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R&D Tax Incentive Documentation

Supporting your R&D Tax Incentive (RDTI) through maintaining adequate documentation.

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RDTI Documentation Explained.

Supporting documentation should be generated and maintained throughout the development cycle.
To support your RDTI, your documentation should illustrate that you:

→ Performed eligible core and, where claimed, supporting RDTI activities

→ Incurred eligible expenditures in relation to submitted RDTI activities; and

→ Your RDTI activities and expenditures met all other legislative requirements under the program.

The best supporting documentation is created during the development process. Documentation comes in a wide range of formats and content, including:

General	Software	Manufacturing	Life Science	Agriculture
• Business case documents • Competitor research • Literature reviews and market research • Technical meeting notes • Development contract agreements • Presentations to board members and other stakeholders • Contractor invoices • Employee time sheets	• Technical specification requirements • Technology evaluations and comparisons • Architectural diagrams • Design documents • Jira boards and tickets • Test plans • Test documentation • Test results	• Technical specification sheets • Test method documentation • Designs of experiment • Pictures of experiments, prototypes, and test results • Prototype design iterations • Preliminary design and testcorrelation analysis	• Technical specification sheets • Material selection evaluation • Designs of experiment • Test method documentation • Test results and analysis • Prototype design iterations • Pictures of experiments, prototypes, and test results • Animal studies' protocols, test data and results • Clinical trial protocols, test data, and results	• Desired genetic traits in future crops • Genetic analysis of parent crops • Genetic analysis of hybrid crops • Breeding protocols, test data, and results • Field trial results

❝ *Azure Group is the go to firm for R&D and EMDG claims. With their years of experience dealing with technology firms you are in safe hands. For our fintech, New Quantum, they have been responsive partners from day 1. Highly recommend the team. — David L, New Quantum* ❞