

# Sybiz Employer Portal - Contributions Employer User Guide

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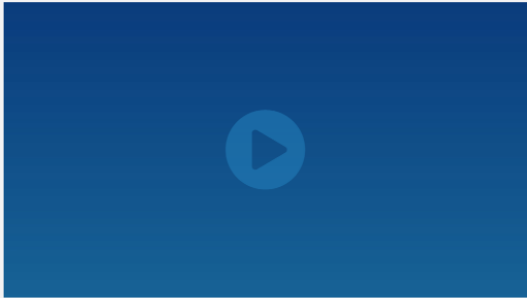
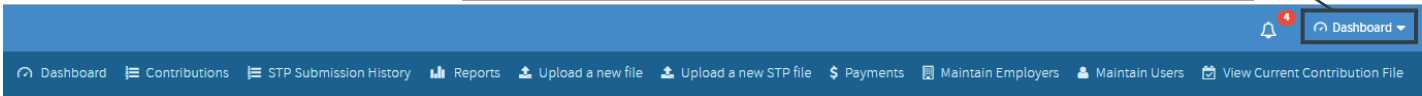
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# Dashboard Summary

Selecting this menu option will allow a user to navigate through the Employer Portal, regardless of the page they are on.



## Welcome to the Employer Portal

The Employer Portal ensures employer contribution files are submitted through an industry accredited gateway using legislated formats and messaging protocols. Watch this video for more information.

Training guides →

Clicking the above tab will allow a user to view Employer Portal training guides.

### Contributions

You can pay contributions for employees through a number of options:

- Upload a new file
- Manually key a contribution
- Create an ad hoc contribution
- Reuse a previous contribution file
- History
- Current

### Maintenance

You can add users and maintain employer and user details:

- Employer Details
- User Details
- Member Maintenance
- Add Member

### Reports

You can view and search previous payments and contributions:

- Contributions
- Payments

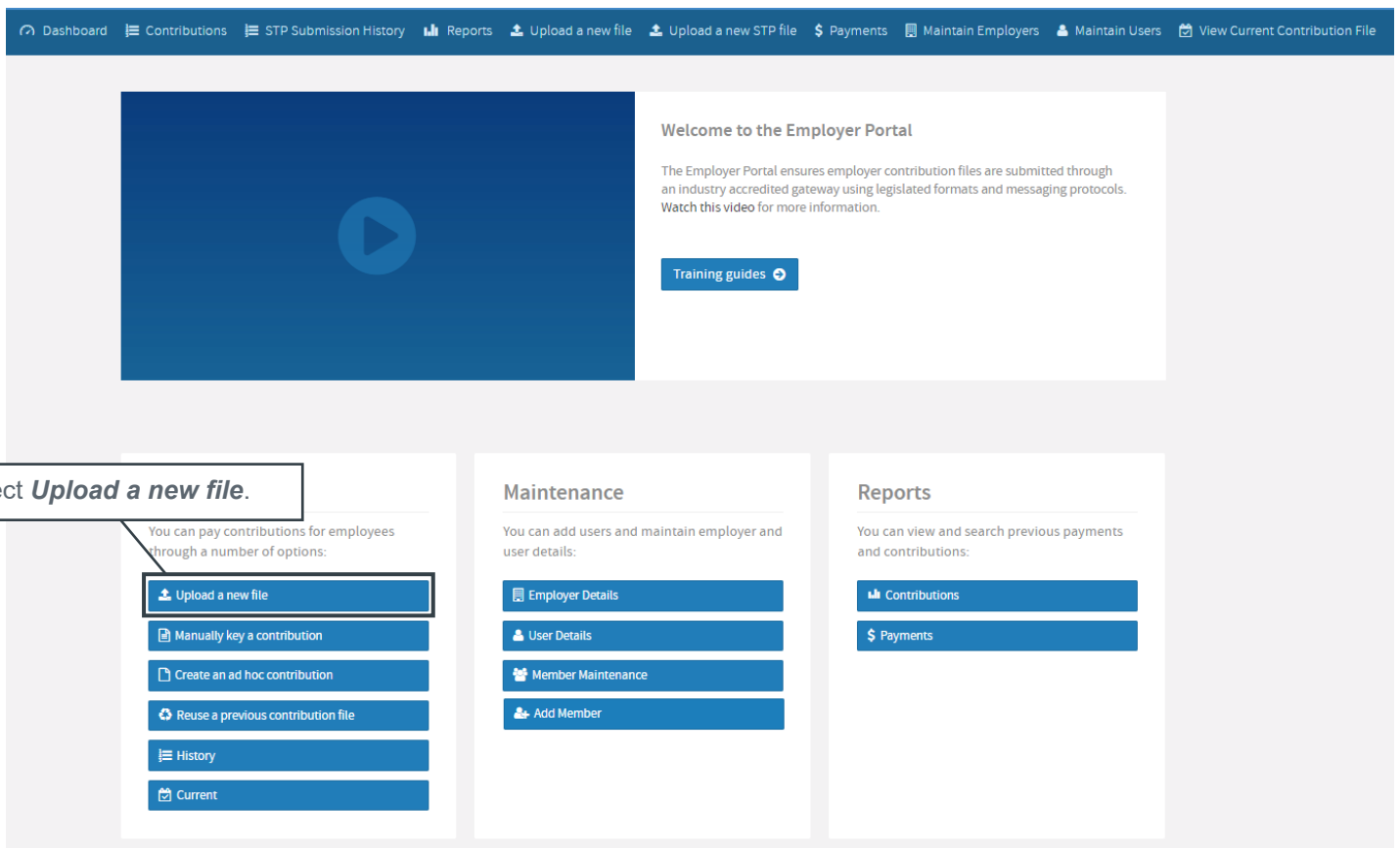
**Upload a new file** – Allows a user to upload a file exported from their payroll system.  
**Manually key a contribution** – Allows a user to manually process contributions, add and edit employee's details. This shows all employees linked to their employer.  
**Create an ad hoc contribution** – Allows a user to create an ad hoc contribution.  
**Reuse a previous contribution file** – Allows a user to reuse a previously submitted contribution.  
**History** - Allows a user to view a history of their past submissions and response messages.

**Employer Details** – Allows a user to update details about their business.  
**User Details** – Allows a user to update details about their user account, as well as set up new user accounts.  
**Member Maintenance** – Allows a user to update existing member details.  
**Add Member** – Allows a user to add/create a new member account.

**Contributions** – Allows a user to produce reports on super contributions paid by their business.  
**Payments** – Allows a user to produce reports on payments made by their business.

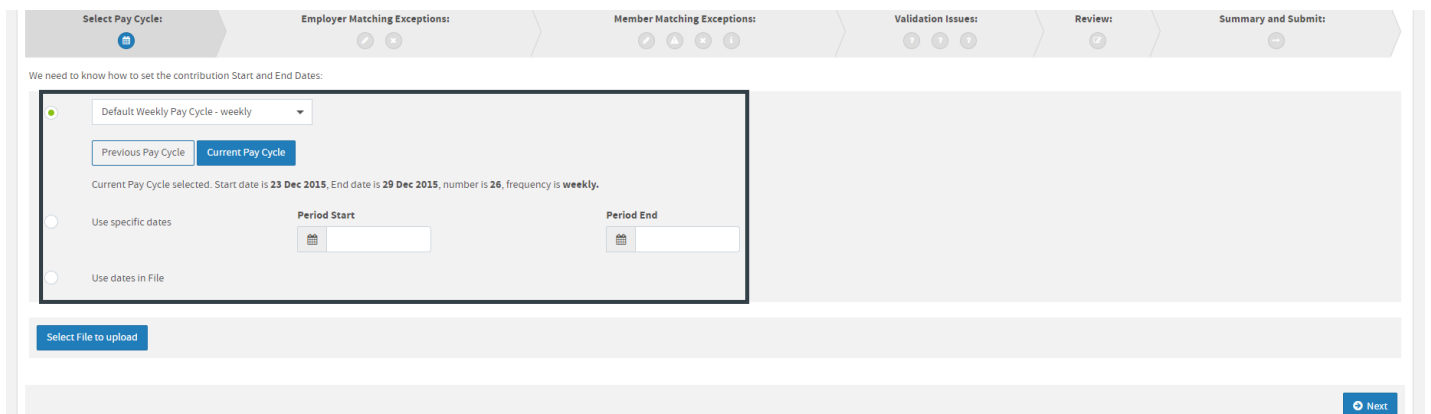
# Upload a new file

Employers are able to upload files exported from their payroll system. These files must be the ATO SAFF.



## Select Pay Cycle

1. Select Dates:
  - **Use Default Employer Pay Cycle** – This will default to the Pay Cycle selected during ESE registration or;
  - **Use Specific Date** – Allows manual selection of Period Start and Period End dates or;
  - **Use dates in File** – Will defer to a Period Start and Period End date in the upload file (if present)
2. Click on **Select File** to upload which will allow you to browse your PC for the saved contribution file.
3. Once you are happy with date choice and file selection, click **Next**.



## Employer Matching Exception

If there is a mismatch between the ABN in the file and the ABN the user is registered against, you will be prompted to select the correct employer. This will override the employer details in the file with those of the employer you are registered with.

## Select Employer

Once the correct employer has been selected, select *Apply All*. A pop up will ask you to **Confirm or Cancel**. To continue loading the file, select **Confirm**.

Select Pay Cycle:    **Employer Matching Exceptions:**    Member Matching Exceptions:    Validation Issues:    Review:    Summary and Submit:

Exceptions related to employer data will need to be resolved before continuing.

**The following employer matching exceptions have occurred:** 1 Exception

No Employer Specified - Select the correct employer.

No employer specified. Please choose the correct employer from the dropdown list.

**Pick an employer**

SUPERCHOICE SERVICES PTY LIMITED [ ABN:78109509739 ]

Please confirm your selection  
Are you sure you would like to apply your selection to all items?  
**Confirm** **Cancel** **Apply to All**

Previous    First    Previous    1    Next    Last

## Member Matching Exceptions

A member matching exception will occur when the database cannot create a member record based on the information in an upload, or there is a possible match with an existing member record. For example, the file may not contain the complete details for a members Self-Managed Super Fund. You will be prompted to **Create SMSF**.

Select Pay Cycle:    Employer Matching Exceptions:    **Member Matching Exceptions:**    Validation Issues:    Review:    Summary and Submit:

Exceptions related to employee data will need to be resolved before continuing. Please expand each section to make the necessary amendments before proceeding.

**John Smith** — P123476 — SuperChoice **Remove** 1 Exception

Unrecognised SMSF [80719602354] - Select the correct fund.

We haven't been able to match the fund for this member. Following is the data we have found in the uploaded file:

Fund Name	The Self-Managed Super Fund	ESA	
ABN	80719602354	BSB	
USI		Account Name	Self-Managed Fund
		Account Number	

Please select whether this is a Fund or an SMSF:  
 Fund     SMSF

**Pick the correct fund**    Or    **Create SMSF**

**Create SMSF:** enter all SMSF details and Save. This record is then verified with the ATO. The SMSF will need to be 'Compliant' to process Super payments.

## Validation Issues

The Validation Issues page will be displayed if there is data within a file that is not compliant to the SuperStream requirements and therefore fails validation. This screen will display a count of the errors and warnings that are present and the reason why it has failed validation.

**Errors:** A user will not be permitted to submit a file with Error Validations. Errors will need to be corrected within the source payroll system or on screen prior to submitting.

**Warnings:** A user will be permitted to submit a file with Warning validations.

Select Pay Cycle:    Employer Matching Exceptions:    Member Matching Exceptions:    **Validation Issues:** 0 Warnings 1 Error 0 Info    Review:    Summary and Submit:

All data matching exceptions have been resolved now, but we found the following validation issues:

**John Smith** P123476 DOB: SuperChoice 1 Error

Contribution ✓

Member 1

Given Name	John	Family Name	Smith
Gender	1	Address Code	RES
Address Line 1	3 Riley Road	Suburb	Sydney
Postcode	2000	State	NSW
Country		Payroll No.	P123476
Birth Date		Member ID	M98762

The Member Birth Date must be a valid date in the format yyyy-mm-dd. (MIG.R.Mem.0016)

Employment ✓

Employer ✓

Fund ✓

DB ✓

Previous    First    Previous    1    Next    Last    Download    Next

Errors and warnings can be resolved in the validation issue screen, downloaded in an error report to be worked on offline, or, by selecting the Next button these can resolve in the Review screen.

**Note:** The Download feature is most useful where there are a large number of validations which can be used to resolve the issues in their payroll system prior to re-uploading the contribution file with corrected data.

All data errors should be also fixed in the source payroll system to avoid having to do the fixes every time you upload a contribution file.

## Review

The Review screen will be the last stage that you can review the data that has been uploaded and fix any remaining errors and/or warnings.

Once all errors have been resolved the **Next** button will be enabled.

## Summary and Submit

The Summary and Submit screen will provide a fund breakdown of the submission, allow you to review the grand totals and confirm the payment summary details.

**Save and Hold** will lock a submission and not allow any further changes.

Once submission and payment details have been confirmed, selecting **Confirm and Send** will submit the contribution.

# Manually key a contribution

The screenshot shows the Employer Portal dashboard. At the top is a navigation bar with links: Dashboard, Contributions, STP Submission History, Reports, Upload a new file, Upload a new STP file, Payments, Maintain Employers, Maintain Users, and View Current Contribution File. Below the navigation bar is a 'Welcome to the Employer Portal' section with a video player and a 'Training guides' button. The main content area is divided into three columns: 'Upload a new file', 'Maintenance', and 'Reports'. A callout box with a black border and white background points to the 'Manually key a contribution' button in the 'Upload a new file' column. The callout text reads: 'Select **Manually key a contribution**'. The 'Upload a new file' column contains buttons for: Upload a new file, Manually key a contribution, Create an ad hoc contribution, Reuse a previous contribution file, History, and Current. The 'Maintenance' column contains buttons for: Employer Details, User Details, Member Maintenance, and Add Member. The 'Reports' column contains buttons for: Contributions and Payments.

## Select Pay Cycle

1. Select Dates:
  - *Use Default Employer Pay Cycle* – This will default to the Pay Cycle selected during ESE registration or;
  - *Use Specific Dates* – Allows manual selection of Period Start and Period End dates
2. You can choose to enter a New Filename for the submission, then select **Next** to progress

The screenshot shows the 'Select Pay Cycle' form. At the top is a progress bar with six steps: Select Pay Cycle, Employer Matching Exceptions, Member Matching Exceptions, Validation Issues, Review, and Summary and Submit. The 'Select Pay Cycle' step is active. Below the progress bar is a message: 'We need to know how to set the contribution Start and End Dates:'. The form has two radio buttons: 'Default Schedule - weekly' (selected) and 'Use specific dates'. The 'Default Schedule - weekly' option has a dropdown menu and two buttons: 'Previous Pay Cycle' and 'Current Pay Cycle'. Below these buttons is text: 'Current Pay Cycle selected. Start date is 14 Jul 2016, End date is 20 Jul 2016, number is 3, frequency is weekly.' The 'Use specific dates' option has two date input fields: 'Period Start' and 'Period End'. Below these fields is a 'New Filename' field with a callout box highlighting it. The callout text reads: 'New Filename Data Entry File'. At the bottom right of the form is a 'Next' button.



## Review

The Review / Contribution Grid screen will display all associated member records for an employer, if the contribution contains a new member, employers can manually create these by selecting **Add Member**. Users can then enter the contribution amounts for each member by selecting the related contribution field.

Select Pay Cycle:      Employer Matching Exceptions:      Member Matching Exceptions:      Validation Issues:      **Review:**      Summary and Submit:

Here is all your data for the final check before submitting it:

Contribution    Member    Employment    Employer    Fund    DB    All

Show only:  Rows with errors     Rows with warnings     Rows with changes    Search:

Action	Payroll No.	Family Name	Given Name	Birth Dt	Pay Period Start Dt	Pay Period End Dt	Superannuation Guarantee \$	Productivity/Award \$	Personal \$	Salary Sac. \$	Voluntary \$	Spous
	P123467	Foot	Susan	1965-08-17	2016-06-30	2016-07-06	100.00					
	P123476	Smith	John	1989-01-01	2016-06-30	2016-07-06						
<b>Totals:</b>												0.00

Showing 1 to 2 of 2 entries      Show 10 entries

Click into the contribution type field to manually enter an amount.

Once all amounts have been entered, selecting **Next** will take you to the **Summary and Submit** screen where you can review a fund breakdown of the submission, the grand totals and confirm the payment summary details.

Select Pay Cycle:      Employer Matching Exceptions:      Member Matching Exceptions:      Validation Issues:      Review:      **Summary and Submit:**

**Fund Breakdown** (Period 30 Jun 2016 to 06 Jul 2016)

Fund Name	USI	No. Members	Amount \$
PLUM SUPER	70732426024150	1	100.00
The Trustee for SELF MANAGED SUPER FUND		1	0.00
<b>Grand Totals:</b>		2	\$100.00

Previous 1 Next

**Payment Summary**

<b>Payment Reference</b> 781095097390712003	<b>For Employer</b> SuperChoice ABN: 78109509739	<b>Direct Debit</b> Account to be debited: BSB: 123455 A/c: 123456789
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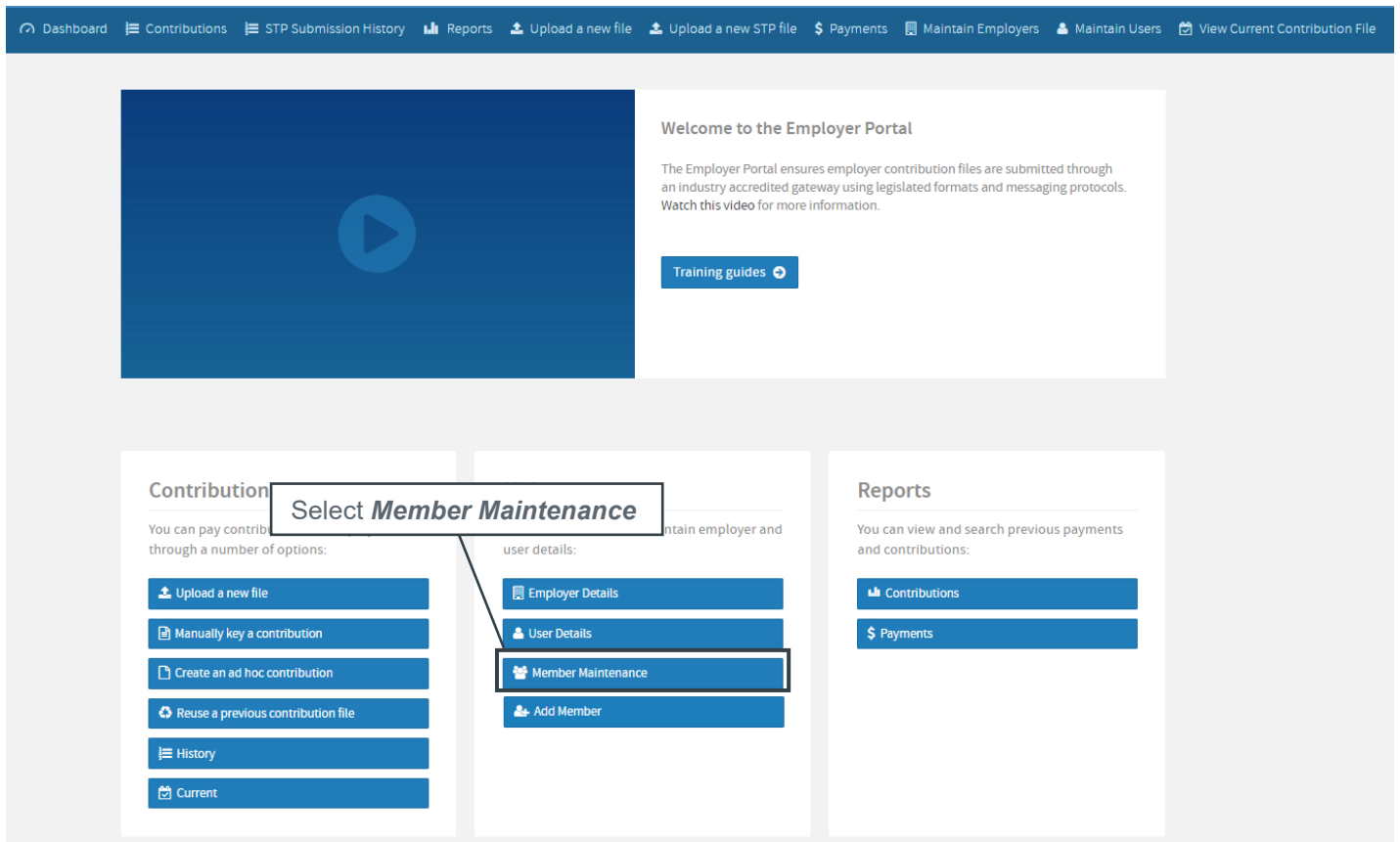
          

Once submission and payment details have been confirmed, selecting **Confirm and Send** will submit the contribution.

# Member Maintenance

The Member Maintenance function allows an employer to maintain their member/employee details. This could include:

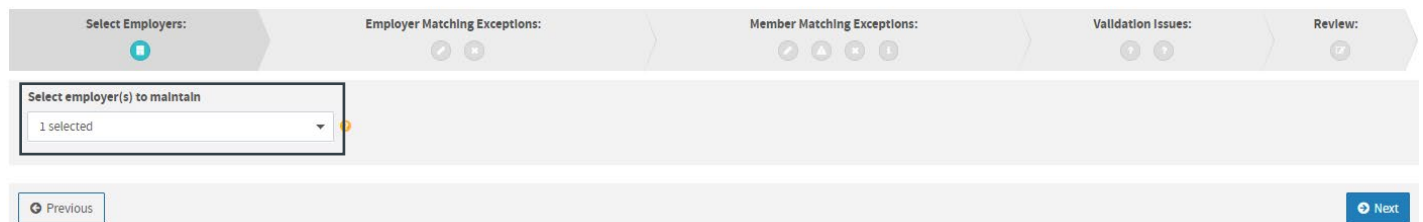
- a. Surname changes
- b. Address changes
- c. Change of Fund
- d. End of employment



## Select Employers:

If a user has access to multiple employers, they will be requested to select the relevant employer record. You can select all employers you have access to and all members will be displayed in the review screen.


Select one or all employers and select **Next**.



**Note**, if you have access to only one employer record, you will be directed straight to the Review screen.

## Review



To edit a member's details, click on the person icon  under the Actions column.

Select Employers: > Employer Matching Exceptions: > Member Matching Exceptions: > Validation Issues: > Review: 

Here is all your data for the final check before submitting it:

Member Employment Employer Fund All

Show only:  Rows with errors  Rows with warnings  Rows with changes Search:

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	Postcode	State	C
	test2	Foot	Susan	1989-02-01	MISS			2	RES	35 Clarence Street				Sydney	2000	NSW	f
	test1	Smith	John	1990-01-01	MR			1	RES	35 Clarence Street				Sydney	2000	NSW	f

Showing 1 to 2 of 2 entries Show 10 entries Previous 1 Next

[Previous](#) [Add Member](#) [Confirm and Send](#)

You will be presented with the Member Management screen. Here you can update the required details and select **Save**.

**MEMBER MANAGEMENT**

Member Details | Contact Details | Employment | Fund Details | Employer Details

### Member Details

**Title**  
Miss

**Given Name**  
Susan

**Other Name**

**Last Name**  
Foot

**Suffix**  
Select Suffix

**Date of Birth**  
01 February 1989

**Gender**  
Female

**Payroll No.**  
test2

**Member No.**  
654321

**TFN**


### Contact Details

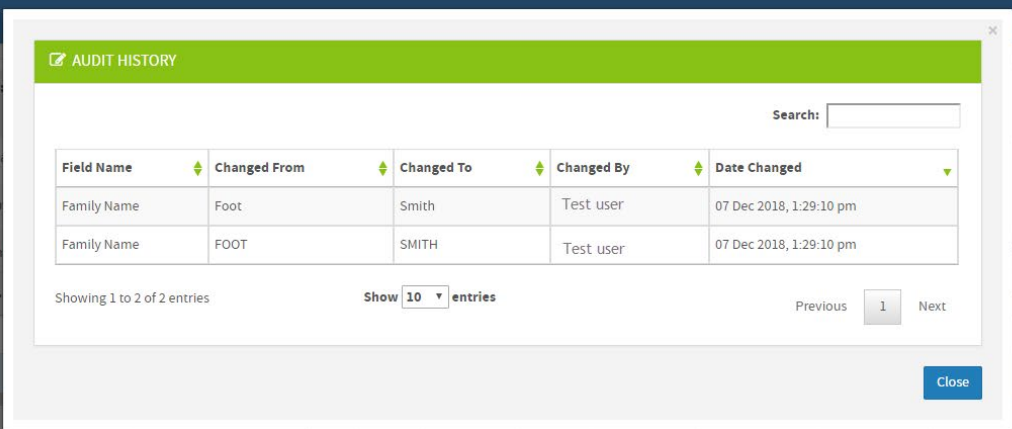
**Address Code**  
Residential

**Address Line 1**  
35 Clarence Street

**Address Line 2**

[Save](#) [Cancel](#)

Once updated, you can view an audit of the change by clicking the  icon under the Actions column. This outlines the changes that have been made, by which user and the date the change was made.



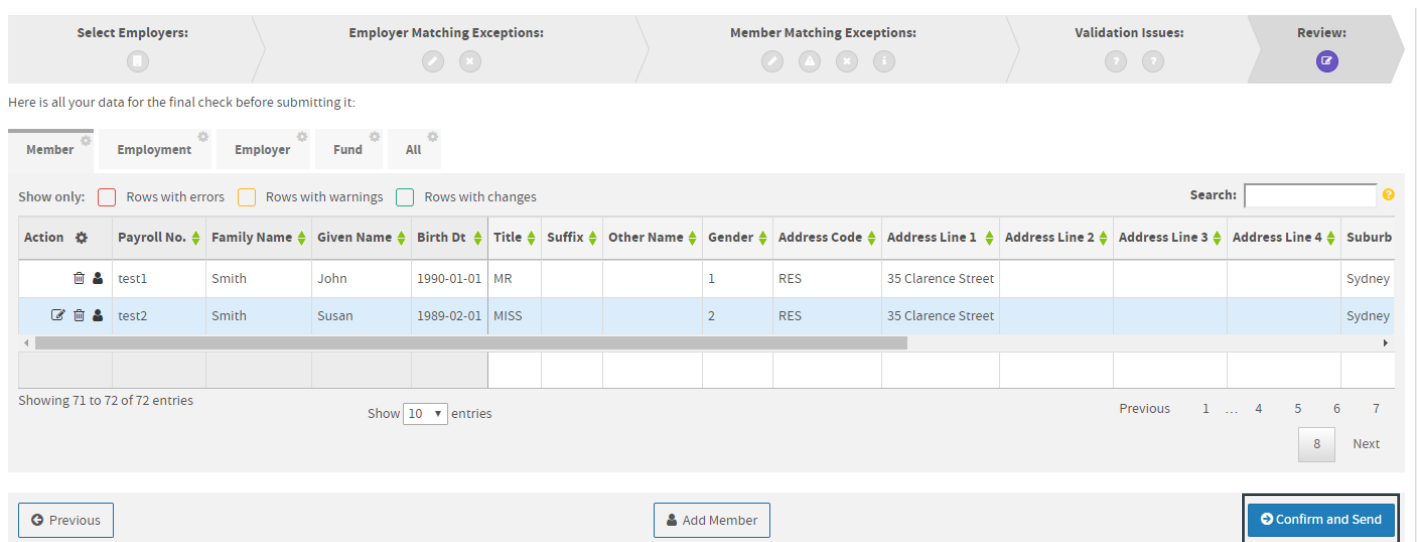
The screenshot shows a modal window titled 'AUDIT HISTORY' with a search bar and a table of changes. The table has the following columns: Field Name, Changed From, Changed To, Changed By, and Date Changed.

Field Name	Changed From	Changed To	Changed By	Date Changed
Family Name	Foot	Smith	Test user	07 Dec 2018, 1:29:10 pm
Family Name	FOOT	SMITH	Test user	07 Dec 2018, 1:29:10 pm

Below the table, it says 'Showing 1 to 2 of 2 entries' and 'Show 10 entries'. There are 'Previous' and 'Next' buttons. A 'Close' button is at the bottom right.

## Review

Once you have made all the required changes, clicking **Confirm and Send** will update the database and send a Member Registration Request through to the Super Fund notifying them of this change.



The screenshot shows the 'Review' step of the process. At the top, there are navigation tabs: 'Select Employers:', 'Employer Matching Exceptions:', 'Member Matching Exceptions:', 'Validation Issues:', and 'Review:'. Below this, it says 'Here is all your data for the final check before submitting it:'. There are tabs for 'Member', 'Employment', 'Employer', 'Fund', and 'All'. Below the tabs, there are checkboxes for 'Rows with errors', 'Rows with warnings', and 'Rows with changes'. A search bar is on the right. The main table has the following columns: 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, and Suburb. Two rows are visible, both for 'test2'.

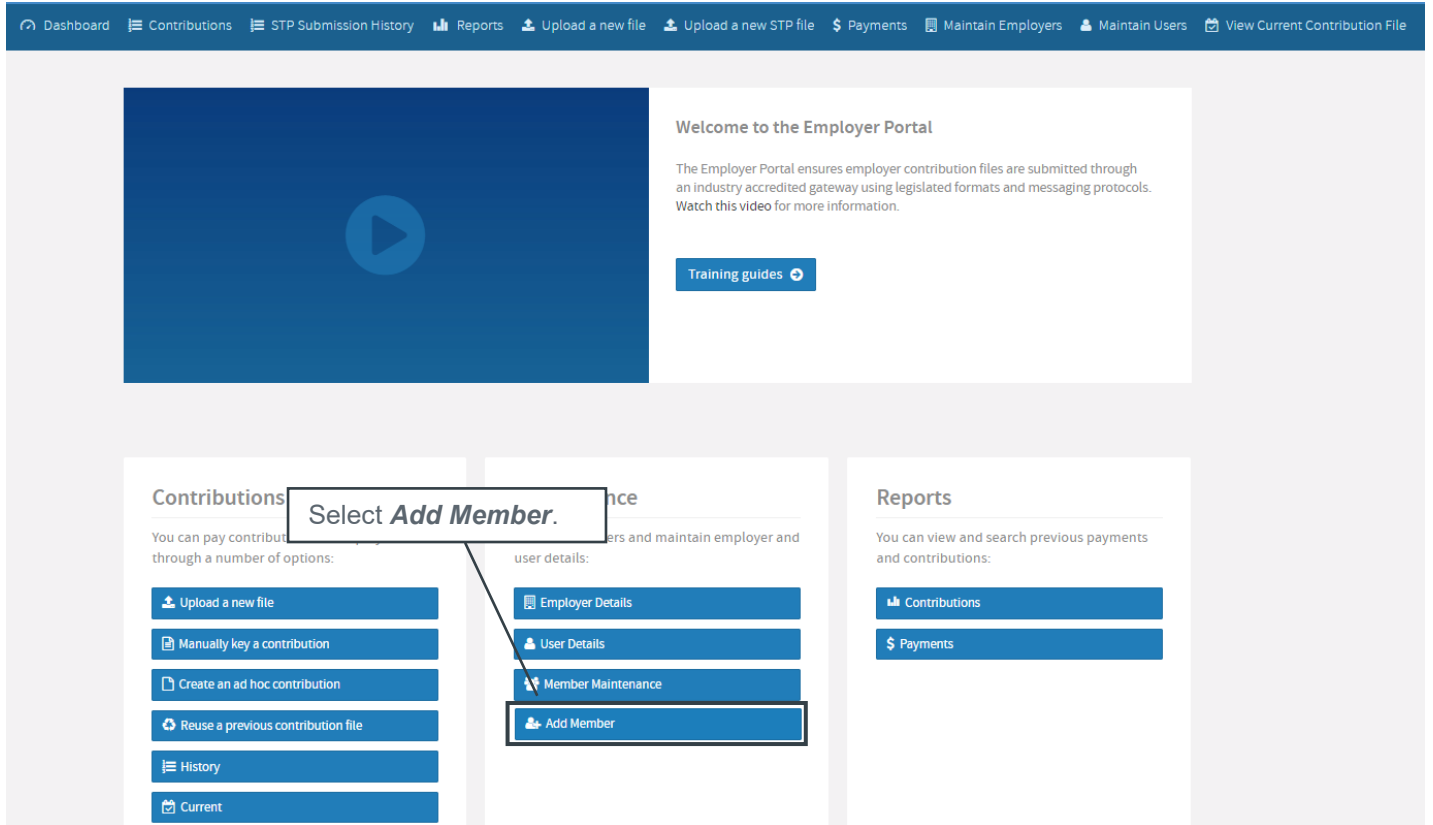
Action	Payroll No.	Family Name	Given Name	Birth Dt	Title	Suffix	Other Name	Gender	Address Code	Address Line 1	Address Line 2	Address Line 3	Address Line 4	Suburb
	test1	Smith	John	1990-01-01	MR			1	RES	35 Clarence Street				Sydney
	test2	Smith	Susan	1989-02-01	MISS			2	RES	35 Clarence Street				Sydney

At the bottom, there are 'Previous', 'Add Member', and 'Confirm and Send' buttons. A callout box points to the 'Confirm and Send' button.

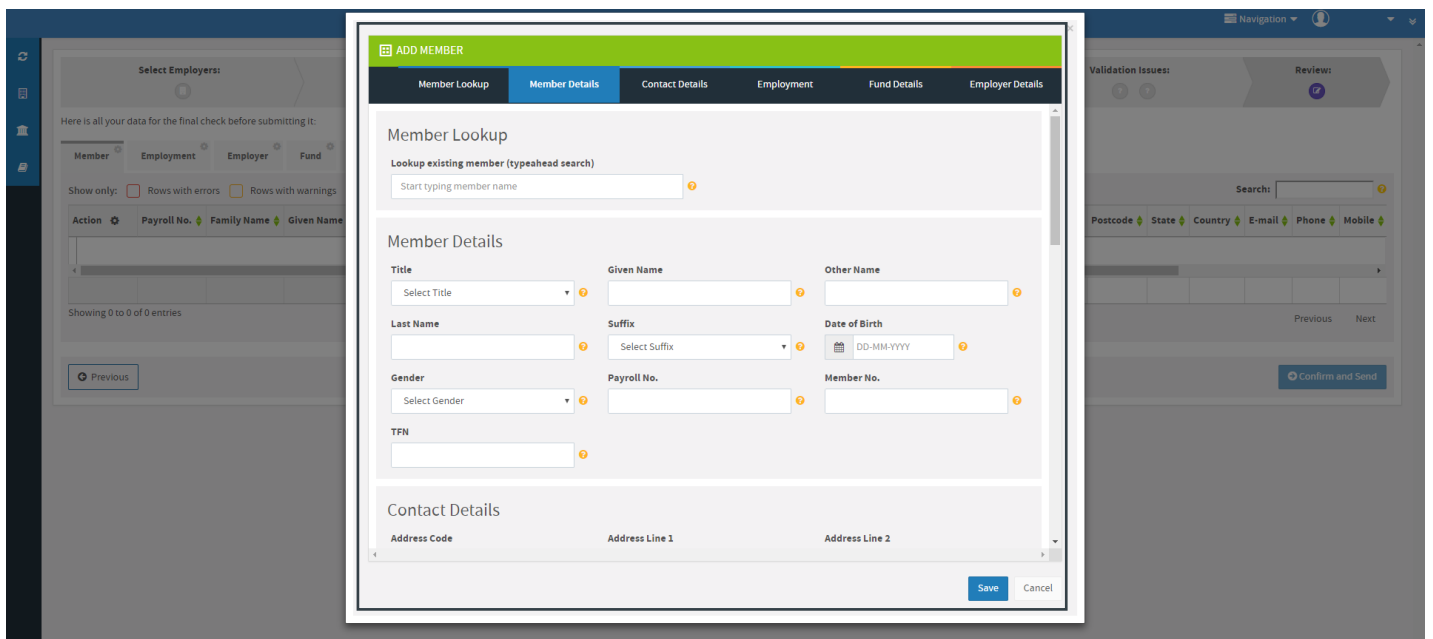
Once updates have been finalised, selecting **Confirm and Send** will submit the changes.

# Add Member

Employers can add a member/employee prior to uploading or manually keying in a contribution.



The Add Member screen will be presented to allow you to add in the new member details.



If you do not provide all the mandatory information required, you will be presented with the relevant validation error and will not be able to submit until the error has been resolved.

### Review

Once you have added a new member, clicking **Confirm and Send** will add these records the database and send a Member Registration Request through to the Super Fund notifying them of the new member.

Select Employers:      Employer Matching Exceptions:      Member Matching Exceptions:      Validation Issues:      Review:

Here is all your data for the final check before submitting it:

Member    Employment    Employer    Fund    All

Show only:  Rows with errors     Rows with warnings     Rows with changes    Search:

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
	New	Member	New	1980-01-01	MR			1	RES	35 Clarence Street				Sydney

Showing 1 to 1 of 1 entries      Show 10 entries      Previous 1 Next

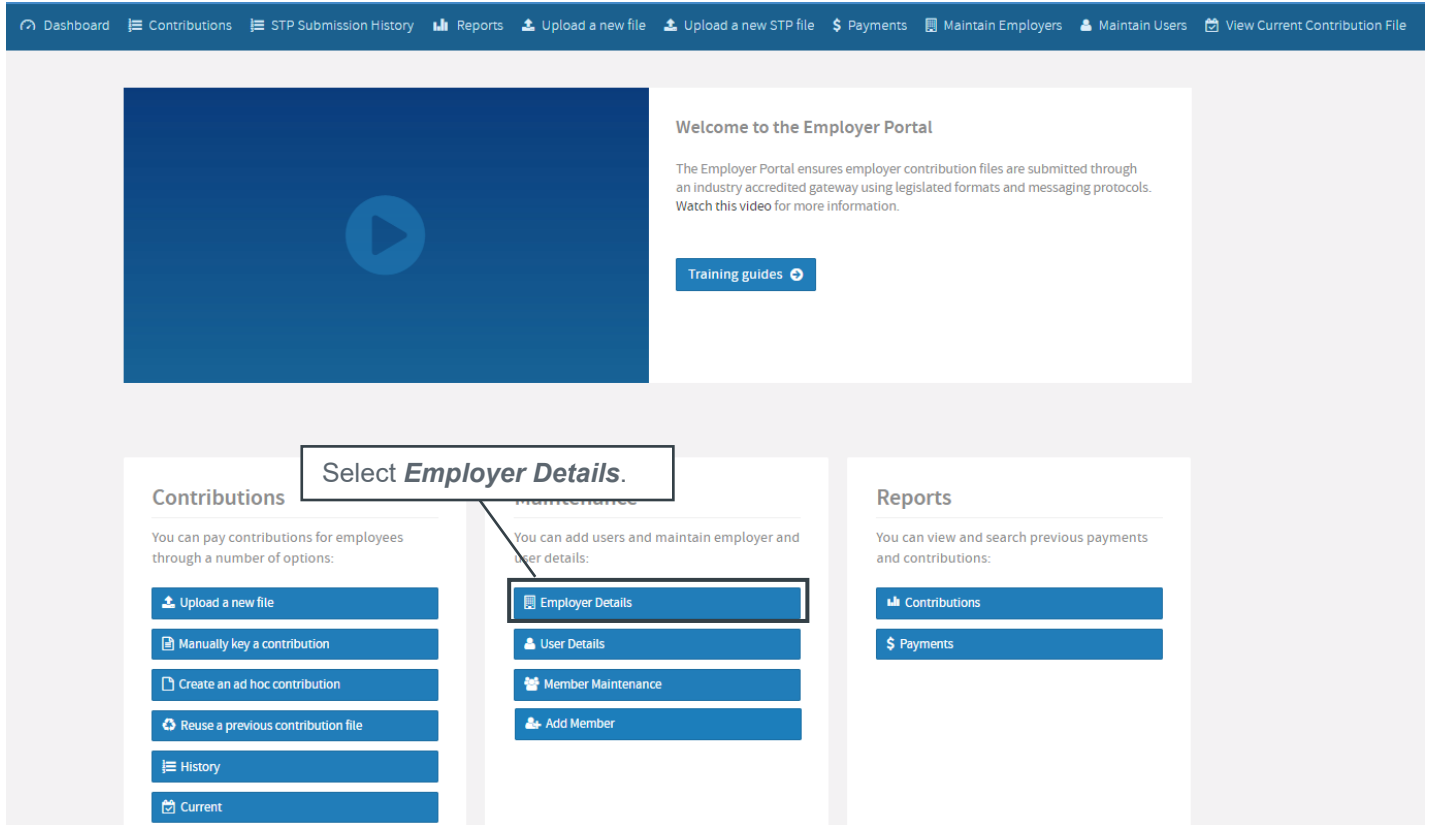
[Previous](#)      [Add Member](#)      [Confirm and Send](#)

Select **Add Member** to add any additional members.

Once all new members have been added, select **Confirm and Send** to submit.

# Employer Maintenance

Employer Maintenance allows a user to update certain details about their business.



## Select Employer

The Employer Maintenance screen will show a list of employers that you have permission to access. There are a range of filters available to search for associated employer records, leaving these filters blank and selecting **Search** will provide a list of all employers.

You can select the employer record you wish to update.

**Employer Maintenance**

**Filter Employers**

Employer Name:  FEN:  ABN:  Status:

**Select from list of available employers**

Showing 1 to 1 of 1 entries

Employer Name	FEN	ABN	Status
2TEST PTY LTD		12055257657	Active

First Previous **1** Next Last

## Employer Maintenance

Depending on your access level, you can update business, contact and payment details, manage associated superannuation funds, schedule pay cycles, manage users and preferences.

You can move through the Employer Maintenance screens by navigating through the tabs.

**Employer Maintenance**

Employer Maintenance / 2TEST PTY LTD

**Employer Details** | Payment Details | Manage Funds | Schedule Pay Cycles | Users & User Groups | Employer Preferences

**Employer Details**

Please fill in the employer details. All fields in this section are required.

Employer Name:

ABN  WPN

ABN:  Location:

Click **Save** to save any changes made to an employer's details.



# Maintain Users

The User Details section allows you to update details about your user account, as well as set up new users if you have the appropriate level of access.

The screenshot shows the Employer Portal dashboard with a navigation bar at the top containing: Dashboard, Contributions, STP Submission History, Reports, Upload a new file, Upload a new STP file, Payments, Maintain Employers, Maintain Users, and View Current Contribution File. The main content area features a 'Welcome to the Employer Portal' message with a video player and a 'Training guides' button. Below this are three panels: 'Contributions' (with options like 'Upload a new file', 'Manually key a contribution', etc.), 'User Details' (with options like 'Employer Details', 'User Details', 'Member Maintenance', 'Add Member'), and 'Reports' (with options like 'Contributions', 'Payments'). A callout box labeled 'Select *User Details*.' points to the 'User Details' button in the middle panel.

## Manage Users

There are a range of filters available to search for associated user records, leaving these filters blank and selecting **Search** will provide a list of all related users.

You can update an existing user record by selecting the record from the list of related users.

The screenshot shows the 'Filter Users' interface. It includes a search bar and several filter fields: 'User Id', 'User Firstname', 'User Lastname', 'User Role' (set to 'All selected'), and 'Status' (set to 'Active'). Below the filters are 'Search', 'Reset', and 'Add User' buttons. The 'SELECT FROM LIST OF AVAILABLE USERS' section shows a table with one entry: 'TestUser' with first name 'Test', last name 'User', and role 'Employer Administrator Full Permissions'. The status is 'Active'. A search bar is also present in this section. At the bottom right, there are pagination controls: 'First', 'Previous', '1', 'Next', 'Last'.

User Id	First Name	Last Name	User Role	Status
TestUser	Test	User	Employer Administrator Full Permissions	Active

Update any required changes using the tabs at the top of the screen to navigate through each section. Select **Save** to save changes.

### Create a New User

Depending on the level of access, new users can be created via the User Maintenance screen.

### User Account

Enter in the following details:

- User ID: We recommend that generic user ID's are not created.
- First Name: Enter in the user's first name.
- Surname: Enter in the user's surname.
- User Role: Select the appropriate user role.

The '**This user will self-manage their own private group of users**' checkbox, when enabled, will allow the newly created user to self-manage any users which they create. Any users which are created by that user will by default be assigned to that user. If this option is disabled, a higher-level user will need to manage these users. This checkbox is enabled by default.

### Contact Details

Enter the user contact details. The initial login password for the user will be sent to the email address entered in this screen.

User Maintenance / New User

User Account \*   **Contact Details \***   User Access   Employer Access   Preferences

#### Contact Details

Contact details for this user.

Email Address:  ?

Landline:  ?

Mobile Phone:  ?

Save   Discard Changes   **Next**

### Employer Access

The Employer Access tab allows a user to be assign access to employers. Select **Add/Remove Employers** to display a list of the associated employers that a new user can be granted access to.

User Maintenance / New User

User Account   Contact Details   User Access   **Employer Access**   Preferences

#### Employer Access

This section will give this user access to the selected employers

**Add/Remove Employers** ?

Employers

No employers directly assigned to this User.

« < 1 > »

#### Employers from Groups

This section shows employers that this user has access to through Group Associations (e.g. User Groups). This section will update on save.

Group assigned Employers

Not available until this user has been created.

Save   Cancel   **Next**

Select the employer and click on the > button to move the employer to the Selected Employers section. Select **Update**.

Select employers for this user

Move the employers you wish this user to access, to the right hand side area and click Update.

Available Employers

1 unselected

Enter text to filter list below

2TEST PTY LTD (ABN: 12055257657)

Selected Employers

Nothing selected.

Update Cancel

Once the required employers have been associated, within the Employer Access screen, scroll to the bottom of the screen and select **Save**.

User Maintenance / New User

User Account Contact Details User Access **Employer Access** Preferences

### Employer Access

This section will give this user access to the selected employers

Add/Remove Employers ?

Employers

2TEST PTY LTD (ABN: 12055257657)

Employers from Groups

This section shows employers that this user has access to through Group Associations (e.g. User Groups). This section will update on save.

Group assigned Employers

Not available until this user has been created.

Save Cancel Next