Employer Portal FAQ's version 2.1

Employers

How does an employer self-register on the Employer Portal?

Provide Fund URL to the employer so that they can self-register

Employer clicks on the Fund URL to commence the new registration process

1. The Login page of the funds Portal will appear. Click on Register Account that is located under New User section
2. Employer enters their current ABN and the users email address
3. Employer enters their business and contact details and also create their own username
4. Employer can elect either Direct Debit or Direct Credit Payment Method. If Direct Debit is selected the Direct Debit Terms & Conditions must be agreed and to enter the company's banking details and the contribution payment cycle
5. The summary section is then displayed to review all the information entered in the previous steps. To proceed with the details reviewed the employer then must agree to the PDS Terms & Conditions. Once completed, the employer can submit their registration
6. The registration will trigger an email to be sent to the user with a temporary password which will provide them with access to the Employer Portal

How to add another employer?

1. On the home page, scroll down to Employer Details Maintenance section and select the Employer Details Tab
2. This will provide a list of employers linked to their user access
3. Click on Add Employer Button
4. User will be required to provide Employer, Contact, Address and Banking Information. Once these fields are populated hit Save which will create their new employer and appear in their list of existing employers

How to update Employer Information?

1. On the home page, scroll down to Employer Details Maintenance section and select the Employer Details Tab
2. This will provide a list of employers linked to the user's access
3. Click on the Employer record to be updated
4. Once employer is selected, update contact and businss details and update banking information
5. Ensure to hit save button once all infromation has been changed to update the records

How to add additional users?

1. On the home page, scroll down to Employer Details Maintenance section and select the User Details Tab
2. Click the add user button to set up another user
3. Select the user ID to be used to log in, along with first name and surname and select the user access to be provided i.e. Employer or Clerical. Note: Employer access allows the user to enter data and authorise a contribution file whereas clerical allows the user to enter data but not to authorise a contribution file
4. The users email address is then required
5. Click the Save button. This will trigger a temporary password to be sent to the new users email address

Contributions

How to process a contribution?

1. On the home page, select the Process Contributions button which is located on the right hand side of the Employer Portal video
2. The pay period will automatically default to the pay period selected as part of the registration process. If the pay period dates need to be changed, select the user specific dates button and manually select the period start and end date that applies to the contribution being remitted. Click the Next button that appears on the bottom right hand corner of the screen
3. The next screen displays the contribution grid. If you are a new user, you will be required to add your employees via the "Add Member" button before submitting contributions. Where employee records are already populated, the user can edit members, add members or simply process contributions for the employees.
4. For users who have multiple entities you can elect to pay contributions for all your businesses within the one contribution file, or you can elect to remove employees within the contribution grid and process a file for one of your businesses separately.
5. Once you have entered amounts on the contribution grid and happy that the totals add up select the next button located on the bottom right hand corner
6. A Summary Page is then displayed and provides users with a breakdown of employer and fund information. For users who are paying via direct credit, please take note of the Payment Reference Number will appear on the bottom left hand corner and the banking details. This is the bank account that is required to deposit the EFT funds into using with the corresponding Payment Reference Number
7. Click the Confirm and Send button appearing on the bottom right hand corner of the screen. This will then trigger a pop up confirming the submission of contribution a file and agreeing to a payment liability. Click the submit button at the bottom which will commence the processing of the file
8. Once the file is processed the user will be directed to the historic contributions screen which shows the latest contribution file has been processed

How do I upload a Contribution File?

1. On the home page, scroll down to Contributions and Employee updates and select the Upload a new file Tab
2. There are three options when entering dates: (a) use the default pay cycle as long as the dates match the pay period being contributed for (b) select specific dates by choosing the period start and end date from the supplied calendar (c) use the pay period captured in the SAFF formatted CSV file
3. Once the CSV file has been loaded, any employer or member exceptions may appear which will need to be corrected. The user has the option to correct the exceptions from within the Portal or within the source file. Any changes made to records on the Portal should also be captured in the Payroll system so the same exceptions do not occur in future uploads
4. When all exceptions have been corrected, the contribution grid is loaded successfully with all employees and the contributions for each member.
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How do I view my historic contributions files?

1. On the home page, scroll down to the Search section and select the Historical Contribution Batch Tab
2. Lists of historical contribution batches that have been previously submitted are then displayed.
3. The filter is set to default to the past week. To see more historical batches, click on the drop down box to expand the period of contribution batches to be displayed.

How do I view my past payments?

1. On the home page, scroll down to the Search section and select the Payment Status Tab
2. A filter is then displayed. Select the parameters required for the date period and payments to be viewed.
3. Click on the search button. Past payments and batch information for each payment is then displayed. To view details of a payment, click on the (+) plus button located on the left hand side of each payment. This will expand the payment to reveal the date contribution batch was submitted, the date payment received from employer, the date contributions were sent to the super funds and any refunds back to the employer

Members

How do I add a new member?

1. On the home page, select the Process Contributions button which is located on the right hand side of the Employer Portal video
2. The pay period will automatically default to the pay period selected as part of the registration process. If the pay period dates need to be changed, select the user specific dates button and manually select the period start and end date that applies to the contribution being remitted. Click the Next button that appears on the bottom right hand corner of the screen
3. The contribution grid is then displayed. New employees can be added to the grid by clicking the Add Member button.
4. The Member management form is then displayed. The following fields must be completed for each member:
   - Employees First Name and Surname
   - DOB
   - Member No (if known)
   - TFN
   - Address Details
   - Date Joined Company
   - Date Joined Fund
   - Occupation
   - Super Fund Details
5. When all fields are completed click on the Save button in the right hand bottom corner
6. The user must then either: (a) process a zero contribution line for the new member or (b) pay a contribution for the employee. Note: The contribution file for the new member MUST be submitted with either a zero line or a contribution amount for the record to be saved and submitted. If a file is not submitted the update will not be captured on the Portal.

How do I amend records for an existing member?

1. On the home page, select the Process Contributions button which is located on the right hand side of the Employer Portal video
2. The pay period will automatically default to the pay period selected as part of the registration process. If the pay period dates need to be changed, select the user specific dates button and manually select the period start and end date that applies to the contribution being remitted. Click the Next button that appears on the bottom right hand corner of the screen. The contribution grid is then displayed with a list of employees
3. Click on the person icon on the left hand side next to the member you want to edit
4. The Member Management form is then displayed. Update or edit the member fields requiring change. Please note: When changing an employee's super fund details, a separate record should be created when prompted. The prompt occurs after clicking the Save button
5. The user must then either: (a) process a zero contribution line for the new member or (b) pay a contribution for the employee. Note: The contribution file for the new member MUST be submitted with either a zero line or a contribution amount for the amended member record to be saved and submitted. If a file is not submitted the update will not be captured on the Portal.

Reports

How can I produce a report to display contribution history for an employee?

1. On the home page, scroll down to the Search section and select the Ad Hoc Search Tab
2. On the Reports screen several filters are displayed for an employer to complete. The following filters need to be set:
   - Date Filter (select your date range)
   - Message Type – Select Contributions
   - Feedback Severity – Select No Feedback
3. Once these filters are set, perform a surname search in the Member Surname Field to select the employee the report is to be run for.
4. Scroll down to Group Messages by section and ensure no fields are selected
5. Click on the Search button to run the report
6. The filtered messages section will display your search results
7. The report can be downloaded by clicking on the icon on the far right hand side of the record line with the black arrow facing downwards

How do I produce a report of my past contributions?

1. On the home page, scroll down to the Search section and select the Ad Hoc Search Tab
2. On the Reports screen t several filters are displayed for an employer to complete. The following filters need to be set:
    - Date Filter (select your date range)
    - Message Type – Select Contributions
    - Feedback Severity – Select No Feedback
3. Once these filters are set scroll down to the Group Messages by section
4. In the Group Messages by Section click on Date Initiated and Payment Ref No and then click on the Search Button
5. In the filtered messages section the search results are displayed for each contribution processed on the Employer Portal
6. A report can be downloaded by clicking on the icon on the far right hand side of the record line with the black arrow facing downwards

Navigation

How do I access my notifications?

1. On the home page, the dashboard displays a little bell icon. A notification is received when a number in red appears indicating the number of notifications received to be reviewed
2. Click on the bell icon. A small notification box will appear which displays member and contributions notifications

How do I locate a member number for a new employee I had set up?

1. On the home page, the dashboard displays a little bell icon. A notification is received when a number in red appears indicating the number of notifications received.
2. Click on the bell icon. A small notification box will appear which displays member notifications of either: Information = (Green), Warnings = (Yellow) and Errors = (Red) buttons
3. If there is a number displayed next to one of these options click on that button
4. A screen is displayed with pre-populated filters. Select the search button appearing under the Group Messages By section of the screen
5. This will populate a list of messages and under the column headed with No of Member Events select the button appearing
6. Each member record is displayed showing the fund information and member number
7. The record can be downloaded by clicking on the icon on the far right hand side of the record line with the black arrow facing downwards

How do I locate any refund information?

1. On the home page, the dashboard displays a little bell icon. A notification is received when a number in red appears indicating the number of notifications received to be reviewed Click on the bell icon. A small notification box will appear which displays member notifications of either: Information = (Green), Warnings = (Yellow) and Errors = (Red) buttons
2. If there is a number displayed in the Errors Tab, click on that button
3. A screen is displayed with pre-populated filters. Select the search button appearing under the Group Messages By section of the screen
4. This will populate a list of messages and under the column headed with No of Contribution select the red button appearing
5. This will display each contribution record and the member details the refund is for and the amount
6. Click on the member you want to review and an explanation will be displayed as to why the refund occurred
7. The record can be downloaded by clicking on the icon on the far right hand side of the record line with the black arrow facing downwards