

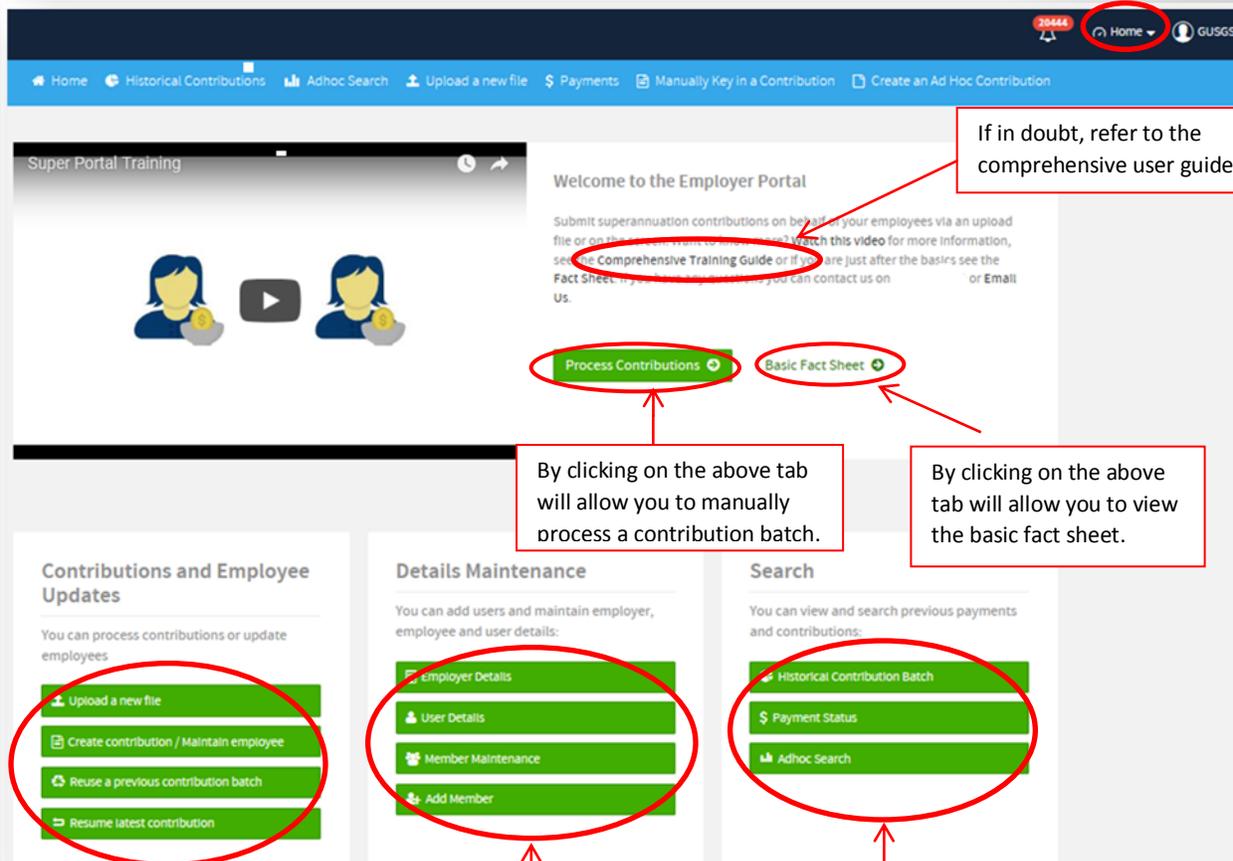
# Employer Portal Fact Sheet

Just the basics for employers entering data manually

## Dashboard summary

Regardless of the page you are on, select this navigation to get back to the Dashboard.

If in doubt, refer to the comprehensive user guide.



By clicking on the above tab will allow you to manually process a contribution batch.

By clicking on the above tab will allow you to view the basic fact sheet.

**Create contribution / Maintain employee** - This will allow you to manually process contributions, add new members', exit members' & update members' details.

**Reuse a previous contribution file** - This will give you a contribution table with previously submitted contribution amounts for your active employees as the template for the next contribution file.

**Resume latest contribution** - This will allow you to recommence a previously started contribution batch.

**Employer Details** - This section lets you update some details about your business.

**User Details** - This section lets you update details about your user account, as well as set up new users if you have the appropriate level of access.

**Member Maintenance** - This section allows you to update and exit members.

**Add Member** - This section allows you to add new members.

**Historical Contribution Batch** - This function will let you produce reports on super contributions paid by your business.

**Payments Status** - This function will let you produce reports on payments made by your business.

**Adhoc Search** - This function will let you produce reports on super contributions paid by your business.

## Contents:

- Editing an existing member
- Adding a new member
- Creating contributions via manual entry
- Exiting a member
- Contributing for an additional employer

## Editing an existing member

1. From the Dashboard select 'Member Maintenance'



2. Select the person icon to edit the member

Action	Payroll No.	Family Name	Given Name	Birth Dt	Title	Other Name	Gender	Address Code	Address Line 1	Address Line 2	Address Line 3	Address Line 4	Suburb	Postcode	State	Country	E-mail	Phone	Mobile	Exit D
		Smith	Susan	1960-06-17	MRS		2	POS	14 Smith St					Padstow 2211	NSW	AU				
		AUSTON	Matthew	1960-01-05	MR		3	POS	15 Smith					Padstow 2211	NSW	AU				2016-4
	123	AUSTON	Matthew	1960-01-05	MR		3	POS	15 Smith					Padstow 2211	NSW	AU				
	674364739	Byrne	Ram	1975-06-06	MR		1	POS	magow road					sydney 2000	NSW	AU	test@mail.com	0296683768	0401926662	
	674364739	Byrne	Ram	1975-06-06	MR		1	POS	magow road					sydney 2000	NSW	AU	test@mail.com	0296683768	0401926662	
	674364739	Byrne	Ram	1975-06-06	MR		1	POS	magow road					sydney 2000	NSW	AU	test@mail.com	0296683768	0401926662	
	674364739	Byrne	Ram	1975-06-06	MR		1	POS	magow road					sydney 2000	NSW	AU	test@mail.com	0296683768	0401926662	
	674364739	Byrne	Ram	1975-06-06	MR		1	POS	magow road					sydney 2000	NSW	AU	test@mail.com	0296683768	0401926662	
	674364739	Byrne	Ram	1975-06-06	MR		1	POS	magow road					sydney 2000	NSW	AU	test@mail.com	0296683768	0401926662	
	674364739	Byrne	Ram	1975-06-06	MR		1	POS	magow road					sydney 2000	NSW	AU	test@mail.com	0296683768	0401926662	

3. Edit the required details across the tabs and select save

**MEMBER MANAGEMENT**

Member Details    Contact Details    Employment    Fund Details    Employer Details

**Member Details**

Title \*    Given Name \*    Other Name

Mrs    Susan   

Last Name \*    Date of Birth \*    Gender \*

Smith    17-August-1960    Female

Payroll No.    Member No. \*    TFN \*

140    321054   

**Contact Details**

Address Code \*    Address Line 1 \*    Address Line 2

Phone    14 Smith St   

Address Line 3    Address Line 4    Suburb \*

      Padstow

State \*    Postcode \*    Country \*

New South Wales    2211    Australia

Email    Phone    Mobile

**Employment**

Date Joined Company \*    Date Joined Fund \*    Employment Status

10-April-2016    01-August-2016    Contractor

Member Reg Amendment Reason    Occupation Description    Ordinary Time Earnings

Actual Period: Salary or Wages    Employer Location Id    Full Time Hours

Save    Cancel

## Adding a new member

1. From the Dashboard select 'Add Member'



2. Select 'Add Member'



Here is all your contribution data for the final check before submitting it:

Action	Payroll No.	Family Name	Given Name	Birth Dt.	Title	Other Name	Gender	Address Code	Address Line 1	Address Line 2	Address Line 3	Address Line 4	Suburb	Postcode	State	Country	E-mail	Phone	Mobile	Exit D
	140	Smith	Susan	1980-09-17	MRS			POS	4 Smith St					Padstow 2211	NSW	AU				
	123	Ashton	Matthew	1988-01-05	MR			3	POS	15 Smith				Padstow 2211	NSW	AU				2016-
	123	Ashton	Matthew	1988-01-05	MR			3	POS	15 Smith				Padstow 2211	NSW	AU				
	674364739	Byre	Ram	1975-06-06	MR			1	POS	magow road				sydney 2000	NSW	AU	test@mail.com	0296883768	0401926662	
	674364739	Byre	Ram	1975-06-06	MR			1	POS	magow road				sydney 2000	NSW	AU	test@mail.com	0296883768	0401926662	
	674364739	Byre	Ram	1975-06-06	MR			1	POS	magow road				sydney 2000	NSW	AU	test@mail.com	0296883768	0401926662	
	674364739	Byre	Ram	1975-06-06	MR			1	POS	magow road				sydney 2000	NSW	AU	test@mail.com	0296883768	0401926662	
	674364739	Byre	Ram	1975-06-06	MR			1	POS	magow road				sydney 2000	NSW	AU	test@mail.com	0296883768	0401926662	
	674364739	Byre	Ram	1975-06-06	MR			1	POS	magow road				sydney 2000	NSW	AU	test@mail.com	0296883768	0401926662	
	674364739	Byre	Ram	1975-06-06	MR			1	POS	magow road				sydney 2000	NSW	AU	test@mail.com	0296883768	0401926662	

Showing 1 to 10 of 22 entries

Show 10 entries

Previous 1 2 3 Next

Previous Add Member Next

3. Enter details across all tabs select 'Save'. Note, the mandatory fields are marked with an asterisk

**MEMBER MANAGEMENT**

Member Lookup Member Details Contact Details Employment Fund Details Employer Details

Member Lookup

Lookup existing member (typeahead search)

Start typing member name

Member Details

Title \*  
Select Title \* Given Name \* Other Name

Last Name \*  
Date of Birth \*  
YYYY-MM-DD \* Gender \*  
Select Gender \*

Payroll No. \*  
Member No. \*  
TFN \*

Contact Details

Address Code \*  
Select Address Code \* Address Line 1 \* Address Line 2 \*

Address Line 3 \*  
Address Line 4 \* Suburb \*

State \*  
Select State \* Postcode \* Country \*  
Select Country \*

Email \*  
Phone \* Mobile \*

Employment

Date Joined Company \*  
Date Joined Fund \*  
Employment Status

Save Cancel

- Once you have added the New Member it will appear in the Contribution Grid. Then proceed to click on 'Confirm and Send' button.

Select Employers:      Employer Matching Exceptions:      Member Matching Exceptions:      Validation Issues:      Review:

Here is all your data for the final check before submitting it:

Member    Employment    Employer    Fund    All

Show only:  Rows with errors     Rows with warnings     Rows with changes    Search:

Action	Payroll No.	Family Name	Given Name	Birth Dt	Title	Suffix	Other Name	Gender	Address Code	Address Line 1
		TEST	TEST	1995-06-14	MR			1	POS	1 SMITH ST

Showing 1 to 1 of 1 entries      Show 10 entries      Previous 1 Next

[Previous](#)      [Add Member](#)      [Confirm and Send](#)

- Your submitted file will be stored in your 'Contribution History' section.

CONTRIBUTION HISTORY

Status    File Name    Employer(s)    File Type    Last Updated    User    Count    Expected \$    Received \$    Refunded \$    Issues    Actions

→ Add Member		SUPERCHOICE SERVICES PTY LIMITED	Manual [Member]	Tue, 25 Sep 2018, 16:53	PETERS	1					
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Show 10 entries      Previous 1 Next

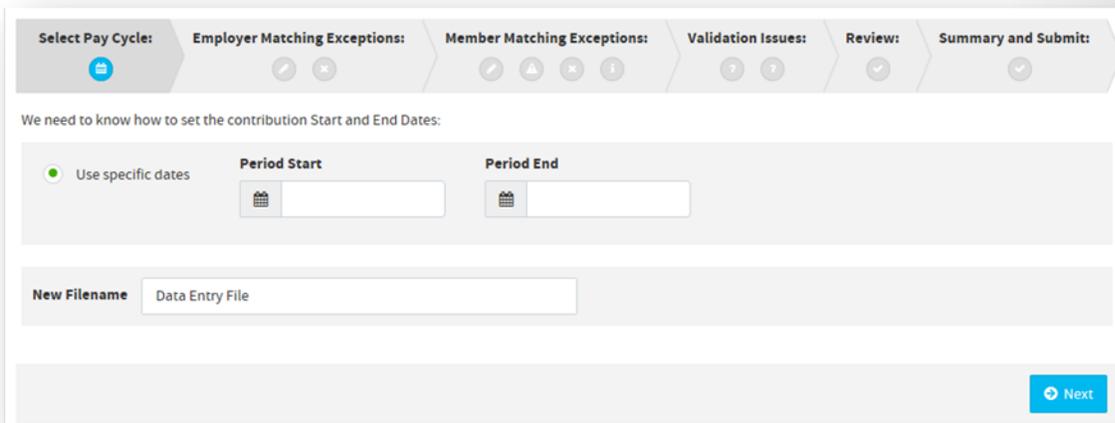
Next: Creating contributions via manual entry...

## Creating contributions via manual entry

1. From the Dashboard select 'Create Contribution / Maintain employee'



2. Enter pay period start and end dates you are remitting for to start the process plus you also have the ability to name your file which allows you to easily recognise the contribution batch at a later date



Select Pay Cycle: Employer Matching Exceptions: Member Matching Exceptions: Validation Issues: Review: Summary and Submit:

We need to know how to set the contribution Start and End Dates:

Use specific dates

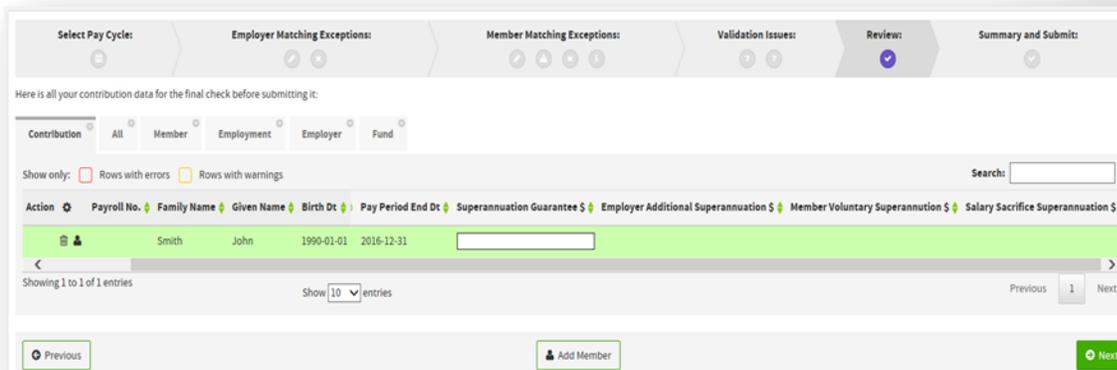
Period Start:

Period End:

New Filename:

[Next](#)

3. Enter contribution amounts for the employee's and select next



Here is all your contribution data for the final check before submitting it:

Contribution: All Member Employment Employer Fund

Show only:  Rows with errors  Rows with warnings

Search:

Action	Payroll No.	Family Name	Given Name	Birth Dt	Pay Period End Dt	Superannuation Guarantee	Employer Additional Superannuation	Member Voluntary Superannuation	Salary Sacrifice Superannuation
		Smith	John	1990-01-01	2016-12-31	<input type="text"/>			

Showing 1 to 1 of 1 entries

Show  entries

[Previous](#) [Next](#)

[Previous](#) [Add Member](#) [Next](#)

#### 4. Confirm the contribution and select next

Select Pay Cycle: ⏪ ⏩
Employer Matching Exceptions: ⏪ ⏩
Member Matching Exceptions: ⏪ ⏩
Validation Issues: ⏪ ⏩
Review: ⏪ ⏩
Summary and Submit: ⏪ ⏩

**Fund Breakdown** (Period 01 Sep 2016 to 30 Sep 2016)

Fund Name	USI	No. Members	Amount \$
Accident/Disability	879622864	1	0.00
Other	1284022864	2	100.00
Public Super	2296022864	4	100.00
<b>Grand Totals:</b>		<b>7</b>	<b>\$200.00</b>

Previous 1 Next

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**Payment Summary**

<b>Payment Reference</b> 710790038021109001	<b>For Employer</b> JASMINA PTY LTD ABN: 71879603882	<b>Direct Credit</b> Please pay to BSB: 633302 A/c: 89628884
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Go Back
Save and Hold
Confirm and Send

### Exiting an existing member

- From the Dashboard select 'Member Maintenance'



- Select the person icon to exit the member

Select Pay Cycle: ⏪ ⏩
Employer Matching Exceptions: ⏪ ⏩
Member Matching Exceptions: ⏪ ⏩
Validation Issues: ⏪ ⏩
Review: ⏪ ⏩
Summary and Submit: ⏪ ⏩

Here is all your contribution data for the final check before submitting it:

Member Employment Contribution Employer Fund
Search:

Show only:  Rows with errors  Rows with warnings

Action	Payroll No.	Family Name	Given Name	Birth Dt	Title	Other Name	Gender	Address Code	Address Line 1	Address Line 2	Address Line 3	Address Line 4	Suburb	Postcode	State	Country	E-mail	Phone	Mobile	Exit D
	145	Smith	Susan	1968-06-17	MRS		2	POS	14 Smith St				Padstow	2211	NSW	AU				
	121	Ashton	Matthew	1968-01-05	MR		3	POS	15 Smith				Padstow	2211	NSW	AU				2016-
	123	Ashton	Matthew	1968-01-05	MR		3	POS	15 Smith				Padstow	2211	NSW	AU				
	674364739	Byre	Ram	1975-06-06	MR		1	POS	magow road				sydney	2000	NSW	AU	test@mail.com	0296683766	0401926682	
	674364739	Byre	Ram	1975-06-06	MR		1	POS	magow road				sydney	2000	NSW	AU	test@mail.com	0296683766	0401926682	
	674364739	Byre	Ram	1975-06-06	MR		1	POS	magow road				sydney	2000	NSW	AU	test@mail.com	0296683766	0401926682	
	674364739	Byre	Ram	1975-06-06	MR		1	POS	magow road				sydney	2000	NSW	AU	test@mail.com	0296683766	0401926682	
	674364739	Byre	Ram	1975-06-06	MR		1	POS	magow road				sydney	2000	NSW	AU	test@mail.com	0296683766	0401926682	
	674364739	Byre	Ram	1975-06-06	MR		1	POS	magow road				sydney	2000	NSW	AU	test@mail.com	0296683766	0401926682	

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Previous
Add Member
Next

3. Enter an exit date in the format yyyy-mm-dd and select an exit reason from the drop down list and save

MEMBER MANAGEMENT

Member Details | Contact Details | Employment | Fund Details | Employer Details

Date Joined Company \* 03-April-2016 ?

Date Joined Fund \* 01-August-2016 ?

Employment Status Contractor ?

Member Reg Amendment Reason ?

Occupation Description ?

Ordinary Time Earnings ?

Actual Periodic Salary or Wages ?

Employee Location Id ?

Full Time Hours ?

Contracted Hours ?

Actual Hours ?

Exit Reason Select Employment End Reason ?

Exit Date YYYY-MM-DD ?

At Work

Save Cancel

## Contributing for an additional employer

1. From the Dashboard select 'Create Contribution / Maintain employee'



2. Enter pay period start and end dates to allow you to proceed Contributing for an additional employer
3. Below example highlights that you can contribute to more than one employer

Select Pay Cycle:    Employer Matching Exceptions:    Member Matching Exceptions:    Validation Issues:    Review:    Summary and Submit:

Here is all your contribution data for the final check before submitting it:

All    Member    Employment    Contribution    **Employer**    Fund

Show only:  Rows with errors     Rows with warnings    Search:

Action	Payroll No.	Family Name	Given Name	Birth Dt	o.	Account No.	Account Name	Payment Type	ABN	Location ID	Name	Fund Employer No.
		Test	Test	1990-01-01	2	83628894	Clearing Account	DIRECTCREDIT	77143160230	NSW	EMPLOYER 1	
	1	TEST	TEST	1970-01-01	2	83628894	Clearing Account	DIRECTCREDIT	71079003802	MELB	EMPLOYER 2	