RDTI General application approval

Total balance: $0.00

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R&D Tax Incentive general approval

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.

Cancel   Save Draft   < Previous   Next >

R&D Tax Incentive general approval

What to expect   Project detail

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

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? *

Required

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

| Cancel | Save Draft | | ‹ Previous | Next › |

R&D Tax Incentive general approval

✓ —————— ✓ —————— ⟩
What to expect   Project detail   Contact 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

| Cancel | Save Draft | | ‹ Previous | Next › |

R&D Tax Incentive general approval

✓ What to expect   ✓ Project detail   ✓ Contact details   ❯ Core activities

Core activities *

Core activities

[+ Add core activity]

▼ Type to filter

Core activity	Activity starts this tax year	Activity ends this tax year

+ Add core activity

[+ Add core activity]

[Cancel]   [Save Draft]   [< Previous] [Next >]

R&D Tax Incentive general approval

✓ What to expect   ✓ Project detail   ✓ Contact details   ❯ Core activities

Core activities

⚠ Core activities   **❗ Core activity**

Core activity

[+ Add core activity]   [✕ Delete core activity]

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

Core activity *   Activity starts this tax year *   Activity ends this tax year *

[Required]   **Required**   [Required ▾]   [Required ▾]

Describe your core activity *

[Required]

ⓘ 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]

ⓘ 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

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R&D Tax Incentive general approval

✓ What to expect — ✓ Project detail — ✓ Contact details — ✓ Core activities — › Supporting activities

Supporting activities *

Do you have any supporting activities for this project?

| Yes | No |

Supporting activities

➕ Add supporting activity

▼ Type to filter

Supporting activity	Activity starts this tax year	Activity ends this tax year

➕ Add supporting activity

➕ Add supporting activity

Cancel   Save Draft   ‹ Previous   Next ›

R&D Tax Incentive general approval

○ What to expect — ○ Project detail — ○ Contact details — ○ Core activities — ○ Supporting activities

Supporting activities

Do you have any supporting activities for this project?

| Yes | No |

ⓘ **Supporting activities** ❗ **Supporting activity**

Supporting activity

[+ Add supporting activity]   [✕ Delete 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 [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 activities

Select one or more associated core activities *

[+ Add supporting activity]   [✕ Delete supporting activity]

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R&D Tax Incentive general approval

○ expect — ○ Project detail — ○ Contact details — ○ Core activities — ○ Supporting activities — ○ Joint ventures/partnerships

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 |

[Cancel]   [Save Draft]   [< Previous]   [Next >]

R&D Tax Incentive general approval

expect — Project detail ✓ — Contact details ✓ — Core activities ✓ — Supporting activities ✓ — Joint ventures/partnerships ›

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 (%)
		☐	

How have you calculated your joint venture interest? *

Required

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R&D Tax Incentive general approval

t detail — Contact details ✓ — Core activities ✓ — Supporting activities ✓ — Joint ventures/partnerships ✓ — Associated persons ›

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 |

ⓘ 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.

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R&D Tax Incentive general approval

t details   Core activities   Supporting activities   Joint ventures/partnerships   Associated persons   Attachments

Attachments

Upload supporting documents

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

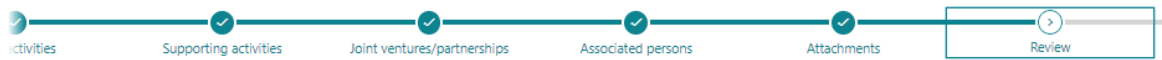| Name	Description	Size	
No attachments have been uploaded			

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R&D Tax Incentive general approval

ctivities   Supporting activities   Joint ventures/partnerships   Associated persons   Attachments   Review

∨ **Project information**

Project information

Project identifier

project 1

Describe the overall objective of your project.

detail

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

300000

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

01-Apr-2020

Enter the anticipated end date of the project

31-Mar-2022

ANZSRC code

099999 - Engineering not elsewhere classified

> **Contact details**

> **Core activities**

> **Support activities**

Cancel   Save Draft   < Previous   Submit

R&D Tax Incentive general approval

ctivities — Supporting activities — Joint ventures/partnerships — Associated persons — Attachments — Review

∨ **Project information**

Project information

Project identifier

project 1

Describe the overall objective of your proje

detail

What is your estimated spend on eligible R

300000

Enter the start date of the project (even if it

01-Apr-2020

Enter the anticipated end date of the projec

31-Mar-2022

ANZSRC code

099999 - Engineering not elsewhere classified

> **Contact details**
> **Core activities**
> **Support activities**

| Cancel | Save Draft | | < Previous | Submit |

Confirmation number   0-697-566-552

What happens next

- To view or edit your submission go to the 'I want to' tab then select 'Search submissions'.
- You will receive a notice from us confirming your assessment.
- You will be contacted by the R&D team to discuss your application.

Printable copy

Close

Confirmation ✕

By selecting "OK" you are confirming that:

To the best of your knowledge the information you've supplied is true and correct.

Cancel   **OK**