This document, and the Excel Workbook it accompanies, while having been reviewed, are still very new. Any feedback as to ways things can be made simpler or clearer are welcome. If you find any formula errors, please let us know ASAP so we can get a corrected version out.

**Working From Home Sheet Instructions**

In the Excel workbook you will see there are a number of tabs for different sheets. There are 15 sheets, one for each month, one that tallies them all together, one for recording the costs to run and one for purchases made.

Depending on the method of claiming you wish to use you may not need to fill in the whole work book. To get the maximum claim you will need to use the “Actual Costs” Method. These instructions will assume that is the method being used. If you are going to use the “Fixed rate” method only the time (Part 4 of this document) and purchases (Part 2 of this document) will need to be recorded. If you are a small business operating from home and using the “Floor Area” method the only change from previous years is the need to record every hour rather approximating from a smaller sample. You can use this sheet for that (Part 4 of this document), as well as the cost section if you wish, but if you already have a method that works you can continue to use that.

1. Costs Sheet

On the “Costs” sheet you will need to enter the Kilowatt rating for any items that are being used. This can be found on the compliance plate of an appliance, or sometimes the manufacture’s website. Double check the Kilowatt rate (kw Rate) matches what your utility is charging, it has been prefilled with data from Aurora, but may have changed.

The Row names can be updated in the “July” sheet, which will propagate across the whole workbook to keep them in sync, and rows that are directly linked to easily recorded hours prefill from the “Totals” sheet.

Below the Electrical section are spaces to put in the monthly costs for your phone and internet plans, if applicable.

Below that are areas for other common heat sources, such as wood and gas, please fill in the costs if applicable, the rest will be pulled from the other sheets.

This sheet will also pull the totals from the “Purchases” sheet.

2. Purchases

The Equipment section is for large purchases, such as chairs, desks, computers etc. that may need to be depreciated. The Supplies section are your small purchases. To the right the sheet will automatically calculate your private use percentage for printing, which can be put against ink, paper etc., based on the usage you enter on the monthly sheets.

If you are unsure on the percentage to claim, it can be discussed during your appointment.

3. Totals

This sheet should not need to be touched; it is a tally of the numbers entered on the monthly sheets.

4. Month sheets

There are 12 sheets, one for each month. Each sheet has a column for each day of the month where the hours usage for each item (or “touches” in the case of phones) can be recorded.

If you are using the “Fixed Rate” or “Floor Area” methods only the “Working from Home Hours” and “Studying at Home Hours” rows need to be completed, putting the hours for each day in the relevant column.

For all other users please fill in any relevant rows. Not all rows are relevant for all users, and there are a number of rows that can be renamed (only on the July sheet, the changes will be carried to the other months automatically) for equipment specific to your use case.

All hours will be automatically tallied, and where possible calculated. Once the sheet is complete it can be submitted to us ahead of your tax appointment so the final calculations (for those items not automatically done) and appropriate claims can be made.

**Differences for 2023**

As the new system was brought in part way through the year a special version of the sheet has been prepared, which is a hybrid of the old sheet and new. The first tab is for capturing the data for the first 8 months of the year, July-February, and other than changing the calculations to account for the shorter period is the same as the old sheet.

The number of monthly sheets has also been reduced to just the four covered by the 4 months requiring the actual hours to be recorded. Row names can be adjusted in the March sheet rather than the July sheet.