Schemes and Categories

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.

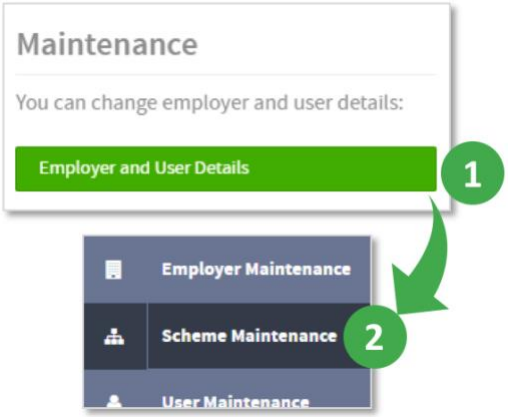
View and filter schemes

1. On the Dashboard view, on the **Maintenance** panel, click the **Employer and User Details** button.

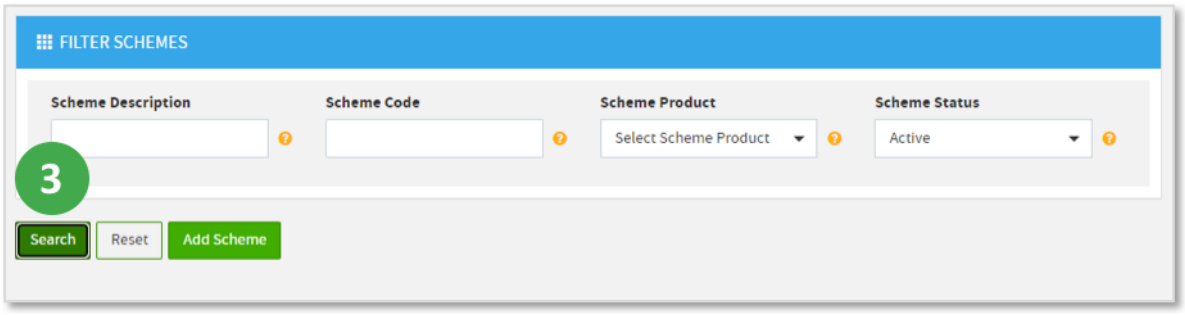
2. On the sidebar, click **Scheme Maintenance**.

3. To display a list of all the available schemes, click the **Search** button.

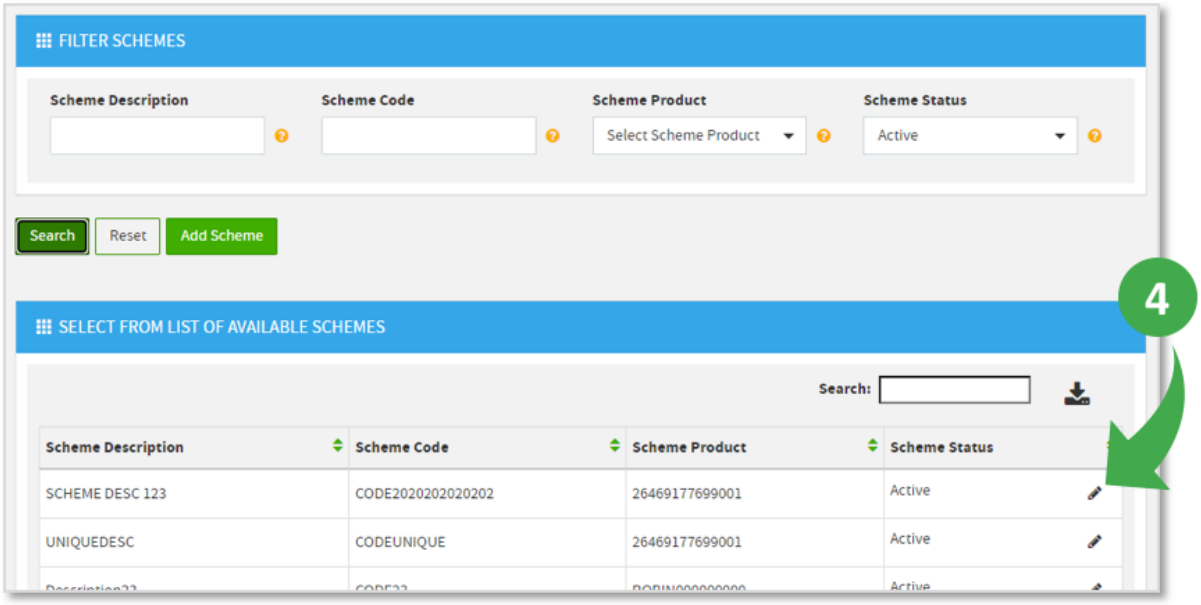
   The **Schemes** screen displays.



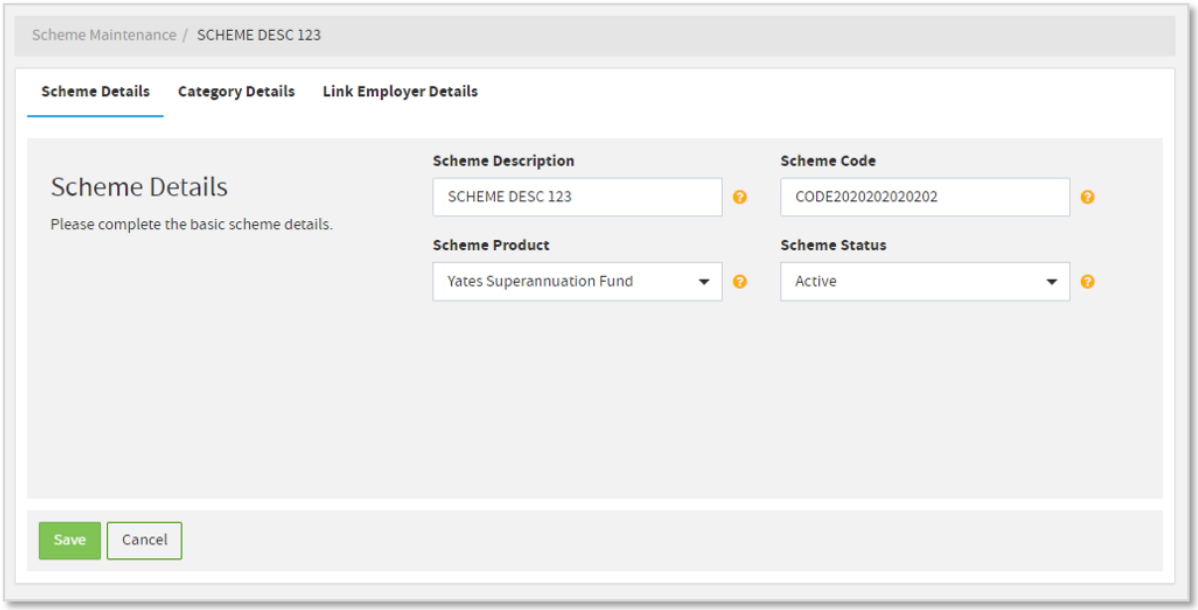
> If there is a large list of schemes, use the top panel to filter the list. For example, type part of the description in the **Scheme Description** field, and then click **Search**.



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



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

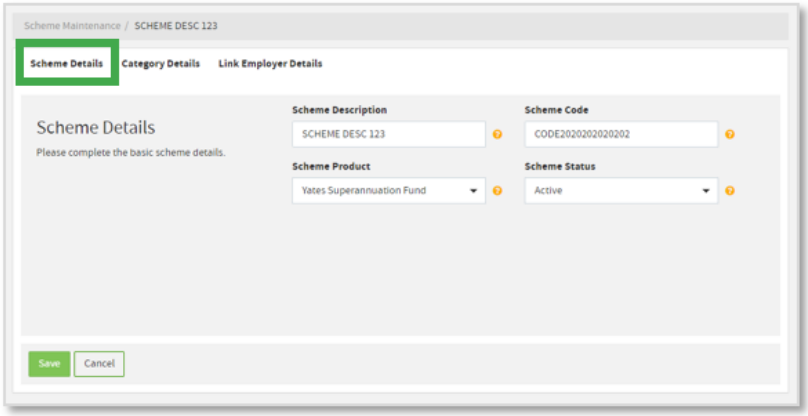


Scheme Details tabs

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

Scheme Details

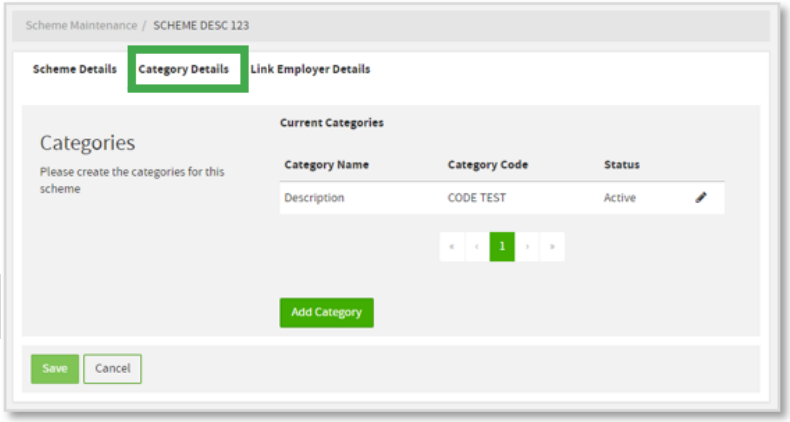
This tab shows the selected scheme's details, which include:



- 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.

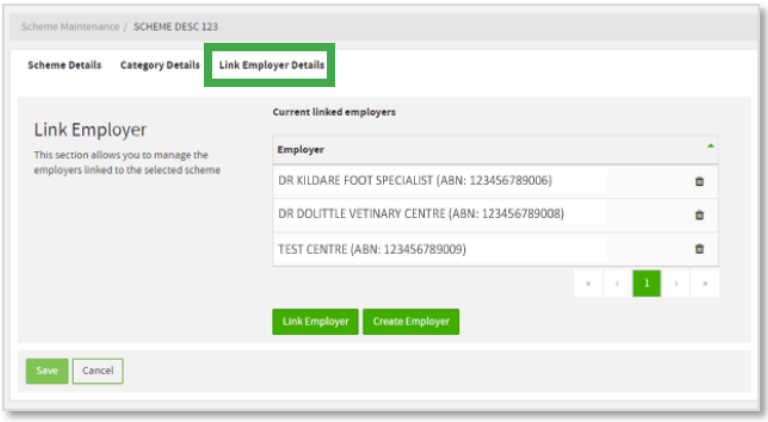
You can also use the **Add Category** button on this tab to create categories.

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.



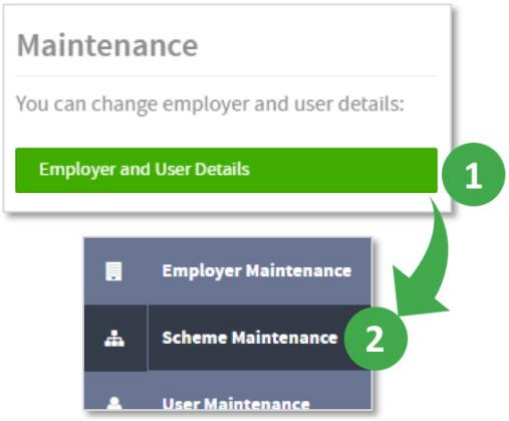
- Current Linked Employers

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.

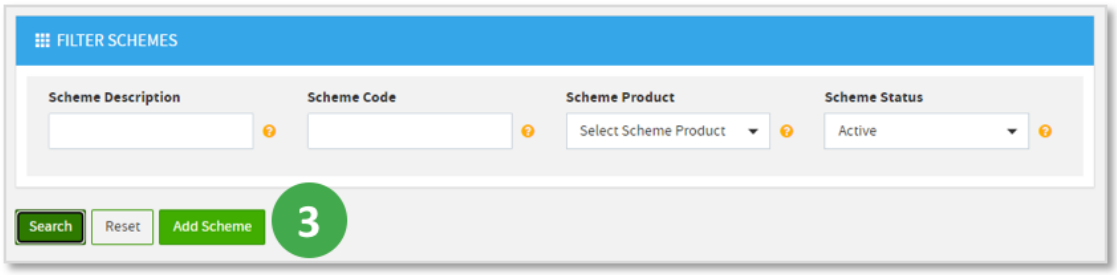
Add a new scheme



1. On the Dashboard view, on the **Maintenance** panel, click the **Employer and User Details** button.

2. On the sidebar, click **Scheme Maintenance**.

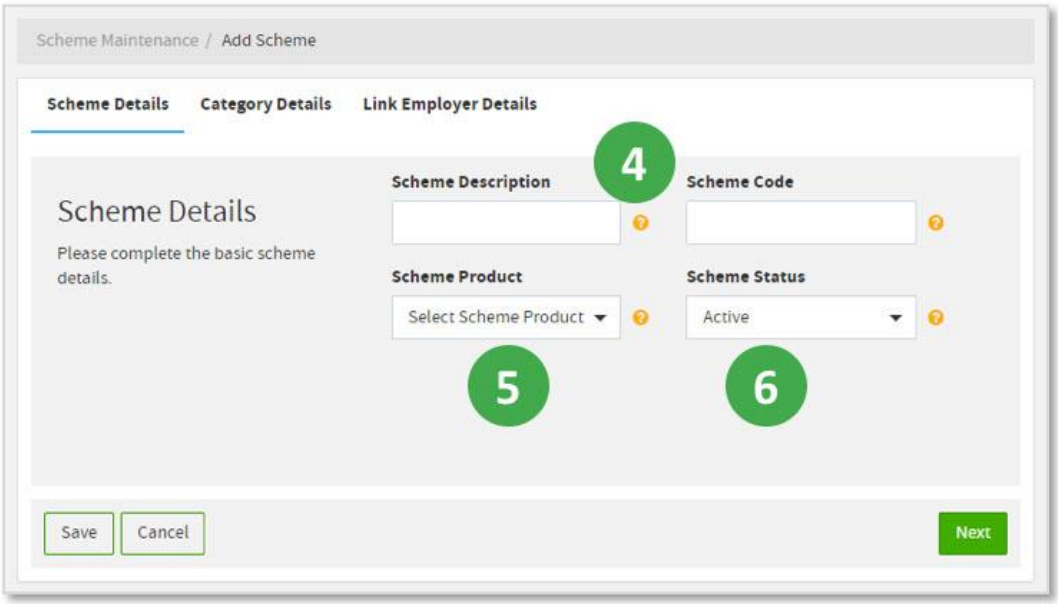
   The **Schemes** screen displays.



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**.

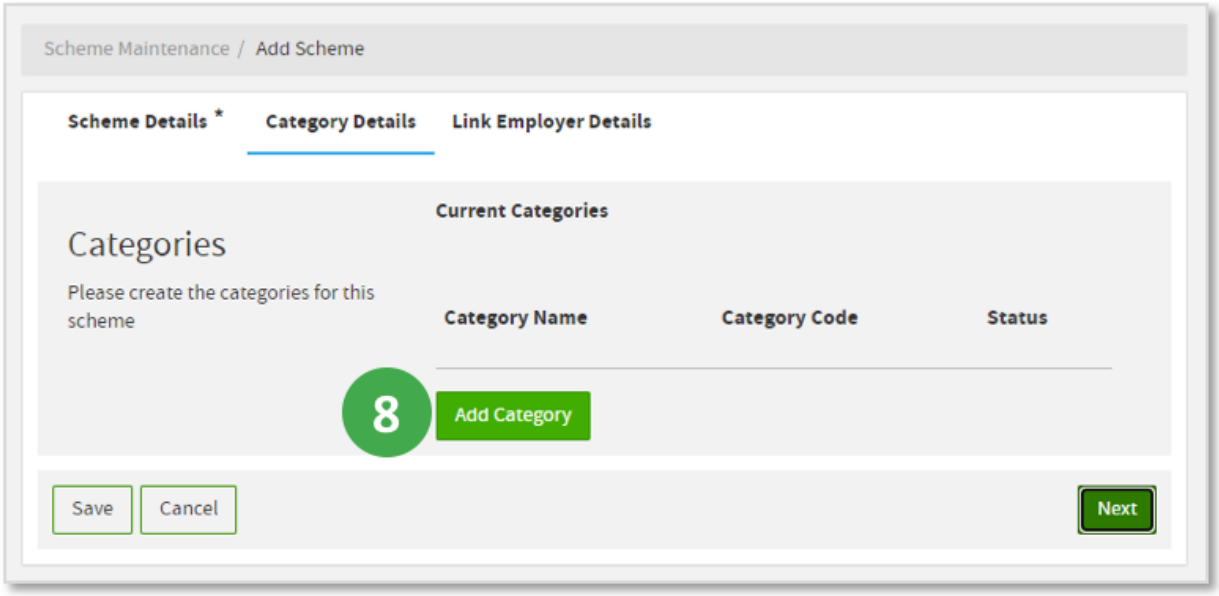
5 From the **Scheme Product** list, select the product that the scheme will be related to.

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 Detail**s 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.



Add a category

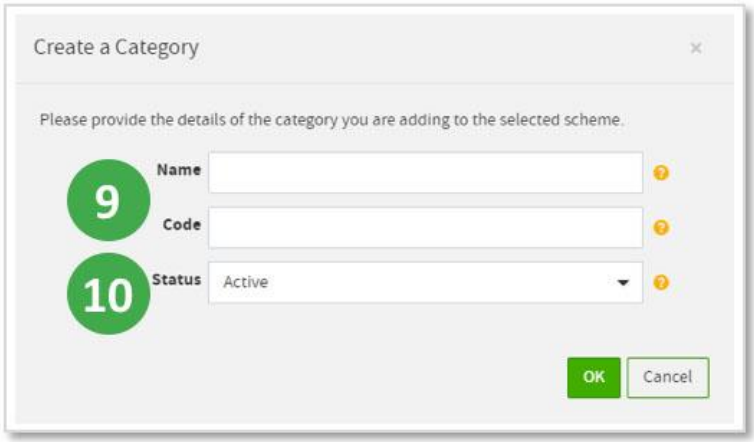
8 Click the **Add Category** button.

The **Create a Category** popup displays.

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

10 For **Status**, accept the default of ***Active***.

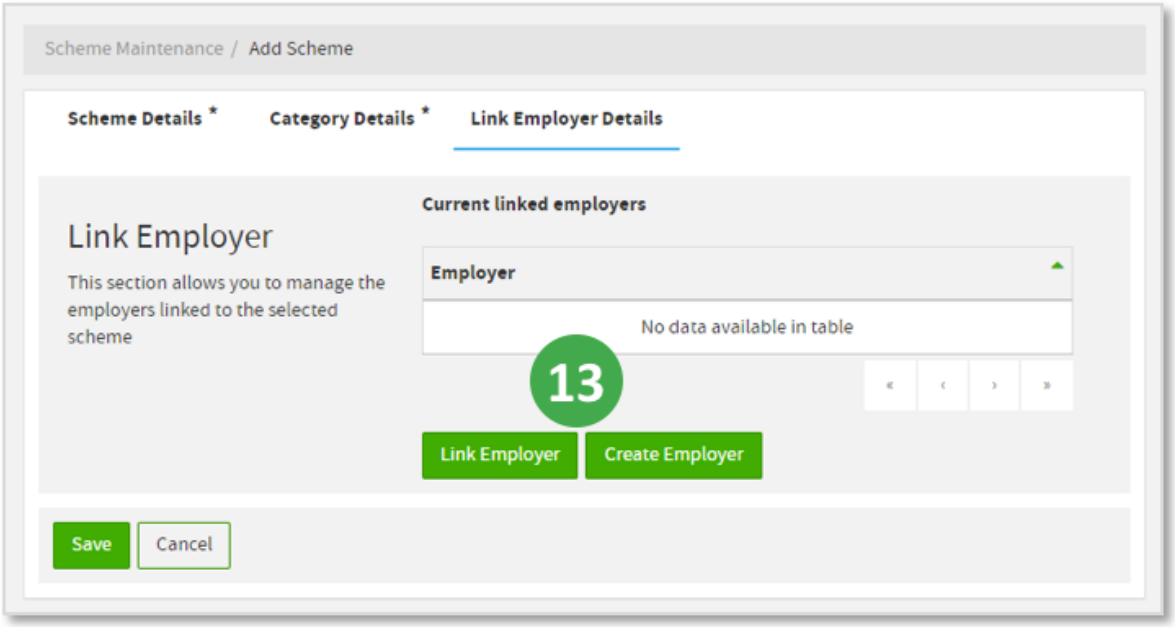
Otherwise, if you want to make the category active at a later date, select ***Inactive***.



11 Click the **OK** button.

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

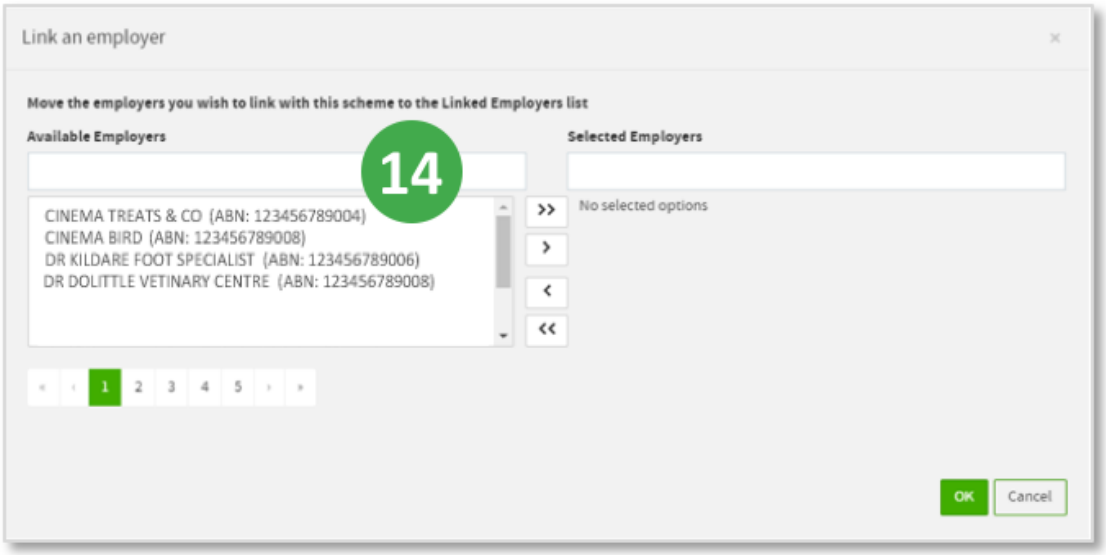
12 Click the **Next** button to proceed to the **Link Employer Details** tab.



Link an employer to the scheme

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

The **Link an employer** popup displays.



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.

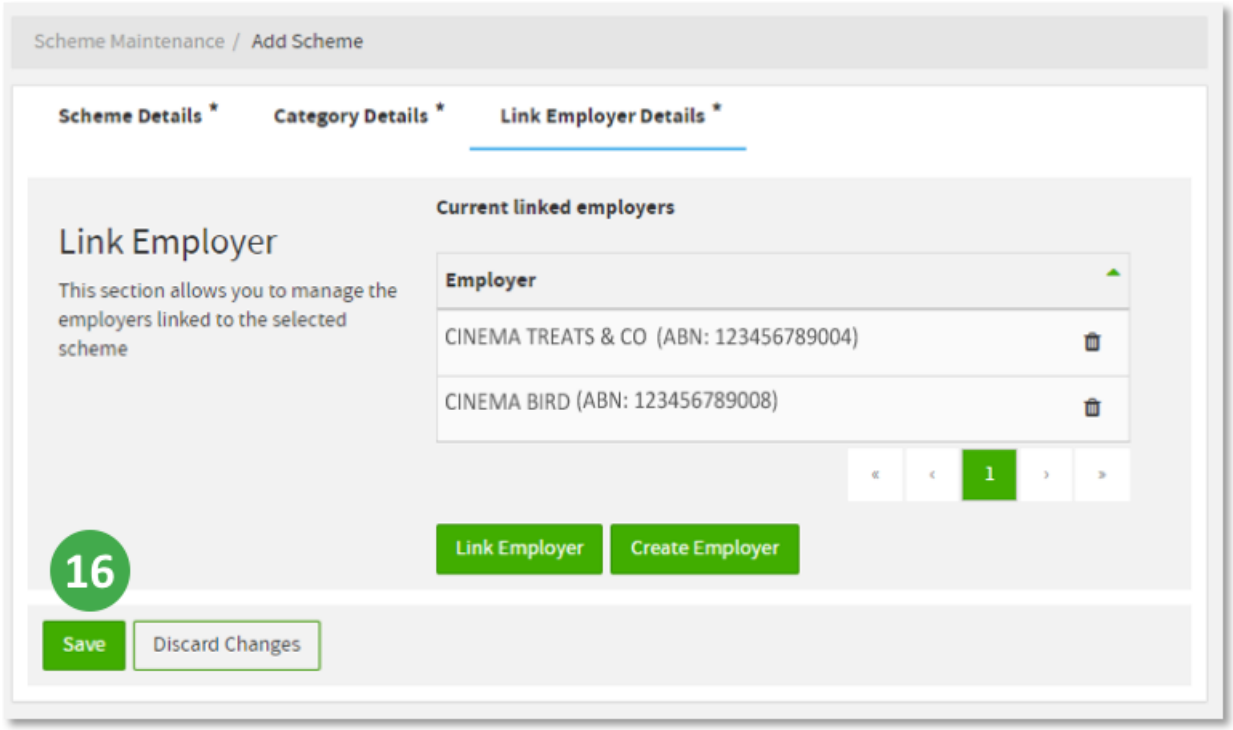
14 From the list on the left, locate an employer that you want to link. Select them and then click the › button to move them to the right into the **Selected Employers** list. Repeat this for each employer.

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.

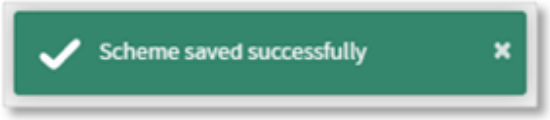
15 Click the **OK** button.

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



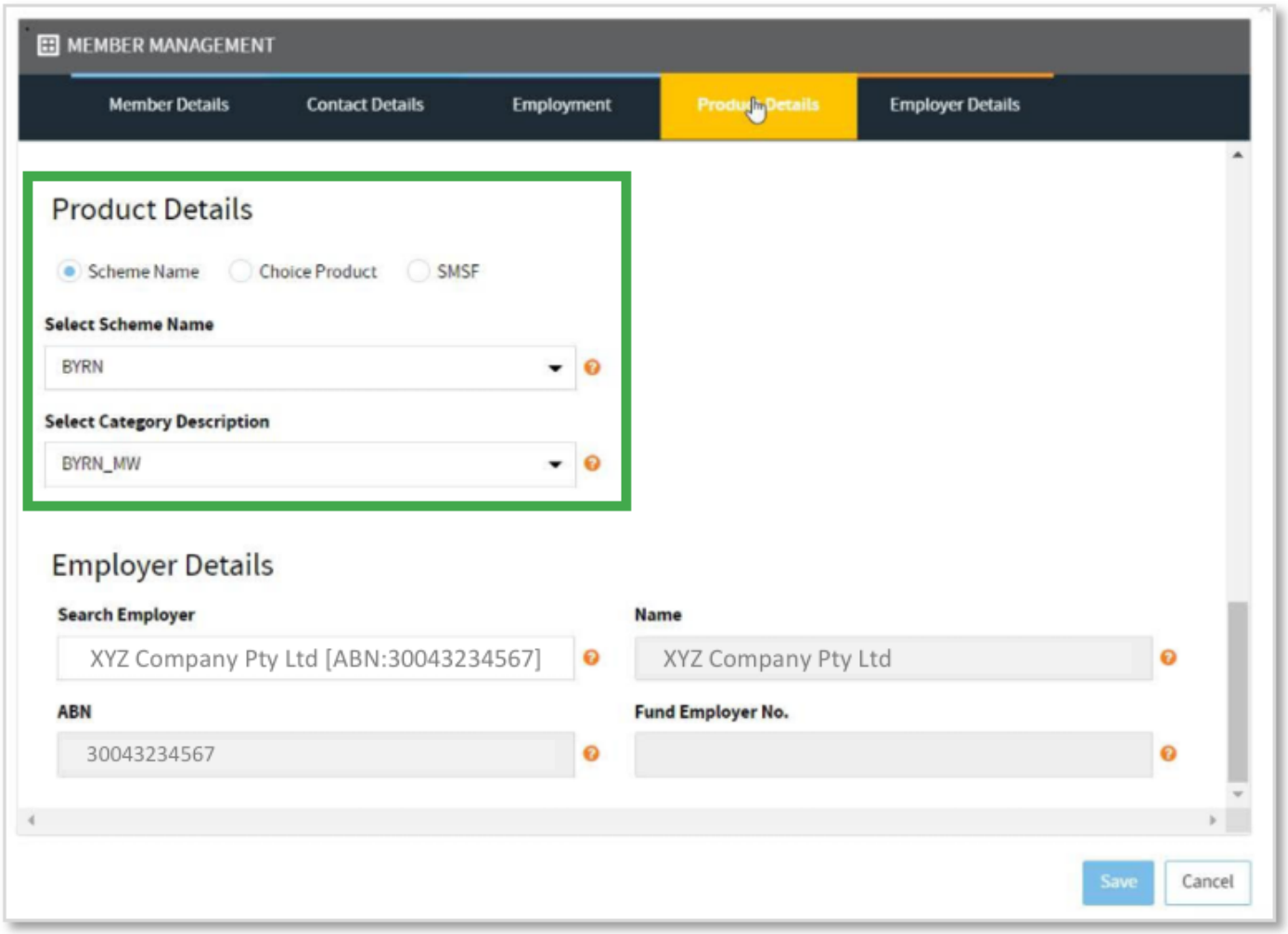
16 After you have completed all of the tabs, click the **Save** button.

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.



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.



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