

COMPLETING A REFUND REQUEST FORM

INTRODUCTION

If a levy has been paid incorrectly, either at a higher levy rate or paid on incorrect eligible wages, or in the circumstances where a levy has been over paid, a refund can be requested by completing a Refund Request Form and emailing it in Microsoft Excel format to claims@coallsl.com.au.

COMPLETING THE FORM

1. ENTER YOUR EMPLOYER AND AUTHORISED OFFICER DETAILS

2. SELECT THE MONTH

Choose the month and year that the Refund Request form is for. You must complete one Refund Request form per month in which a reporting error occurred.

3. COMPLETE THE ENTRANTS SECTION

This section is where you record eligible employees who commenced being eligible that month that were missed off the original Levy Advice form.

Examples: a new employee who started that month but was missed off the original advice; change to a start date listed on the original advice for a new employee.

If you are unsure of a new employee's LSL number, please leave the LSL number area blank.

4. COMPLETE THE EXITS SECTION

This section is where you record employees who are ceasing to be eligible and were missed off the original levy advice form or whose cessation date needs to be amended.

Ensure you have selected the cessation code which accurately reflects the reason that individual ceased to be an eligible employee. Providing an incorrect cessation code can affect an eligible employee's ability to access their entitlement.

5. COMPLETE THE PERIODS OF UNAUTHORISED ABSENCE OR PERIODS OF UNPAID LEAVE (L) AND PERIODS OF WORKERS COMPENSATION LEAVE (W) SECTION

Periods of unauthorised absence and unpaid leave

This section is for periods of unpaid leave for full-time and part-time eligible employees only, who were missed off the original Levy Advice form or who were on the original form but whose leave without pay or workers compensation dates need to be amended.

If an employee is full-time or part-time but did not work as an eligible employee during the month (e.g. unauthorised leave, unpaid leave or workers compensation), and is not ceasing to be an eligible employee, they must be recorded in this section as well as the Employee Details section, showing zero hours in the Total Hours Worked column.

Casual employees must NOT be included in this section. If a casual employee did not work within the month, they should be recorded in the employee details section with zero hours.

Periods of workers compensation

This section should include all eligible employees, including casual employees, who received workers compensation that month.

6. COMPLETE EMPLOYEE DETAILS SECTION

In this section, include every eligible employee from the above-mentioned sections i.e. those who were included on the original Levy Advice form or who were on the original form but whose leave without pay or workers compensation dates need to be amended.

Also include any additional employees for whom you require a refund during the month. Only employees for whom you require a refund should be listed; you are not required to list all employees.

- Columns E to H: record the details supplied on the original Levy Advice form.
- Columns I to L: record the amended/correct details.

- Column M will automatically calculate the difference between what was submitted and what should have been submitted.
- Column O must be updated for each employee to clearly show the reason a refund is required.
- In the totals cell, if a positive amount is shown then this line will need to be removed from the Refund Request Form and resubmitted on an Adjustment Levy form along with an adjustment payment. If a negative amount is shown, a refund will be processed in due course.

Helpful hint

You can run an entitlement report via the employer self-service portal at www.coallsl.com.au - this report captures all eligible employees we have recorded for your organisation.

7. SUBMIT YOUR COMPLETED FORM

Submit your form in the supplied Microsoft Excel template to claims@coallsl.com.au. All information requested in the form must be supplied. Forms submitted with incomplete information, with modifications to the original form or in any format other than the Coal LSL Microsoft Excel template **will be returned for amendment.**

8. RECEIVING A REFUND

If you have overpaid levies, you don't need to do anything. You will be reimbursed from the Fund in due course.

CHECKLIST

- THE CORRECT MONTH AND YEAR HAVE BEEN SELECTED TO MATCH THE ADVICE FORM YOU ARE AMENDING.**
- LSL NUMBERS ARE INCLUDED FOR ALL EMPLOYEES, WITH THE EXCEPTION OF ENTRANTS.**
- ALL DETAILS ARE INCLUDED AND CORRECT FOR ENTRANTS. PLEASE ATTACH PHOTO ID OF ENTRANTS.**

COMMON ERRORS

Below are the common errors and prompts which can appear in the Refund Request form.

ORANGE HIGHLIGHTED BOXES

If the field/s become highlighted in orange, you have not filled in all information required. Review and complete all the highlighted cells.

RED HIGHLIGHTED BOXES

If field/s become highlighted in red, something is either incorrect or the form is validating your information according to an incorrect date. Review the information entered and ensure you have selected the correct month and year (located at the top right of the form) for that levy period.

RED TEXT BOX ERROR MESSAGE 'PLEASE CHECK LEVY AMOUNT'

If this message appears at the top of the form next to 'Total Levy Payable', there is a mistake with your calculation of the levy rate for an eligible wage. Check you have the correct levy rate for each eligible wage.

The levy rate on all eligible wages paid on or after 1 July 2018 is 2.0%. More information about levy rates is available at www.coallsl.com.au under Employer FAQs/ What is the long service leave levy?

ALERTS

Alert messages will pop up to assist you as you complete the form. If a cell is highlighted, you can hover over that cell to read why.

SUBMITTING YOUR REFUND REQUEST

Submit your Refund Request form in Microsoft Excel format via email to claims@coallsl.com.au

Enquiries: please call 1300 852 625 from Monday to Friday between 8:30am and 5:00pm (AEST).