



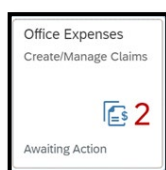
HOW TO GUIDE

CREATE A MONTHLY AUSTRALIA POST CLAIM

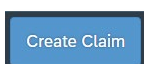
This guide explains how to create an Australia Post Claim and includes a checklist and example to assist you in the process. **Note:** Australia Post issues monthly invoices that need to be processed in a timely manner to avoid late payment fees. Australia Post strictly enforces a 14-day payment date before late fees are incurred. To avoid late fees, the Australia Post invoice must be received by MaPS for verification no later than five business days before the due date stated on the invoice.

Create a Monthly Australia Post Claim

1. Open the **Office Expenses** tile from the PEMS dashboard.



2. Click the **Create Claim** button located at the bottom left of the screen.



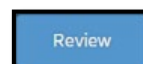
3. Fill in the claim details, **noting:**
 - a) **Goods/Services received date:** The monthly charges commence from the 1st of the month.

Example: If the invoice is for the period ending 31/10/22, the goods received date is the 01/10/22.

- b) **Descriptions:**
 - For general postage charges:
Distribution 1 Oct to 31 Oct 22
 - For any credits:
Credit adjustments 1 Oct to 31 Oct 22
 - For late payment charges:
Late payment fee 1 Oct 22 (no GST)
 - For redirections less than 3 months:
Mail redirection 1 Oct to 31 Dec 22 (3 months)
 - **Note:** Please contact the Help Desk for redirections > 3 months
- c) **Additional Claim Expense lines:** To be added

depending on the description, credits and work expense.

- d) **Gross total:** Should balance back to the charges for the month.
4. Once all claim details have been entered, select the **Review** button located at the bottom left of the screen.



5. Review the claim details carefully against the invoice. To progress, select **Submit**, **Assign To** or **Manually Certify**, based on the following:

MOP(s) Employee reviewing the claim



Select **Assign To:**

- a) If the claim was created on behalf of the Parliamentarian or someone else and is ready for certification, assign the claim to the Parliamentarian. Select **OK**.
 - b) If the claim requires peer review prior to certification, assign the claim to the individual by selecting their name from the drop down list. Select **OK**.
- OR
- c) Select **Manually Certify** where a physically signed form is attached to the claim in PEMS. Select **OK**.
 - d) Select **Submit** – If you are the claimant and the claim is in a complete and ready state, you can submit to the parliamentarian for certification.

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This section steps through an Australia Post claim using the following example invoice.

Supply this Period Tax Invoice		Tax Invoice Number		Page 2 of 2	
Description	Quantity	Unit Price (ex. GST)	Total Price (ex. GST)	Total Price (in. GST)	GST in Price
Late Payment Charge	1	8.88000	8.88	8.88	0.00
Postage Meter Modern Reset	2	909.09000	1,818.18	2,000.00	181.82
TC 2916 Underpaid Mail	1	9.00000	9.00	9.90	0.90
Total Supply			\$1,836.06	\$2,018.78	\$182.72
Total GST free supplies this period		\$9.88			
Total GST exclusive supplies this period		\$1,827.18			
Total GST inclusive supplies this period		\$2,009.90	(GST component is \$182.72)		
Adjustment Note					
Description	Transaction ID	Adjustment (ex. GST)	Adjustment (in. GST)	GST in Adjustment	
Credit Adjustments					
10/10/2022 Rebate - Meter Licence	7739643580	22.73CR	25.00CR	2.27CR	
17/10/2022 Rebate - Meter Licence	7740689578	22.73CR	25.00CR	2.27CR	
Credit Total		\$45.46CR	\$50.00CR	\$4.54CR	
Total Net Adjustment		\$45.46CR	\$50.00CR	\$4.54CR	
Total GST free supplies this Adjustment		\$0.00			
Total GST exclusive supplies this Adjustment		\$45.46CR			
Total GST inclusive supplies this Adjustment		\$50.00CR	(GST component is \$4.54CR)		

Example: Australia Post Invoice (below showing page 2)

- Late payment charge: \$8.88
- General postage charges: \$2,009.90
- Credits adjustment: - \$50.00

Example Claim Details:

Vendor Name > Select Vendor name:

'Supplier 700167 - Australia Post (Communications)'

Expense Category > Office Services

Expense Type > Communication

Work Expense > Printing and Communications

Expenses (three line items)

Note: These expenses needs to be entered as separate expense items.

Example for **Expense item 1:**

- **Description:** *Distribution 1 Oct to 31 Oct 22*
- **Gross amount:** 2,009.30 AUD (include GST)

Example for **Expense item 2:**

- **Description:** *Late payment fee 1 Oct 22*
- **Gross amount:** 8.88 AUD (exclude GST)

Example for **Expense item 3:**

- **Description:** *Credit adjustments 1 Oct to 31 Oct 22*
- **Gross amount:** - 50.00 AUD (include GST).
Please note the use of a minus key '-'

Total Gross Amount: 1,968.78 AUD

The screenshot shows the 'Office Claim' summary page in the PEMS system. It displays claim details such as Claim Status (Draft), Claim Type (OFFICE - MOFS Self Service Office Claim), Invoice Reference (Example - 1318), Invoice Date (02/11/2022), Due Date, Remittance Text, T&C Acceptance (No), and Split Invoice (No). The summary also shows Net Amount (1,790.61 AUD), GST Amount (178.17 AUD), and a highlighted Gross Amount (1,968.78 AUD). Below the summary is a table of expenses with 3 items:

Claim Number	Description	Work Expense	Expense Date	Net Amount	Gross Amount	Tax Inclusive
8000101	Australia Post postage machine	1000000129 - Printing and Communications	01/10/2022	1,827.18 AUD	2,009.90 AUD	Yes
8000102	Late Payment Fee	1000000329 - Printing and Communications	01/10/2022	8.88 AUD	8.88 AUD	No
8000103	Adjustments for period	1000000329 - Printing and Communications	01/10/2022	-45.45 AUD	-50.00 AUD	Yes

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Checklist for Australia Post Claims

- ✓ All three pages of the invoice are attached to the claim.
- ✓ Invoices can include credit amounts for adjustments or meter rebates. These credits need to be entered in as a line item with a negative amount. Example -\$25.00.
- ✓ Charges for the month are listed on page 2 of the invoice. Not all items on the invoice will have a GST component. Late payment fees and international mail charges do not incur GST. These need to be entered as a separate expense item to ensure the GST is excluded.
- ✓ You cannot claim the purchase of stamps or stamped envelopes from your office expenses budget. Offices will need to ensure any purchase of stamps is settled directly by the office with Australia Post and not included as part of a claim.
- ✓ Each monthly invoice needs to be submitted as a separate claim. Any invoice showing an outstanding balance needs to be checked if it has previously been paid. If not paid, the outstanding invoice will need to be submitted on a separate claim. Each monthly invoice has the itemised list of services received during that month.
- ✓ If a credit has been raised by Australia Post, this will show up in the next month's invoice.

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