SuperChoice

Depending on your user access, you can maintain contact, payment and fund details for your business using the **Employer Maintenance** function. Maintenance may be required because of:

- Changed contact information
- Changed payment details, eg new or different bank accounts
- Pay cycle adjustments
- New or changed super fund details.

Updating Employer details

If you update employer details using the steps below, you should also ensure any changes to employer information is also made in your payroll system so that contribution files have the correct data.

If you want to change the bank account for refunds, you must make this change in the Portal before submitting your next contribution file. Otherwise any refunds associated with contributions in that file will be paid to the former account.

On the Dashboard view, on the Maintenance panel, click the Employer Details button.						Maintenance You can add or maintain users and employer and user details: Employer Details User Details Member Maintenance		
The Emp	oloyer view		🌲 Add Member					
Dashboard 🛛 🎘 Submissio	on History 🛛 🍋 STP S	ubmission History	Upload a new contribu	ution file 🕹 Upload a n	new STP file \$ Payments	📥 Maintain Users 🛛 🚢 Add Memb	er	
Employer Name		FEN		ABN		Payment Method		
Status Active	•	Date Created	-	• 1234	456789004	All selected	• O	
Status Active Reset SELECT FROM LIST OF A showing 1 to 1 of 1 entries		Date Created All		• 1234 • •	456789004	All selected Search:	- 0 *	
Status Active arch Reset SELECT FROM LIST OF A showing 1 to 1 of 1 entries Employer Name		Date Created All RS	Category 🗘	 ● 1234 ● Main Contact 	456789004	All selected Search: Date Created	Status	

8. Updating Employer Details



2

Select the employer to adjust from the list of available employers by clicking the **Employer Name** in the bottom panel.

If you have a large list of employers, use the top panel to filter the list. Avoid clicking the pencil in the **Status** column as this only enables you to change the status of the employer to either Active or Inactive.

The **Employer Maintenance** screen displays and provides access to sets of information via tabs across the top. Depending on your access level, you can update business, contact and payment details, manage associated superannuation funds, schedule pay cycles, manage users and also change preferences.

You can move freely through the tabs to access the fields of information you are able to edit.

For detailed information about each of the tabs, see <u>Employer tabs</u> on the next page.

mployer Details Payment Details Manage Funds File T	ype and Template Schedule Pay Cycles Users &	User Group	5	
Employer Details	Employer Name			
Please fill in the employer details. All fields in this section are	Cinema Treats & Co	•		
required.	ABN WPN		Location	
	123456789004		1	•
	Employer Id 7c870975-cb32-4ddc-8005-7d49abe08b2c Access Name Cinema Treats & Co (ABN: 123456789004) Custodian		Last Updated Thu, 18 Mar 2021, 13:51 by JBORDER Date Created Thu, 25 Feb 2016, 03:55 by bwllson Employer Arrangement	
	SuperCollect			•
Contact Details	Title		Sufftx	
Please fill in the contact details fleids. Given Name, Family Name	Select Title	* 0		•
and Email Address are required fields.	Given Name		Other Name	

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.

Employer Details *

Before moving to another tab, save any changes by clicking the **Save** button in the bottom left corner.

If you forget to save, the Portal will prompt you to save or discard any changes before moving on. To keep your changes, click the **Save Changes** button.

Unsaved changes	×							
You have unsaved changes on this page. Click Save Changes to save these changes now, Discard Changes to discard them. Click Cancel to stay on this screen.								
Save Changes Discard Changes Cance	2l							

After saving a change, the Portal flashes a confirmation message in the bottom right corner of your screen.



8. Updating Employer Details



Employer tabs

The following tabs display across the Employer Maintenance screen.

Employer Details

The Employer Details tab contains information in three panels:

- Employer Details
- Contact Details
- Address Details

Payment Details

The Payment Details tab includes:

Payment Details – where you can switch between the Direct Debit or Direct Credit payment method.

If you change from Direct Credit to Direct Debit, you will need to place a tick in the check box to indicate you agree to the direct debit authority.

 Direct Debit Account – where you can change the BSB, Account Number and/or Account name for the bank account used for your payment method.

The Direct Debit Account panel only displays if your payment method is Direct Debit.

 Refund to Employer Bank Account – where you can change the BSB, Account Number and/or Account Name of the bank account that refunds are paid to.

Manage Funds

The Manage Funds tab enables you to adjust the selection of Super Funds available. It includes:

- Manage Default Funds define (or remove) any funds set as default.
- Manage FENs define (or remove) any Fund Employer Numbers as required.
- Manage SMSFs define (or remove) any Self Managed Super Fund entries as needed by your employees.

File Type and Template

This tab contains options for changing the format and display of your contribution file uploads. It is recommended you do not make any changes here unless advised by Support.

Schedule Pay Cycles

On this tab you can review and adjust your current Pay Cycle settings (by clicking the cog ² symbol to the left), or you can set up a new pay cycle by clicking the **Add Pay Cycle** button.

User & User Groups

Here you can review and adjust any users with access to your Employer functions. This includes activating and deactivating users. If you have User Groups enabled for your Employer record, you can also maintain User Groups in this tab.

© 2021 SuperChoice Services Pty Limited. All rights reserved. ABN 78 109 509 739 SuperChoice Services Pty Limited (ACN 109 509 739), Authorised Representative (Number 336522) of PayClear Services Pty Limited (ACN 124 852 320) holder of Australian Financial Services Licence Number 314357.