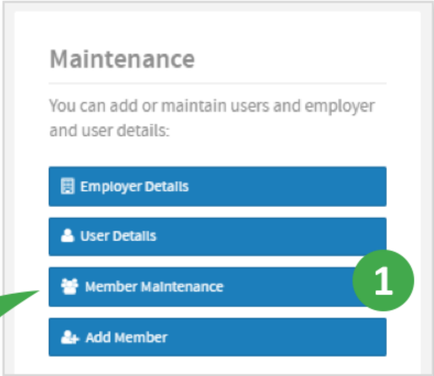
You can update member/employee details using the **Member Maintenance** function. Updates may be required because of:

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

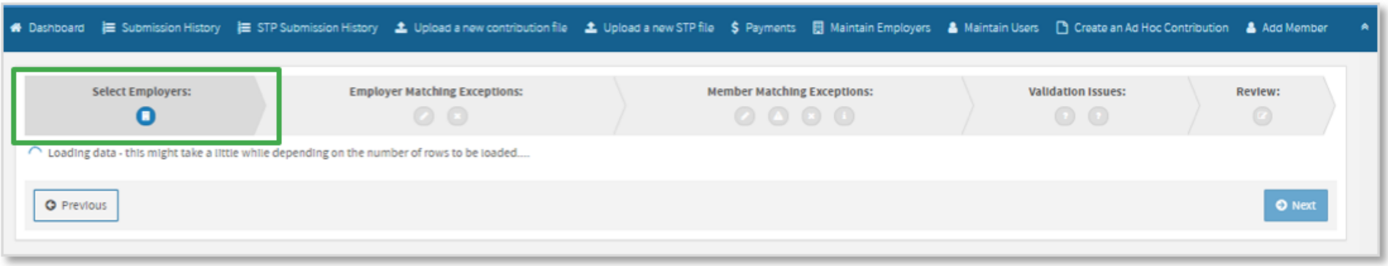
You can also add new members using the **Member Maintenance** function.



Updating member details

1 On the Dashboard view, on the **Maintenance** panel, click the **Member Maintenance** button.

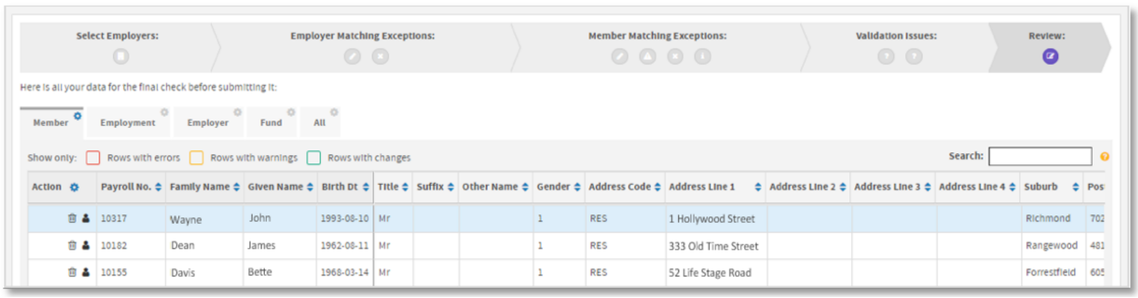
The screen that displays, shows the process steps across the top, starting with **Select Employers.**



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

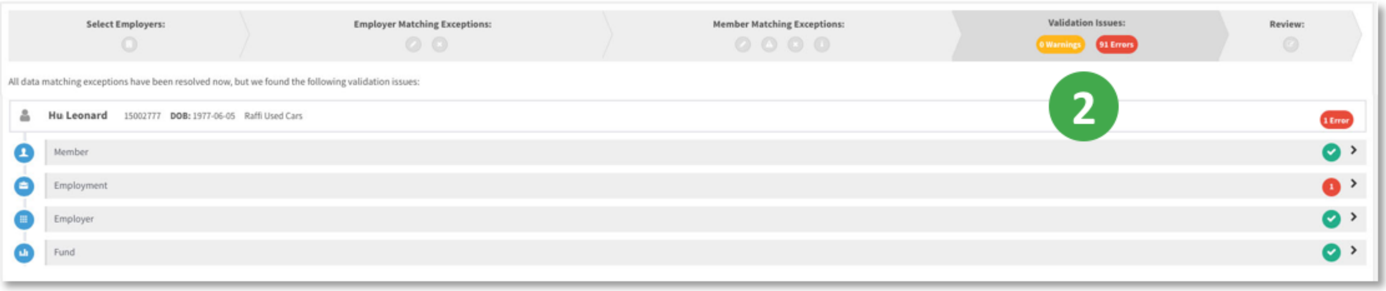
However, if you have access to multiple employers, you will need to select the relevant employer(s) before progressing to the next step. After selecting one or more employers, click **Next**, and then all member records associated with the employer(s) will display.

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

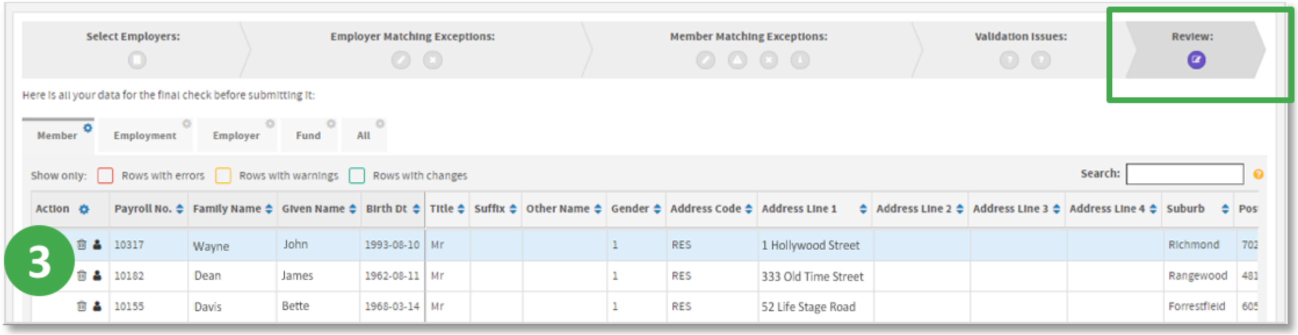


If mandatory information is missing for one or more members, validation errors will occur and the screen will only progress to the **Validation Issues** step.

2 If applicable, resolve all validation errors for the members.

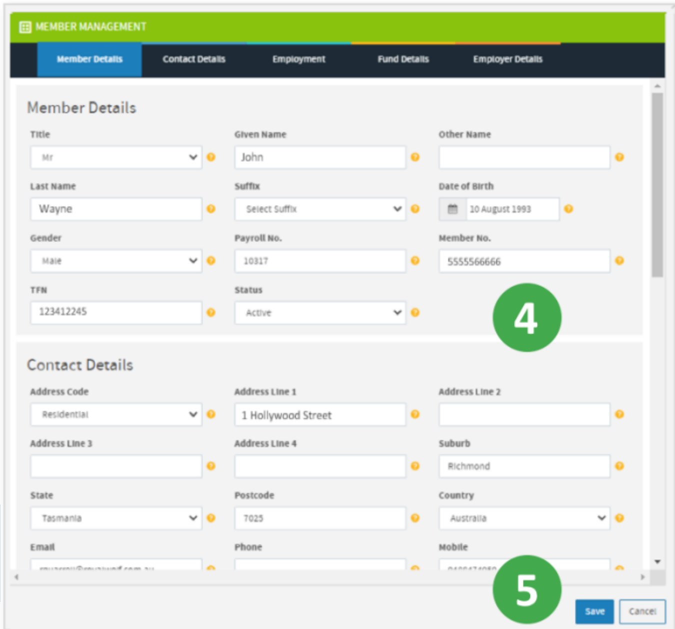


If there are no validation issues, the screen progresses to the **Review** step where you can make edits to the listed members.



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

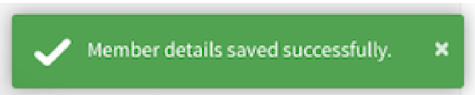
The **Member Management** popup opens and displays the member's information in a series of panels and tabs. You can either scroll down to see each panel, or click a tab to jump to its panel.



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

5 Click the **Save** button when done.

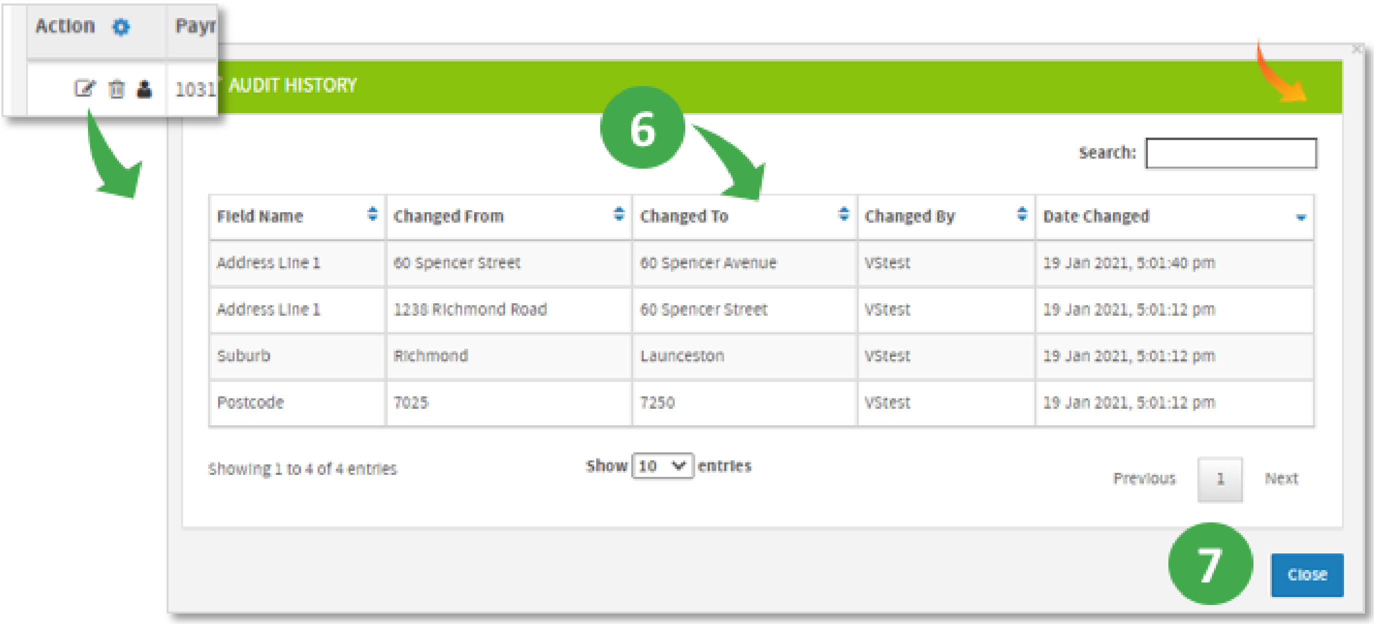
The Portal will confirm the changes have been saved.



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

7. Adding/Updating Members

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



7 Click the **Close** button when done.

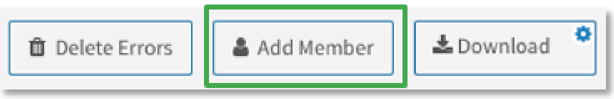
8 After you have finished all of the updates (and there are no validation errors), click the **Confirm and Send** button on the bottom right corner.

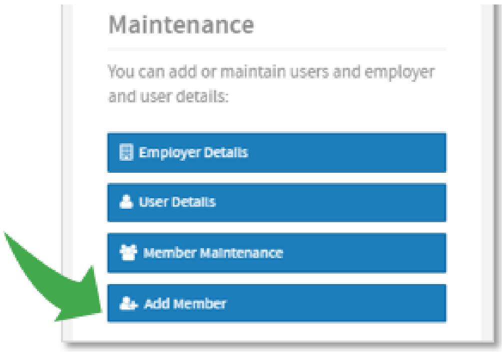
This will send a Member Registration Request through to the Superannuation Fund notifying them of the change(s).

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.

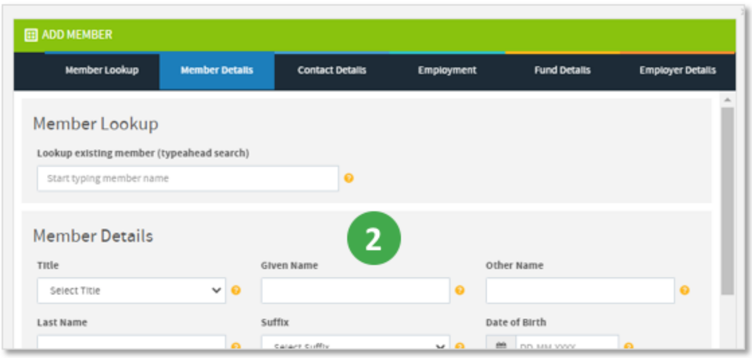
You can also add a member via clicking the **Add Member** button on the Dashboard view.





1. 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.

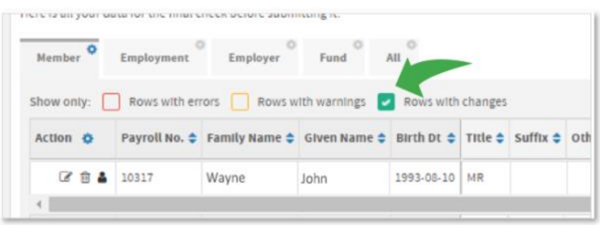


2. Complete all available information about the member.

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

3. Click the **Save** button when done.

   To add another member, repeat steps **1** to **3**.



   tip 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.

4. 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

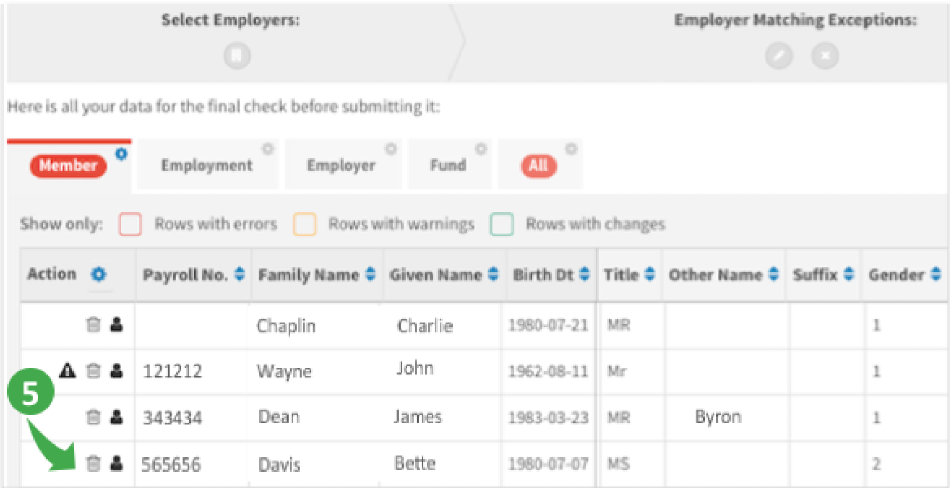
It is possible to remove a member from the current file upload, but if the file has already been submitted, the member will remain in the Portal.

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.

1. From the Dashboard view, on the **Maintenance** panel, click the **Member Maintenance** button.
2. If more than one employer is listed, select the employer of the member who you want to remove, and then click **OK**.
3. Click **Next** to show all the member records on the Member view screen.

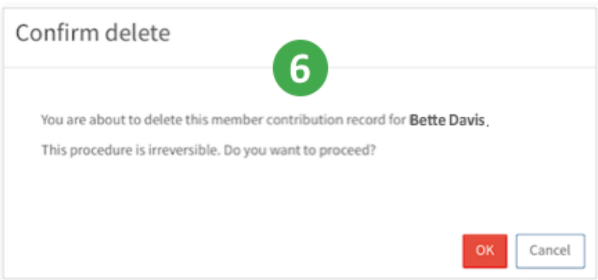
   If a filter has been previously set to display member records with validation issues, these may display. Click **Next** again to continue to the Member view screen.

4. Search for and locate the member you want to remove.
5. On the member's row, in the **Action** column, click the **Delete** icon.



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

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



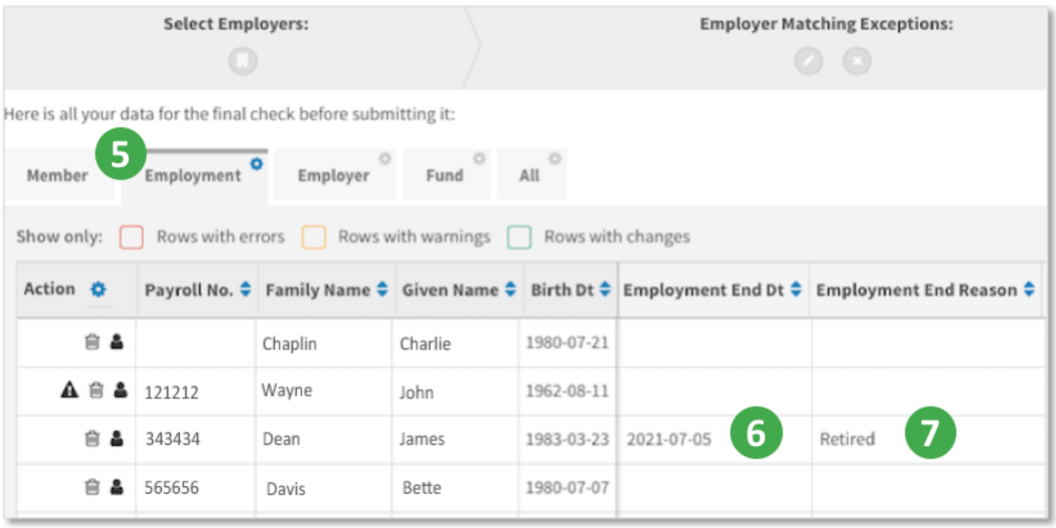
Exit a member

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 Dashboard view, on the **Maintenance** panel, click the **Member Maintenance** button.
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 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.
4. Search for and locate the member you want to exit.
5. Click the **Employment** tab.



6. 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.
7. Click in the **Employment End Reason** field, and type one or two words to describe why the member's employment ended.
8. Click the **Confirm and Send** button in the bottom right corner.

   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.

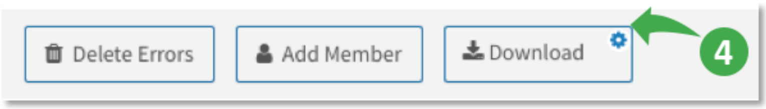
1. From the Dashboard view, on the **Maintenance** panel, click the **Member Maintenance** button.

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

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

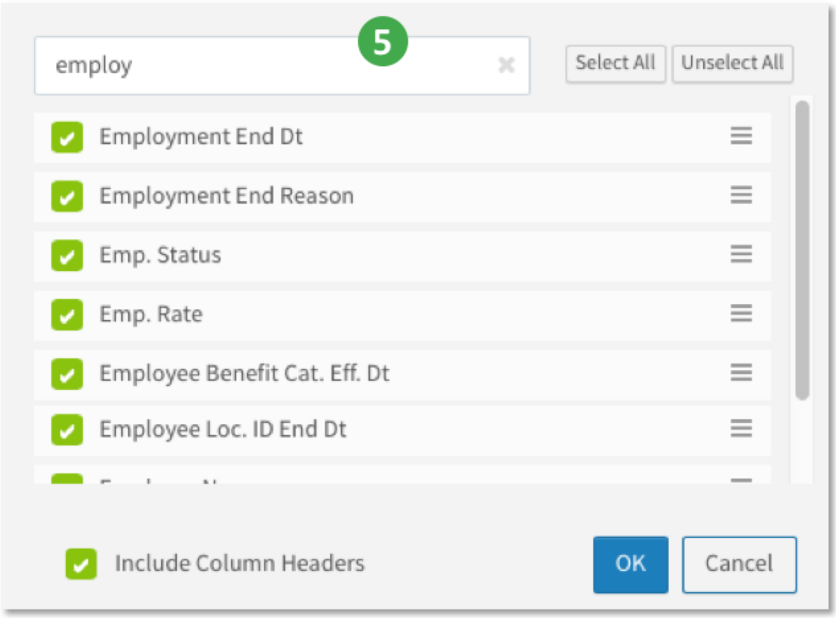
   If a filter has been previously set to display member records with validation issues, these may display. Click **Next** again to continue to the Member view screen.

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



5. 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.



6. 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.