



Australian Government

DEFFIN009 Perform taxation management

Release: 1

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Modification History

Release 1. This is the first release of this unit of competency in the DEF Defence Training Package.

Application

This unit describes the skills required to develop tax strategies, perform taxation accounting, prepare tax returns and monitor compliance.

This unit applies to those working in the public sector Finance Domain who would be required to undertake financial management activities related to taxation as part of their duties.

The skills and knowledge described in this unit must be applied within the legislative, regulatory and policy environment in which they are carried out. Organisational policies and procedures must be consulted and adhered to, particularly those related to financial management activities.

Those undertaking this unit would be working under minimal supervision and/or supervising small teams while undertaking financial management tasks. They would perform complex tasks in familiar context.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Pre-requisite Unit

Not applicable.

Competency Field

Financial Management

Unit Sector

Not applicable.

Elements and Performance Criteria

ELEMENTS

Elements describe the essential outcomes.

PERFORMANCE CRITERIA

Performance criteria describe the performance needed to demonstrate achievement of the element.

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|--------------------------------------|---|
| 1 Develop tax strategy | 1.1 Identify taxation issues |
| | 1.2 Interpret and apply relevant taxation legislation and policies |
| | 1.3 Identify and negotiate solution |
| 2 Perform taxation accounting | 2.1 Extract report from the relevant financial systems |
| | 2.2 Verify that taxation data is accurate and complete |
| | 2.3 Prepare and process journal and payment documentation |
| | 2.4 Reconcile accounts |
| 3 Prepare tax returns | 3.1 Collate data for inclusion in tax return |
| | 3.2 Perform calculations and categorise information |
| | 3.3 Review calculations for accuracy and applicability |
| | 3.4 Compile and submit tax return |
| 4 Monitor taxation compliance | 4.1 Develop quality assurance sample from taxation report |
| | 4.2 Investigate sample transactions |
| | 4.3 Identify issues within the sample data |
| | 4.4 Advise on solutions and initiate corrective action |

Foundation Skills

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Range of Conditions

Range is restricted to essential operating conditions and any other variables essential to the work environment.

Non-essential conditions may be found in the Companion Volume Implementation Guide.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6bdbab1e-11ed-4bc9-9cba-9e1a55d4e4a9>