**Expenditure Report (Form 5) (WA) Action Definition**

This action definition describes what needs to be done to lodge an Expenditure Report in WA.

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| Editable Content |  |

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| **Action Trigger** | | |
| **Asset Type** | Tenement | |
| **Action Name[[1]](#footnote-1)** | Expenditure Report | |
| **Precondition** | {status} = Live | |
| **Is Member Of** | Managed | |
| **Interval** | Annually | |
| **Critical Date** | Anniversary[[2]](#footnote-2) | = {commencementDate} + {Interval} |
| **Deadline** | Deadline[[3]](#footnote-3) | = {Critical Date} + 59 days |
| **AutoComplete[[4]](#footnote-4)** |  | |

*Note: The Action Trigger defines the logic of the Action. The Deadline is the latest date by which the Action can be completed.*

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| **Applies To** | | |
| **Jurisdiction** | **Sub Type** | **Version** |
| WA | Exploration Licence | Pre 2006 |
| WA | Exploration Licence | Post 2006 |
| WA | Prospecting Licence |  |
| WA | Mining Lease |  |
|  |  |  |

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| --- | --- |
| **Task List** | |
| **Description** | **Days Needed Before Deadline** |
| Meet with Exploration Manager | 60d |
| Notify Accounts | 59d |
| Gather Allowable Expenditure data | 59d |
| Check to see if there is drill data from Database Geologist | 59d |
| Generate Expenditure Report | 30d |
| Lodge Expenditure Report | 15d |
| Lodge Exemption (if required) | 14d |
| Exemption Application Fee required from accounts | 14d |
| Verify Form 5 Lodged on MTO | 7d |
| Lodge Statutory Declaration (if required) (r.54(3)) | -28d |
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*Note: Task List items define the Action Status and will have their own trigger dates based on the Days Needed Before the Deadline. Task List items negate the need for separate follow up Actions. You may add in as many Task List items as you wish. If a Task List item has no Days Needed Before Deadline entered then it will default to the previous Task List item Days Needed Before Deadline.*

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| **Change History** | | |
| **Date** | **Version** | **Changes** |
| 10/10/2024 | 1.9.0 | Removed custom fields, test examples, wiki links. |
| 25/02/2020 | 1.8.0 | AutoComplete field added to allow auto-complete rule to be specified |
| 27/08/2019 | 1.7.0 | Removed Custom Fields as no longer required |
| 15/06/2017 | 1.6.0 | Changed Loge Stat Dec task to -28d as old text (-28d from [Lodge Exemption Date]) was a placeholder that did not perform any calculations |
| 30/08/2016 | 1.5.0 | Custom Fields added to allow fields from Assets to be displayed in Actions |
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1. Define the action name [↑](#footnote-ref-1)
2. This is the label that will appear on the form & can be customised [↑](#footnote-ref-2)
3. This is the label that will appear on the form & can be customised [↑](#footnote-ref-3)
4. Options are Off, OnLodgeForm5, OnLodgeExemption, OnExemptionGranted (default) [↑](#footnote-ref-4)