

## COMPLETING A REFUND FORM

### INTRODUCTION

If a levy has been paid incorrectly, either at a higher levy rate or paid on incorrect eligible wages, a refund can be requested by completing a Refund Form and emailing it in Microsoft Excel format to [claims@coallsl.com.au](mailto:claims@coallsl.com.au).

### COMPLETING THE FORM

#### 1. ENTER YOUR EMPLOYER AND AUTHORISED OFFICER DETAILS

#### 2. SELECT YOUR MONTH

Choose the month and year the Refund Form is for. You must complete one Refund Form per month.

#### 3. COMPLETE THE INCORRECT AMOUNT BANKED AND DATE THE INCORRECT AMOUNT WAS BANKED

This section refers to when and how much you paid to Coal LSL. It allows us to match up the payment with our records and cannot be left blank.

#### 4. COMPLETE THE EMPLOYEE DETAILS

Enter the correct information in the fields, keeping in mind the following:

##### LSL number

LSL numbers comprise of eight or nine digits and can be found by running an entitlement report (available for download via the employer login at [www.coallsl.com.au](http://www.coallsl.com.au)).

##### Surname and given name(s)

These must be the employee's full legal name (no nicknames).

##### Date of birth

Enter the employee's date of birth in the format dd/mm/yyyy.

##### Work status

List the correct work status for that employee as F for full-time, P for part-time, C for casual or W for workers compensation.

##### Hours worked in month

This field is required for part-time or casual workers only. You must enter the hours the part-time or casual employee worked that month as per the originally submitted Levy Advice Form.

##### Incorrect eligible wages

Enter the eligible wages submitted on your original monthly Levy Advice Form.

##### Incorrect levy paid

Enter the levy paid on the eligible wages, as submitted in your original monthly Levy Advice Form.

##### Correct eligible wages

Enter the correct eligible wages.

##### Correct levy to be paid

This is the correct amount of levy that should have been paid. For more information about what levy should be paid, please refer to Employers/Changes to levy rate on our website [www.coallsl.com.au](http://www.coallsl.com.au).

##### Correct hours worked in month

This refers to the correct hours that the eligible employee has worked that month.

This cannot be left blank, even if it is the same as what was entered in the 'hours worked in month' column.

##### Refund amount

Your refund will be automatically calculated based on the figures you have entered.

##### Reason for refund

Please use the drop down box to select the refund reason.

If there is more information required due to your reason, the box on the right hand side will turn orange and an alert will appear.

Please give as much detail as possible when the form requests more information.

### 5. CERTIFICATION

The box that states 'please tick' certifies and dates the form. This must be ticked for your Refund Request Form to be processed by Coal LSL. If you receive an error message when trying to check this box, please check your Microsoft Excel macro settings.

## CHECKLIST

- THE CORRECT MONTH AND YEAR HAS BEEN SELECTED.
- EMPLOYER DETAILS AND AUTHORISED OFFICER DETAILS HAVE BEEN ENTERED.
- ONE REFUND FORM HAS BEEN COMPLETED PER MONTH.
- ALL SURNAMES AND GIVEN NAMES ARE LISTED AS PER EMPLOYEE'S ID.
- EVERY EMPLOYEE'S DATE OF BIRTH IS CORRECT.
- INFORMATION HAS BEEN ENTERED IN THE FIRST EIGHT COLUMNS IS THE SAME AS THE LEVY ADVICE FORM WHICH WAS ORIGINALLY SUBMITTED.
- REASON FOR REFUND CHOSEN FROM DROP DOWN OPTIONS. EXTRA INFORMATION INCLUDED IF NEEDED.
- CERTIFICATION CHECK BOX IS TICKED.
- REFUND FORMS EMAILED IN EXCEL FORMAT TO [CLAIMS@COALLSL.COM.AU](mailto:CLAIMS@COALLSL.COM.AU).

## SUBMITTING YOUR REFUND REQUEST

Submit your Refund Form in Microsoft Excel format to [claims@coallsl.com.au](mailto:claims@coallsl.com.au).

For questions, please call 1300 852 625, between 8.30am to 5pm (AEST) Monday to Friday.