



User Reference Guide

# Essential Super for business

November 2024

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# About the superannuation clearing house portal

The superannuation clearing house portal provides a simple solution to pay super for your employees to any super fund through one single payment.

You can:

- Add new employees to Essential Super.
- Pay super using employer initiated direct debit.
- Access the status and reports of payments.

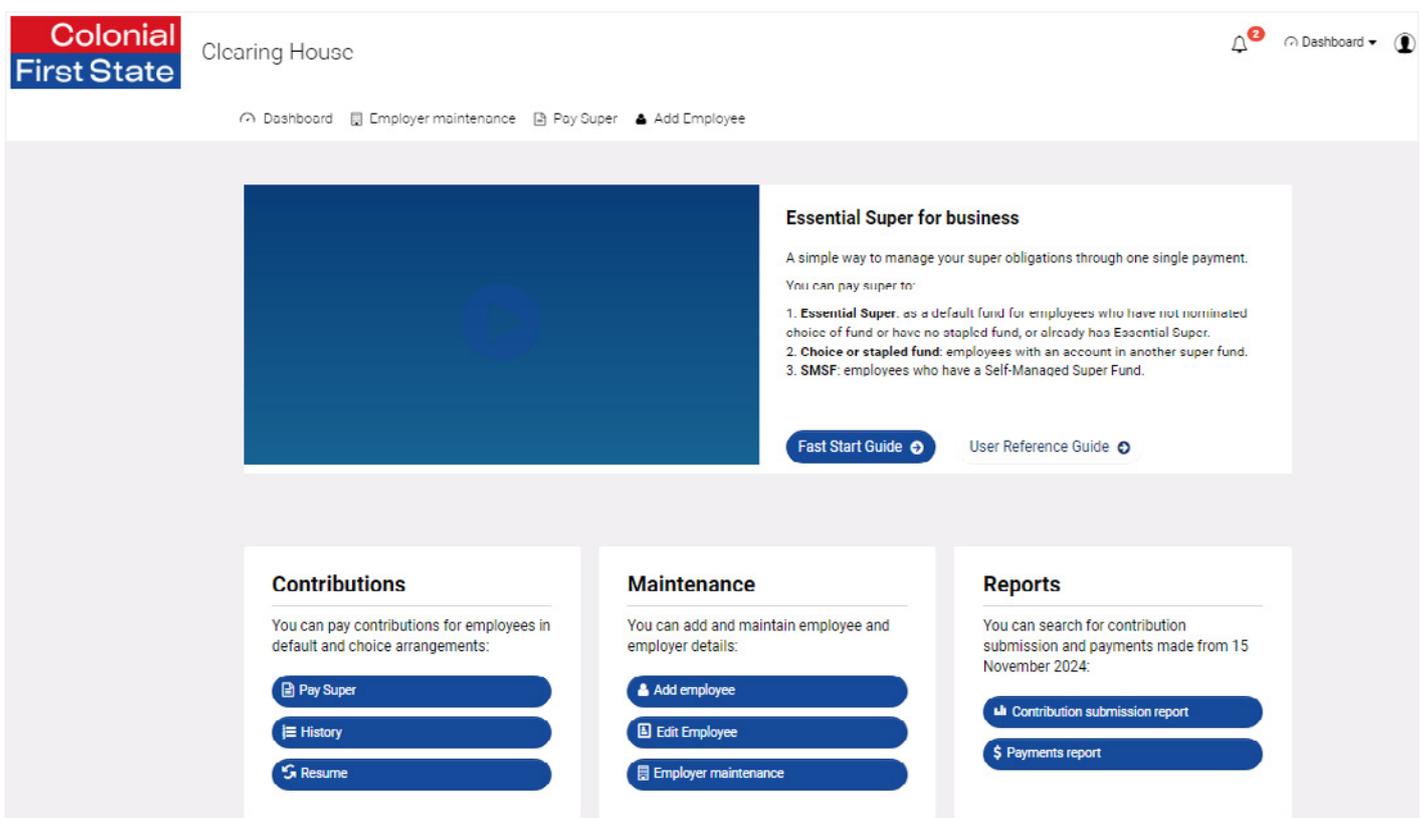
This User Reference Guide will help guide you through the main functions of the clearing house portal.

## Dashboard

### Overview

The **Dashboard** is the main screen of the clearing house portal. It allows you to navigate to any section of the portal.

You can always return to the **Dashboard** screen by clicking on **Dashboard** in the quick links or clicking on the logo.



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# Contributions

## Pay Super

**Pay Super** provides access to a contribution form pre-filled with your employees and their super fund details so you can manually enter the amount of super to pay.

- 1 Select **Pay Super** from the Dashboard.
- 2 Enter the **Period Start** date and **Period end** date for your contributions.
- 3 Enter a **new filename** with an identifier of your choosing (e.g. pay period reference).
- 4 Click **Next** (the **Review file mapping** box can remain ticked or not).
- 5 In the **Review** screen, enter the super contribution amounts for your employees.
- 6 If you have any new employees to add, click **Add Member** and complete their details.
- 7 When your contribution is ready, and there are no validation errors, click **Next** and move to the **Summary and Submit** screen.
- 8 Review the summary, and if the information is correct. Click **Confirm and Send**.

**Important note:** Before you make your first payment using the portal, you will need to make sure that in **Employer maintenance**, the **Contact** and **Payment details** sections are completed (refer to Payment details in the Employer maintenance section of this document for further information).

## History

**History** allows you to view:

- the results of past contributions
- each stage of a submission has gone through and when the stages occurred (via expanding the submission by clicking on the plus symbol)
- status of payments
- a view of information about any refund or payment notification

The History view displays information about the status and progress of submissions.

## Resume

Resume allows you to commence from your latest contribution you started.

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# Maintenance

## Add employee

From the **Dashboard**, you can add an employee using 2 methods:

- 1 **Pay Super** - At the same time of making a super payment by clicking the **Add member** button at the bottom of the contribution form, or
- 2 **Add employee** - To notify a super fund of the new employee without making a payment.

In both methods, an Add member pop up box will appear requiring the following information of the employee:

### Member (Employee) details

- Title
- Full name
- Date of birth
- Gender
- Address
- Tax file number (if provided by employee)

Other contact details that will help the employee to keep in touch with their super:

- Mobile
- Email

### Additional details

If your employee has provided their account or membership number of their super fund, it should be provided in the following field:

- Member account number

### Product details

This is the selection of super fund where the super payment will be directed. There are 3 options:

- 1 Essential Super
- 2 Choice product
- 3 SMSF

### Important note

When adding an employee without making a payment, you must click on the Confirm and Send button shown below.

Confirm and send >

## 1. Essential Super

Select **Essential Super** if you are joining a new employee to Essential Super or the employee already has an Essential Super account.

Select Essential Super in the **Select Category Name** field.

You should also complete the Member account number if the employee has nominated an existing Essential Super account or leave blank if it's a new employee you are joining to Essential Super.

There are additional validations when adding a new employee to Essential Super and this is outlined in *Appendix A – Contributions Data Guide*.

## 2. Choice product

Select **Choice** if the employee has chosen their own super fund, that is not an Essential Super account or an SMSF. Simply start typing the super fund's USI, super fund's ABN into the **Select Fund** look up box and select the super fund.

You should also complete super fund account number or membership number the employee has nominated in the above **Member account number** field.

## 3. SMSF

Select SMSF if the employee has chosen their own self-managed super fund.

Click **Add SMSF** button.

A box will appear called **Manage SMSFs**. The following information will be required:

- SMSF's ABN
- ESA (Electronic Service Address)

- SMSF bank account details (BSB, Account Number, Account Name).

Once the information is entered, press **Save**.

The clearing house portal will perform a validation check to ensure the SMSF is a compliant and registered SMSF with the ATO. If the status is not compliant, you will need to check the details with the employee.

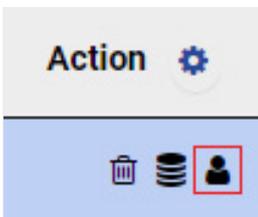
## Edit employee

The clearing house portal allows you to maintain employee information for your records. This includes surname changes, address changes, change of fund and providing an employment end date.

You can update your employee's details by selecting **edit employee** on the **dashboard**.

Click the **View Member Contribution** icon highlighted below and a pop up will appear.

You can also edit the employee's details in the contribution form when using the **Pay Super** function.



### Important note

When amending an employee record, **you** must click on the Confirm and Send button shown below.

Confirm and send >

### Important note

Any changes made to an employee's personal details such as name, address, and contact details will be reflected in the Essential Super for business clearing house portal for your records. However, generally super funds, including Essential Super will not update the personal details of an employee's super account. You should advise your employee to contact their super fund directly to reflect changes on their super account.

## Exit employees

To remove terminated employees from your contribution form, enter a date in the **Employment End Date** column in the contribution form in *yyyy-mm-dd* format or if a calendar box appears select the date. You can only enter today's date or a prior date. You can do this as part of paying super in **Pay Super** or if not paying super, through **Edit employee**.

You can re-activate the employee by searching for their details in the 'Add member' screen.

## Employer maintenance

The **Employer maintenance** section allows you to update contact and payment details about your business, including updating SMSF details.

There are a number of tabs in the employer maintenance section:

Select **Employer maintenance** from the **Dashboard**.

You will have your business name in the Employer name column.

SELECT FROM LIST OF AVAILABLE EMPLOYERS

Search  

Employer name	Australian business number (ABN)	Status
SuperChoice	78109509739	Active 

Showing 1 to 1 of 1 entries

First Previous **1** Next Last

- Click on your business name shown in the Employer name column or click on the edit icon in the Status field.

You will be presented with a screen that has a number of tabs:

Employer details	Contact	Address	Payment details	Manage funds
This is the business authorised to use the clearing house portal. This cannot be altered by you.	An email and phone number are mandatory fields to complete. This is in case you need to be contacted about your super payment.	The address of the business.	This section is a mandatory requirement to complete: <ul style="list-style-type: none"><li><b>Direct debit account:</b> the bank account that will be debited for super payments.</li><li><b>Refund to employer bank account:</b> the bank account where any returned payments from super funds are deposited.</li><li><b>Direct debit authorisation terms:</b> the terms for direct debit which requires to be read and agreed before using the service.</li></ul>	In the <b>Manage Funds</b> tab, you can use the <b>Manage SMSFs</b> section to add, edit or remove a SMSF. <ul style="list-style-type: none"><li><b>Add SMSF</b> To add a SMSF, click on the <b>Add SMSF</b> button. A Manage SMSFs box will require you to enter the SMSF ABN, ESA, and the SMSF's Bank details.</li><li><b>Edit SMSF</b> To edit an existing SMSF, click on the pencil icon in the <b>Status</b> column.</li><li><b>Remove SMSF</b> To remove an existing SMSF, click on the trash icon in the <b>Status</b> column.</li></ul>

## Other sections

Other sections such as Unblocked Choice Funds, Manage Default Funds and Manage FENs do not apply to Essential Super for business.

### Tip!

Make sure to press **Save** on each screen you enter new information.

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## Reports

From the **Dashboard** you can filter and generate reports on contributions and payments made after 15 November 2024 using the **Reports** panel.

There are 2 types of reports:

### Contribution submission report

The **Contribution submission report** provides employers with the ability to search and filter contribution submissions and retrieve responses from super funds.

### Payments report

The **Payments Report** button allows employers to view the details and payment processing status of submitted superannuation contributions, including to help you identify refunded super payments or dishonoured payments.

### Using filters and search output

#### Filter screen

The screen filters can assist in narrowing your search, otherwise you can click on Search.

#### Viewing search output

Once your search results are displayed, you can expand and minimise the details using the plus or minus symbols.

## Appendix A: Contributions Data Guide

Field name	Employee details	Additional rules for Essential Super
Title	Accepted values: Mr, Mrs, Ms, Miss, Master, Doctor	
First name	Employee first name	
Surname	Employee surname	
Date of birth	Employee date of birth	Must be 14 years or older at time of joining
Gender	Accepted values: Male (1), Female (2), Intersex (3), Unspecified (0)	Must be Male or Female for insurance reasons.
Tax file Number	Must be provided where the employee has provided to the employer	
Address code	RES - residential or POS - postal	Must be RES – residential address
Address Line 1	Employee address - first line	
Address Line 2	Employee address - additional line if required	
Suburb	Employee address - city or suburb	
Postcode	Employee address - Australian postcode	
State	Employee address - Australia state or territory: NSW, VIC, QLD, ACT, SA, WA, NT, TAS	
Country	Employee address - country - au for Australia	Must be Australian address
Mobile	Employee's mobile number if employee provided	
Email	Employee's email address if employee provided	
Employment End Date	Employee employment end date - can only be today's date or prior date	
Member account number	Employee's super fund membership or account number if provided	Leave blank for new Essential Super account



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