

COMPLETING A LEVY ADVICE FORM

INTRODUCTION

All employers of eligible employees must complete a monthly Levy Advice form, due on the 28th day of the following month.

The Levy Advice form contains information Coal LSL requires to accurately maintain records of an eligible employee's entitlement.

COMPLETING THE FORM

1. ENTER YOUR EMPLOYER AND AUTHORISED OFFICER DETAILS

2. SELECT THE MONTH

Choose the month and year the Levy Advice form is for. You must complete one Levy Advice form per month.

3. COMPLETE THE ENTRANTS SECTION

This section is where you record eligible employees who commenced being eligible that month. This could include a new employee or an existing employee who moved into a new role and now meets the eligibility definition.

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.

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.

If an employee is full-time or part-time but has not worked as an eligible employee during the month (for reasons other than unauthorised leave, unpaid leave or workers compensation),

and is not ceasing to be an eligible employee, they must be recorded in the employee details section with zero hours.

Casual employees must NOT be included in this section.

If a casual employee has not worked 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 were receiving workers compensation that month.

6. COMPLETE EMPLOYEE DETAILS SECTION

In this section include every eligible employee on your organisation's payroll. Include employees who did not receive an eligible wage during the month.

For example, this section must include:

- All employees who were paid an eligible wage that month, including entrants and employees ceasing to be eligible
- Casual employees who were not paid an eligible wage during the period
- Employees with unpaid leave or receiving workers compensation or who were not paid an eligible wage that month.

Helpful hint

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

7. CERTIFICATION

The box that states 'please tick' certifies and dates the form. This must be ticked for your Levy Advice 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.

8. SUBMIT YOUR COMPLETED LEVY ADVICE FORM

Submit in Microsoft Excel format to levy@coallsl.com.au. Please note, all information required by the Levy Advice form must be supplied. Forms submitted with incomplete information will be returned for amendment.

CHECKLIST

- THE CORRECT MONTH AND YEAR HAS BEEN SELECTED.
- ONLY ELIGIBLE WAGES PAID IN THE LEVY ADVICE FORM PERIOD ARE INCLUDED.
- ONE LEVY ADVICE FORM COMPLETED PER MONTH.
- ALL SURNAMENAMES AND GIVEN NAMES ARE LISTED AS PER EMPLOYEE'S ID.
- EVERY EMPLOYEE'S DATE OF BIRTH IS CORRECT.
- ALL LSL NUMBERS ARE INCLUDED FOR EMPLOYEES, WITH THE EXCEPTION OF ENTRANTS.
- ALL DETAILS ARE INCLUDED AND CORRECT FOR ENTRANTS. PLEASE ATTACH PHOTO ID OF ENTRANTS.
- ALL ELIGIBLE EMPLOYEES ARE INCLUDED ON THE LEVY.
- CERTIFICATION CHECK BOX IS TICKED.
- LEVY ADVICE FORM EMAILED IN MICROSOFT EXCEL FORMAT TO LEVY@COALLSL.COM.AU BY THE DUE DATE.

COMMON ERRORS

Below are the common errors and prompts which can appear in the Levy Advice 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 Employers/ Changes to levy rate.

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 AND PAYING THE LEVY

Submit your Levy Advice form in Microsoft Excel format via email to levy@coallsl.com.au.

Quote your company ID as reference when banking funds.

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