



Correct process for requesting copies of tax documents

- <https://www.ato.gov.au/Tax-professionals/Newsroom/Income-tax/Correct-process-for-requesting-copies-of-tax-documents/>
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Correct process for requesting copies of tax documents

To request copies of tax documents (COTD) for your clients, you need to use *Online services for agents* (OSfA) and be authorised on the client's record to do so.

OSfA is the quickest and easiest way to access these copies.

In OSfA you can self-serve copies of:

- income tax returns and notices of assessment for 2010 onwards – select Lodgments then Income tax
- payment summaries or income statements (pre-fill) for 2009 onwards – select Reports and forms then Reports.

You need to use our new form and submit it via Practice mail in OSfA for copies of:

- income tax returns and notices of assessment for 1997 to 2009
- payment summaries or income statements (pre-fill) for 2001 to 2008
- FBT returns from 2001.

Our [Copies of tax documents request](#) page will be updated from 20 August 2022 with more details and the new form.

We're providing the new form to help address errors we've identified in some requests submitted. Errors we've noticed include:

- COTD form not attached to the Practice mail message
- incorrect email subjects or headings
- requests being made by an unauthorised agent
- requests for documents for multiple clients within the one Practice mail

message.

When requests are submitted with errors in them, or aren't submitted online, it affects our ability to process them for you in a timely manner.

From 1 October 2022, if you submit a request using the incorrect form or process, we'll reply to advise you how to resubmit correctly.

If you need help using OSfA, you can access the:

- help content in OSfA
- [Online services for agents user guide](#) on our website.

Our commitment to you

We are committed to providing you with accurate, consistent and clear information to help you understand your rights and entitlements and meet your obligations.

If you follow our information and it turns out to be incorrect, or it is misleading and you make a mistake as a result, we will take that into account when determining what action, if any, we should take.

Some of the information on this website applies to a specific financial year. This is clearly marked. Make sure you have the information for the right year before making decisions based on that information.

If you feel that our information does not fully cover your circumstances, or you are unsure how it applies to you, contact us or seek professional advice.

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