



## Summary

### Objective

To set up an advance payment for clients who haven't got the necessary earnings information to complete a full weekly compensation assessment and they are in need of funds.

### Background

For employees this procedure would be used when we cannot fully establish the client's earnings immediately prior to their incapacity period, but they are in need of payment.

For self-employed or non-PAYE shareholders, this process will occur when the three month interim period is due to lapse and Eos has created a task for the Payments Team to follow up with the client to lodge their returns. The Advance payment is created when the client still can't legitimately confirm their earnings.

Note: Where self-employed or shareholder interim or estimated periods expire, and current employee earnings exist you must include the employee portion of the calculation in any advance amounts until the recalculation is completed due to system constraints.

Owner

[Name withheld]

Expert

## Procedure

### 1.0 Check information

#### Payments Assessor

**a** In Eos, open the task containing a request for an advance, if applicable, then go to the related claim.

**b** Confirm that the client is eligible for an advance payment.

 Consider an interim estimate or advance of weekly compensation Policy

**NOTE What if additional information is required to confirm the client is eligible for an advance payment?**

Contact the client and request additional information as required.

For Self-Employed and Shareholder Clients, this includes the reason they have been unable to file their relevant tax return, and whether this was due to factors beyond their control.

You will also need to clarify the client's obligation to file a return, their planned timeframe for filing, and that an over-payment may be raised if they do not file.

**NOTE What if the client is not eligible for an advance payment?**

Contact the client and advise them that they are not eligible for an advance, or request further information as required.

Add a contact in Eos. This process ends.

**c** Check client has a valid bank account in Eos

**NOTE What if the client doesn't have a valid bank account in Eos?**

Follow the procedure below

 **PROCESS** Manage Client Bank Account and Notification

**d** Check client has a tax code in Eos

**NOTE What if client doesn't have a tax code loaded in Eos?**

See procedure below

 **PROCESS** Manage Client Tax Code

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### 2.0 Collect and calculate

#### Payments Assessor

**a** Complete these system steps for an employee or PAYE shareholder.

 Add a collection period from DOFI/DOSI

 Add collection point for an advance payment

 Set up a Weekly Compensation entitlement subcase

**NOTE What if the employee is a self-employed person or non-PAYE shareholder?**

Edit the end date of payable period for the interim payment to the date on which the interim payments must cease. A system message provides this date.

Payments assessors trained in these employments must then contact the client to discuss if an advance is appropriate beyond this end date.

**b** Add the advance payment

 Add an advance payment

**NOTE** What payment amount should you enter in Eos?

Eos will pay the rate you manually enter. Ensure this is 80% of the required payment rate.

The Advance Amount SHOULD NOT exceed the current 80% of current minimum weekly earnings unless the client is a self-employed or non-PAYE shareholder with 'current employee' income to consider in the advance amount.

Once the interim period has passed, EOS will no longer pay based on the estimated self-employed or Non PAYE shareholder. You need to do an advance based on the held employee earnings Long Term rate at the Collection Point. This is because ACC has the actual employee earnings details to base an actual calculation on. If the employee earnings rate is less than the minimum rate, and the client is eligible to the minimum, uplift their advance amount to match the 80% of the minimum weekly earnings rate.

**NOTE** What if the client is working part hours?

Ensure you reduce the advance accordingly. If the client provides hours or percentage you can use the abatement tool (Advance reduction calculator). Ensure you capture the Hours or Percentage of abatement requested in the reference field to assist with recalculation wash-up. Please note the Maximum Advance we can pay is the Minimum Weekly Earnings.

Save your workings to the claim when complete for future reference.

 Advance reduction calculator

**NOTE** What if the client is a self-employed or non-PAYE shareholder AND have current employee earnings on the collection point?

Then the client is entitled to continue to receive their current employee earnings amount beyond the interim 90 day period. You must add the employee earnings portion (80% rate) as an advance.

Once the interim period has passed, EOS will no longer pay based on the estimated self-employed or Non PAYE shareholder. You need to do an advance based on the held employee earnings Long Term rate at the Collection Point. This is because ACC has the actual employee earnings details to base an actual calculation on. If the employee earnings rate is less than the minimum rate, and the client is eligible to the minimum, uplift their advance amount to match the 80% of the minimum weekly earnings rate.

**c** Add a new 'Calculate and Pay' payable period once you have added your advance earnings amount to the claim. Change the status to 'Approved'.

 Edit a payment period

 Add a payment period

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### 3.0 Review client payment

#### Payments Assessor

**a** Review the calculation then initiate payments for approval.

 Initiate payments for approval

**b** Send the Set Up Weekly Comp Entitlement task (or whichever task you received) to the Centralised Weekly Compensation Approval queue. Add any notes or instruction to the task description that the approver may require, such as fast track.

**NOTE** What if I didn't receive a task?

Create an Approve Weekly Compensation Entitlements task. Add any notes or instruction to the task description that the approver may require, such as fast track. Send to the Centralised Weekly Compensation Approval queue.

 Add an approval task

**NOTE** What if the task is about a sensitive claim?

If the claim is sensitive, transfer the task to "Weekly Compensation Sensitive Claims Approvals" queue

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