

# For NSW Health Employees only

## I would like to make a meal entertainment claim



### Things to know

Please use this form to claim reimbursements for dine-in meals at cafes, bistros, hotels and restaurants, for professional catering or self-catered functions, or travel and accommodation associated with meals, as part of your salary packaging benefits.

**Complete your claim online or download our app (not eligible for self-catering or travel and accommodation claims)**

For easier, simpler and faster ways to claim, you can choose to:

login to your Maxxia Online account at [securemaxxia.com.au](http://securemaxxia.com.au) and lodge a claim in four easy steps; or download our free app, Maxxia Claims, from either the App Store or Google Play™, for simple claiming 'on the go' from a mobile device.

## 1 My details

Full name: \_\_\_\_\_

Phone number: \_\_\_\_\_

Email: \_\_\_\_\_

Employer name: \_\_\_\_\_

Payroll identification number: \_\_\_\_\_

## 2 My payment options

If there are insufficient funds in my meal entertainment account to pay this claim, I would like Maxxia to:

- use the balance on my Meal Entertainment Payment Card to pay this claim, as well as any future funds scheduled for my card, until the claim has been reimbursed in full.
- use future funds scheduled for my Meal Entertainment Payment Card to pay this claim until it is reimbursed in full, but **do not** use my existing card balance.
- increase my contributions in equal instalments over the next  available pays.
- Other (please advise): \_\_\_\_\_

## 3 Where to pay my claim

You only need to complete this section if you have **not** previously supplied your account details or if the details have changed. This will become your default account that all reimbursement payments are made to.

Account name \_\_\_\_\_

BSB number  -  Account number

**! CHECKPOINT:** Please ensure you include a copy of the following documentation for each item you are claiming.

<p>Purchases <b>within</b> Australia:</p> <ul style="list-style-type: none"><li>• an itemised tax invoice showing the entire purchase was for meals, and</li><li>• proof of payment, this may be listed on the invoice or can be a receipt number or financial institution statement.</li></ul>	<p>Purchases <b>outside</b> Australia:</p> <ul style="list-style-type: none"><li>• a receipt clearly showing the entire purchase was for meal entertainment, and</li><li>• a credit card statement identifying the actual cost of the meal in Australian dollars. This will be used to confirm the claim amount in Australian dollars.</li></ul>
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**My claim details**

Please fill in the below table with details of the expenses you are claiming.

- For travel and accommodation associated with meals claims go to section 5
- For self-catered function claims go to section 6

Name of restaurant/café/caterer	Date paid	Amount (incl GST)
		\$
		\$
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		\$
		\$
<b>Total</b>		\$

**Continued over →**

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### Travel and Accommodation Associated with Meals

Additional information is required to ensure compliance with the meal entertainment rules for travel and accommodation associated with a meal.

Travel and accommodation are only allowable when

- the sole purpose of the travel is the meal
- the venue is over 100 kilometres return trip
- you are away from your home for one night only
- the invoices for travel and/or accommodation are attached
- the meal invoice is attached to validate travel and accommodation.

Start Address: \_\_\_\_\_

Destination Address: \_\_\_\_\_

Name of restaurant/transport provider/accommodation provider	Date paid	Amount (incl GST)
		\$
		\$
		\$
		\$
		\$
		\$
		\$
	<b>Total</b>	\$

## 6

### Self-Catering Function

Additional information is required to ensure compliance with the meal entertainment rules for self-catered functions.

Expenses for self-catered functions are only allowable when:

- you have purchased the food and drink for a special function
- the invoices are attached
- the invoices include only food and drink items for the particular event
- the invoices are not older than 14 days before the function date.

Reason for Function: \_\_\_\_\_

Date of Function: \_\_\_\_\_

Item and Supplier	Date paid	Amount (incl GST)
		\$
		\$
		\$
		\$
		\$
		\$
		\$
	<b>Total</b>	\$

Continued over →

## 7

## My declaration

By submitting this form, I declare:

- I have read, understood and accept the Terms and Conditions below.
- I am entitled to reimbursement of these expenses in accordance with my employer's Salary Packaging Policy.
- These expenses were paid by me, not my employer or any other third party.
- I have not previously claimed reimbursement for these expenses from my employer or any other third party.
- Each individual expense to be claimed is at least \$15.00 and was not takeaway or fast food.
- The expenses listed have not been paid for with a Meal Entertainment Payment Card or Salary Packaging Payment Card.
- I have not and will not claim a tax deduction for the expenses included in this claim.

I understand that submission of false or misleading information may lead to serious tax offences and result in my claim being denied.

Sign here

Date / /



## CHECKPOINT

- I have completed my claim details on all four pages of this form.
- I have signed the declaration.
- I have included all pages of my supporting documentation and claim form.

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## Submitting my claim

**Submit this completed claim form along with all your supporting documents:**

**Online:** [maxxia.com.au/forms/upload-a-form](https://maxxia.com.au/forms/upload-a-form)

**Email:** [info@maxxia.com.au](mailto:info@maxxia.com.au)

**Fax:** 1300 733 444

**Post:** Maxxia Pty Ltd, Locked Bag 18, Collins Street East, Melbourne VIC 8003

## What happens next?

We will organise this payment for you. If you don't have enough money in your meal entertainment account, we'll make a partial payment from the amount currently available. The remainder of your claim will be automatically paid to you as funds become available.

**Privacy Statement:** Maxxia is committed to protecting the privacy and rights of its customers. Our Privacy Policy contains important information about how we collect, hold, use and disclose personal information including with third parties to provide our services to you. It explains what happens if we cannot collect your personal information, as well as how you can access and correct the personal information we hold about you, or make a complaint. If you do not wish to receive promotional material from us, or would like a copy of our Privacy Policy, please contact us on 1300 123 123 or view online at [maxxia.com.au](https://maxxia.com.au)

## Terms and Conditions

Important please read before signing this form.

By submitting this form, you acknowledge and agree:

1. Maxxia may request you to provide additional substantiation of the meal entertainment expenses for which you are claiming reimbursement at any time.
2. If you do not fully complete this form including providing appropriate supporting documentation then Maxxia may return your claim to you without payment.
3. If we suspect you have made a false claim for reimbursement, the matter will be referred to your employer and you may be denied further participation in salary packaging.