



Department of  
Transport

# User Guide

## Levy records template completion

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# Purpose

The Levy Audit Tool Completion Manual has been developed to provide guidance to users on completing the Levy Template during the Levy Audit process. This document provides instructions on completing each column. It is split out by tab and header grouping.

## User accountability

The structure, format and embedded formulae in the Levy Template must not be altered under any circumstances. If any alterations are made, the completed Levy Template will be deemed non-compliant.

The examples provided are suggested inputs and are not representative of all possible inputs, nor the inputs to be entered into the template for the user's specific circumstances. They are provided as a guideline to assist users.

## Overview tab

The Overview tab requires information in relation to the booking service to which the Levy Template relates, as well as the Audit Period and the booking service representative completing the Levy Template.

The user should complete all blue filled cells as described below:

**Booking Service Name:** The name of the booking service to which the Levy Template being completed relates

Booking Service Name (e.g. "Cabs 'R' Us Pty Ltd"): **Limos R Us Pty Ltd.**

**Booking Service Authorisation Number:** The ODBS authorisation number for the booking service. This can be found on your ODBS authorisation in DoTDirect.

Booking Service Authorisation Number: **12345**

**Does your booking service on charge the levy to the customer?** A "Yes" or "No" question to confirm whether the booking service passes on the levy charge to their customers. If "Yes", please mark as Y. If "No", please mark as N. Please do not enter any other symbols, letters or numbers.

Does your Booking Service on charge the levy to the customer? **Y**

**Name:** The name of the person filling out the Levy Template on behalf of the booking service.

Name (e.g. John Smith): **Joanna Smithee**

**Position:** The position held by the person who is filling out the Levy Template on behalf of the booking service.

Position (e.g. Owner, Business Analyst): **Co-Owner**

**Contact number:** The phone number of the person filling out the Levy Template on behalf of the booking service.

Contact Number:	0401020305
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**Contact Email:** The email address of the person filling out the Levy Template on behalf of the booking service.

Contact Email (e.g. john.smith@cabsrus.com.au):	J.Smith@LimosRus.com
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**Date:** The date the Levy Template was completed.

Date:	28/11/2019
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**Levy Period start date:** The first date of the Audit Period as per the audit advice letter. That is, the first date of the period for which booking records are being submitted.

Levy period start date (per audit advice letter):	30/06/2019
Levy period end date (per audit advice letter):	30/09/2019

**Levy Period end date:** The last date of the Audit Period as per the audit advice letter. That is, the date the last date of the period for which booking records are being submitted.

Levy period start date (per audit advice letter):	30/06/2019
Levy period end date (per audit advice letter):	30/09/2019

# Levy records tab

The Levy Records tab requires the user to input information in relation to all bookings / jobs completed by the booking service during the Audit Period, as per the booking records required to be kept by the booking service in accordance with the legislation.

Please note that if you are copying and pasting data from your existing database, column Z has a formula that can't be overwritten. Please copy the data as Columns A to Y and then AA to AC.

## Booking details

**Booking ID / Job No:** Please provide the booking ID or job number for each leviable trip during the period, as per your booking records.

Booking ID / Job No	Booking date and time	Hirer contact details (if provided)
1	1/04/2019 15:35	08 9000 0000
2	1/04/2019 17:52	08 9100 0000

**Booking date and time:** Please provide the date and time (in *DD/MM/YYYY HH:MM* format) that the booking was made for the booking ID / job number entered, as per your booking records. Please note that the user must include the hours and minutes as well as the date.

Booking ID / Job No	Booking date and time	Hirer contact details (if provided)
1	1/04/2019 15:35	08 9000 0000
2	1/04/2019 17:52	08 9100 0000

**Hirer contact details (if provided):** If applicable, please provide the contact details of the hirer for the booking ID / job number entered, as per your booking records. Only the hirer's phone number should be entered into this field.

Booking ID / Job No	Booking date and time	Hirer contact details (if provided)
1	1/04/2019 15:35	08 9000 0000
2	1/04/2019 17:52	08 9100 0000

## Vehicle and driver details

**Vehicle registrations:** Please provide the vehicle registration (i.e. car licence plate number) for the vehicle completing the relevant booking ID / job, as per your booking records. Taxi plates should include "TAXI".

Vehicle registration	Electric vehicle (Y/N)	Driver's licence number	Driver's name
1ABC123	N	1234567	John Smith
TAXI413	N	2345678	Jane Smithson

**Electrical vehicle (Y/N):** If the vehicle used for this booking ID / job number was propelled entirely by electricity, please enter "Y". If the vehicle was propelled for only a portion of the job, or not at all, by electricity, please enter "N". Please only enter a "Y" or "N" into this column, do not enter any other symbol, number or word into this field.

Vehicle registration	Electric vehicle (Y/N)	Driver's licence number	Driver's name
1ABC123	N	1234567	John Smith
TAXI413	N	2345678	Jane Smithson

**Driver's licence number:** Please provide the driver's licence number for the driver completing the booking ID / job entered, as per your booking records. Note that the user must only enter the seven digits as shown on the driver's licence, and not any other ID number (e.g. Taxi ID numbers).

Vehicle registration	Electric vehicle (Y/N)	Driver's licence number	Driver's name
1ABC123	N	1234567	John Smith
TAXI413	N	2345678	Jane Smithson

**Driver's name:** Please provide the full name of the driver completing the booking ID / job entered.

Vehicle registration	Electric vehicle (Y/N)	Driver's licence number	Driver's name
1ABC123	N	1234567	John Smith
TAXI413	N	2345678	Jane Smithson

## Trip details

**Start date and time:** Please provide the date and time that the booking ID / job entered began (in DD/MM/YYYY hh:mm format).

Trip details			
Start date and tin	Start location	End date and tin	End location
1/04/2019 15:40	-32.28; 116.02	1/04/2019 16:20	-31.98; 115.95
1/04/2019 17:58	1 Example Rise, Kallaroo WA 6025	1/04/2019 18:05	1 Placeholder Rd, Ocean Reef WA 6027

**Start location:** Please provide the location where the booking ID / job entered began. The location should be entered in the form of "street number, street name, suburb, state and post code" or latitude and longitude. All descriptors of the location should be entered, for example, entering "Safety Bay Road" does not sufficiently describe the start location.

Trip details			
Start date and tin	Start location	End date and tin	End location
1/04/2019 15:40	-32.28; 116.02	1/04/2019 16:20	-31.98; 115.95
1/04/2019 17:58	1 Example Rise, Kallaroo WA 6025	1/04/2019 18:05	1 Placeholder Rd, Ocean Reef WA 6027

**End date and time:** Please provide the date and time that the booking ID / job entered began (in DD/MM/YYYY hh:mm format).

Trip details			
Start date and tin	Start location	End date and tin	End location
1/04/2019 15:40	-32.28; 116.02	1/04/2019 16:20	-31.98; 115.95
1/04/2019 17:58	1 Example Rise, Kallaroo WA 6025	1/04/2019 18:05	1 Placeholder Rd, Ocean Reef WA 6027

**End location:** Please provide the location where the booking ID / job entered ended. The location should be entered in the form of "street number, street name, suburb, state and post code" or latitude and longitude. All descriptors of the location should be entered, for example, entering "Safety Bay Road" does not sufficiently describe the start location.

Trip details			
Start date and tin	Start location	End date and tin	End location
1/04/2019 15:40	-32.28; 116.02	1/04/2019 16:20	-31.98; 115.95
1/04/2019 17:58	1 Example Rise, Kallaroo WA 6025	1/04/2019 18:05	1 Placeholder Rd, Ocean Reef WA 6027

**Distance travelled:** Please enter the distance travelled (in kilometres) to complete the booking ID / job entered.

Distance travelled (kr)	No of wheelchair passenge	Total amount payable (incl. GS)
44.70	1	62.14
5.80	-	12.16

**Number of wheelchair passengers:** Please enter the number of wheelchair passengers for the booking ID / job entered. If there were no passengers who required a wheelchair for the relevant booking ID / job number, enter 0 (this then appears as a dash on the template). "N/A" or text will not be accepted.

Distance travelled (kr)	No of wheelchair passenge	Total amount payable (incl. GS)
44.70	1	62.14
5.80	-	12.16

**Total amount payable (incl. GST):** Please enter the total amount payable (including GST) for the booking ID / job entered.

Distance travelled (kr)	No of wheelchair passenge	Total amount payable (incl. GS)
44.70	1	62.14
5.80	-	12.16

### Excluded levy fare components (required for leviable transactions only)

**GST amount:** Please enter the total Goods and Services Tax (GST) amount for the booking ID / job entered.

GST amount	Airport fee (excl. GS)	Payment method charge (excl. GST)	Cleaning fee (excl. GS)
5.65	-	-	-
1.11	-	0.15	-

**Airport fee (excl. GST):** Please enter the total amount of any airport fees associated with the booking ID / job, excluding the GST. If not applicable, enter 0. "N/A" or text will not be accepted.

GST amount	Airport fee (excl. GS)	Payment method charge (excl. GST)	Cleaning fee (excl. GS)
5.65	-	-	-
1.11	-	0.15	-

**Payment method charge (excl. GST):** Please enter any amounts payable due to payment method charges (e.g. credit card surcharges), for the booking ID / job, excluding the GST. If not applicable, enter 0. "N/A" or text will not be accepted.

GST amount	Airport fee (excl. GST)	Payment method charge (excl. GST)	Cleaning fee (excl. GST)
5.65	-	-	-
1.11	-	0.15	-

**Cleaning fee (excl. GST):** Please enter the cleaning fee amount payable for the booking ID / job entered, excluding the GST. If not applicable, enter 0. "N/A" or text will not be accepted.

GST amount	Airport fee (excl. GST)	Payment method charge (excl. GST)	Cleaning fee (excl. GST)
5.65	-	-	-
1.11	-	0.15	-

**Child restraint, booster seat or safety harness fitting charge (excl. GST):** Please enter the amount payable for any child restraint, booster seat or safety harness fittings for the booking ID / job entered, excluding the GST. If not applicable, enter 0. "N/A" or text will not be accepted.

Child restraint, booster seat or safety harness fitting charge (excl. GST)	Excess luggage fee (excl. GST)	Any amount allocated for the Levy (excl. GST)
-	-	5.14
-	-	-

**Excess luggage fee (excl. GST):** Please enter the amount of any excess luggage fees payable for the booking ID / job entered, excluding the GST. If not applicable, enter 0. "N/A" or text will not be accepted.

Child restraint, booster seat or safety harness fitting charge (excl. GST)	Excess luggage fee (excl. GST)	Any amount allocated for the Levy (excl. GST)
-	-	5.14
-	-	-

**Any amount allocated for the Levy (excl. GST):** Please enter the total of the levy amounts payable by the customer as part of the total fare due to the application of the Levy for the booking ID / job entered, excluding the GST. If not applicable, enter 0. "N/A" or text will not be accepted.

Child restraint, booster seat or safety harness fitting charge (excl. GST)	Excess luggage fee (excl. GST)	Any amount allocated for the Levy (excl. GST)
-	-	5.14
-	-	-

## Included levy fare components (required for leviable transactions only)

**Base, minimum or metered fare (excl. GST):** Please enter the total base, minimum or metered fare payable for the booking ID / job entered (fall flag), excluding the GST. If not applicable, enter 0. "N/A" or text will not be accepted.

Base, minimum or metered fare (excl. GST)	Callout charge, booking fee or surcharge (excl. GST)	Amount relating to the time and distance of travel (excl. GST)
-	-	51.35
4.60	-	6.30

**Callout charge, booking fee or surcharge (excl. GST):** Please enter the total call out charges, booking fees and/or surcharges payable for the booking ID / job entered, excluding the GST. If not applicable, enter 0. "N/A" or text will not be accepted.

Base, minimum or metered fare (excl. GST)	Callout charge, booking fee or surcharge (excl. GST)	Amount relating to the time and distance of travel (excl. GST)
-	-	51.35
4.60	-	6.30

**Amount relating to the time and distance of travel (excl. GST):** Please enter the total amount relating to the time and distance of travel for the booking ID / job entered, excluding the GST. If not applicable, enter 0. "N/A" or text will not be accepted.

Base, minimum or metered fare (excl. GST)	Callout charge, booking fee or surcharge (excl. GST)	Amount relating to the time and distance of travel (excl. GST)
-	-	51.35
4.60	-	6.30

**Any other amount payable not captured as an excluded Levy fare component (excl. GST):** Please enter any other amounts payable which are not captured elsewhere for the booking ID / job entered, excluding the GST. This may include public holiday surcharges. If not applicable, enter 0. "N/A" or text will not be accepted.

Any other amount payable not captured as an excluded Levy fare component (excl. GST)	Total Levy fare (excl. GST)	Levy amount (excl. GST)
25.00	-	5.14

## Levy amounts

**Total Leviable fare (excl. GST):** This is a calculated column and does not require input or amendment. It is the sum of the Included levy fare components.

**Levy amount (excl. GST):** Based on the total Levy fare, please enter the Levy amount in relation to for the booking ID / job entered. The levy amount should be the lower of (i) 10% of the total levy fare and (ii) \$10.

Levy amount (excl. GST)	Rates used per km (excl. GST)	
	Rate per minute (excl. GST)	Rate per minute (excl. GST)
5.14	1.26	1.41
1.09	1.91	1.58

**Rates used per km (excl. GST):** Please enter the rate per kilometre (excluding GST) for the booking ID / job entered, if applicable.

Rates used per km (excl.			
Levy amount (excl. GS		GS	Rate per minute (excl. GS
5.14		1.26	1.41
1.09		1.91	1.58

**Rate per minute (excl. GST):** Please enter the rate per minute (excluding GST) for the booking ID / job entered, if applicable.

Rates used per km (excl.			
Levy amount (excl. GS		GS	Rate per minute (excl. GS
5.14		1.26	1.41
1.09		1.91	1.58

## Integrity checks

**Check of dates and times:** This is a calculated column and **does not require user input or amendment**. Where a warning appears in this column, please ensure that the dates and times on the applicable line are entered accurately reflect the start, end and booking times of the booking ID / job entered. If any of the start, end and booking times of the booking ID / job entered occurred at 12 midnight and all other fields contain a time value, no action is required.

Check of dates and times
Please ensure that the dates and times entered accurately reflect the start, end and booking times of the trip. If this trip was booked, started or ended at 12 midnight, no action is required.

**Check of completeness:** This is a calculated column and does not require user input or amendment. Where a warning "Incomplete" appears in this column, please review the information on the applicable line to ensure that all fields have been completed. Please remember to put a zero value in amount fields rather than leaving cells blank.

Check of completeness
Incomplete.

## Final steps

Upon completion of the Levy Template, the template should be submitted to the Department of Transport in accordance with the audit advice letter. For any enquiries in relation to the completion of the manual, please [contact On-demand Transport](#).