

For 2019-20 tax year, submit your R&D supplementary return. For 2020-21 tax year, you must request general approval for your R&D activities.

Customer

RDTI CUSTOMER

Account

R&D Tax Incentive

Account alerts
✔ There are no alerts

I want to... [More >](#)
[Submit Criteria & Methodologies approval](#)
[Send a message](#) >

| Summary | Periods | Submitted | Correspondence | Names and addresses | Logons |
|---------|---------|-----------|----------------|---------------------|--------|
|---------|---------|-----------|----------------|---------------------|--------|

Approvals submitted
Tax year:
Period begin: Period end:

| Name | Type | Accepted |
|-----------------------------------|------|----------|
| You have no pre-approved projects | | |

Current year [?](#)
Projects with approved activities : 0
[Request general approval](#)

Recent activity
No recent activity

1 What to expect >

About this service

This service is for gaining approval of your eligible research and development (R&D) activities

When to use this service

Use this service to gain approval of your R&D activities. Unless you are eligible for, and have opted to use the significant performer process, you'll need to gain approval of your activities to claim your R&D tax credit at the end of the year.

What you'll need

To complete your General Approval application, you will need:

- Details of your R&D project, Australia New Zealand Standard Research Classification (ANZSRC) codes and your estimated spend on eligible R&D activities for this project.
- Details of the core and supporting activities you are conducting as part of your project. For more information on the ANZSRC codes see [here](#). For more information on eligible activities see [here](#).
- Each party in a joint venture or partnership needs to apply for general approval. Make sure each party uses the same project name and activity descriptions in their application.

What happens next

We'll review your application, which can take up to 6 weeks. If approved your myIR account will be updated to show this decision. We may decline some of the activities you have submitted if they don't meet the definition of core and supporting. If we are considering declining, we will contact you before doing this. We may also contact you for more information if necessary. For more information on eligible activities see [here](#).

[Save draft](#)[Cancel](#)[Next >](#)

1 What to expect ✓ > 2 **Project detail** >

RDTI CUSTOMER

[Show details](#) ▼

Project details

❗ A 'project' is a group of related core and supporting activities. If you do not have a concept of 'project', you can create a project for each core R&D activity you are requesting approval for.

Project identifier

*Required

Describe the overall objective of your project.

*Required

Project spending

❗ These are to give us an estimate of your spending. It will not affect the outcome of your application and you will not be penalised if your actual spending is different.

What is your estimated spend on eligible R&D activities for this project?

*\$

Have you received any Government funding for your R&D?

*Yes

No

Project length

Enter the start date of the project (even if it hasn't begun yet)

*Required



Enter the anticipated end date of the project

*Required



ANZSRC codes

❗ ANZSRC applies to your research activity. This is not your BIC code.

[Find my ANZSRC code](#)

ANZSRC code

*Required

Unknown code

[Save draft](#)

[Cancel](#)

[Previous](#)

[Next](#) >

1 What to expect ✓ > 2 Project detail ✓ > 3 **Contact details** >

RDTI CUSTOMER

Show details ▾

Project owner contact details

First name

* Required

Last name

* Required

Role

* Required

Contact phone country

* Required ▾

Contact phone type

* Required ▾

Phone

* Required

Email

* Required

Save draft

Cancel

< Previous

Next >

1 What to expect ✓ > 2 Project detail ✓ > 3 Contact details ✓ > 4 **Core activities** >

RDTI CUSTOMER

Show details ▾

Core activities

Core activities

Use this field to filter by keywords, dates, or numbers

Core activity

Activity starts this tax year

Activity ends this tax year

+ Add core activity

! Please submit at least one core activity.

Save draft

Cancel

< Previous

Next >

1 What to expect ✓ > 2 Project detail ✓ > 3 Contact details ✓ > **4 Core activities** >

RDTI CUSTOMER

[Show details](#) ▾

Core activities

Core activities **Core activity**

Core activity

① Core activities evaluate possible solutions to your scientific or technological uncertainty. Approval may be granted for up to three years.

Core activity

*Required

Activity starts this tax year

*Required

Activity ends this tax year

*Required

Describe your core activity

*Required

① Scientific or technological uncertainty exists if:

- the required knowledge is not publicly available
- a professional in that field cannot work out the answer without undertaking a systematic approach to evaluate possible solutions.

Describe the scientific or technological uncertainty that your core activity had a material purpose of resolving.

*Required

① A systematic approach is a planned and structured way to resolve your scientific and technological uncertainty.

Describe the systematic approach you took conducting the core activity.

*Required

Describe how your core activity intends to create either:

- new knowledge
- new or improved processes, services or goods.

*Required

[+ Add core activity](#) [Delete core activity](#)

Save draft

Cancel

[Previous](#)

[Next](#)

① What to expect ✓ > ② Project detail ✓ > ③ Contact details ✓ > ④ Core activities ✓ > ⑤ Supporting activities >

RDTI CUSTOMER

Show details ▾

Supporting activities

Do you have any supporting activities for this project?

Yes No

Supporting activities

🔍 Use this field to filter by keywords, dates, or numbers

Supporting activity

Activity starts this tax year

Activity ends this tax year

+ Add supporting activity

📘 Please submit at least one supporting activity.

Save draft Cancel

< Previous Next >

① What to expect ✓ > ② Project detail ✓ > ③ Contact details ✓ > ④ Core activities ✓ > ⑤ Supporting activities >

RDTI CUSTOMER

Show details ▾

Supporting activities

Do you have any supporting activities for this project?

Yes No

📌 Supporting activities • supporting activity

supporting activity

📘 Supporting activities are directly related to a core R&D activity. These activities may qualify for the tax incentive if:

- supporting the core R&D activity is their only or main purpose
- they are required for and integral to the core R&D activity.

Approval may be granted for up to three years.

Supporting activity

* Required

Activity starts this tax year

* Required

Activity ends this tax year

* Required

Describe your supporting activity.

* Required

Describe how this satisfies the supporting activity definition.

* Required

Select one or more associated core activ

Select one or more associated core activities

Select at least one core activity

Add supporting activity Delete supporting activity

Save draft Cancel Previous Next

Describe how this satisfies the supporting activity definition.

Select one or more associated core activ

Select one or more associated core activities

Select at least one core activity

Add supporting activity Delete supporting activity

Save draft Cancel Previous Next

Select core activities

Use this field to filter by keywords, dates, or numbers

| Select | Core activity |
|--------------------------|-----------------|
| <input type="checkbox"/> | Core activity 1 |

OK Cancel

Home > Confirm access > R&D Tax Incentive > R&D Tax Incentive general approval

2 Project detail > 3 Contact details > 4 Core activities > 5 Supporting activities > 6 Joint ventures/partnerships >

RDTI CUSTOMER Show details

Joint ventures/partnerships

A joint venture is when two or more parties with the same objective temporarily join together for a common purpose. A partnership is when two or more parties join in business. The people involved are usually co-owners of a single business enterprise.

Complete the following fields if you are claiming the R&D Tax Incentive as part of a joint venture or partnership.

Was some or all of this project carried out as part of a joint venture?

Yes No

Was some or all of this project carried out as part of a partnership?

Yes No

What are the names and IRD numbers of the persons party to the joint venture/partnership?

| Party name | IRD | IRD number not known | Interest in this group (%) |
|------------|-----|--------------------------|----------------------------|
| | | <input type="checkbox"/> | % |

Add at least one entry to the joint venture/partnership table to continue.

How have you calculated your joint venture interest?

Required

Save draft Cancel Previous Next

2 Project detail ✓ > 3 Contact details ✓ > 4 Core activities ✓ > 5 Supporting activities ✓ > 6 Joint ventures/partnerships >

RDTI CUSTOMER

Show details ▾

Joint ventures/partnerships

i A joint venture is when two or more parties with the same objective temporarily join together for a common purpose. A partnership is when two or more parties join in business. The people involved are usually co-owners of a single business enterprise.

Complete the following fields if you are claiming the R&D Tax Incentive as part of a joint venture or partnership.

Was some or all of this project carried out as part of a joint venture?

☐ Yes ☒ No

Was some or all of this project carried out as part of a partnership?

☒ Yes ☐ No

What are the names and IRD numbers of the persons party to the joint venture/partnership?

| Party name | IRD | IRD number not known | Interest in this group (%) |
|------------|-----|--------------------------|----------------------------|
| | | <input type="checkbox"/> | % |

i Add at least one entry to the joint venture/partnership table to continue.

Save draft

Cancel

< Previous

Next >

Contact details ✓ > 4 Core activities ✓ > 5 Supporting activities ✓ > 6 Joint ventures/partnerships ✓ > 7 Associated persons >

RDTI CUSTOMER

Show details ▾

Associated persons

Do you have any associated person(s) who have claimed, or intend to claim, R&D tax credits for the income year?

* ☐ Yes ☐ No

i The associated persons rules in the Income Tax Act 2007 ensures taxpayers cannot use people or entities they are connected with to get a tax benefit. The rules define associated persons which includes relatives, companies, trustees and beneficiaries, partners and partnerships, and other persons. A person is generally associated with another party when a relationship or sufficient amount of influence exists between them, and they can be considered a single economic entity. The rules also apply to specific circumstances, for example, two entities may be associated with each other because they are associated with the same third party. If you are unsure whether someone claiming a research and development tax credit is an associated person, review our guidance on [associated persons definitions](#) or consult a tax advisor.

Save draft

Cancel

< Previous

Next >

Core activities ✓ > 5 Supporting activities ✓ > 6 Joint ventures/partnerships ✓ > 7 Associated persons ✓ > 8 Attachments >

RDTI CUSTOMER

Show details ▾

Attachments

Upload supporting documents

Accepted format : gif,jpg,jpeg,pdf,png, csv,doc,docx,xls,xlsx,ppt,pps,pptx,ppsx,odt,ods,odp.

| Name | Description | Size |
|------|-------------|------|
|------|-------------|------|

No attachments have been uploaded

Save draft

Cancel

< Previous

Next >

s ✓ > 5 Supporting activities ✓ > 6 Joint ventures/partnerships ✓ > 7 Associated persons ✓ > 8 Attachments ✓ > 9 Review

RDTI CUSTOMER

Show details ▾

> Project information

> Contact details

> Core activities

> Support activities

Save draft

Cancel

< Previous

Submit