

How to read your 2021 Private Health Insurance Tax Statement

180
YEARS



Private Health Insurance Tax Statement 1 July 2020 to 30 June 2021



Keep this statement - Use the following information to complete your 2021 income tax return

The table below provides details of your 2020-21 private health insurance policy. If your policy has more than one Private Health Insurance Incentive Beneficiary, this statement will only display your share amounts.

The Australian Government determines the way the rebate is calculated and applied to premiums. Rebate percentages are adjusted on 1 April each year. If you paid premiums for your policy before and on or after 1 April, the table below will contain at least two lines of information. Where more than one line of information has been provided, the information from each line must be entered separately at the corresponding labels on the income tax return at **Private health insurance policy details**.

You will need to nominate a tax claim code when completing the Private health insurance policy details section of your tax return. Read the tax return instructions to determine the tax claim code appropriate for your situation.

Australian Government Rebate on private health insurance

Statement print date:

Health Insurer ID	Membership Number	Your premiums eligible for Australian Government rebate	Your Australian Government rebate received	Benefit code	Other adult beneficiaries for the policy
B	C	J	K	L	
B	C	J	K	L	
B	C	J	K	L	
B	C	J	K	L	
B	C	J	K	L	
B	C	J	K	L	
B	C	J	K	L	

Important – If you have more than one line of information in the table above, make sure each line is input separately into your income tax return. Do **not** add-up amounts reported in any column or row and input a total.

M2 Medicare Levy Surcharge

If you and all your dependants (including your spouse) did not have an appropriate level of private patient hospital cover for the full financial year (365 days) you may be liable for the **Medicare Levy Surcharge** – see 2021 individual tax return instructions question M2

Number of days this policy provides an appropriate level of private patient hospital cover M2

The labels on this statement correspond to the labels on your tax return.

If you have any questions about this Private Health Insurance Statement, your income tax return or the Government Rebate, please contact the Australian Taxation Office on **13 28 61**. Or for information specific to the income testing of the private health insurance rebate and Medicare levy surcharge you can visit ato.gov.au/Individuals/Medicare-and-private-health-insurance/Private-health-insurance-rebate/

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A copy of your statement will be stored in Online Member Services. Visit australianunity.com.au/memberservices

- B** Australian Unity's unique fund ID code is AUF.
- J** Your share (for taxation purposes) of the total amount paid for your health insurance policy this financial year.
- K** Your share of the rebate you have already received (if applicable) this financial year..
- L** Australian Tax Office code representing your age based rebate entitlement.

Any other adult/s (if applicable) you shared the policy with during the financial year.

A The number of days during the tax year that your policy provided private hospital cover.

The number of days during the tax year that your policy provided extras cover.

For more specific information contact the ATO on **13 28 61** or visit ato.gov.au/privatehealthinsurance



For frequently asked questions, visit australianunity.com.au/taxstatement

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