

You can update member/employee details using the **Member Maintenance** function. Updates may be required because of:

- Surname changes
- Address changes
- Change of fund
- Changes/end of employment.
- Changes to Salary

You can also add new members using the Member Maintenance function.

Upda	iting me	ember details		Mai You ca and us	ntenance an add or maintai ser details:	in users and emplo	oyer
1	On the Da click the M	shboard view, on the M ember Maintenance b	aintenance panel, utton.	Er	nployer Details ser Details		
	The screer across the	n that displays, shows th top, starting with Selec	he process steps et Employers.		lember Maintenand	e	
Dashboard Loading	Select Employers:	STP Submission History Upload a new contribution Employer Matching Exceptions: O while depending on the number of rows to be loaded	If the Lupload a new STP file S Payments Maintain Employer Member Matching Exceptions:	s 🔺 Maintain Users Va	alidation Issues:	Contribution Add M	ember A
O Prev	rlous					٥	Next

If you have access to only one employer, all members for that employer will be automatically displayed.

However, if you have access to multiple employers, you will need to select the relevant employer(s) before progressing to the next step. After selecting one or more employers, click **Next**, and then all member records associated with the employer(s) will display.

It may take a few moments for members to load, depending on the number.

Sele	ct Employers:		Empl	oyer Matchir	ig Except	lons:			Member Matchin	g Exceptions:		Validation issues	•	Review:	
Here Is all your da	ata for the final o	heck before subm	itting it:												
Member [©]	Employment	Employer	Fund	All [©]											
Show only:	Rows with en	rors 🗌 Rows w	ith warnings	Rows with	changes								Search:		0
Action 💠	Payroll No. 🗢	Family Name 🖨	Given Name 🖨	Birth Dt 🌲	Title 🖨	Suffix 🖨	Other Name 💠	Gender 🖨	Address Code 🖨	Address Line 1 🔶	Address Line 2 🖨	Address Line 3 💠	Address Line 4 💠	Suburb 💠	Pos
84	10317	Wayne	John	1993-08-10	Mr			1	RES	1 Hollywood Street				Richmond	702
84	10182	Dean	James	1962-08-11	Mr			1	RES	333 Old Time Street				Rangewood	481
84	10155	Davis	Bette	1968-03-14	Mr			1	RES	52 Life Stage Road				Forrestfield	605





If applicable, resolve all validation errors for the members.

	Select Employers:	Employer Matching Exceptions:	Member Matching Exceptions:	Validation Issues: • Warnings • 91 Errors	Review:
All data	matching exceptions have been resolved now, but we	found the following validation issues:			
4	Hu Leonard 15002777 DOB: 1977-06-05 Raffi	Used Cars		2	1 Error
0	Member				o >
0	Employment				0 >
0	Employer				2 >
٥	Fund				2 *

If there are no validation issues, the screen progresses to the **Review** step where you can make edits to the listed members.

Selec	ct Employers:		Emplo	oyer Matchin	g Except	lons:			Member Matchin	g Exceptions:		Validation Issues		Review:	
re Is all your da	ta for the final c	heck before subm	itting it:												
Member 🌻	Employment	Employer	Fund /	AII [©]											
Show only:	Rows with err	rors 🗌 Rows w	ith warnings	Rows with	changes								Search:		
Action 💠	Payroll No. 💠	Family Name 🖨	Given Name 🖨	Birth Dt 🌲	TItle 韋	Suffix 🖨	Other Name 🖨	Gender 🖨	Address Code 🖨	Address Line 1 🔷	Address Line 2 💠	Address Line 3 💠	Address Line 4 💠	Suburb 💠	Po
84	10317	Wayne	John	1993-08-10	Mr			1	RES	1 Hollywood Street				Richmond	70
84	10182	Dean	James	1962-08-11	Mr			1	RES	333 Old Time Street				Rangewood	4
84	10155	Davis	Bette	1968-03-14	Mr			1	RES	52 Life Stage Road				Forrestfield	6

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To edit a member's details, locate them in the list, and then click the Person in the **Action** column.

The Member Management popup opens and displays the member's information in a series of

panels and tabs. You can either scroll down to see each panel, or click a tab to jump to its panel.



Click in a field that you want to update, and type the new/updated information.

Click the **Save** button when done.

The Portal will confirm the changes have been saved.

Member details saved successfully.

To update another member, repeat steps **3** to **5**.

Member Details	Contact Details	Employment	Fund Deta	ls	Employer Details	
Member Details						
Title		Given Name		ot	her Name	
Mr	¥ 9	John	•			•
Last Name		Suffix		Da	te of BIrth	
Wayne	0	Select Suffix	× 9	t	10 August 1993	•
Gender		Payroll No.		Me	ember No.	
Male	~ <u>0</u>	10317	•	1	5555566666	•
TEN		Status				
123412245	0	Active	¥ 0			
					- 4	
Contact Details						
Address Code		Address Line 1		ad	dress Line 2	
Residential	× 0	1 Hollowood Street			uress chie z	
		1 Hollywood Street				
Address Line 3		Address Line 4		Su	burb	
	· ·				Richmond	· · · ·
State		Postcode		Co	untry	
Tasmania	¥ 0	7025	•		Australia	× 0
Email		Phone		Mo	obile	
			0			0

SuperChoice

After updating a member, you can view an audit of the change by clicking the **View Changes** icon \square in the **Actions** column. This opens the **Audit History** popup that shows what information was changed, what the change was, and who changed it.

SuperChoice

_		6		Search:
Field Name 🗘	Changed From	Changed To 🗘	Changed By 🗘	Date Changed
Address Line 1	60 Spencer Street	60 Spencer Avenue	VStest	19 Jan 2021, 5:01:40 pm
Address Line 1	1238 Richmond Road	60 Spencer Street	VStest	19 Jan 2021, 5:01:12 pm
Suburb	Richmond	Launceston	VStest	19 Jan 2021, 5:01:12 pm
Postcode	7025	7250	VStest	19 Jan 2021, 5:01:12 pm
Showing 1 to 4 of 4 entrie	es Show	10 V entries		Previous 1 Next



8

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Click the **Close** button when done.

After you have finished all of the updates (and there are no validation errors), click the **Confirm and Send** button on the bottom right corner.

This will send a Member Registration Request through to the Superannuation Fund notifying them of the change(s).



Add a member

You can add members/employees via the **Add Member** popup during the process of uploading or manually keying a contribution. To access the popup, click the **Add Member** button on the bottom of the **Review** step.

You can also add a member via clicking the Add Member button on the Dashboard view.





Click the **Add Member** button.

The **Add Member** popup opens and displays the panels and tabs where the information is entered. You can scroll through these panels or click the tabs across the top.

ADD MEMBER					
Member Lookup	Member Details	Contact Details	Employment	Fund Details	Employer Details
Member Lookup					Í
Lookup existing member (typeahead search)				
Start typing member nam	ne	•			
Member Details		6			
Title		Given Name		Other Name	
Select Title	× 0		0		•
Last Name		Suffix		Date of Birth	
		Calart Cuffly	U 0		0

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Complete all available information about the member.

While you do not need to enter all mandatory information at this stage, you will need to complete all mandatory fields prior to submitting.



Click the **Save** button when done.

To add another member, repeat steps 1 to 3.

Click the **Rows with Changes** check box at the top of the table to show only those members with changes – this is useful for a final review before submission.

Member ^O	Employment	Employer	Fund /	AIL O			
how only:	Rows with en	rors 🔲 Rows w	vith warnings 🔽	Rows with	changes		
Action 👌	Payroll No. 🖨	Family Name 🖨	Given Name 🖨	Birth Dt 💠	Title 韋	Suffix 🗢	ot

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After you have finished adding members (and there are no validation errors, eg missing mandatory details) click the **Confirm and Send** button on the bottom right corner.

This will send a Member Registration Request through to the Superannuation Fund notifying them of the change(s).



Remove a member from a submission

It is possible to remove a member from the current file upload, but if the file has already been submitted, the member will remain in the Portal.

It is not possible to delete a member as this would also remove valid historic member records where the member may have had a different member number, payroll number or benefit category.

From the Dashboard view, on the Maintenance panel, click the Member Maintenance button.

If more than one employer is listed, select the employer of the member who you want to remove, and then click **OK**.



If a filter has been previously set to display member records with validation issues, these may display. Click **Next** again to continue to the Member view screen.



Search for and locate the member you want to remove.

On the member's row, in the **Action** column, click the **Delete** icon $\overline{\square}$.

		Select Emp	loyers:				Employer Mate	ching Exce	ptions:
Here is all you	ur da	ta for the final o	heck before subm	itting it:					
Member	•	Employment	Employer	° Fund °	All °				
Show only:	C	Rows with er	rors 🗌 Rows w	ith warnings	Rows with	t change	5		
Action 🧿		Payroll No. 🗘	Family Name 🗘	Given Name 🗘	Birth Dt 🗘	Title 🗘	Other Name 🗘	Suffix 🖨	Gender 🗘
Ê	۵		Chaplin	Charlie	1980-07-21	MR			1
	۵	121212	Wayne	John	1962-08-11	Mr			1
8	۵	343434	Dean	James	1983-03-23	MR	Byron		1
1	۵	565656	Davis	Bette	1980-07-07	MS			2

If you proceed to click OK in the next step, this action cannot be undone.

To confirm the deletion and remove the member from the submission, click **OK**.

Confirm delete
You are about to delete this member contribution record for Bette Davis ,
This procedure is irreversible. Do you want to proceed?
OK Cancel



Exit a member

Before exiting an employee from a fund you must have made the employee's last contribution. For example, if the employee terminates their employment on February 1st, but still has super payable, then do not exit them until you've paid their last contribution.

If you upload contribution files created by your payroll system to the EmployerPay Portal, employee changes such as exiting a fund should be included in the uploaded file rather than following the below process.

1	From the Dashb	oard view,	on the Ma i	intenance	panel, c	lick the Membe	Maintenance butto	in.
2	If more than one employer is listed, select the employer of the member who you want to exit, and then click OK .							
3	Click Next to s	how all th	e member	records o	n the M	ember view sci	een.	
	If a filter has be display. Click N	een previo lext agair	ously set to n to continu	display mule to the N	nember /lember	records with va view screen.	lidation issues, the	se may
4	Search for and	locate the	e member	you want	to exit.			
5	Click the Empl	oyment t	ab.					
		Select Emp	loyers:			Employer Mat	ching Exceptions:	
	Here is all your d	ata for the final o	heck before subm	itting it:				
	Member 5	Employment	Employer	Fund	All [©]			
	Show only:	Rows with er	rors 🗌 Rows w	vith warnings	Rows with	h changes		
	Action 🔅	Payroll No. 🗢	Family Name 🗢	Given Name 🗢	Birth Dt ≑	Employment End Dt 🗢	Employment End Reason 🗢	
	ê 🌢		Chaplin	Charlie	1980-07-21			
	▲ 🔒 🌢	121212	Wayne	John	1962-08-11			
	ê 🌢	343434	Dean	James	1983-03-23	2021-07-05 6	Retired 7	
	ê 🌢	565656	Davis	Bette	1980-07-07			

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On the member's row, click in the **Employment End Dt** field, and in YYYYMMDD format, type the date when the member's employment ended.

Click in the **Employment End Reason** field, and type one or two words to describe why the member's employment ended.



The Portal is updated with the member's details and a Member Registration Request is sent to MasterKey Business Super notifying them of the change(s).



Download member data

When downloading member data, you can report on all member, employment, employer and fund data elements captured in the Portal or you can select specific data to create the CSV file.



From the Dashboard view, on the Maintenance panel, click the Member Maintenance button.



If more than one employer is listed, select the employer(s) whose members you want to report on and click **OK**.



Click Next to show all the member records on the Member view screen.

If a filter has been previously set to display member records with validation issues, these may display. Click **Next** again to continue to the Member view screen.



Click the cog icon so on the **Download** button.





In the popup that displays, make your selections, and then click **OK**.

Each item selected will form a column in the downloaded file. For column headings, make sure **Include Column Headers** is selected.

employ 5	Select All Unselect All
Employment End Dt	=
Employment End Reason	=
🖌 Emp. Status	=
🖌 Emp. Rate	=
Employee Benefit Cat. Eff. Dt	=
Employee Loc. ID End Dt	≡
	_
Include Column Headers	OK Cancel



Click the **Download** button.

The member data is downloaded in a CSV file to your Download folder.



Upload a member file

While it is possible to upload a file with member data to the Portal, it is recommended that you add and make changes to member records within your contribution file. During the upload, the Portal will recognise any new members and member changes and ask you to verify and accept those changes.

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