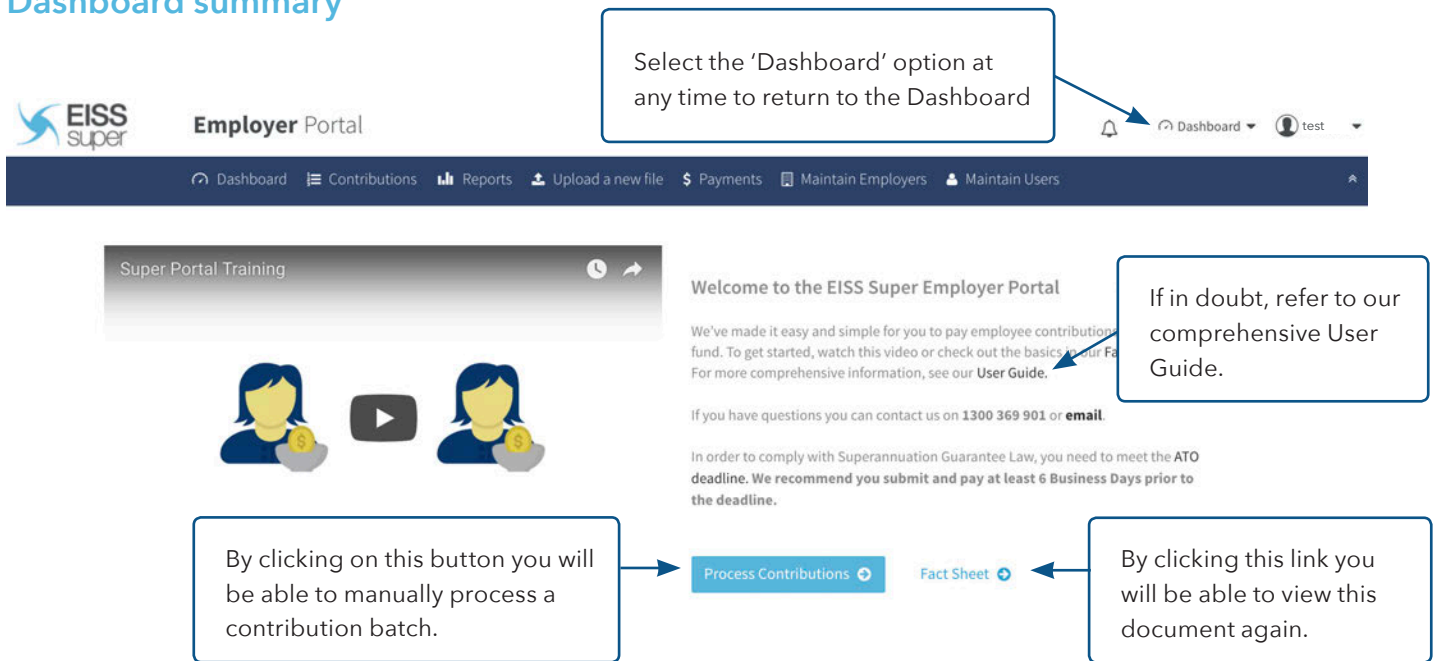


Employer Portal Basics

Here's the basics for when you're entering data manually

Dashboard summary



Select the 'Dashboard' option at any time to return to the Dashboard

If in doubt, refer to our comprehensive User Guide.

By clicking on this button you will be able to manually process a contribution batch.

By clicking this link you will be able to view this document again.

Processing

You can process contributions or update employee details:

- Upload a new file
- Create contribution/maintain employee
- Reuse a previous contribution file

Create contribution/maintain employee: This will allow you to manually process contributions, add new members, exit members & update members' details.

Reuse a previous contribution file: This will give you a contribution table with previously submitted contribution amounts for your active employees as the template for the next contribution.

Maintenance

Add and maintain user details, employer details and member details:

- Employer
- User
- Member
- Add Member

Employer: This section lets you update some details about your business.

User: This section lets you update details about your user account, as well as set up new users if you have the appropriate level of access.

Reports

You can view and search previous payments and contributions:

- Contribution History
- Payments
- Reports

Contribution history: This function will let you produce reports on super contributions paid by your business.

Payments: This function will let you produce reports on payments made by your business.

Reports: This function will let you produce reports on super contributions paid by your business.

Contents

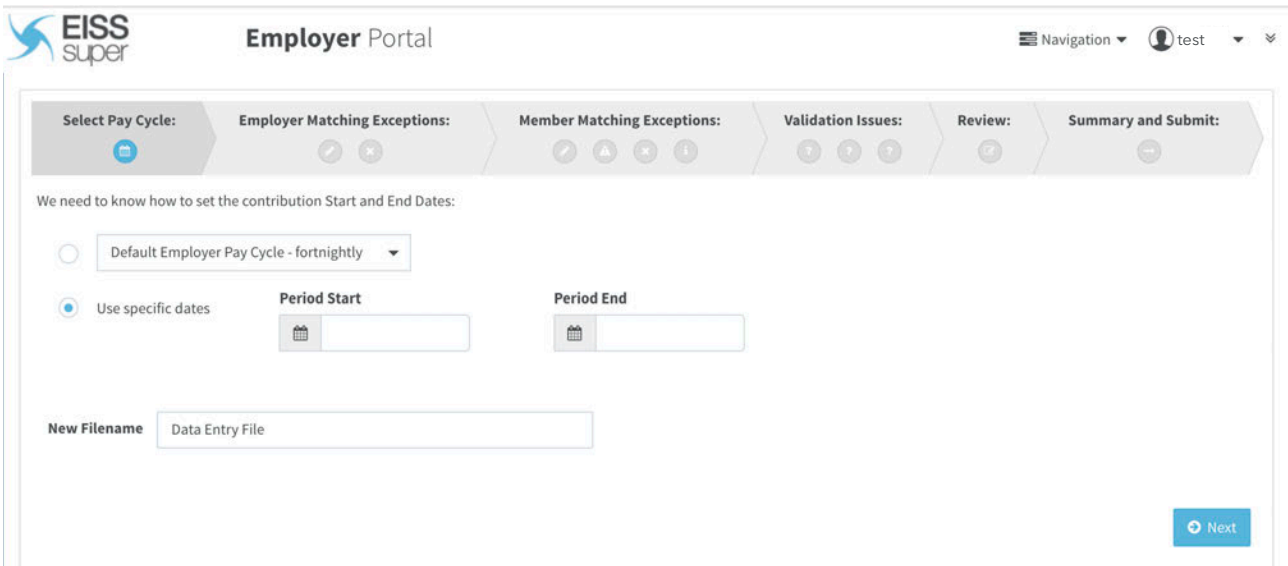
- Editing an existing member (pg 2-3)
- Adding a new member (pg 3-4)
- Creating contributions via manual entry (pg 5-6)
- Exiting an existing member (pg 6-7)
- Contributing for an additional employer (pg 7-8)

Editing an existing member

Step 1. From the Dashboard select 'Create contribution/maintain employee'.

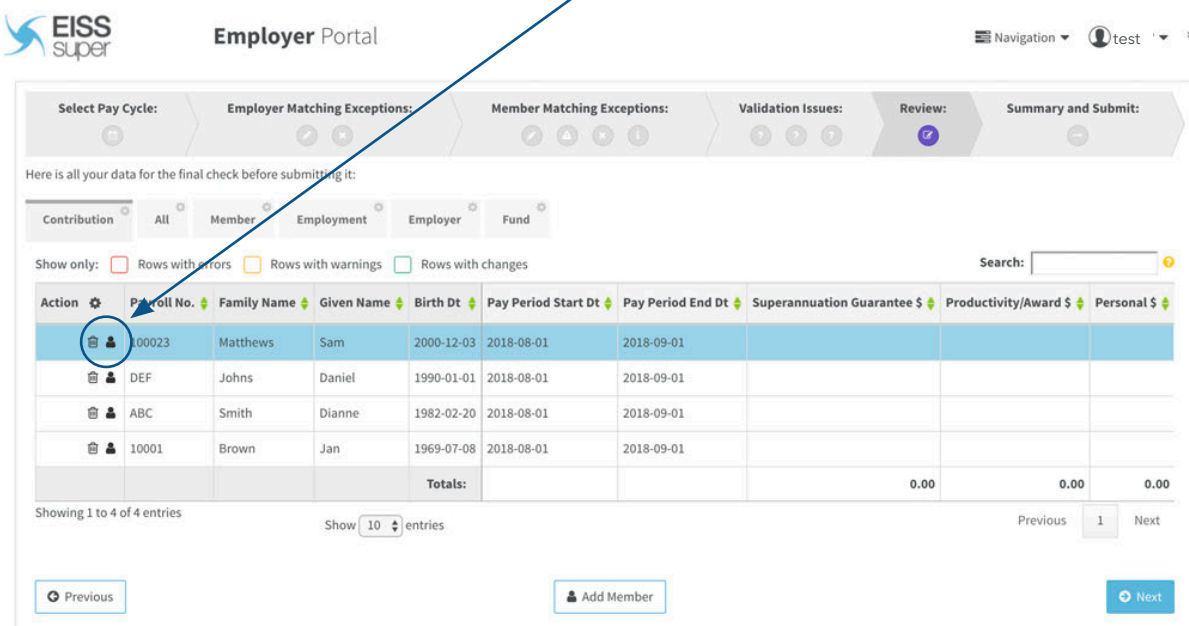
 Create contribution/maintain employee

Step 2. Enter pay period start and end dates to allow you to proceed editing an existing member.







The screenshot shows the 'Create contribution/maintain employee' form in the EISS super Employer Portal. The form is titled 'Employer Portal' and includes a navigation menu with 'Navigation' and a user profile 'test'. The main content area has a progress bar with 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, there is a message: 'We need to know how to set the contribution Start and End Dates:'. There are two radio buttons: 'Default Employer Pay Cycle - fortnightly' (unselected) and 'Use specific dates' (selected). Under 'Use specific dates', there are two date input fields: 'Period Start' and 'Period End'. Below these fields is a 'New Filename' input field with the text 'Data Entry File'. A 'Next' button is located at the bottom right of the form.

Step 3. Select the person icon to edit the member. 



The screenshot shows the 'Review' step of the 'Create contribution/maintain employee' form. The progress bar is now on the 'Review' step. Below the progress bar, there is a message: 'Here is all your data for the final check before submitting it:'. There are several tabs: 'Contribution', 'All', 'Member', 'Employment', 'Employer', and 'Fund'. The 'Member' tab is selected. Below the tabs, there are three checkboxes: 'Rows with errors' (unchecked), 'Rows with warnings' (unchecked), and 'Rows with changes' (checked). There is a search input field. Below the search field is a table with the following columns: 'Action', 'Payroll No.', 'Family Name', 'Given Name', 'Birth Dt', 'Pay Period Start Dt', 'Pay Period End Dt', 'Superannuation Guarantee \$', 'Productivity/Award \$', and 'Personal \$'. The table contains four rows of data. The first row is highlighted in blue. A blue arrow points from the text 'Select the person icon to edit the member.' to the person icon in the 'Action' column of the first row. Below the table, there is a 'Totals' row. At the bottom of the page, there are buttons for 'Previous', 'Add Member', and 'Next'. The 'Add Member' button is highlighted in blue.

Action	Payroll No.	Family Name	Given Name	Birth Dt	Pay Period Start Dt	Pay Period End Dt	Superannuation Guarantee \$	Productivity/Award \$	Personal \$
	100023	Matthews	Sam	2000-12-03	2018-08-01	2018-09-01			
	DEF	Johns	Daniel	1990-01-01	2018-08-01	2018-09-01			
	ABC	Smith	Dianne	1982-02-20	2018-08-01	2018-09-01			
	10001	Brown	Jan	1969-07-08	2018-08-01	2018-09-01			
Totals:							0.00	0.00	0.00

Editing an existing member (continued)

Step 4. Edit the required details across the tabs and select 'Save'.

The screenshot shows the 'MEMBER MANAGEMENT' interface with the 'Member Details' tab selected. The form contains the following fields:

- Title:** Mr (dropdown)
- Given Name*:** Sam (text input)
- Other Name:** (text input)
- Last Name*:** Matthews (text input)
- Suffix:** Select Suffix (dropdown)
- Date of Birth*:** 03 December 2000 (calendar icon)
- Gender*:** Male (dropdown)
- Payroll No.:** 100023 (text input)
- Member No.:** 45687 (text input)
- TFN:** (text input)

Buttons for 'Save' and 'Cancel' are located at the bottom right of the form.

Adding a new member

Step 1. From the Dashboard select 'Create contribution/maintain employee'.

 Create contribution/maintain employee

Step 2. Enter pay period start and end dates to allow you to proceed adding a new member.

The screenshot shows the 'Employer Portal' interface for 'EISS super'. The 'Create contribution/maintain employee' form is displayed with the following sections:

- Select Pay Cycle:** Default Employer Pay Cycle - fortnightly (dropdown)
- Employer Matching Exceptions:** (no input)
- Member Matching Exceptions:** (no input)
- Validation Issues:** (no input)
- Review:** (no input)
- Summary and Submit:** (no input)

Below the navigation bar, the text reads: "We need to know how to set the contribution Start and End Dates:"

- Default Employer Pay Cycle - fortnightly
- Use specific dates

When 'Use specific dates' is selected, the following fields are visible:

- Period Start:** (calendar icon)
- Period End:** (calendar icon)

At the bottom, there is a **New Filename** field with the value "Data Entry File" and a **Next** button.

Adding a new member (continued)

Step 3. Select the button 'Add Member'.

Employer Portal

Navigation | test

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: All | Member | Employment | Employer | Fund

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

Action	Payroll No.	Family Name	Given Name	Birth Dt	Pay Period Start Dt	Pay Period End Dt	Superannuation Guarantee \$	Productivity/Award \$	Personal \$
	100023	Matthews	Sam	2000-12-03	2018-08-01	2018-09-01			
	DEF	Johns	Daniel	1990-01-01	2018-08-01	2018-09-01			
	ABC	Smith	Dianne	1982-02-20	2018-08-01	2018-09-01			
	10001	Brown	Jan	1969-07-08	2018-08-01	2018-09-01			
Totals:							0.00	0.00	0.00

Showing 1 to 4 of 4 entries | Show 10 entries | Previous 1 Next

Previous | **Add Member** | Next

Step 4. Enter details across all tabs and select 'Save'. Please note, the mandatory fields are marked with an asterisk.

MEMBER MANAGEMENT

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

Member Details

Title: Mr | Given Name*: Sam | Other Name: | Last Name*: Matthews | Suffix: Select Suffix | Date of Birth*: 03 December 2000 | Gender*: Male | Payroll No.: 100023 | Member No.: 45687 | TFN: |

Contact Details

Address Code*: Residential | Address Line 1*: 2 Street Name | Address Line 2: | Address Line 3: | Address Line 4: | Suburb*: Sydney |

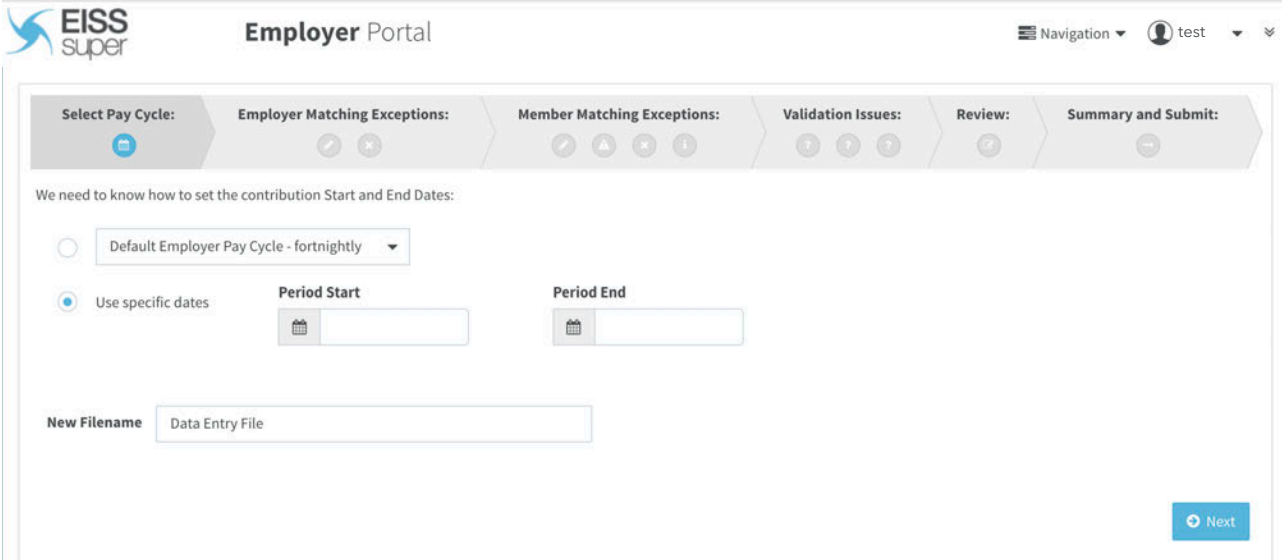
Save | Cancel

Creating contributions via manual entry

Step 1. From the Dashboard select 'Create contribution/maintain employee'.

 Create contribution/maintain employee

Step 2. Enter pay period start and end dates you are remitting for to start the process. You also have the ability to name your file which allows you to easily recognise the contribution batch at a later date.



EISS super Employer Portal Navigation test

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

We need to know how to set the contribution Start and End Dates:

Default Employer Pay Cycle - fortnightly

Use specific dates

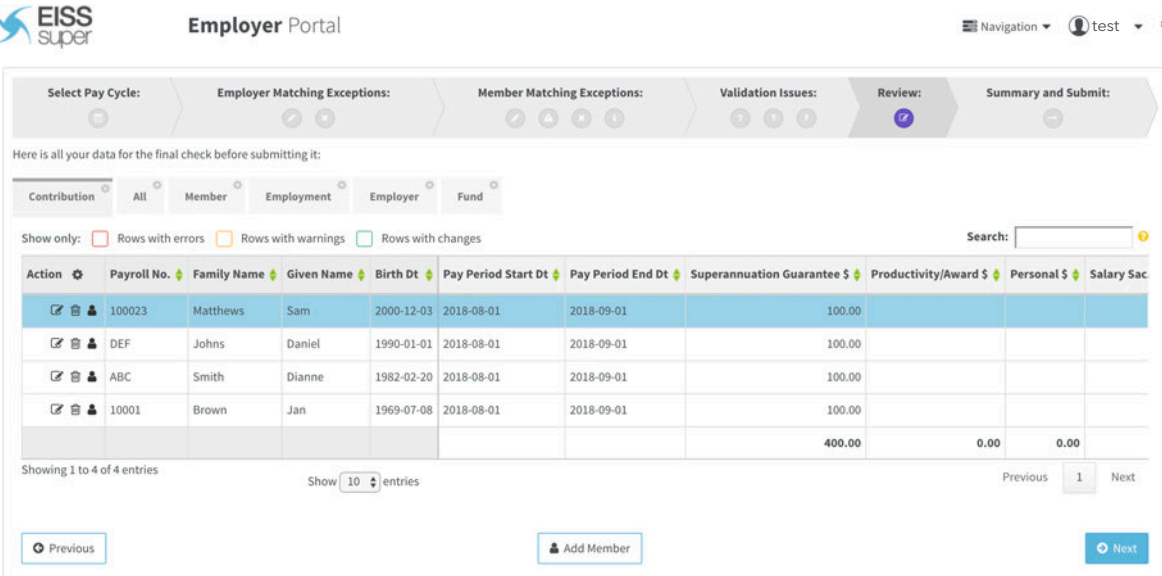
Period Start:

Period End:

New Filename:

[Next](#)

Step 3. Enter contribution amounts for the employees and select 'Next'.



EISS super Employer Portal Navigation test

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: All Member Employment Employer Fund

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
	100023	Matthews	Sam	2000-12-03	2018-08-01	2018-09-01	100.00			
	DEF	Johns	Daniel	1990-01-01	2018-08-01	2018-09-01	100.00			
	ABC	Smith	Dianne	1982-02-20	2018-08-01	2018-09-01	100.00			
	10001	Brown	Jan	1969-07-08	2018-08-01	2018-09-01	100.00			
							400.00	0.00	0.00	

Showing 1 to 4 of 4 entries Show 10 entries Previous 1 Next

[Previous](#) [Add Member](#) [Next](#)

Creating contributions via manual entry (continued)

Step 4. Confirm the contribution/s by selecting 'Confirm and Send'.

The screenshot shows the 'Employer Portal' interface for EISS super. The navigation bar includes 'Navigation' and a user profile 'test'. The main content area is titled 'Fund Breakdown (Period 01 Aug 2018 to 01 Sep 2018)'. It features a table with columns for Fund Name, USI, No. Members, and Amount \$.

Fund Name	USI	No. Members	Amount \$
EISS Super	EIS0001AU	4	800.00
Grand Totals:		4	\$800.00

Below the table is a 'Payment Summary' section with the following details:

- Payment Reference: 401145866591709002
- For Employer: Demo Employer, ABN: 40114586659
- Direct Debit: Account to be debited: BSB: 012345 A/c: 1111111111

At the bottom, there are three buttons: 'Go Back', 'Save and Hold', and 'Confirm and Send'.

Exiting an existing member

Step 1. From the Dashboard select 'Create contribution/maintain employee'.

Create contribution/maintain employee

Step 2. Enter pay period start and end dates to allow you to proceed exiting an existing member.

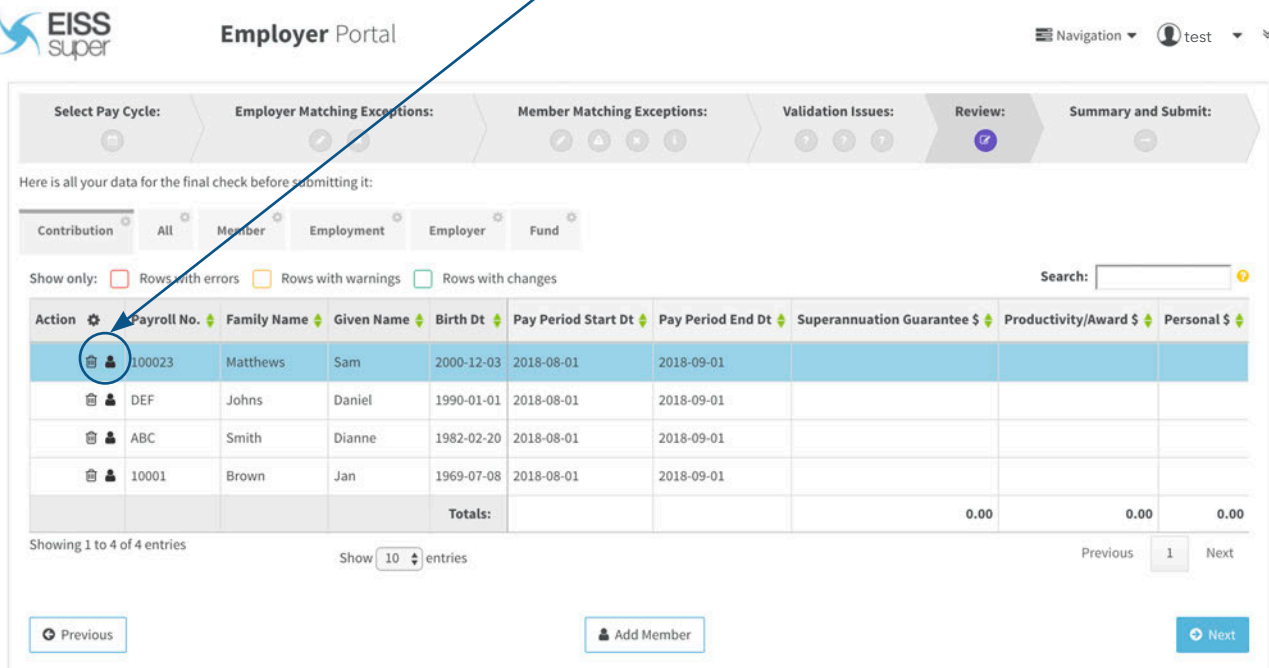
The screenshot shows the 'Employer Portal' interface for EISS super. The navigation bar includes 'Navigation' and a user profile 'test'. The main content area is titled 'We need to know how to set the contribution Start and End Dates:'. It features a form with the following fields:

- Default Employer Pay Cycle - fortnightly (selected)
- Use specific dates (selected)
- Period Start: [Calendar icon] [Text input]
- Period End: [Calendar icon] [Text input]
- New Filename: Data Entry File

At the bottom right, there is a 'Next' button.

Exiting an existing member (continued)

3. Select the person icon to exit the member. 



EISS Super Employer Portal





Navigation | test

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: All | Member | Employment | Employer | Fund

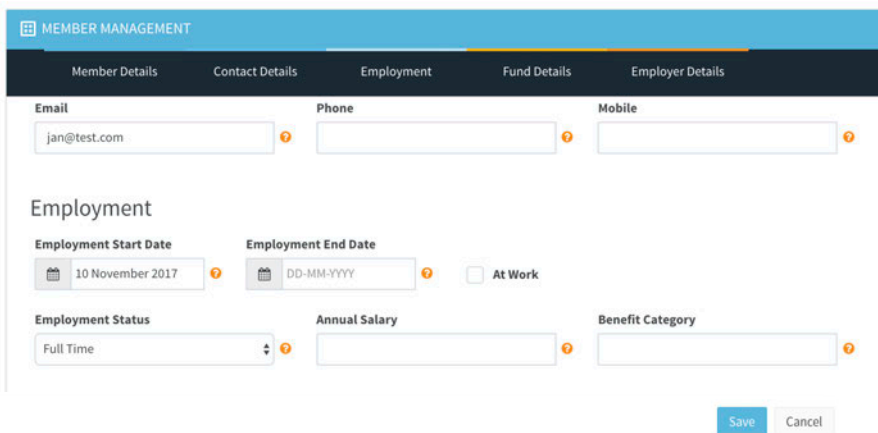
Show only: Rows with errors Rows with warnings Rows with changes Search:

Action	Payroll No.	Family Name	Given Name	Birth Dt	Pay Period Start Dt	Pay Period End Dt	Superannuation Guarantee	Productivity/Award	Personal
	100023	Matthews	Sam	2000-12-03	2018-08-01	2018-09-01			
	DEF	Johns	Daniel	1990-01-01	2018-08-01	2018-09-01			
	ABC	Smith	Dianne	1982-02-20	2018-08-01	2018-09-01			
	10001	Brown	Jan	1969-07-08	2018-08-01	2018-09-01			
Totals:							0.00	0.00	0.00

Showing 1 to 4 of 4 entries Show 10 entries Previous 1 Next

Previous Add Member Next

4. Enter an Employment End Date in the format DD-MM-YYYY to exit the member and select 'Save'.



MEMBER MANAGEMENT

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

Email: jan@test.com Phone: Mobile:

Employment

Employment Start Date: 10 November 2017 Employment End Date: DD-MM-YYYY At Work

Employment Status: Full Time Annual Salary: Benefit Category:

Save Cancel

Contributing for an additional employer

- Step 1. From the Dashboard select 'Create contribution/maintain employee'.

 Create contribution/maintain employee

Contributing for an additional employer (continued)

Step 2. Enter pay period start and end dates to allow you to proceed contributing for an additional employer.

EISS super Employer Portal

Navigation | test

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

We need to know how to set the contribution Start and End Dates:

Default Employer Pay Cycle - fortnightly

Use specific dates

Period Start:

Period End:

New Filename: Data Entry File

Next

Step 3. Select the 'Employer' Tab.

EISS super Employer Portal

Navigation | test

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: All Member Employment **Employer** Fund

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

Search:

Step 4. The below example highlights that you can contribute to more than one employer.

EISS super Employer Portal

Navigation | ASEMP

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: All Member Employment **Employer** Fund

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

Search:

Action	Payroll No.	Family Name	Given Name	Birth Dt	Account No.	Account Name	Payment Type	ABN	Location ID	Name	Fund Employer No.
	100023	Matthews	Sam	2000-12-03	111111	Demo account	DIRECTDEBIT	40114586659		EMPLOYER 1	
	DEF	Johns	Daniel	1990-01-01	111111	Demo account	DIRECTDEBIT	40114586659		EMPLOYER 2	

We're here to help



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