Sybiz Employer Portal - Contributions Employer User Guide

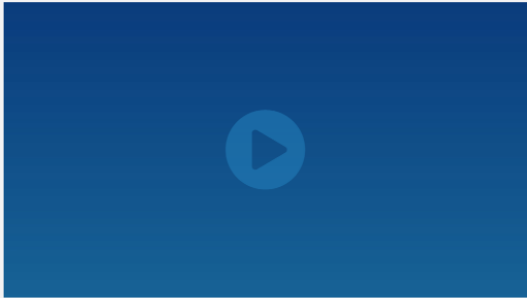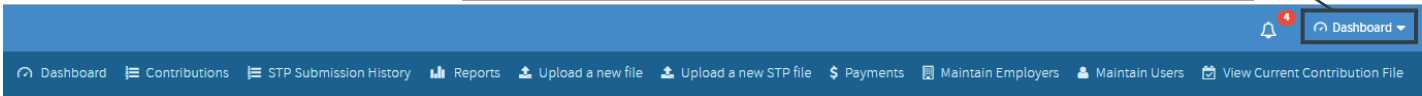# Contents

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.

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Upload a new file

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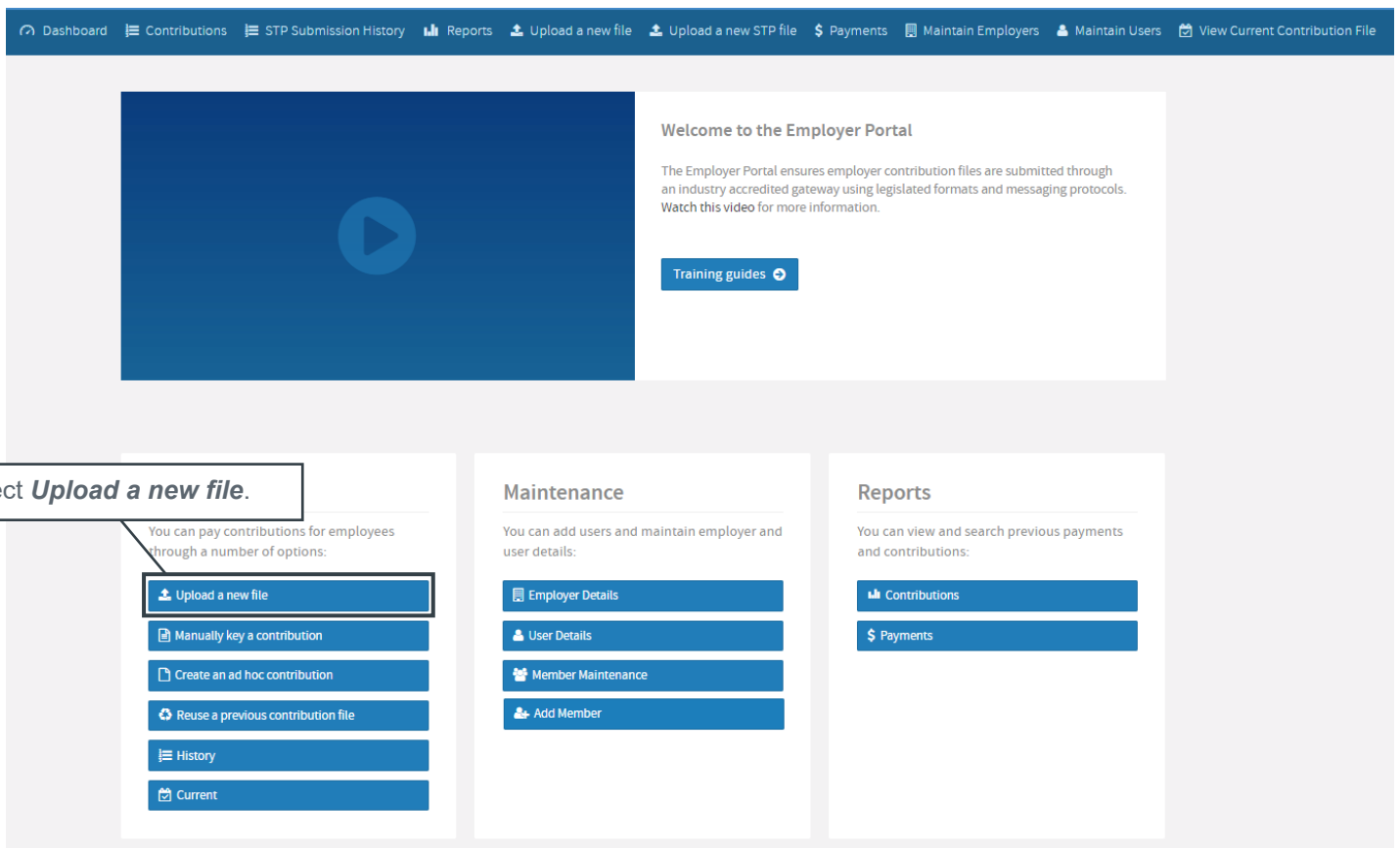
Select Pay Cycle

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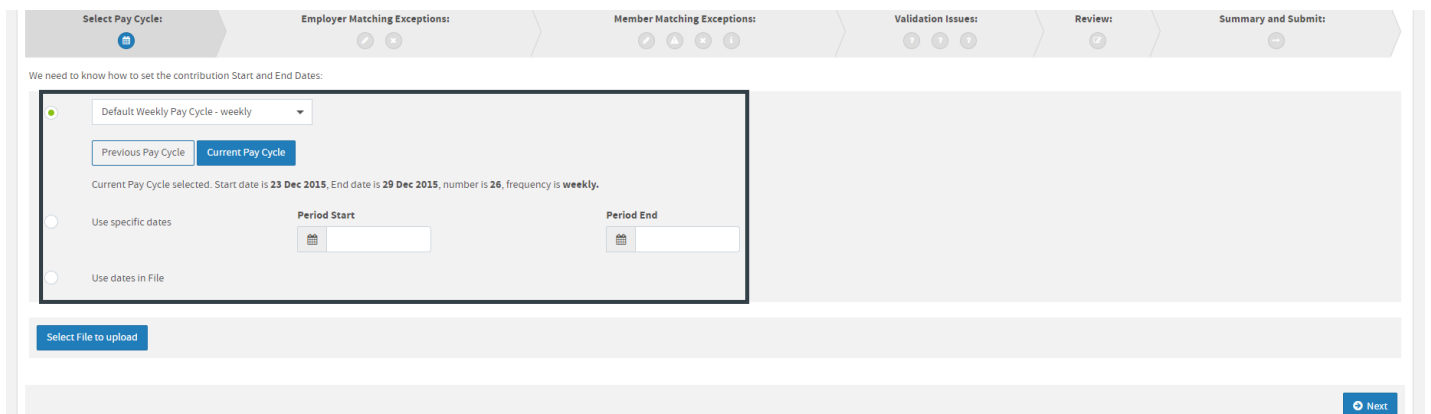
Employer Matching Exception
If there is a mismatch between the ABN in the file and the ABN the user is registered against, you will be prompted to select the correct employer. This will override the employer details in the file with those of the employer you are registered with.

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**.

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**.

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.

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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.

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.

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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.

Filter rows to show records with Errors, Warnings or Changes.

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 | A...

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 $	Spouse $	Child $	Other $	Pre Tax
✏ 🗑 👤	P123476	Smith	John	1989-01-01	2018-01-01	2018-01-31	1,058.00				50.00				
🗑 👤	P123754	Lee	Sally	1990-06-12	2018-01-01	2018-01-31	680.78		200.00						
🗑 👤	P123467	Foot	Susan	1965-08-17	2018-01-01	2018-01-31	865.21			100.00					
			Totals:				2,603.99	0.00	200.00	100.00	50.00	0.00	0.00	0.00	0

Showing 1 to 3 of 3 entries   Show 10 ▼ entries   Previous 1 Next

◄ Previous   👤 Add Member   ⊕ Next

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.

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

Fund Breakdown for Cycle 26 (Period 23 Dec 2015 to 29 Dec 2015)

Fund Name	USI	No. Members	Amount $
PLUM SUPER	70732426024150	1	965.21
The Trustee for SELF MANAGED SUPER FUND		1	1,108.00
WA Super Super Solutions	WAL0001AU	1	880.78
	Grand Totals:	3	$2,953.99

Previous 1 Next

Payment Summary

Payment Reference	For Employer	Direct Debit
781095097390612001	SuperChoice ABN: 78109509739	Account to be debited: BSB: 123455 A/c: 123456789

◄ Go Back   🖫 Save and Hold   ⊕ Confirm and Send

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.

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Manually key a contribution

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

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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						
					Totals:							0.00

Showing 1 to 2 of 2 entries   Show 10 ▼ entries

[◯ Previous]   [👤 Add Member]   [➔ Next]

> 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
	Grand Totals:	2	$100.00

Previous 1 Next

Payment Summary

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

[◯ Go Back]   [💾 Save and Hold]   [➔ Confirm and Send]

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

7

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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
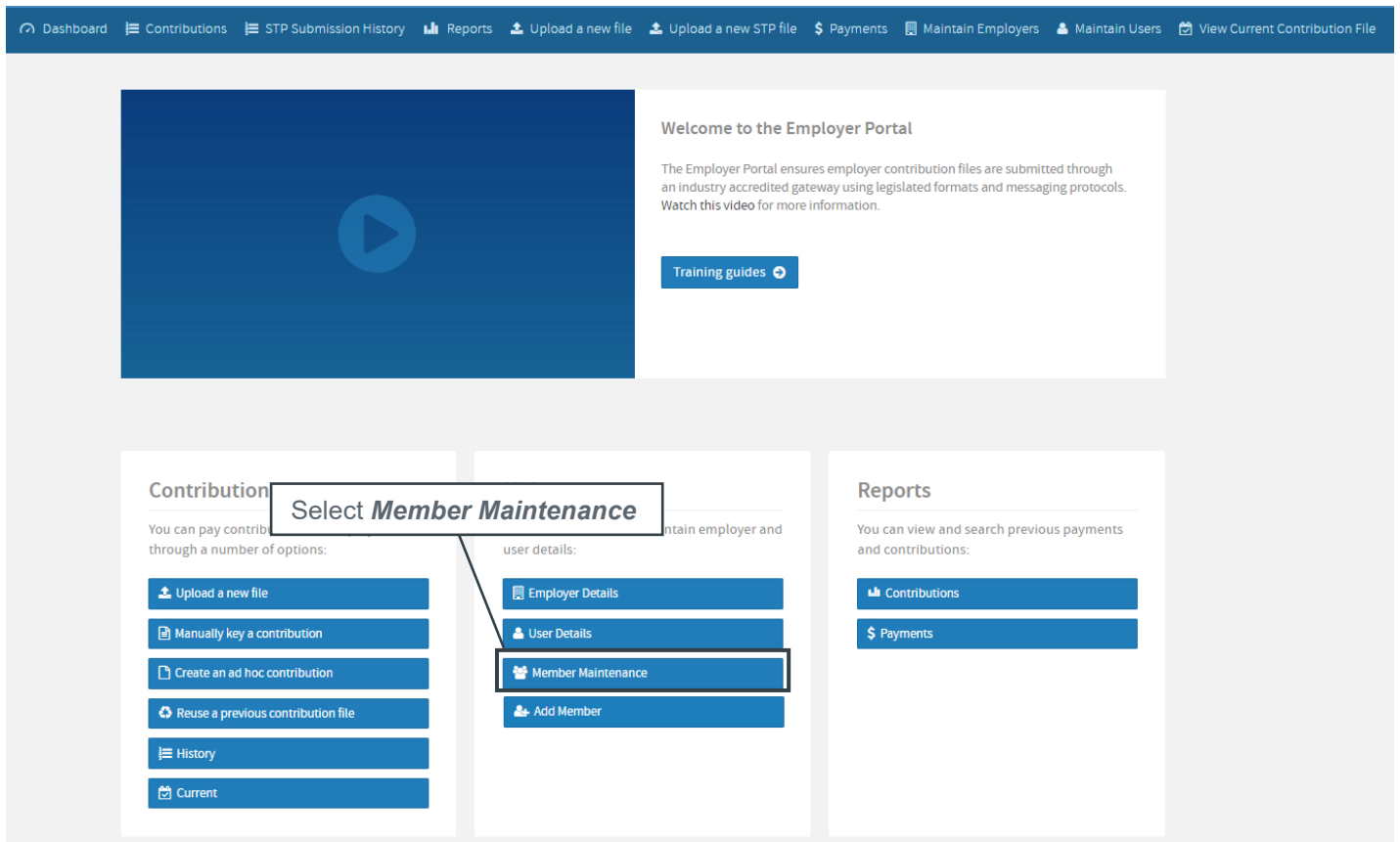
Select Employers:

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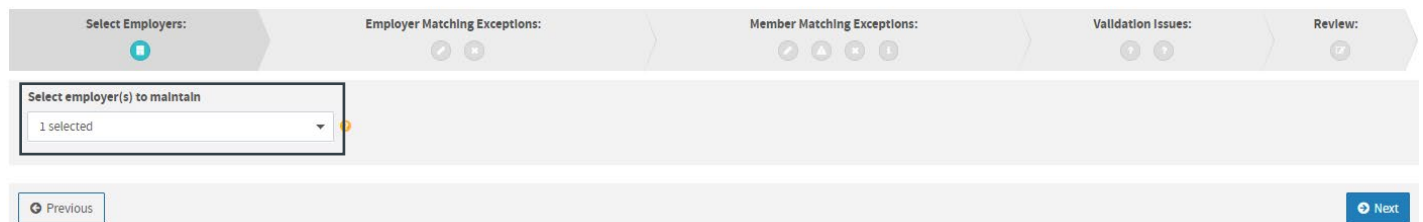
Note, if you have access to only one employer record, you will be directed straight to the Review screen.

Review

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

You will be presented with the Member Management screen. Here you can update the required details and select *Save*.
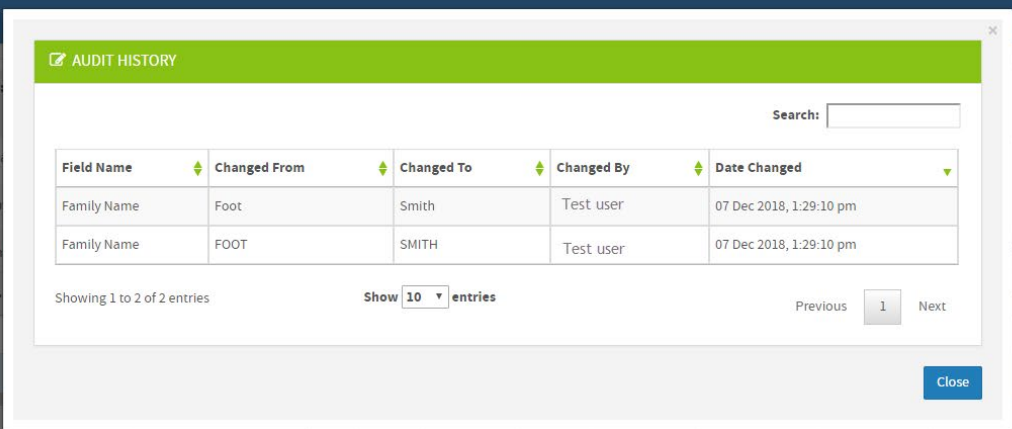
Once updated, you can view an audit of the change by clicking the ✏️ icon under the Actions column.

This outlines the changes that have been made, by which user and the date the change was made.
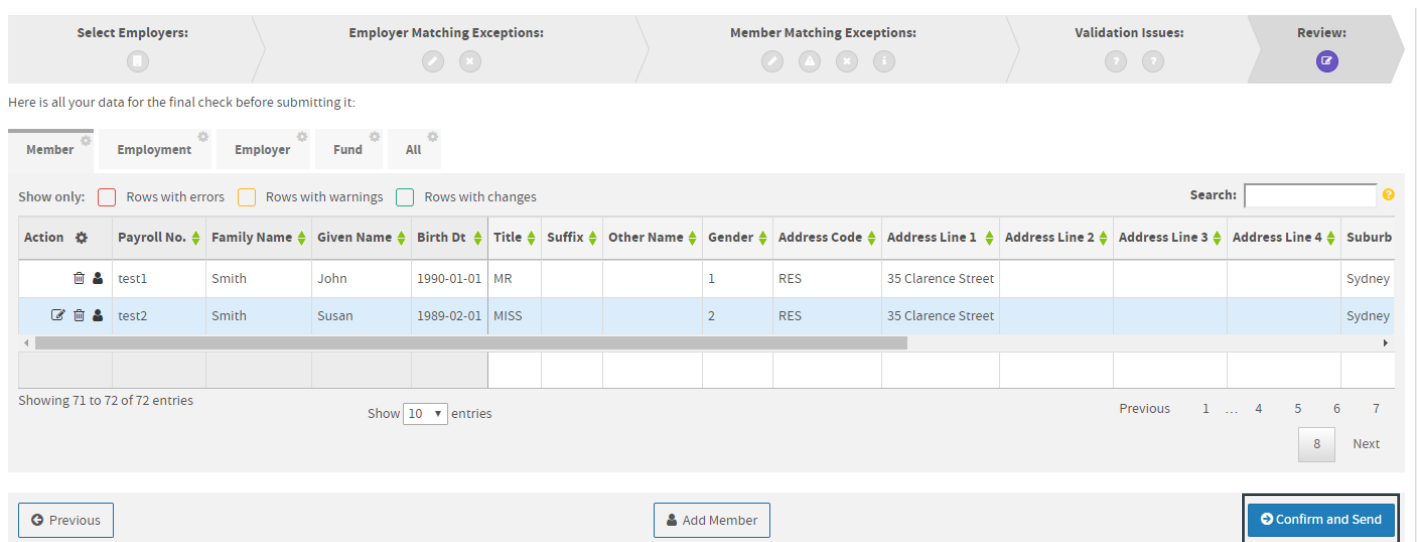

Review

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.
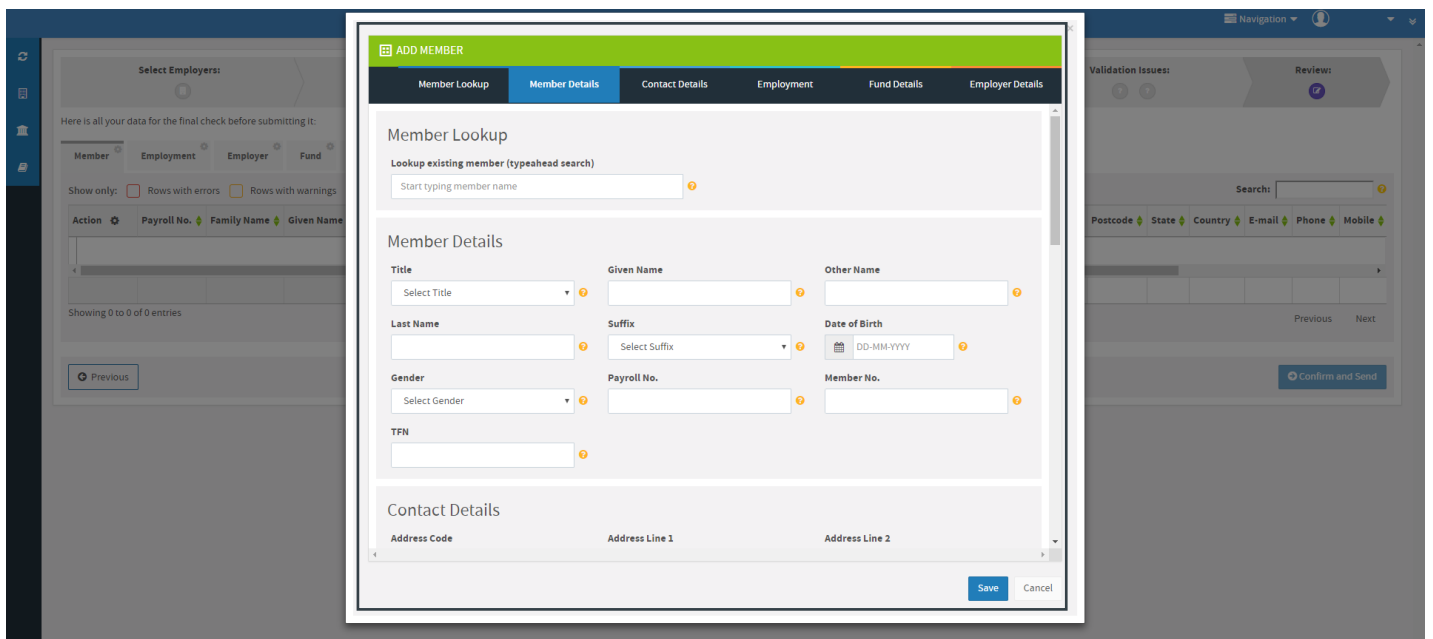

Once updates have been finalised, selecting **Confirm and Send** will submit the changes.

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Add Member

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

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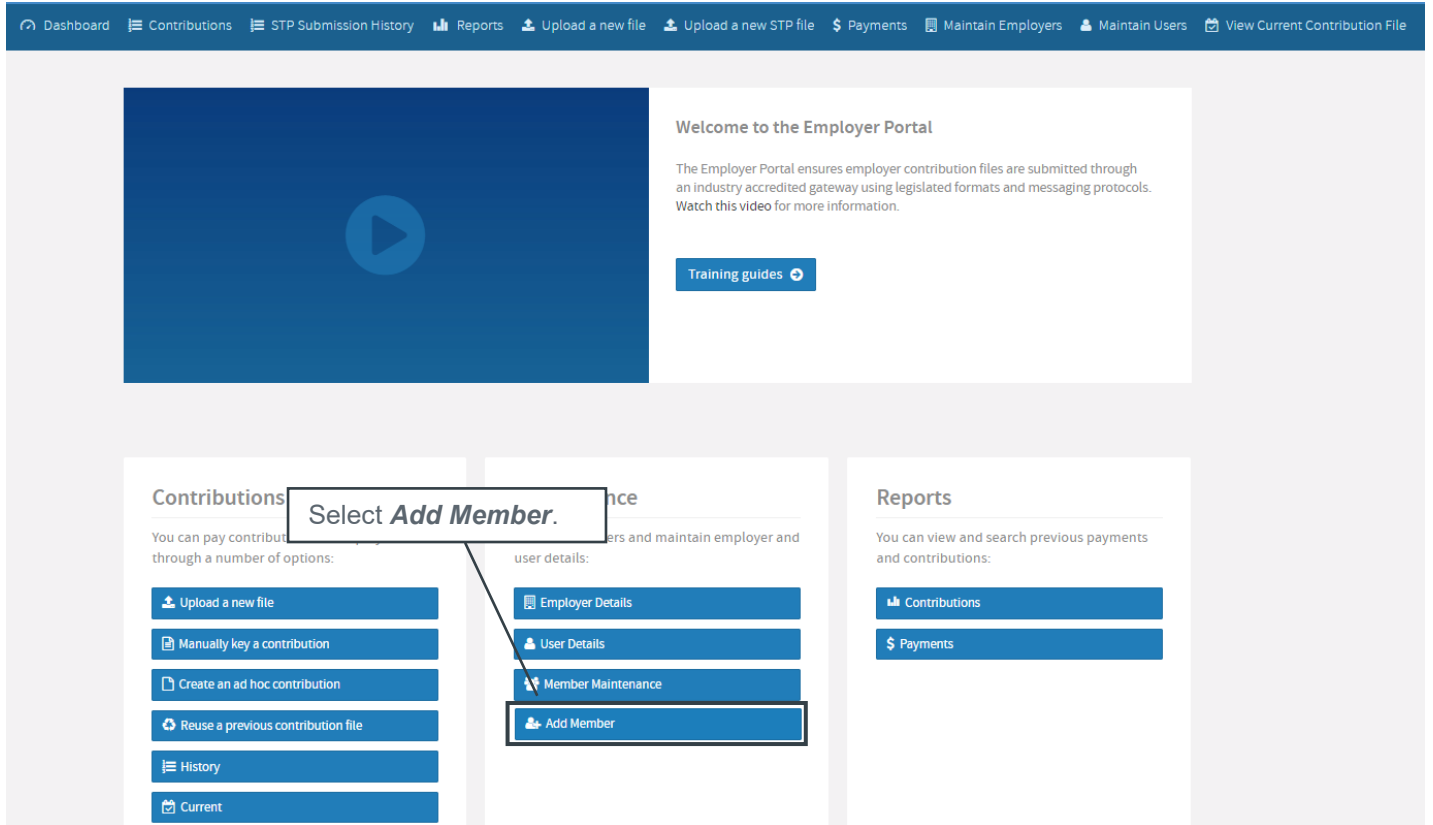
The Add Member screen will be presented to allow you to add in the new member details.

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

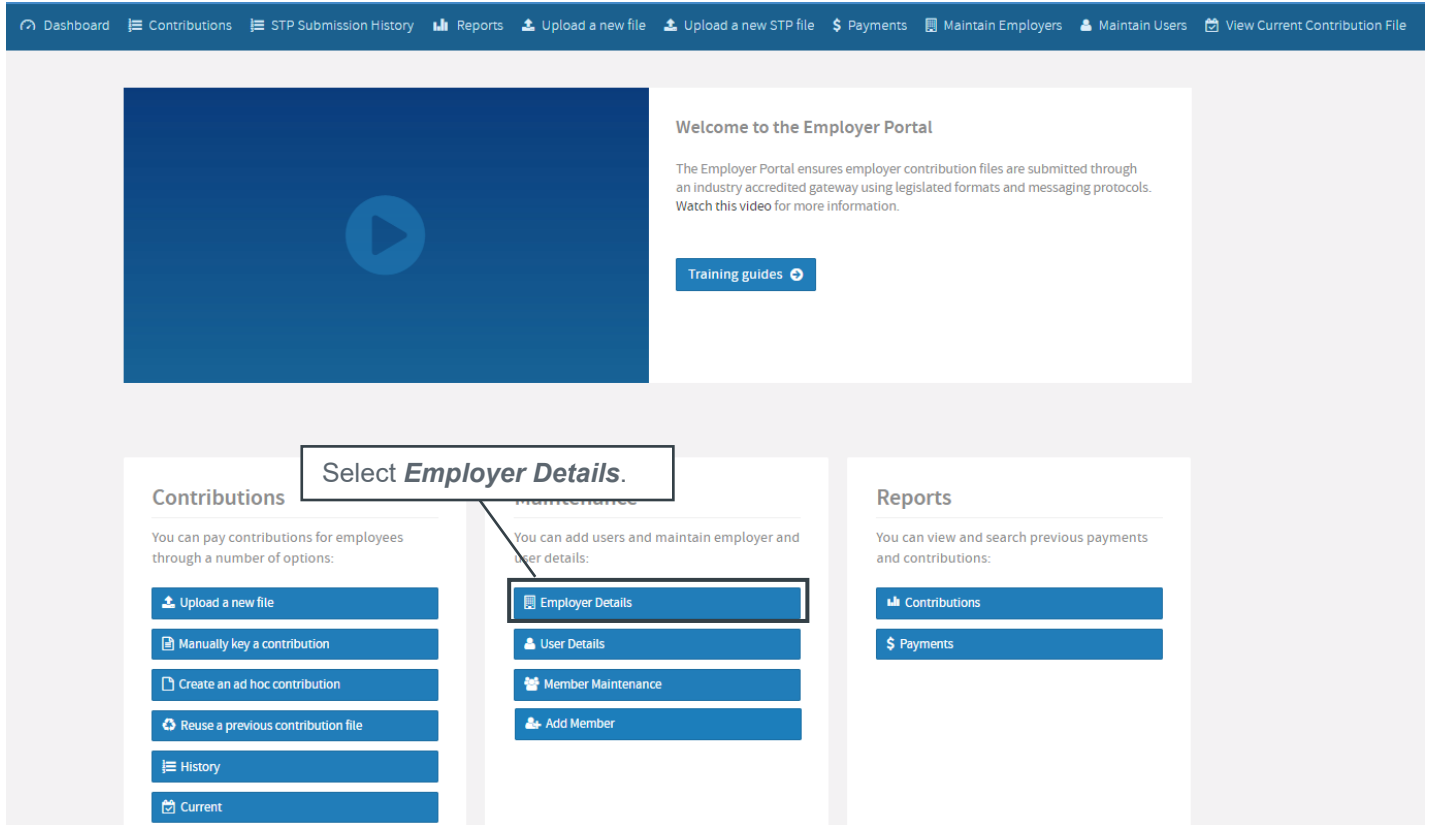◉ Previous   👤 Add Member   ➔ Confirm and Send

Select *Add Member* to add any additional members.

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

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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

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.

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.

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.

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

Select *Deactivate User* to deactivate the user. Note, user accounts cannot be deleted.

Select *Reset Password* to create a temporary password for the user.

Create a New User

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

Select *Add User*

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.

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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

emailaddress@email.com.au

Mobile Phone

Landline

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

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

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

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