



Employer User Guide



Getting Started



Daily Processing



Maintenance



Reporting



Starting SuperChoice

1. Start your Internet browser
2. In the Location or Address field, type the path *https://www.superchoice.com.au/SuperChoiceScNew.htm*.
3. Press the **ENTER** key. The system displays the **Welcome to SuperChoice** screen.
4. In the **User ID** field, type in your User ID.
5. In the **Password** field, type your password. The characters appear as asterisks (*) for security reasons.
6. Click the **Logon** text located under the Password field. The system validates your user account, and displays the SuperChoice home page. You can now use SuperChoice.

Exiting SuperChoice

1. Click on **Exit** text at the top right hand corner of the screen.
2. Close the browser window by accessing the **File** menu and clicking either **Exit** or **Close**.

SuperChoice Help Desk

Phone: **1300 659 456** between the hours of 8:30 am – 5 pm weekdays

Email: superchoicesupport@superchoice.com.au

Day-to-day Processing

Choice of fund

Upon receiving a choice of fund form, you will need to ensure that the fund is linked and the employee is added to the fund. [Click here](#) for detailed instructions.

Regular processing

Once you have updated the choice of fund information, the three remaining steps can be performed.

- New Members ([Click here](#))
- Contributions ([Click here](#))
- Exits ([Click here](#))

Each of these steps needs to be performed in sequence to ensure that the data provided from the payroll system is passed on to SuperChoice accurately. For example, you cannot allocate contributions until a member has been created on the system and you cannot allocate contributions to a member that has already been exited.

[Click here](#) to proceed to new entrants.

Search

The ability to search previous transactions is available and can be performed at a member or batch level.

[Click here](#) to go to transaction search.

Fund Administrator Feedback

The Fund Administrator Feedback is a functionality which facilitates the receipt of information by a contributing employer from a Participating Choice Fund. On login, if feedback has been provided by a Choice Fund, an alert will display stating:

["Click here to View new Fund Administrator feedback"](#).

To view the message, there are two options:

- 1) Click on the hyperlink OR
- 2) Select **Feedback** option

The Feedback screen allows an employer to:

- Display the specified Choice Fund information by clicking the hyperlink under *Fund*
- Display the specified Member Details page, to make necessary changes, by clicking the Member Number/Name
- 'Hide' or archive, individual messages: Note that this will prevent the notification (hyperlink) from displaying on the login page.
- Download all messages currently displayed, by selecting the appropriate button.
- Show all messages, including hidden or archived messages, by selecting the appropriate button.

Note

Changes or amendments should be actioned prior to submitting a contribution schedule.
After the displayed period of days, messages will be deleted and archived.

Linking the Choice fund to your Employer Fund List

Before you remit contributions, check whether any employees have completed a choice of fund form, nominating a superannuation fund other than the default fund (a choice fund).

You must link this choice fund to your employer fund list on SuperChoice.

Log on to the SuperChoice site (see [Getting Started](#)).

Click the **Choice of Fund | Link to Choice Fund** item in the menu at the top of the screen. The **Choice of Fund Search** screen will appear.

Enter the SPIN, ABN or SFN of the fund into the applicable field and click the **Search** button.

Depending on the results of the search, there are four possible courses of action:

- a. If the fund exists **and** is already linked to your employer fund list a message of *“You are already linked to this Fund”* will appear in red. The next step is to add the new member(s) [click here](#) for instructions OR transfer members from an old choice fund [click here](#) for detailed instructions.
- b. If the fund exists on the SuperChoice register the **Link to Choice Fund** screen will appear , [click here](#) to view detailed instructions.
- c. If the fund does not yet exist on the SuperChoice register, the **Choice Fund Application** screen will be displayed, [click here](#) for instructions on how to proceed.
- d. If either a message of *“The ABN you have entered does not match to a compliant superannuation fund. Please check the ABN and if correct, contact the SuperChoice Help Desk”* OR *“This Fund is not an ATO regulated fund”* appears in red, contact the SuperChoice Helpdesk for further assistance.

[Click here](#) to view SuperChoice Help Desk contact details.

Choice Fund exists but is not linked to your Employer list

The **Link to Choice Fund** screen will appear

Enter the fund employer number (if applicable) and click the **Link** button. The fund is now linked and available for selection in your “Select Fund” drop-down list.

Note

If you are linking an ATO regulated fund you will be required to confirm the payment details before selecting **Link**
If you are linking an APRA regulated fund the link is automatic after selecting **Link**

- If a payroll upload file is used containing Fund Codes. [Click here](#) for important information.
- If the employee is an existing employee, transfer the member to the new fund. [Click here](#) for instructions on how to transfer to the new fund.
- If the employee is new, add the member to the fund. [Click here](#) for instructions.

[Click here](#) to return to Linking Choice Funds to Your Employer Fund List section.

Choice fund does not exist

From the **Choice Fund Application** screen

1. Indicate which payment method is required by the choice fund. If the fund accepts both EFT and Cheque, select EFT and click **Continue**.
2. Enter details for all the mandatory fields highlighted in **bold** and click **Request**.
3. For EFT Payment Method, re-enter the bank account details and click **Continue**.
4. Confirm that all the details have been accurately entered and click on **Yes** to confirm.

Your request will now be submitted to the SuperChoice register which will notify you by e-mail when the fund is available. The registration process usually takes up to one business day.

NOTE: New Fund requests are processed at 12pm each business day, and are normally available after 2pm

Once you receive confirmation that the fund is available, you must:

1. link the fund to your employer fund list ([click here](#) for instructions);
2. transfer any members from the old fund ([click here](#) for instructions); and
3. add these members to the choice fund ([click here](#) for instructions).

You can then remit contributions for these members.

[Click here](#) to return to Linking Choice Funds to your Employer record.



Transferring an existing employee to a new fund

You must transfer any members from the old fund and add them to the new fund before you can remit contributions to the new fund. Ensure that the final contributions have been paid to the old fund before transferring the members.

Before transferring members from the old fund to their new choice fund, the choice fund should already be linked to your employer fund list. Make sure the choice fund is available from the drop-down list.

1. Select **Members |Transfer Members**
2. Select the member and complete the details then click **Submit**

You can now remit contributions to the choice fund.

SuperChoice will automatically ensure that the contributions are directed to the choice fund.

[Click here](#) to return to Linking Choice Funds to your Employer record.

[Click here](#) to go to Contributions.



Adding New Members

There are two methods of adding new members to your SuperChoice system.

File upload

A file or report created from your payroll system is used to create new members in the SuperChoice system.

[Click here](#) for information on what to do.

Manual Entry

Enter new member data using an e-form to create a member in SuperChoice.

[Click here](#) for information on what to do.

Check New Member Application status

[Click here](#) to go to Contributions.



Adding New Members via e-form (manual entry)

Note: - For important information regarding **supplying member TFN** [Click Here](#)

1. Click on **Members | New Members** item in the menu at the top of the screen. The **New Member Application Status Summary** screen appears.
2. Click the **Add** button. The **New Member Application – Select Fund** screen is displayed.
3. From the drop-down menu, select the fund for this member and click **Continue**. The **New Member Application** screen is displayed.
4. Complete the field details. Note that all field names in **bold** text are compulsory, and must be populated.
5. Once you have finalised the information click the **Submit Now** button to forward the information to SuperChoice. The **New Member Application** screen is displayed again to allow you to enter other new entrants. You may also click **Submit Later** to save the details and submit the application later.
6. Click on the **Return** button to return to the main **New Member Application Status Summary** screen.

[Go back to the previous step](#)

[Check New Member Application status](#)

[Return to Choice of Fund instructions](#)



Adding New Members via File Upload

Note: - For important information regarding **supplying member TFN** [Click Here](#)

1. Click **Members | New Members** menu to go to the **New Member Application Status** screen.
2. Click the **Upload Members** button
3. Click the **Browse** button to search for and select the correct file for upload from your own directory.
4. Using the drop down menus, populate the fields as appropriate.
5. Click the **Upload** button to load the file.
6. Click the **Yes** button to confirm the upload. You are returned to the **New Member Application Status Summary** screen. The members you just uploaded will appear with a status of **Incomplete**.
7. Click either the:
 - a) **Bulk Completion** button – click the **Yes** button to confirm. This will process the members that have all the mandatory fields correct.OR
 - b) **Sequential Completion** button – This will require you to click the **Submit Now** button for each member entry.

[Go back to the previous step](#)

[Check New Member application status](#)

[Return to Choice of Fund instructions](#)



Checking Member Application Status

To find the new members added for a Date or Date range:

1. Click on the [Members | New Members](#) item in the menu at the top of the screen. The **New Member Application Status Summary** screen is displayed.
2. Click the **Today's Members** button.
3. The date range will default to today's date and the new members and their numbers will be listed.

To view members added from another date, insert a range of dates, enter the required value in the field "New Members submitted from dd-mm-yyyy to dd-mm-yyyy". Click the **Submit** button

The new members and their numbers will be listed for the specific date range requested.

[Go back to Adding New Members](#)

[Click here](#) to go to Contributions.



Member Search Criteria

Fund Name

The full name of the fund.

Member First Name / Member Last Name

The full name of the member.

Member Number

The number assigned to this member.

Payroll Number

The payroll number assigned to this member.

Maximum Number of Members in search results

The limit set for searching.

[Go back to Exiting a member using e-form](#)

[Search by Batch](#)

[Click here](#) to go to Contributions.



Contributions

There are two methods to submit contributions via SuperChoice.

File upload

A file or report created from your payroll system is used to load contribution data in SuperChoice.

[Click here](#) for information on what to do.

Manual Entry

Using an e-form, enter each member's contribution data in SuperChoice.

[Click here](#) for information on what to do.

[Click here](#) to view payment Status Terminology.

Skip this step and:

[Continue to Exiting a member using e-form.](#)

[Continue to Exiting a member via file upload.](#)

[Search for Previous Transactions](#)

Creating a Contribution batch via e-form

1. Click the **Contributions** item in the menu at the top of the screen, to display the **Contribution Status** screen.
2. On the row corresponding to your contribution schedule click the **Begin** button.

****Note**** Each time the **Begin** button is clicked, a new e-form will be created affecting Period To and From Dates

3. The **Batch Input** screen is displayed detailing the Period Date as well as all the members currently in the Contribution Batch. If you want to *Add* or *Remove* a member from this list, select the **Members in Schedule** item. Next to each member's name in the following screen, un-tick the name to *Remove* or tick the name to *Add*. Select **Save**, you will be returned to the **Batch Input** screen which will now show all selected members.
4. If the amounts do not correspond to the payments to be made for this period enter the correct contribution amounts. Click the **Calculate Totals** button for the totals columns to be recalculated. Make sure that the amounts correspond to your total contributions before proceeding.
 - a) If you are happy to submit the data for processing, click the **Save and Continue** button. The **Batch Payment Details** screen is displayed. Continue to step 5 – 9.
 - b) If you want to keep your changes but are not ready to proceed with submission, click the **Save and Return** button. The batch will be saved and the **Contribution Summary** screen will be displayed. When you are ready to return to the Batch Input screen, click on the **Contributions** item in the menu at the top of the screen, to display the **Contribution Status** screen. On the row corresponding to your contribution schedule click the **Ready for Submission** button. The **Batch Input** screen is displayed – continue from step 4 (above) – 9.

Note

- An exclamation mark (!) appears against a member's name, if the member's TFN has not been marked as being provided. You will still be able to submit the contribution, however in order to remove this warning you will be required to update the TFN flag. [Click here](#) for instructions on updating the TFN flag.
5. Enter your password into the Enter Password field (the password you used when you logged on to SuperChoice)
 6. Enter the **exact** total amount to be paid (as per the Batch Total).
 7. Click the **Transmit Batch** button to display the **Batch Confirmation** screen, detailing the payment for each fund and the status of that payment.
 8. If you wish to view a report for a specific fund, click the **View Report** button. Click on the **Print** button to print a copy of the contribution advice report. Click the **Return** button to go back to the **Batch Confirmation** screen.
 9. Click the **Return** button to go back to the (now updated) **Contribution Status** screen.

[Click here](#) for instructions on creating a batch via Payroll.

[Click here](#) for Payment Status Terminology.

[Click here](#) for SuperChoice contact details

[Continue to Exiting a member using e-form.](#)

[Continue to Exiting a member via file upload.](#)

Creating a Contribution Batch via Payroll method

If you wish to create and transmit a batch directly from your payroll system, read these instructions carefully before entering or modifying any SuperChoice data.

1. Click the **Contributions** menu to display the **Contribution Status** screen.
2. On the **Contribution Status** screen, click the **Begin** button on the line corresponding to the relevant *payroll* contribution schedule. The system displays the **Batch Input** screen.
3. Click the **Browse** button and select the payroll file to be uploaded into SuperChoice.
4. Click the **Submit** button. The payroll file is submitted for processing and you will be returned to the **Contribution Summary** Screen.
5. Click the **Refresh** button to update the status of the submitted batch. The batch will show a status of either 'Ready for Submission' (if so, proceed to step 6 below), or 'Input Error'. If there is an error, click on the input error to view and print the error. The error will either be in a) the content of the data or b) the format of the file.

If it is a) cross check the data in the file with data logged on SuperChoice.

If it is b) you may need to contact your IT department or SuperChoice for further assistance.

Once the errors have been corrected, recommence the upload. Click the status 'Input Error' and repeat 3-5 (above).

6. In the status box, click on the heading **Ready for Submission**.
7. Enter your password in the Enter Password field, (the password you used when you logged on to SuperChoice).
8. Enter the **exact** total amount to be paid (as per the Batch Total). The exact amount must be entered otherwise an error message will be generated.
9. Click the **Transmit Batch** button to submit your batch. The **Batch Confirmation** screen is displayed, showing details of each fund payment and the status of the payment.
10. Click the **View Report** button to view the **Contribution Report**. Click the **Print** button to print a copy of the Contribution Report.
11. Click the **Return** button to go back to the (now updated) **Contribution Status** screen.

[Click here](#) for instructions on creating a batch via e-form

[Click here](#) for Payment Status terminology

[Click here](#) for SuperChoice contact details

[Continue to Exiting a member using e-form.](#)

[Continue to Exiting a member via file upload.](#)



Payment Status Terminology

Input Error

There is a problem with file load. Click *“Input Error”* in the status field. This will open another page. Click *“View Error”*, to open the error report and identify the problem(s).

Ready for Submission

The data (either e-form or file) is now OK. Click the *“Ready for Submission”* status to authorise your payment.

Submitted

Contributions have been sent to Administration.

Pending Payment Clearance

Administrator has collected the financial details and forwarded them to the financial institution. SuperChoice is awaiting confirmation that funds have cleared and contribution data can be forwarded automatically.

Confirmed

Financial institution has cleared the banking and advised SuperChoice, which in turn has forwarded the contribution data to the applicable Administrator.

[Go back to Contributions.](#)



Searching for Previous Transactions

This option enables you to search for the transactions you have previously entered using the SuperChoice system. Read the following information carefully before proceeding with entering/modifying any SuperChoice data.

Search by Batch

1. Click the **Search | Search by Batch** menu item to display the Search for Transactions screen.
2. Enter the required search criteria and then click the **Search** button to display the **Transaction List** screen.
3. Click on any **Batch Id** or **Reference ID** to access the information pertaining to that transaction.
4. Click **Batch Id** to go to the **Transaction Details** screen or click the **Reference ID** to go to the **Contribution Report** screen.
5. Click the **Return** button from either report screen. This will return you to the **Transactions List** screen.
6. Click the **Return** button to go back to the **Search for Transactions** screen.

Search by Member

1. Click the **Search | Search by Member** menu item to display the Search for Transactions screen.
2. Enter the required search criteria and then click the **Search** button to display the **Member Contributions** screen.
3. Enter the date range and click on the appropriate member's name. The **Members Contributions Reports Screen** is displayed detailing contributions for the member within the period specified are displayed.
4. If you wish to print these details, click on the **Print** button.
5. Click the **Return** button to return you to the **Member Contributions** screen.
6. Click the **Return** button to go back to the **Search for Transactions** screen.

Search for Transaction Payment Status

1. Click the **Choice of Fund | Payment Status** menu item to display the Payment Status.
2. Enter the relevant Batch Id and then click the **Submit** button to display the Payment Details and any relevant Cheque Details

[Go back to the Day-to-day Processing page.](#)

Exiting a member using e-form

1. Click on **Members | Exit Members** item in the menu at the top of the screen. The **Status of Member Exits** screen appears.
2. Click on the **Exit Member** button to display the **Member Exits Search** screen.
3. On the **Member Exits Search** screen, enter your search criteria and click on the **Search** button. For more information on the fields, [click here](#).
4. On the **Member Exits** screen, click on the name of the member to be exited.
5. Click the **Exit Member** button.
6. Click the **Yes** button to confirm you want the member to be exited. The **Member Exits Search** screen will appear to allow you to process any other exits.
7. Click the **Return** button to return to the **Status of Member Exits** screen.

Note

The member being terminated will either:

- have his/her status altered to “Exit Waiting”. This means there are “Unconfirmed” contributions still to be sent to SuperChoice and the exit information will come through once these are confirmed; or
- have his/her status altered to “Exited”, meaning the exit has been sent to SuperChoice and no further contributions can be remitted for that member (for that membership record)

[Click here](#) for instructions on Exiting a Member via File upload.

Exiting a Member via File upload

1. Click the **Members | Exit Members** menu to go to the **Status of Member Exits** screen.
2. Click the **Upload Exits** button to go to the **Member Exit File Upload** screen.
3. Click the **Browse** button to search for and select the appropriate file from your directory.
4. Using the drop-down menus, populate the fields as appropriate.
5. Click the **Upload** button to load the file.
6. Click the **Yes** button to confirm the upload

[Click here](#) for instructions on Exiting a Member via e-form.



Employer Maintenance

Modify Employer details

This section deals with maintaining your employer record, and describes how to update your employer details, such as Name, ABN, and contact details. For instructions on how to amend your employer details [click here](#).

User

Follow this section to add new users to your SuperChoice employer account, or to change details of existing users.

Add a new user [click here](#)

Change User details [click here](#)

Change User password [click here](#)

Funds

Follow this section to change the details for any funds attached to your employer account. [Click here](#) for instructions.

Payroll

Use this menu to change the payroll numbers of your employees. [Click here](#) for instructions.

Modify Employer Details

1. Click the **Change Details | Employer** menu item at the top of the screen to display the **Employers** screen.
2. Make any necessary amendments.

Note

- Be particularly careful when selecting the fields referring to Contribution Alert details to ensure that you select the required notification option.
 - If you opt for notification by e-mail (usually the most efficient way), make sure that the contact e-mail you have provided is complete and correct
3. Click the **Save** button to save your changes.

Security

Your Responsibilities

After consultation with SuperChoice concerning your business processes and related user requirements, SuperChoice has established one or more User Ids and passwords for your management.

SuperChoice treats all transactions received from your user IDs as authorised transactions. SuperChoice accepts no responsibility for unauthorised use of your User ID and Password. Therefore it is important that you control and manage knowledge of and access to these user IDs and Passwords.

[Click here](#) to return to Employer Maintenance.

[Click here](#) to continue to Change User Details

[Click here](#) to continue to Adding a User.

Changing a User Password

Use the following instructions to change a SuperChoice User password.

1. Click on the **Change Details | User** item in the menu at the top of the screen. The **User List** screen will appear, containing a list of all current users.
2. Click on the User ID of the account whose password you wish to change. The **User Modify** screen will be displayed.
3. You must enter the current password into the **Old Password** field, along with the new password, which is entered into the **New Password** and **Verify New Password** fields.
4. Click on the **Submit** button. The user password will have been modified.

Note

- **SuperChoice** requires that you enter the old user password prior to assigning a new one.

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[Click here](#) to return to Employer Maintenance.

[Click here](#) to continue to Change User Details

[Click here](#) to continue to Adding a User.

Changing User Details

1. Click the **Change Details | User** item in the menu at the top of the screen. The **User List** screen will appear, containing a list of all current users.
2. Click on the User ID of the account whose details you wish to change. The **User Modify** screen will be displayed.
3. Update the user's details as required.
4. Click on the **Submit** button. The user's details have been modified.

Security

Your Responsibilities

After consultation with SuperChoice concerning your business processes and related user requirements, SuperChoice has established one or more User Ids and passwords for your management.

SuperChoice treats all transactions received from your user IDs as authorised transactions. SuperChoice accepts no responsibility for unauthorised use of your User ID and Password. Therefore it is important that you control and manage knowledge of and access to these user IDs and Passwords.

[Click here](#) to return to Employer Maintenance.

[Click here](#) to go to Changing a User Password.

[Click here](#) to continue to Adding a User.

Adding a User

1. Click on the **Change Details | User** item in the menu at the top of the screen. The **User List** screen will appear containing a list of all current users.
2. Click on the **Add** button. The **User Add** screen will be displayed.
3. You must enter details for all highlighted fields. Refer to notes below for correct completion of these fields.
4. Click on the **Submit** button. The user is added to SuperChoice and the **User List** screen is displayed.

Notes

- Enter the User ID. This is a unique name identifying a user. The User ID must be between 2 and 16 characters in length.
- Enter a password. This must be a minimum of 8 characters and contain at least one upper case letter and one numeric character.
- Enter first name, middle name (optional) and last name of user.

Enter other optional details as required.

Security

Your Responsibilities

After consultation with SuperChoice concerning your business processes and related user requirements, SuperChoice has established one or more User Ids and passwords for your management.

SuperChoice treats all transactions received from your user IDs as authorised transactions. SuperChoice accepts no responsibility for unauthorised use of your User ID and Password. Therefore it is important that you control and manage knowledge of and access to these user IDs and Passwords.

[Click here](#) to return to Employer Maintenance.

[Click here](#) to go to Change User Details

[Click here](#) to go to Changing a User Password.



Funds

View the Current Fund Payment Details

1. Click on the **Choice of Fund | Payment Instructions** item in the menu at the top of the screen. The funds for your employer will appear.
2. Select the relevant fund from the drop down list.
3. If available, the current payment details will be displayed.

Changing Fund Payment Details

1. Click on the **Change Details | Funds** item in the menu at the top of the screen. The funds for your employer
2. Select the relevant fund by clicking on it.
3. Change the appropriate details.
4. Confirm any EFT details, if applicable.
5. Confirm the overall Payment Detail Changes and click on the **Submit** button to save the changes.

[Click here](#) to return to Employer Maintenance.

[Click here](#) to view SuperChoice Help Desk contact details.



Payroll Numbers

1. Click on the **Change Details | Payroll** item in the menu at the top of your screen. This displays the **Payroll Member** screen.
2. Enter the search criteria for those members whose payroll details you wish to change. Click **Search**.
3. A list of members and their respective Payroll and Member Numbers is displayed. You may amend the members' payroll numbers only.
4. When you have finished, click **Save**.

Payroll Fund Codes

This is used when a Fund Code in the Payroll extract does not match SuperChoice. This area allows you to define what code you use.

1. Click on the **Choice of Fund | Payroll Fund Codes** item in the menu at the top of your screen.
2. In the appropriate field enter the Fund Code used in the Payroll extract.
3. Select the matching SuperChoice Fund from the drop down menu.
4. Click the **Add** button, the fund will now disappear from the drop down menu and can be viewed by selecting the **Fund Code List** button.

[Click here](#) to return to Employer Maintenance.

[Click here](#) to add New Members.

[Click here](#) to process a contribution.



Reporting

Legislation introduced on 1 July 2003 requires that, in certain circumstances, employers provide reporting to employees on contributions remitted to superannuation funds on their behalf. SuperChoice can produce these advices for either a particular quarter or for a specific batch of contributions for distribution to employees.

There are two types of reports that can be created.

Quarterly Reports

[Click here](#) to produce reports either for the current quarter or a previous quarter.

Specific Batch Reports

[Click here](#) to produce reports for a specific batch.

Specific Batch Reports

To produce the batch reports for a specific period

1. Click the **Contributions** item in the menu at the top of the screen.
2. Click the Confirmed status of a current batch, or to produce advices for a previous period, click the **Twelve Months Batches** button.
3. Click the Confirmed status of the relevant batch for the period required. This will open the **Batch Confirmation** page.
4. Click the **Employees Advices** button to display the **Contribution Advices** page. There are two options for printing the employee contribution advices – flexible or fixed.

[Click here](#) to see instructions for Fixed Format reporting.

[Click here](#) for Flexible Format Contribution Advices.

[Click here](#) to go to Quarterly Reports.



Quarterly Reports

1. Click on **Reports | Employee Advices** item in the menu at the top of the screen
2. In the drop-down field, select the quarter for which you want to produce the reports.

[Click here](#) to see instructions for Fixed Format reporting.

[Click here](#) for Flexible Format Contribution Advices.

[Click here](#) to go to Specific Batch Reports.

Fixed Format Contribution Advices

This option produces the reports in a standard PDF output document.

1. Click the **PDF Advices** button to display the “File Download” dialogue box. You have the option either to:
 - Open the document immediately; or
 - Save it to a file.
2. If you do not wish to save the file, click **Open** to launch. Otherwise, click **Save** to save the file. We suggest you click **Open**. This will open the file in Acrobat Reader. From there you can print the report.
3. Once you have printed the report, close the PDF document. You will be returned to the SuperChoice site.

Note

- This option is only available for funds with fewer than 150 members.
- The reports are stored on the website for 12 months, and may be reproduced from there at anytime within the 12 months.
- Once the document is opened in Acrobat Reader, you can save it to file.
- If you do not have Acrobat Reader software on your PC, you will be asked if you wish to download it. This is FREE software that can be obtained at www.adobe.com.

[Click here](#) for Flexible Format Contribution Advices.

[Click here](#) to go back to Reporting page.

Flexible Format Contribution Advices

This option produces reports using a standard merge document and data file. The output is a Word document.

Note: This is available for all funds, regardless of the number of members. The report format can be altered.

First time use

1. Click the **Advice Sample** button to display the **File Download** dialogue box. You have the option either to:
 - open the document immediately; or
 - save it to a file.
2. Click **Save** and save the file to any directory which you use on your network. Remember where you save the file, as you may need to refer to it again.

Note

You only have to complete the above instructions the first time you use this format. The document you have just saved is the standard merge file, and is in a format as shown on the SuperChoice site. You may change this file if you wish.

3. Once you have saved the standard merge file, click the **Advice Details** button to download the actual contribution data file that will be used to create the reports. The **File Download** dialogue box is displayed. You may either:
 - open the document immediately; or
 - save it to a file.
4. Click **Save** to save the file to the same directory on your network where you saved the advice sample file AND change the file name, e.g. to represent the period date. You may need to refer to this file again, so it is important to remember its location. Click **Close** to return.
5. If you need to select another contribution batch for another schedule, click **Return** twice and repeat the above for each schedule required.
6. Open MS Word to merge the base document with the file and create an output of employee advices.

[Click here](#) to go back to Reporting page.

[Click here](#) to see instructions for fixed format reporting.

[Click here](#) to go to instructions for merging files.



Merging files to create the Output Document

Merging your documents will vary slightly, depending on the version of Windows you are running.

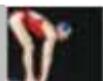
As a quick general overview, refer to the following information. However, you should seek clarification from other Word users in your organisation.

1. Open Word
2. Find the standard merge file that you previously saved to your network.
3. Click the **View** menu. Select the **Toolbars** option. Click **Mail Merge** from the drop-down menu.
4. Mail merge icons will be available on the toolbar. You may click one of these to:
 - Merge to create a new document; or
 - Merge to the printer; or
 - Merge to e-mail (and e-mail directly to employees).

[Click here](#) to go back to Reporting page.

[Click here](#) to return to Flexible Format Contribution Advices.

[Click here](#) to see instructions for Fixed Format reporting.



Supplying Member Tax File Number (TFN)

From 1 July 2007 when your employee fills out a tax file number declaration form you must pass on the employee's TFN to their super fund if you make contributions for them.

If you do not pass on the employee's TFN: -

- You will be guilty of an offence and liable to pay a penalty
- The fund will not be able to accept member voluntary contributions
- An additional 31.5% contributions tax on taxable contributions will be levied on the fund
- Your employee may miss out on Super co-contribution payments

Please Note: -

- You must pass the TFN to the super fund within 14 days of receiving the tax file number declaration form, if you make an employer contribution during that time. If you do not make a contribution for the employee in that time, you can pass the TFN on when you first make a contribution.
- If your employee is a member of the SuperChoice Super Trust you can provide the TFN when advising the new fund, you will need to provide the TFN directly to that fund.
- Note that the above requirements apply to employees who have completed a TFN declaration form on or after 1 July 2007. For employees who have completed this form prior to 1 July 2007, you should ensure that your employee has provided appropriate permissions before passing their TFN to the fund.

If you have any queries regarding these changes please contact your fund administrator or, refer to the ATO website (www.ato.gov.au).

Updating the TFN Flag

After supplying the employees TFN to their Choice Fund, you may update the TFN Flag by following the below steps:

1. Click **Change Details |Members** menu at the top of the screen, to display the **Members Search** screen.
2. On the **Members Search** screen, enter your search criteria and click on the **Search** button. [Click here](#) for more information on the search fields.
3. Select the member you will be modifying.
4. Click on the **TFN Details** button.
5. Select either "*Supplu TFN now*" and enter the employee's TFN number or select "*TFN has been supplied directly to the member's Superannuation Fund*".
6. Click the **Submit** button.

This update will now remove the exclamation mark (!) from next to the members name in the **Batch Input** screen.

[Go back to Creating a Contribution](#)