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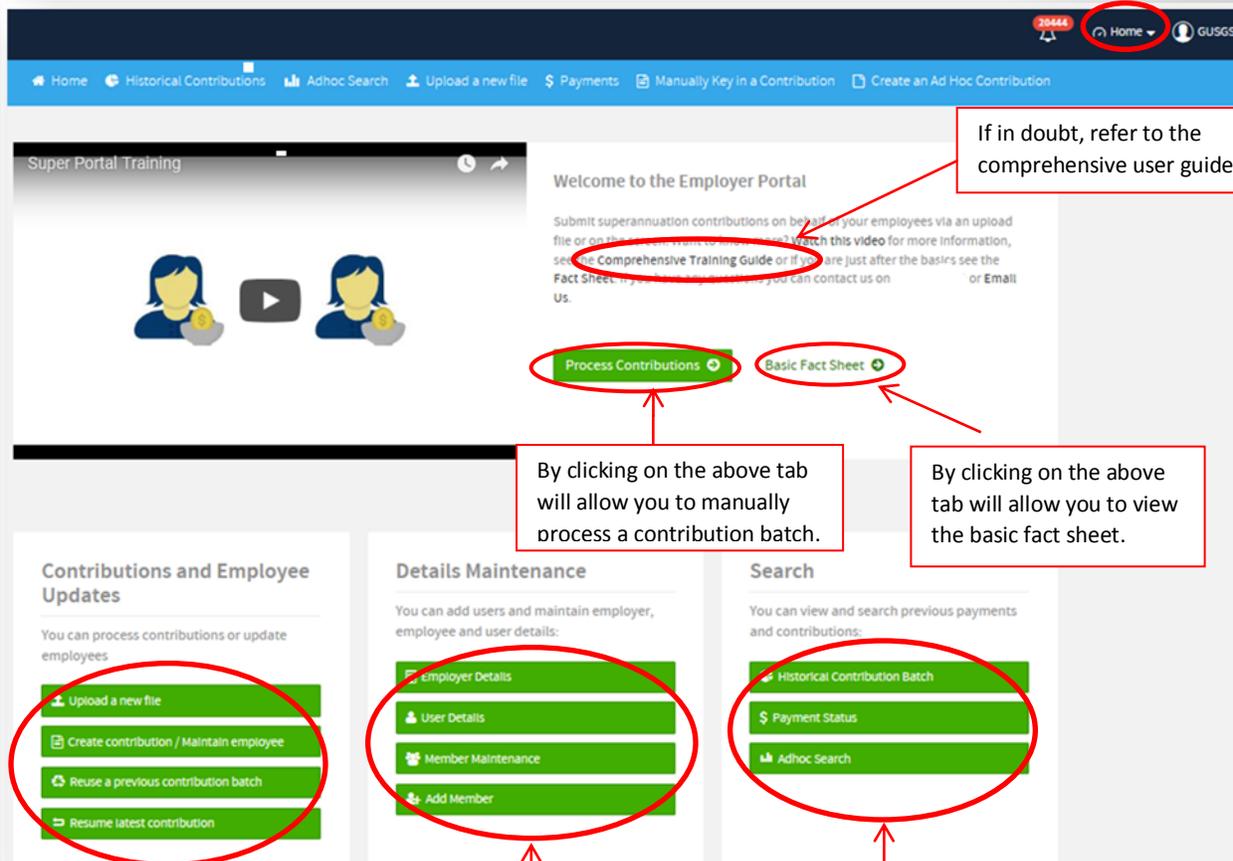
By clicking on the above tab will allow you to manually process a contribution batch.

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.

Employer fact sheet for entering data manually

Contents:

Editing an existing member

1. From the Dashboard select 'Member Maintenance'

2. Select the person icon to edit the member

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

Adding a new member

1. From the Dashboard select 'Add Member'

2. Select 'Add Member'

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

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

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

Next: Creating contributions via manual entry…

Creating contributions via manual entry

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

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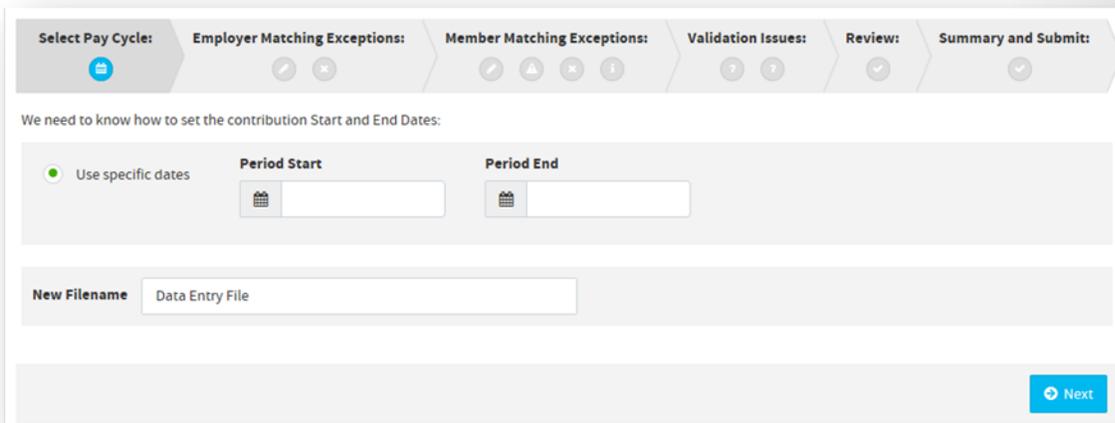
Select Pay Cycle:	Employer Matching Exceptions:	Member Matching Exceptions:	Validation Issues:	Review:	Summary and Submit:

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

- ⦿ Use specific dates

Period Start

📅 _____

Period End

📅 _____

New Filename   Data Entry File

⊙ Next

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

Select Pay Cycle:	Employer Matching Exceptions:	Member Matching Exceptions:	Validation Issues:	Review:	Summary and Submit:
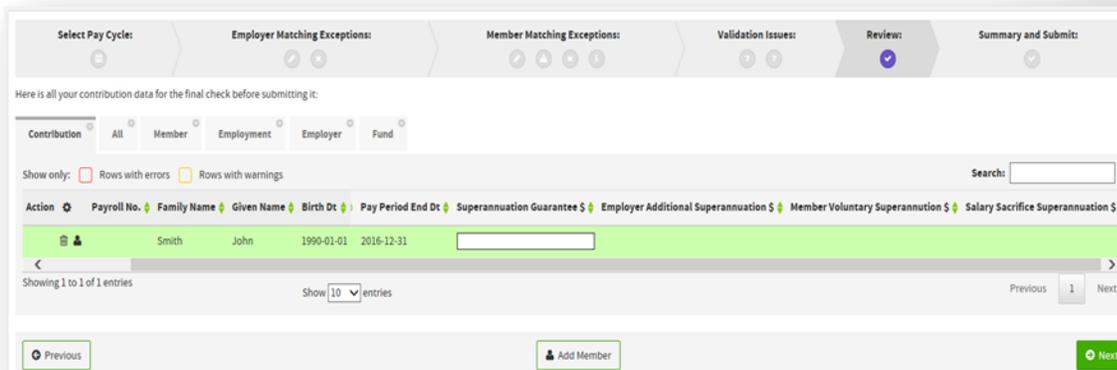
Here is all your contribution data for the final check before submitting it:

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 Superannution $ ⇕	Salary Sacrifice Superannuation $ ⇕
🗑 👤		Smith	John	1990-01-01	2016-12-31	[_____]			

Showing 1 to 1 of 1 entries

Show 10 ∨ entries   Previous 1 Next

⊙ Previous   👤 Add Member   ⊙ Next

4. Confirm the contribution and select next

Exiting an existing member

1.   From the Dashboard select 'Member Maintenance'

2.   Select the person icon to exit the member

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

Contributing for an additional employer

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

📄 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

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