accordance with the reasonable limits specified by the tax office</li> <li>If <b>YES</b>, 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</li> </ul> <p>If <b>NO</b>, then full substantiation will apply to your claim for overnight business travel.</p> <p>If you are required to substantiate your domestic overnight travel claim, then what records did you maintain to substantiate your travel claim?</p>	Yes	No
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## Substantiating Overseas Business Travel

<p>Did the following conditions apply to you during your overseas business travel?</p> <ul style="list-style-type: none"> <li>You receive a travel allowance for overnight business travel; and</li> <li>The business travel was less than six nights; and</li> <li>Your travel claim is in accordance with the reasonable limits specified by the tax office .If <b>YES</b>, 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.</li> </ul> <p>If <b>NO</b>, then full substantiation will apply to your claim for overnight business travel.  <b>In addition, a travel diary will be required where the overseas travel was for more than five nights.</b></p>	Yes	No
<p><b>If you are required to substantiate your overseas overnight travel claim, then what records did you maintain to substantiate your travel claim?</b></p>		

## OVERSEAS AND DOMESTIC TRAVEL WORKSHEETS

### TRAVEL DIARY

<p><b>Reason for trip:</b></p> <p><b>Duration:</b></p> <p><b>Business proportion:</b>     %</p> <p><b>The nature of the activity:</b></p> <p><b>The day and approximate time when it began:</b></p> <p><b>How long it lasted:</b></p> <p><b>Where you engaged in it: Yes/No</b></p>
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### DETAILS OF EXPENSES INCURRED:

Description	Business	Private	Total
Airfares	\$	\$	\$
Accommodation	\$	\$	\$
Incidentals	\$	\$	\$
Meals	\$	\$	\$
Other:	\$	\$	\$