

# 8. Updating Employer Details

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:

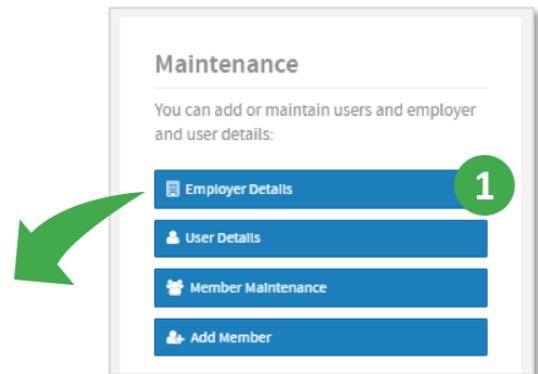
- Changed contact information
- Changed payment details, eg new or different bank accounts
- Pay cycle adjustments
- New or changed super fund details.

## 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.

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



The Employer view displays.

The screenshot shows the 'FILTER EMPLOYERS' section with the following fields:

- Employer Name:
- FEN:
- ABN:
- Payment Method:
- Status:
- Date Created:

Buttons: Search, Reset

Section: SELECT FROM LIST OF AVAILABLE EMPLOYERS

Showing 1 to 1 of 1 entries

Employer Name	ABN	FEN	Category	Main Contact	Payment Method	Date Created	Status
Cinema Treats & Co	123456789004	ARC-445		Lillian Gish	Direct Debit	Thu, 25 Feb 2016, 03:55	Active

Navigation: First Previous 1 Next Last

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

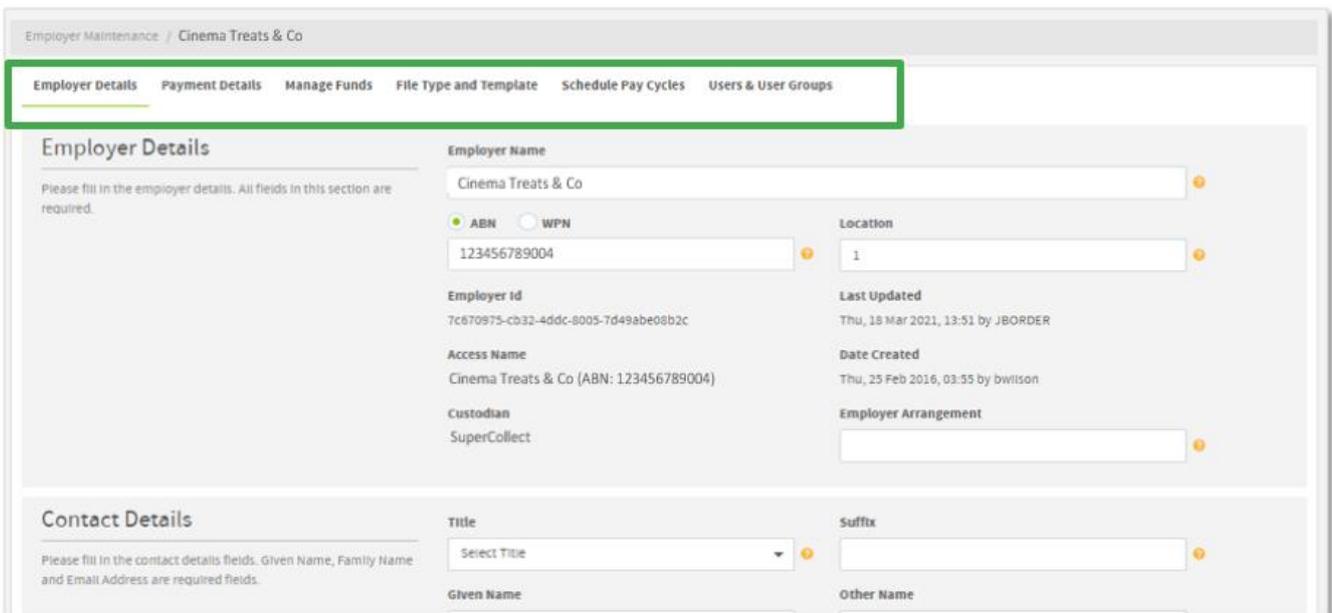
If you have a large list of employers, use the top panel to filter the list.

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.

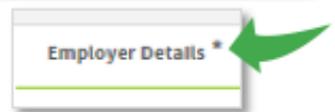
The **Employer Maintenance** screen displays and provides access to sets of information via tabs across the top. Depending on your access level, you can update business, contact and payment details, manage associated superannuation funds, schedule pay cycles, manage users and also change preferences.

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 [Employer tabs](#) on the next page.

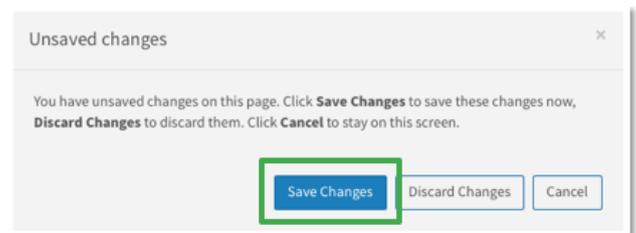


When you make a change on a tab, an asterisk will display to the right of the tab's name to indicate there are unsaved changes.

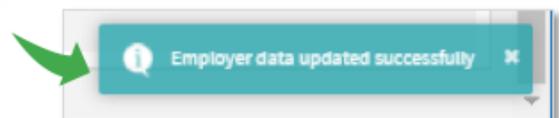


Before moving to another tab, save any changes by clicking the **Save** button in the bottom left corner.

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.



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



## 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  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.