

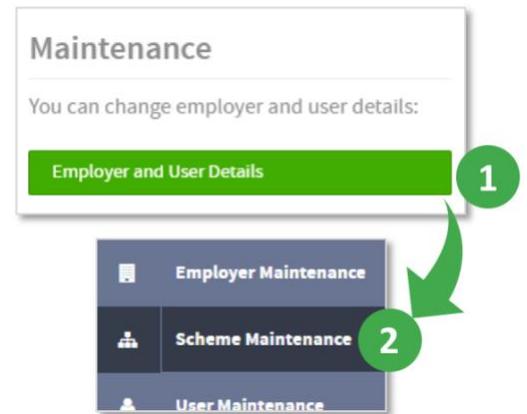
Employers are able to group employees with shared characteristics into specific superannuation-related schemes (or insurance plans). After a scheme is created in the Portal, a custodian can link an employer to the scheme, and then the employer can link their employees to the correct category within the scheme.

A scheme's product must exist in the Portal before the scheme can be created. Each scheme must have at least one category and one linked employer.

Schemes are maintained in the Portal via the **Scheme Maintenance** function.

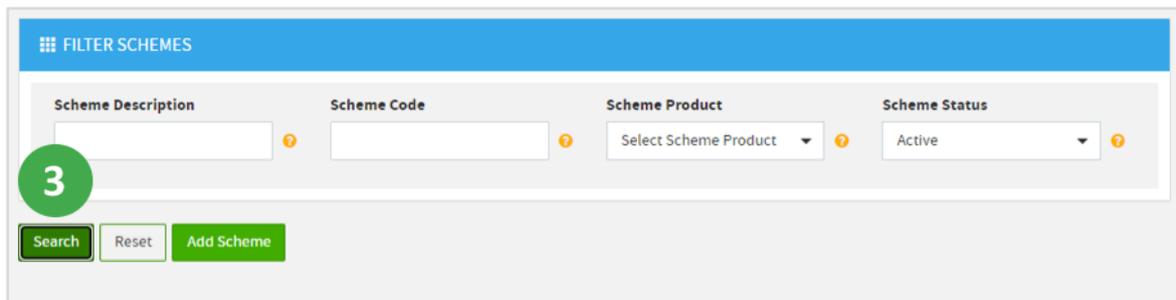
View and filter schemes

- 1 On the Dashboard view, on the **Maintenance** panel, click the **Employer and User Details** button.
- 2 On the sidebar, click **Scheme Maintenance**.
- 3 To display a list of all the available schemes, click the **Search** button.



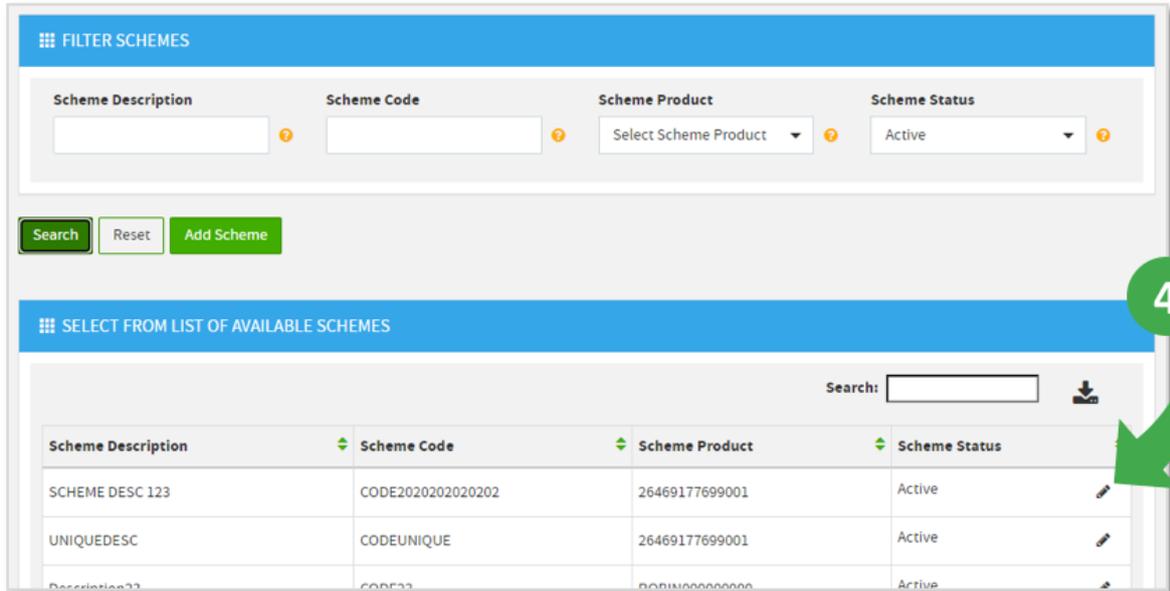
The **Schemes** screen displays.

If there is a large list of schemes, use the top panel to filter the list. For example, type part of the description in the **Scheme Description** field, and then click **Search**.



4

Locate the scheme that you want to view, and then click the pencil icon next to the adjacent **Scheme Status**.



FILTER SCHEMES

Scheme Description: ?

Scheme Code: ?

Scheme Product: Select Scheme Product ?

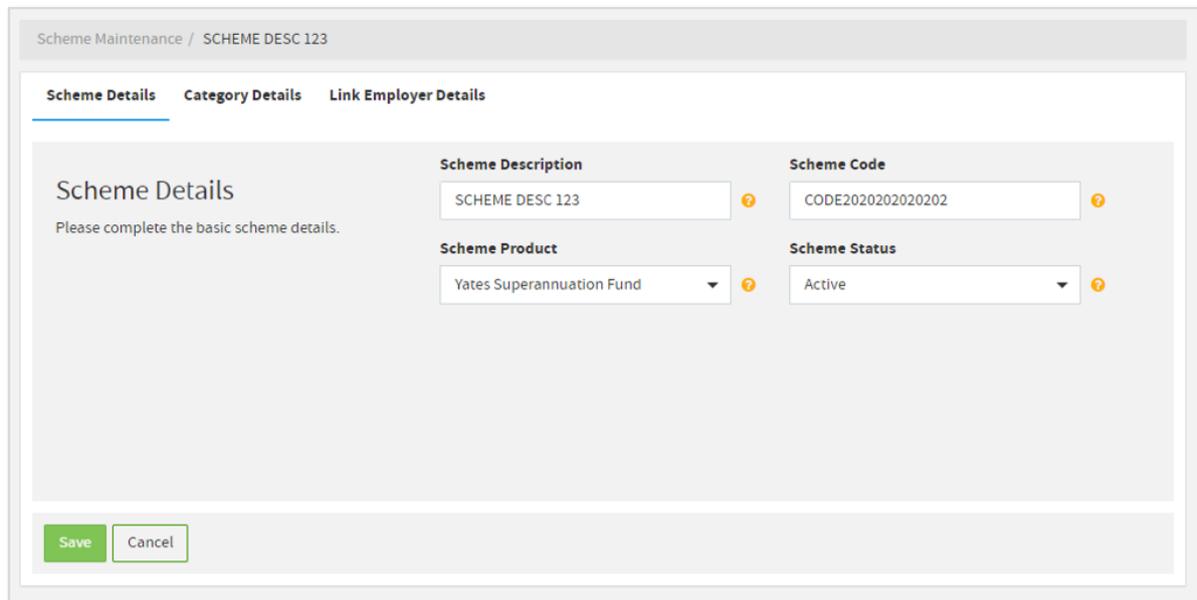
Scheme Status: Active ?

SELECT FROM LIST OF AVAILABLE SCHEMES

Search: 

Scheme Description	Scheme Code	Scheme Product	Scheme Status	
SCHEME DESC 123	CODE2020202020202	26469177699001	Active	
UNIQUEDESC	CODEUNIQUE	26469177699001	Active	
Description??	CODE??	CODEUNIQUE	Active	

The **Scheme Details** screen and tabs displays. From here you can edit a scheme by adding categories and linking the scheme to employers.



Scheme Maintenance / SCHEME DESC 123

Scheme Details | Category Details | Link Employer Details

Scheme Details

Please complete the basic scheme details.

Scheme Description: ?

Scheme Code: ?

Scheme Product: Yates Superannuation Fund ?

Scheme Status: Active ?

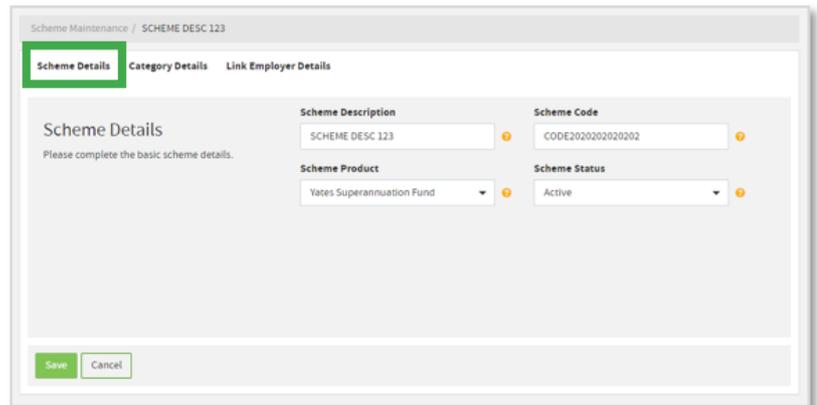
Scheme Details tabs

Each of the tabs on the **Scheme Details** screen are described below.

Scheme Details

This tab shows the selected scheme's details, which include:

- Scheme Description and Scheme Code
- Product the scheme is related to (a scheme can be related to only one product)
- Scheme Status (Active or Inactive)



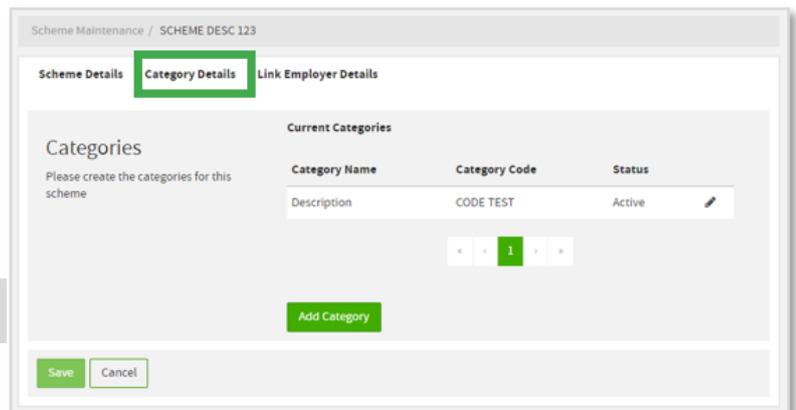
Category Details

Categories define characteristics shared by grouped employers. This tab contains the details of categories that have been defined for the scheme:

- Category Description
- Category Code
- Status

A scheme can have one or more categories.

You can also use the **Add Category** button on this tab to create categories.



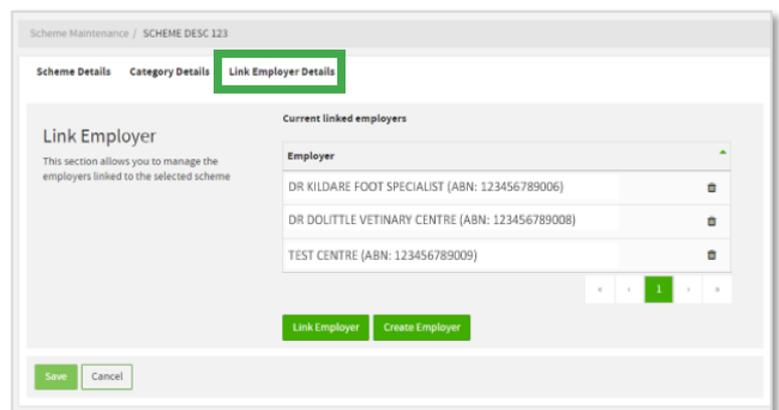
Link Employer Details

The Link Employer Details tab displays employer(s) that are linked to this scheme.

On this tab you can also link additional employers by using the **Link Employer** button. In addition you can create an employer by clicking the **Create Employer** button.

The Create Employer function is also available via the Employer Maintenance function.

- Current Linked Employers



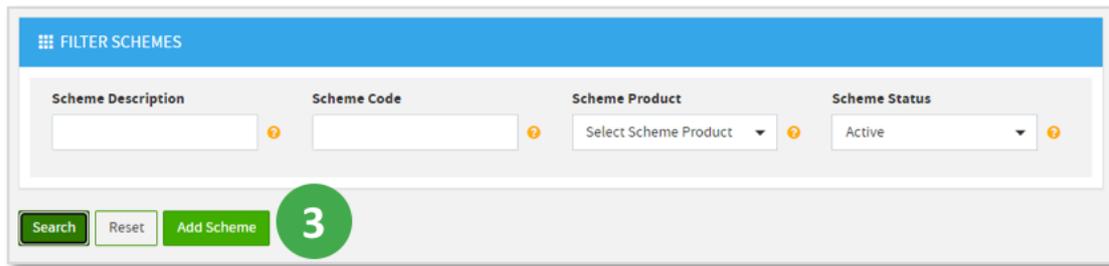
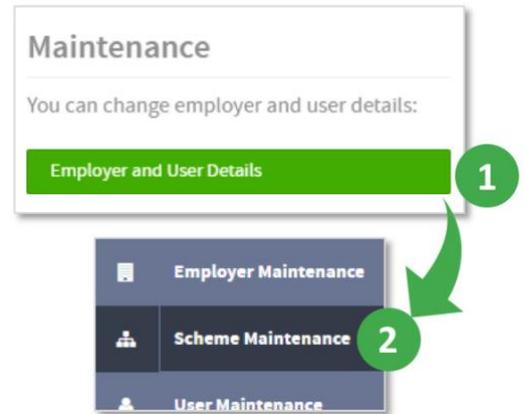
Create a scheme

When creating a scheme, you must also create/add at least one category and one linked employer.

A new scheme can only be saved when it has a category and a linked employer.

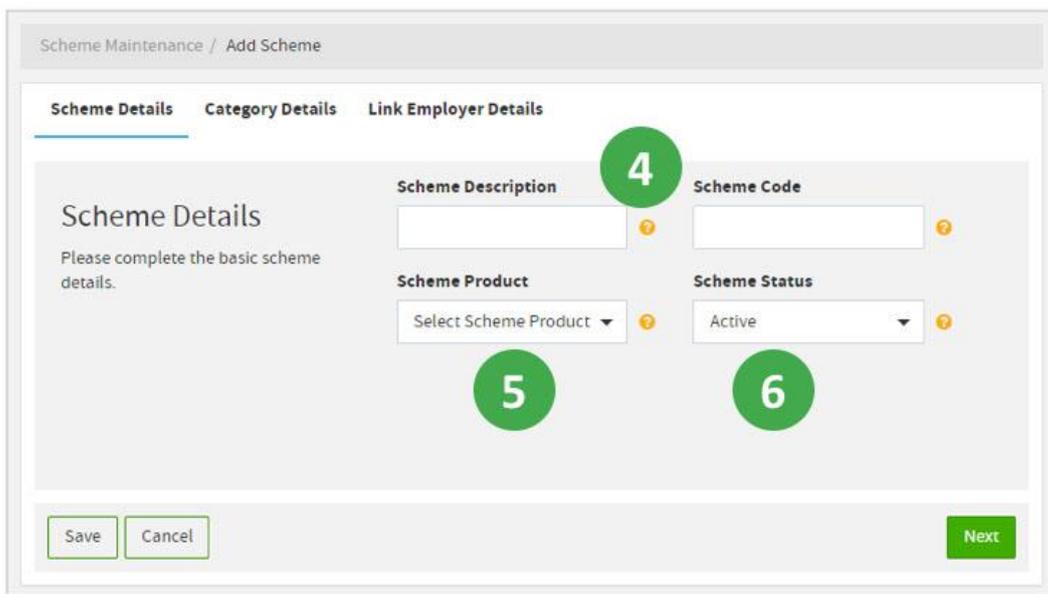
Add a new scheme

- 1 On the Dashboard view, on the **Maintenance** panel, click the **Employer and User Details** button.
- 2 On the sidebar, click **Scheme Maintenance**.
The **Schemes** screen displays.



- 3 Click the **Add Scheme** button.
The **Scheme Details** screen and tab displays.

All fields on this tab are mandatory.



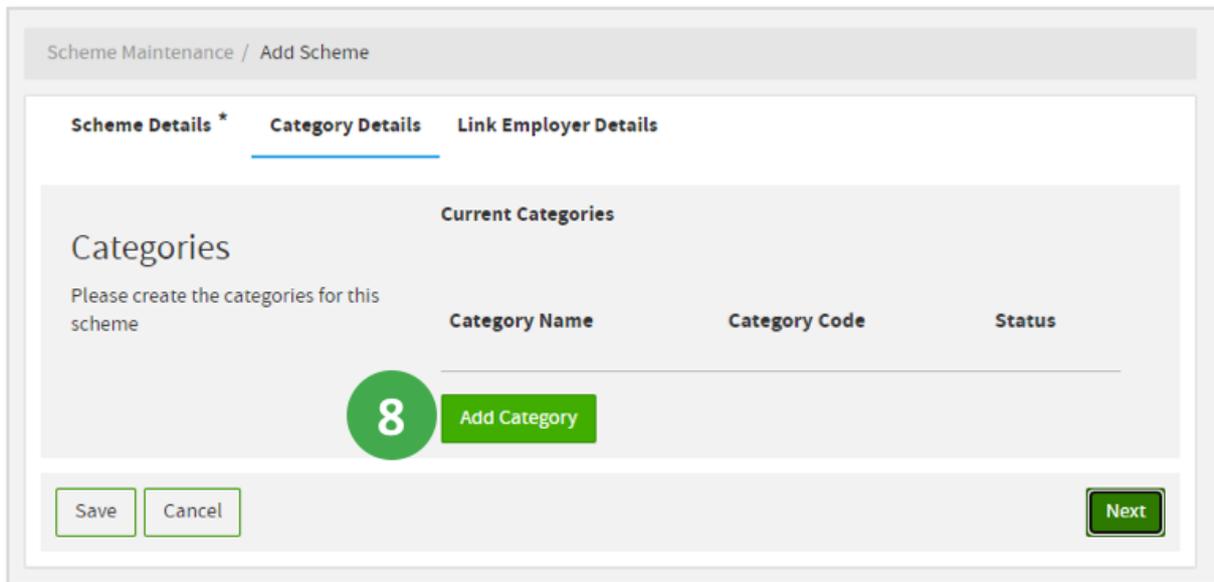
4 Type a brief **Scheme Description** (up to 100 characters), and type the **Scheme Code**.

5 From the **Scheme Product** list, select the product that the scheme will be related to.

6 For **Scheme Status**, accept the default of **Active**.
Otherwise, if you want to make the scheme active at a later date, select **Inactive**.

7 Click the **Next** button to proceed to the **Category Details** tab.

When you make a change on a tab, an asterisk will display to the right of the tab's name to indicate there are unsaved changes.



Scheme Maintenance / Add Scheme

Scheme Details * **Category Details** Link Employer Details

Categories

Please create the categories for this scheme

Category Name	Category Code	Status
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8 Add Category

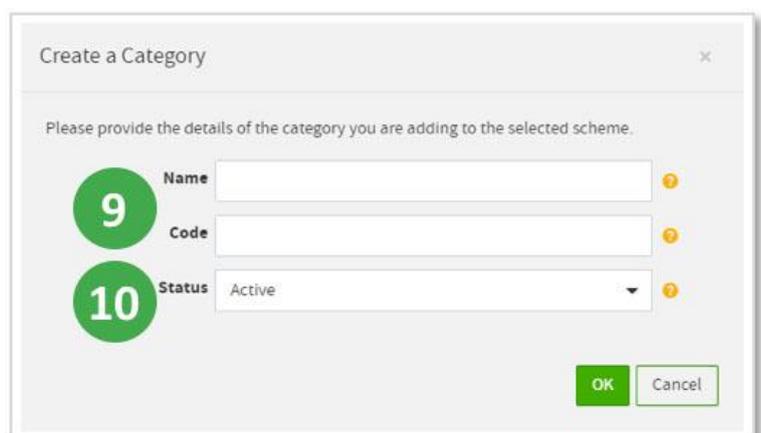
Save Cancel Next

Add a category

8 Click the **Add Category** button.
The **Create a Category** popup displays.

9 Type the category's **Name** and **Code**.

10 For **Status**, accept the default of **Active**.
Otherwise, if you want to make the category active at a later date, select **Inactive**.



Create a Category

Please provide the details of the category you are adding to the selected scheme.

9 Name

Code

10 Status

OK Cancel

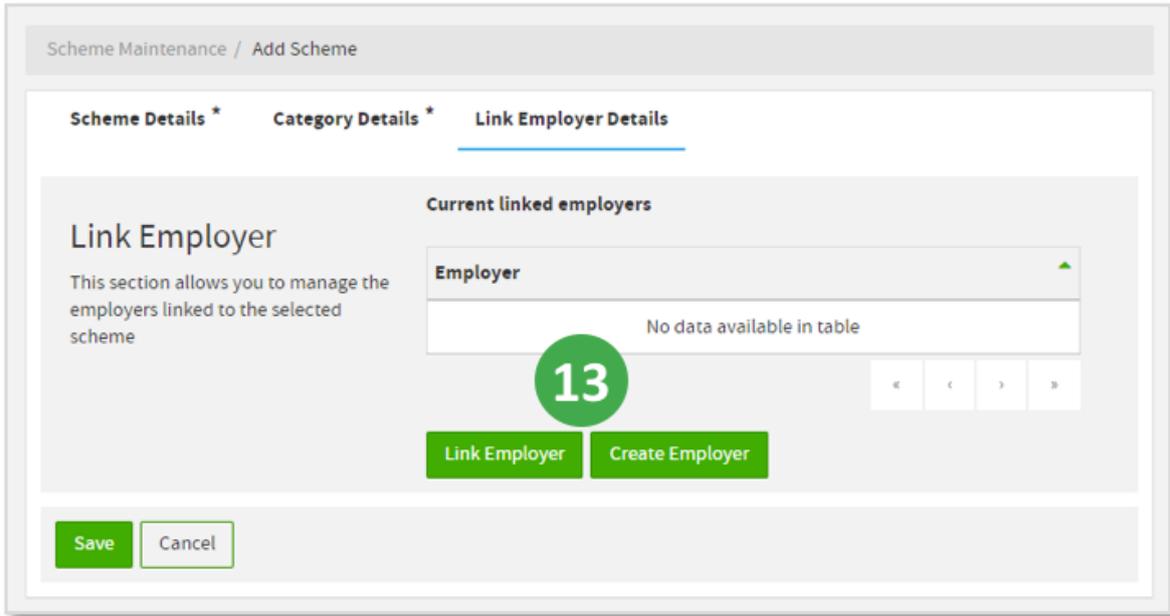
11

Click the **OK** button.

The popup closes and you are returned to the **Category Details** tab.

12

Click the **Next** button to proceed to the **Link Employer Details** tab.



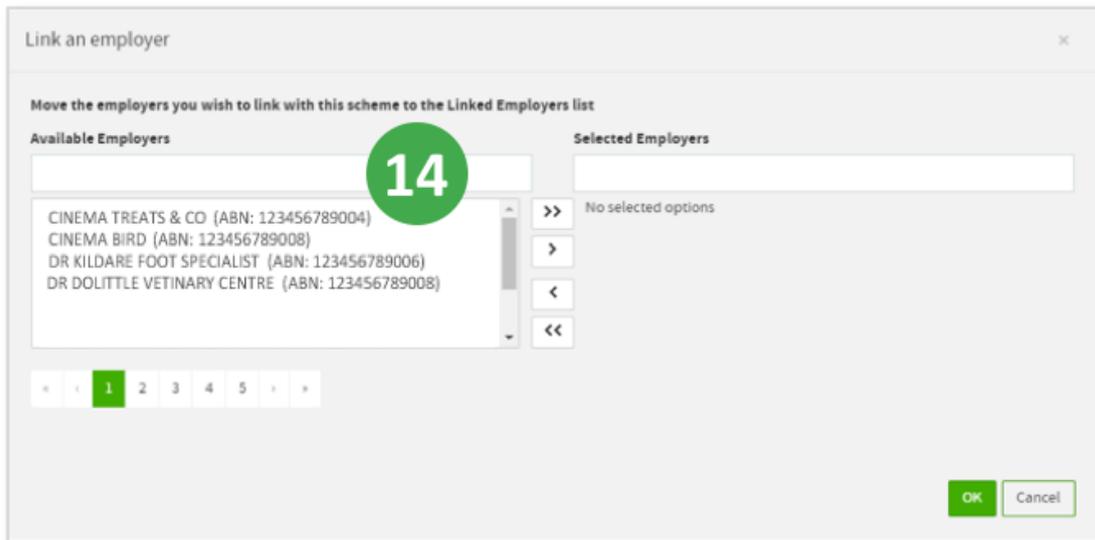
The screenshot shows the 'Scheme Maintenance / Add Scheme' window with the 'Link Employer Details' tab selected. The main heading is 'Link Employer'. Below it, a text box states: 'This section allows you to manage the employers linked to the selected scheme'. To the right, under 'Current linked employers', there is a table with the header 'Employer' and a message 'No data available in table'. A green circle with the number '13' is overlaid on the table area. Below the table are two buttons: 'Link Employer' and 'Create Employer'. At the bottom left of the window are 'Save' and 'Cancel' buttons.

Link an employer to the scheme

13

If the employer record already exists, click the **Link Employer** button.

The **Link an employer** popup displays.



The screenshot shows the 'Link an employer' popup window. It has a title bar with a close button. The main instruction is: 'Move the employers you wish to link with this scheme to the Linked Employers list'. There are two lists: 'Available Employers' and 'Selected Employers'. The 'Available Employers' list contains four entries: 'CINEMA TREATS & CO (ABN: 123456789004)', 'CINEMA BIRD (ABN: 123456789008)', 'DR KILDARE FOOT SPECIALIST (ABN: 123456789006)', and 'DR DOLITTLE VETINARY CENTRE (ABN: 123456789008)'. A green circle with the number '14' is overlaid on the first entry. Between the lists are navigation buttons: '>>', '>', '<', and '<<'. The 'Selected Employers' list is currently empty with the text 'No selected options'. At the bottom left is a pagination control with a green highlight on '1'. At the bottom right are 'OK' and 'Cancel' buttons.

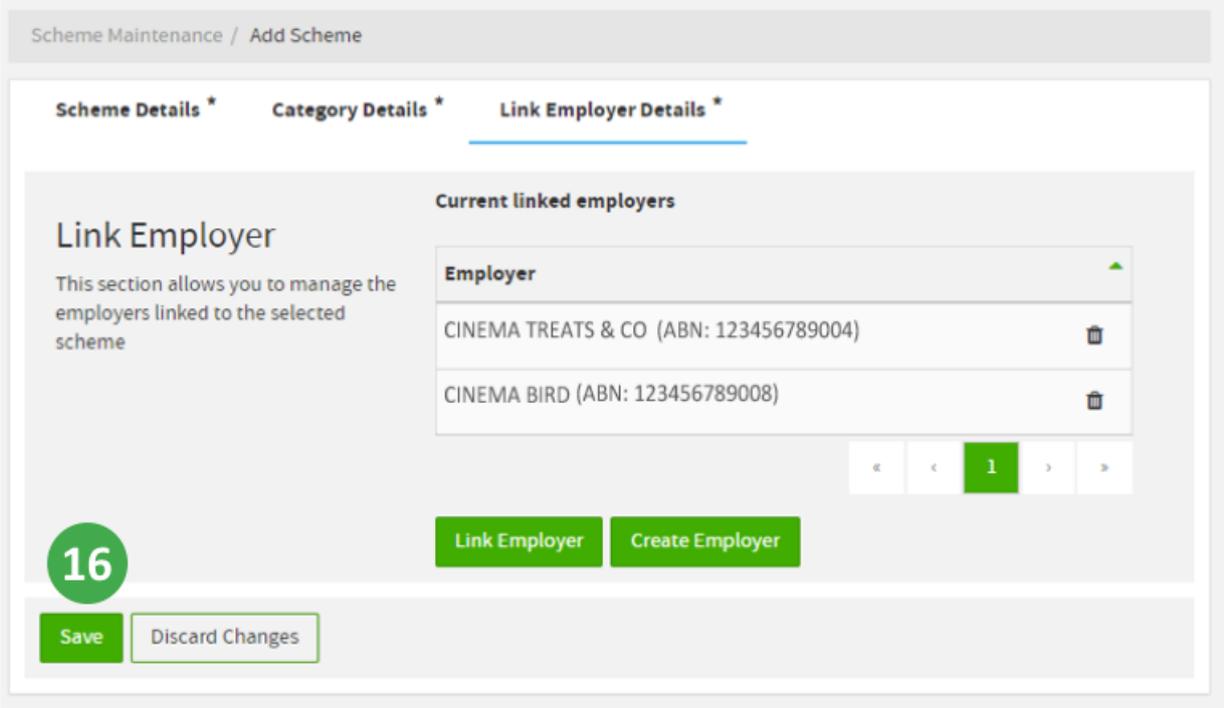
If the employer does not exist, click the **Create Employer** button to add the employer, and then return to the tab. For details on how to create an employer, see the *Updating Employer Details* quick reference guide.

- 14** From the list on the left, locate an employer that you want to link. Select them and then click the  button to move them to the right into the **Selected Employers** list. Repeat this for each employer.

You can filter this list by typing all or part of the employer name in the **Available Employers** field. Alternatively browse the list by clicking the page number or scroll buttons at the bottom.

Tip: To select multiple employers, press and hold the Ctrl key while clicking each one.

- 15** Click the **OK** button.
The popup closes and you are returned to the **Link Employer Details** tab.



Scheme Maintenance / Add Scheme

Scheme Details * Category Details * **Link Employer Details ***

Link Employer
This section allows you to manage the employers linked to the selected scheme

Current linked employers

Employer
CINEMA TREATS & CO (ABN: 123456789004)
CINEMA BIRD (ABN: 123456789008)

« < 1 > »

16 Link Employer Create Employer

Save Discard Changes

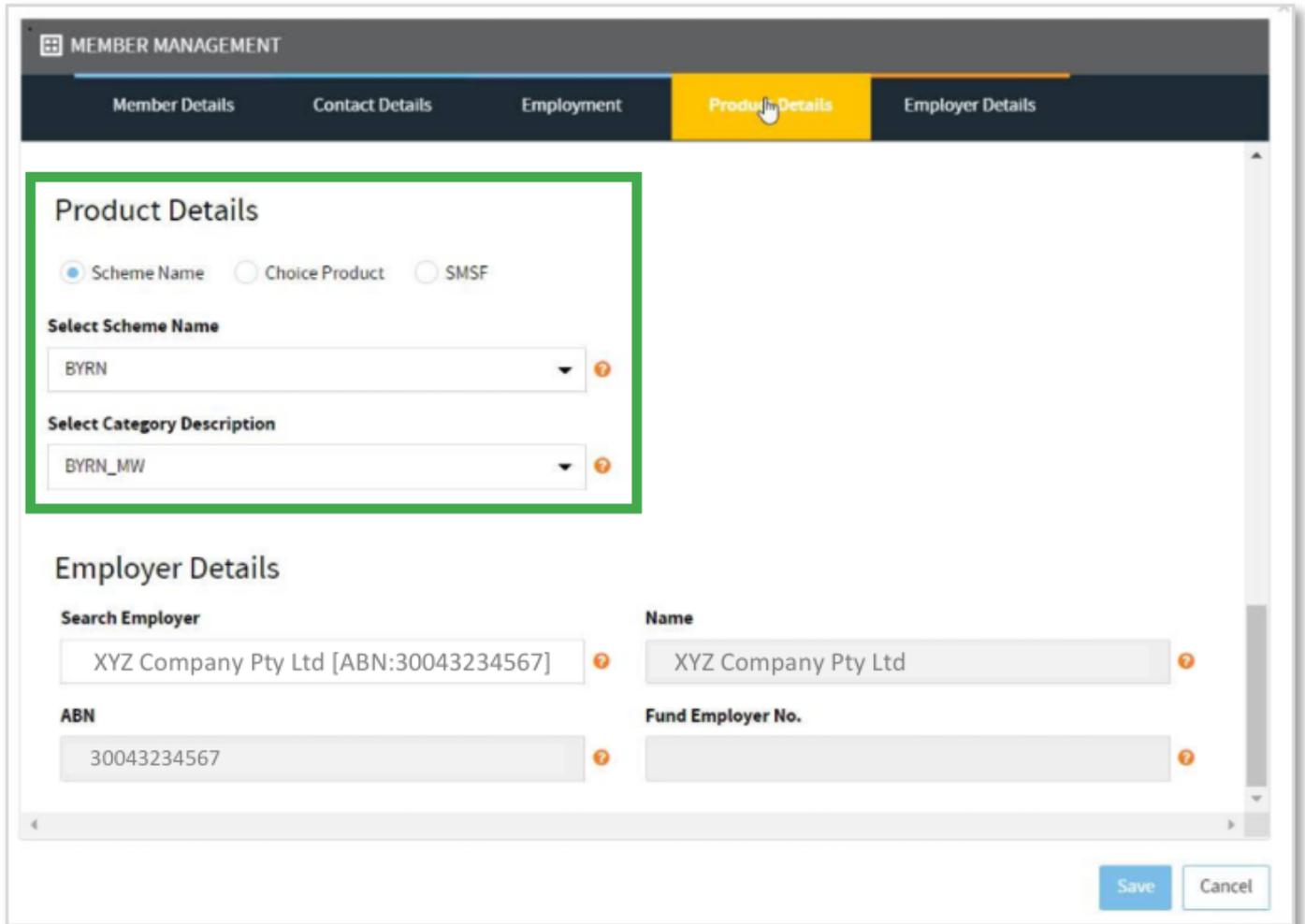
- 16** After you have completed all of the tabs, click the **Save** button.

The portal takes a moment to build the scheme and associated categories, and then displays a confirmation message in the bottom right corner of your screen.

 Scheme saved successfully 

Link an employer to a scheme

Employers do not always have to be linked to a scheme via the **Scheme Maintenance** function. During the member creation process, the **Product Details** tab includes an option where you can select the relevant scheme and category the employer will be linked to.



MEMBER MANAGEMENT

Member Details | Contact Details | Employment | **Product Details** | Employer Details

Product Details

Scheme Name Choice Product SMSF

Select Scheme Name

BYRN

Select Category Description

BYRN_MW

Employer Details

Search Employer

XYZ Company Pty Ltd [ABN:30043234567]

Name

XYZ Company Pty Ltd

ABN

30043234567

Fund Employer No.

Save Cancel