



vision
super

Employer Online user guide
June 2016



Welcome

This is the user guide for Employer Online – if you cannot find the information you are looking for in this guide please contact us and we'll be happy to help you further.

 **Employer Hotline 1300 304 947**

 **employerservices@visionsuper.com.au**

 **www.visionsuper.com.au/employers/employer-secure-site**

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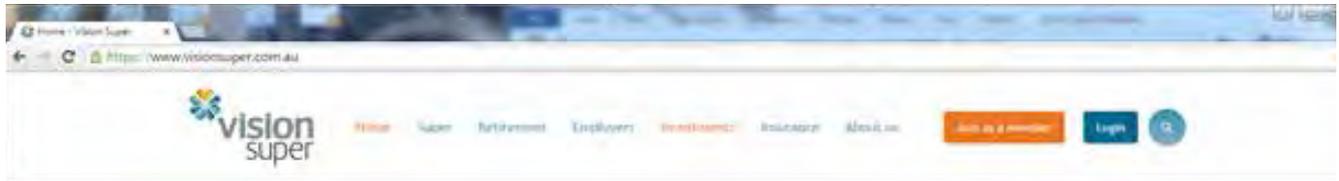
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Accessing the site

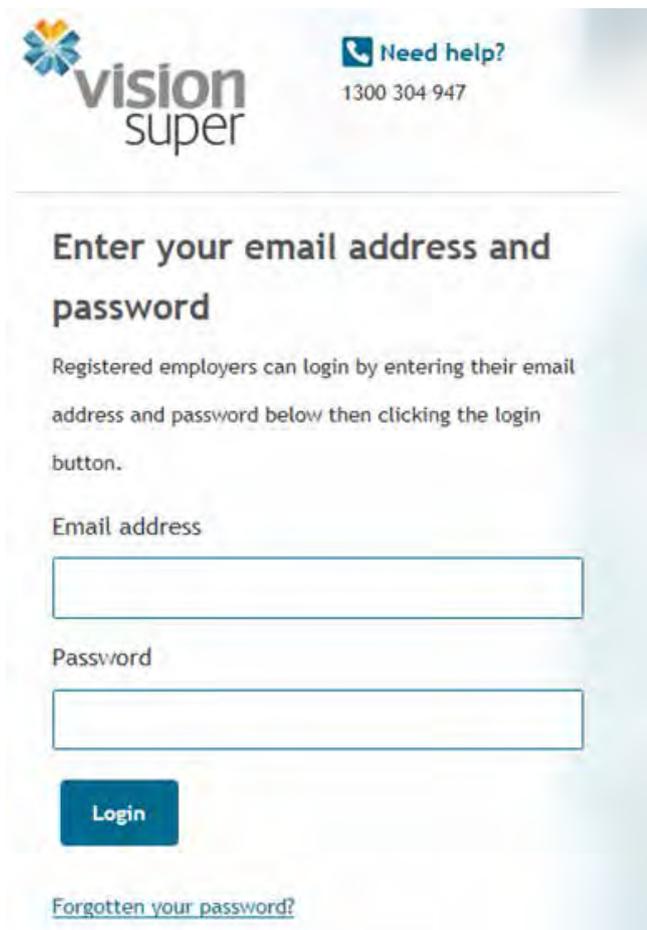
Logging in

You can access the Employer Online site from the Vision Super website, www.visionsuper.com.au.

Click on the blue login button in the top right corner of the site:

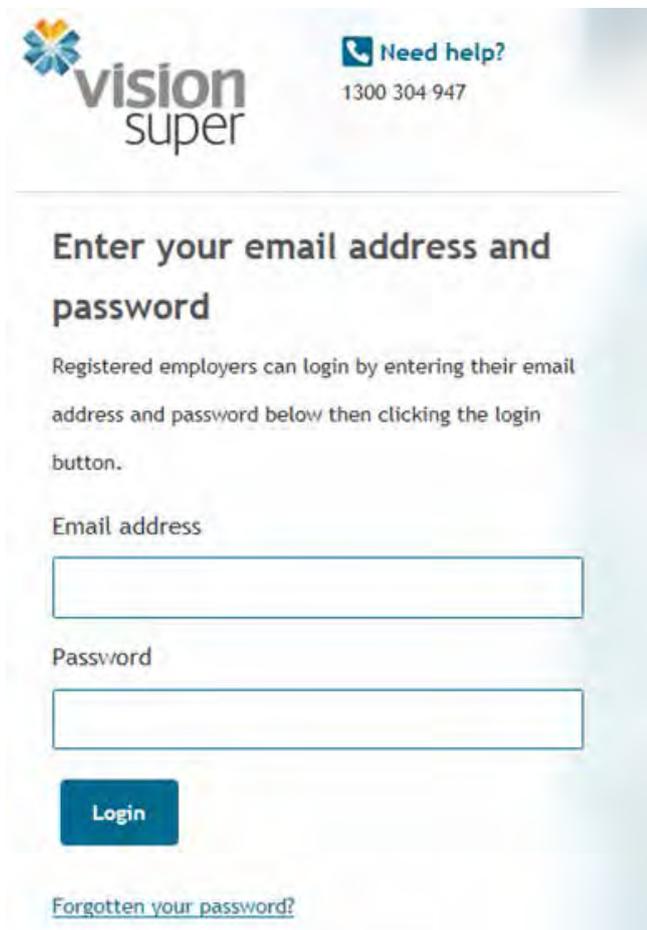


Enter your email address and password:

A screenshot of the Vision Super login page. At the top left is the Vision Super logo. At the top right is a 'Need help?' link with a phone icon and the number 1300 304 947. The main heading is 'Enter your email address and password'. Below this is a paragraph: 'Registered employers can login by entering their email address and password below then clicking the login button.' There are two input fields: 'Email address' and 'Password'. Below the 'Password' field is a blue 'Login' button. At the bottom left is a link: 'Forgotten your password?'.

Resetting a password

If you have forgotten your password you can request it to be reset via the log in page. Go to the Vision Super website www.visionsuper.com.au, click on the blue login button in the top right corner of the site and select the forgotten your password link.



The screenshot shows the top of the Vision Super website. On the left is the Vision Super logo. On the right is a 'Need help?' link with a phone icon and the number 1300 304 947. Below the header is a section titled 'Enter your email address and password'. It contains a paragraph of text: 'Registered employers can login by entering their email address and password below then clicking the login button.' There are two input fields: 'Email address' and 'Password'. Below the fields is a blue 'Login' button. At the bottom of the section is a link that says 'Forgotten your password?'.

Enter your email address and the verification code to receive an email with a token to reset your password. The verification code can be refreshed by selecting the  icon.



The screenshot shows the 'Forgotten password' page on the Vision Super website. It features the same header as the login page. The main heading is 'Forgotten password'. Below it is a paragraph: 'Please enter your email address and press 'Reset Password'. You will receive an email that will explain how to reset your password.' Another paragraph follows: 'To advise us of your email address or for any problems logging on to this site, please call the Vision Super contact centre on 03 9911 3222 (regional 1300 300 820) or email info@visionsuper.com.au'. There are three input fields: 'Email address *', 'Your Verification Code *', and 'Verification Code (as displayed above)'. The 'Your Verification Code' field contains a blue, distorted image of the text 'Yyscrpn' and a refresh icon to its right. At the bottom are two buttons: 'Reset Password' (orange) and 'Cancel' (blue).

Site navigation

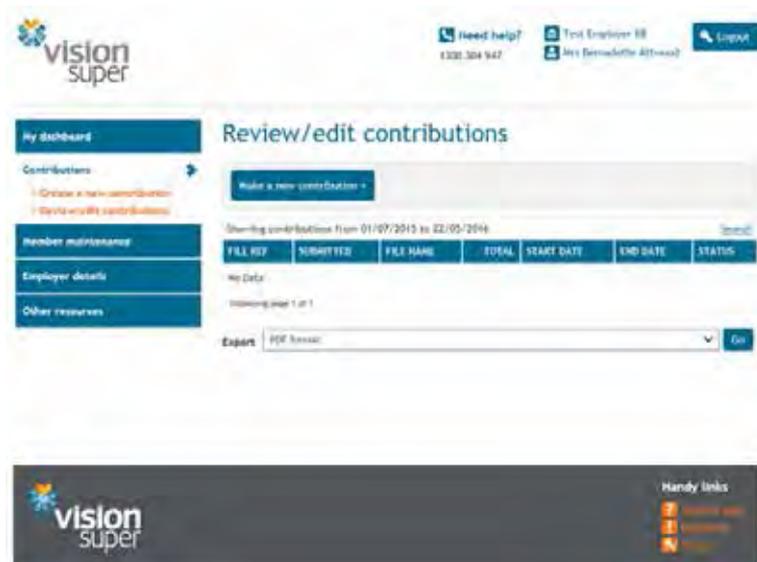
The landing page of the site consists of four icons:

- Contributions
- Member maintenance
- Employer details
- Other resources

Each of these sections is explained in more detail throughout this document.



Once you select an icon you are taken to the relevant page to perform certain functions. You will then be able to navigate using the tabs and menu options on the left hand side.



If you need to return to the landing page select my dashboard.

Note: The site will automatically close your session if it is inactive for 10 minutes. Alternatively you can select the logout button to leave the site.

Contributions

The contributions section of Employer Online has two parts:

- Create a new contribution
- Review/edit contributions

The create a new contribution function is discussed in the next section. The review/edit contributions screen displays a list of all contribution files for your employer. The files will appear in order of when they were submitted. The status of the file will be one of the following:

- Uploading – the file has been sent to Vision Super to upload in to the administration system to be processed online
- In progress – the file has successfully uploaded and is ready for review and submission
- Received – the file has been successfully submitted to Vision Super
- Upload error – there is an issue with the format of the file, please call our Employer Hotline on **1300 304 947** for assistance

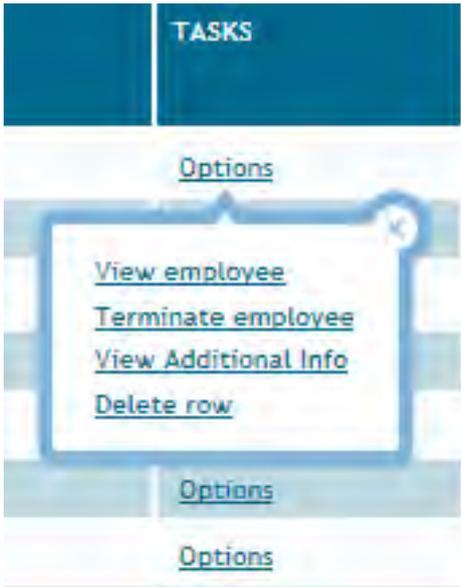
One feature of the new system is that only one file can be in progress at a time. If you have multiple files to send to Vision Super you will have to upload and submit them one by one. If you upload a file and it is the wrong one simply delete the file and upload again.

In the screen example below this employer has a file in progress so they are given the option to resume working on this file or delete the file and upload another.

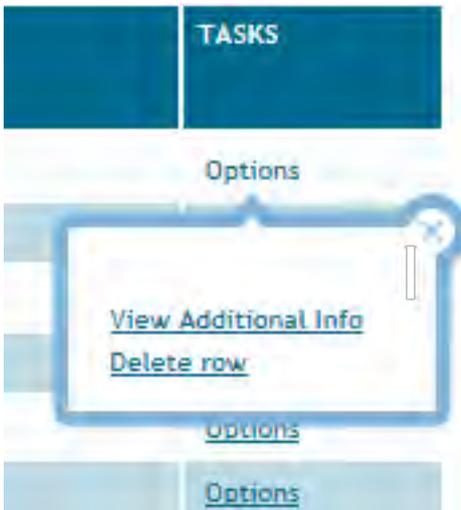
The screenshot shows the 'Review/edit contributions' page in the Vision Super system. The header includes the Vision Super logo, a 'Need help?' link with the number 1300 304 947, a 'Test employer' section for 'Bernadette Atwood', and a 'Logout' button. The left sidebar contains navigation options: 'My dashboard', 'Contributions' (with sub-links for 'Create a new contribution' and 'Review/edit contributions'), 'Member maintenance', 'Employer details', and 'Other resources'. The main content area features a heading 'Review/edit contributions' and a message: 'You have one unconfirmed contribution. Contribution 1894 for start date 11/04/2016 to 24/04/2016.' Below this message are 'Resume' and 'Delete' buttons. A table displays the contribution details, with columns for FILE REF, SUBMITTED, FILE NAME, TOTAL, START DATE, END DATE, and STATUS. The table shows one entry: Contribution 1894, submitted on 04/06/2016, with a total of 5137,672.14 and a status of 'In Progress'. Below the table is an 'Export' dropdown menu set to 'PDF format' and a 'Go' button. The footer contains the Vision Super logo and 'Handy links' for 'Welcome page', 'About us', and 'Contact'.

FILE REF	SUBMITTED	FILE NAME	TOTAL	START DATE	END DATE	STATUS
1894	04/06/2016	testfile.csv	5137,672.14	11/04/2016	24/04/2016	In Progress

If the employee is a Vision Super member the tasks column will contain several options to choose from. These links can be used to view details about the member, terminate them, view the additional information from the file or delete the row.



If the employee is a member of another fund the tasks column will allow you to view the additional information from the file or delete the row.



You will notice for some employees they have a terminated date in the tasks column. This is generally due to them having a previous membership with Vision Super that has ended due to the employee now paying to another super fund. The historical data will be removed as part of our second phase of developing the site.

FUND	TASKS
Tasplan Superannuation Fund	Options
Hundo Superannuation	Options
VicSuper	Options
REST Superannuation	Options
Self Managed Super Fund	Options *Terminated 01/01/2016
Australian Super	Options
Care Superannuation	Options
North Personal Super & Pension Plan	Options
Unisuper	Options
Hesta Super Fund	Options *Terminated 14/03/2015

The additional info link will take you to a pop up page with all of the data from the file for the employee you have selected. This page replaces the tab structure from our previous site. You can amend the data on this page to correct errors for the employee.

Additional Info

<p>Overall file details</p> <p>Pay period start date: <input type="text" value="16/01/2016"/></p> <p>Pay period end date: <input type="text" value="12/02/2016"/></p> <hr/> <p>Personal details</p> <p>Title: <input type="text" value=""/></p> <p>Gender: <input type="text" value="Female"/></p> <p>Suffix: <input type="text" value=""/></p> <p>Other given names: <input type="text" value="Example"/></p> <p>Surname: <input type="text" value="Employee"/></p> <p>Date of birth: <input type="text" value="02/11/1954"/></p> <p>Tax File Number: <input type="text" value="123 456 789"/></p> <p>Email: <input type="text" value=""/></p> <p>Home phone number: <input type="text" value=""/></p> <p>Mobile phone number: <input type="text" value="0400 152 600"/></p>	<p>Super fund info</p> <p>Self-managed super fund (SMSF): <input type="checkbox"/></p> <p>Product, Fund, ABN or USF: <input type="text" value="Enter search terms"/></p> <p>Fund name: <input type="text" value="Hesta Super"/></p> <p>Super fund USF: <input type="text" value="42574421650001"/></p> <p>Super fund ABN: <input type="text" value="42 574-421-650"/></p> <p>Member client id: <input type="text" value="03214785"/></p> <hr/> <p>Address details</p> <p>Address type: <input type="text" value="Res"/></p> <p>Residential country: <input type="text" value="Australia"/></p> <p>Address line 1: <input type="text" value=""/></p> <p>Address line 2: <input type="text" value=""/></p> <p>Address line 3: <input type="text" value=""/></p> <p>Address line 4: <input type="text" value=""/></p> <p>Residential suburb: <input type="text" value=""/></p> <p>Residential state: <input type="text" value=""/></p> <p>Residential postcode: <input type="text" value=""/></p>	<p>Employment details</p> <p>Payroll id: <input type="text" value="1011"/></p> <p>Employment end date: <input type="text" value=""/></p> <p>Employment start date: <input type="text" value=""/></p> <p>At work indicator: <input type="radio"/> True <input type="radio"/> False</p> <p>Salary benefit: <input type="text" value="\$0.00"/></p> <p>Salary insurance: <input type="text" value="\$0.00"/></p> <p>Salary contributions: <input type="text" value="\$0.00"/></p> <p>Employment status: <input type="text" value=""/></p> <p>Weekly hours worked: <input type="text" value="0"/></p> <p>Occupation: <input type="text" value=""/></p> <p>Insurance opt out: <input type="checkbox"/></p> <p>Fund registration date: <input type="text" value=""/></p> <p>Contribution start date: <input type="text" value=""/></p> <p>Contribution end date: <input type="text" value=""/></p> <p>Salary contribution start date: <input type="text" value=""/></p> <p>Salary contribution end date: <input type="text" value=""/></p> <p>Member registration amendment reason: <input type="text" value=""/></p> <p>Termination reason: <input type="text" value=""/></p> <p>Benefit category: <input type="text" value=""/></p>
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If the employee is a member of a Self Managed Super Fund, select the check box to filter the super fund info section. This will display the key details of the SMSF – bank details, ESA and the member ID for the employee.

Super fund info

Self-managed super fund (SMSF)

BSB

Account number

Account name

Electronic service address

Member client Id

If your file contains errors you should try to fix them online. If you have trouble fixing an error please contact our Employer Hotline on 1300 304 947. Once your file is error free and you would like to submit the file to Vision Super for processing press the submit button in the bottom right corner.

Upon clicking submit the file will be revalidated to check for any new errors in the data. If new errors are found the contribution details page will refresh and show the lines with errors. These new errors will need to be fixed before the file can be submitted.

If no new errors are found a contribution summary page will be displayed showing the overall details of the file. It will show the amount owing for the file and the split between internal members (Vision Super) and external members (other fund members).

Once you have reviewed the details on the summary screen select the final submit button to commit this file to the Vision Super database. The file will wait with Vision Super until payment is received either via EFT or direct debit. The payment methods are explained further below.



[Need help?](#)
1300 304 947

[Test Employer ID](#)
[View Remittance Attachments](#)

[Logout](#)

Review and submit - contribution summary

File details

Employer	Test Employer BB	Payment method	Direct Debit
Remittance Id	613	File name	Testfile.csv
Period start date	15/04/2016	Period end date	28/04/2016

Payment instructions

Direct debit date:	10/06/2016	Amount due:	\$26,544.81
Account name:	Test Employer bank account	Internal direct debit:	\$20,085.74
BSB:	083-894	External direct debit:	\$6,459.07
Account No.:	10052147		

Contribution breakdown

Internal employees		External employees	
Employees contributed to:	62	Employees contributed to:	24
Employer Conts	\$13,706.14	Employer Conts	\$5,123.69
Post-Tax Member Conts	\$180.00	Post-Tax Member Conts	\$20.00
Salary Sacrifice Conts	\$6,199.60	Salary Sacrifice Conts	\$1,315.38
Spouse Conts	\$0.00	Spouse Conts	\$0.00
Child Cont	\$0.00	Child Cont	\$0.00
Other 3rd Party	\$0.00	Other 3rd Party	\$0.00
Employer Voluntary Conts	\$0.00	Employer Voluntary Conts	\$0.00
Employer Award Conts	\$0.00	Employer Award Conts	\$0.00
Total Internal contributions	\$20,085.74	Total External contributions	\$6,459.07

Export PDF Format [Go](#)

[Back](#)
[Submit](#)

Vision Super file format

The Vision Super file format can continue to be used by employers whilst you transition over to the SuperStream file format. If you have not begun using SuperStream we encourage you to work with your payroll provider and Vision Super to make this change as soon as possible.

To upload your file, navigate to the make a contribution page and select the file to upload

Contributions icon > make a new contribution > enter date range > add files

The screenshot shows the 'Make a contribution' page on the Vision Super website. At the top, there is a navigation bar with the Vision Super logo, a 'Need help?' link (1300 334 947), a 'Test employer' link (Employer ID: 123456789), and a 'Logout' button. The main heading is 'Make a contribution'. Under 'Contribution data', there are three radio buttons: 'Review my last contribution table', 'Use a new contribution table', and 'Upload a pre-formatted file' (which is selected). Below this, the 'Pay period' is defined by 'From' (01/05/2016) and 'To' (31/05/2016) date fields. The 'Payment method' is set to 'Direct debit'. An 'Add files...' button is located below the form. At the bottom of the form area, there are 'Back' and 'Next' buttons. A footer bar contains the Vision Super logo and 'Handy links' for 'Employer login', 'Employee login', and 'Contact us'.

Once you have attached the file select upload and click next and the file upload process will begin.

When you return to the review/edit contribution screen the file will show as uploading. This may take some time depending on the size of the file. Once the upload has finished the status will change to in progress.

This screenshot shows the same 'Make a contribution' page, but with the upload progress visible. The 'Add files...' button is now disabled. Below the form, there is a 'Test employer ID' field with a 'Cancel' button. At the bottom, a message states 'Uploading completed on Wednesday, 3 June 2016 9:28:52 AM'. The 'Back' and 'Next' buttons are still present.

To review the file and submit it to Vision Super click the file name hyperlink from the review/edit contributions screen.

The contribution details screen contains basic information for the employee, their contribution amounts, their fund details and a tasks column. The screen also allows you to search for a particular employee using the search field and filter the screen to only show lines in error. The tasks column allows you to see additional information about the employee and has links to other tasks you can perform for the employee. You can change the page to show more than the default 10 lines by changing the page size field in the bottom right corner. You can navigate through the pages of data by using the navigation buttons, next, previous, last, first.

To return to the review/edit contribution list select the back button.

MEMBER NUMBER	PAYROLL NUMBER	GIVN NAMES	SURNAME	EMPLOYER CONTRIBUTION	MEMBER CONTRIBUTION	SALARY (BASE/ICE CONTRIBUTION)	SPOUSE CONTRIBUTION	EMPLOYEE FUNDAL	FUND	TASKS
3936402	228	Shirley	MEMBER	\$140.00				\$340.00	Vision Super Super	Default
3937174	228	Lynette	MEMBER	\$180.00				\$340.00	Vision Super Super	Default
3938442	228	Shirley	MEMBER	\$100.00		\$80.00		\$450.00	Vision Super Super	Default
3939394	228	Sammy	MEMBER	\$251.00		\$50.00		\$281.00	Asst Penalties Super	Default
3940042	228	Shirley	MEMBER	\$250.00	\$10.00			\$260.00	Vision Super Super	Default
3941744	228	Lynette	MEMBER	\$400.00		\$250.00		\$650.00	Vision Super Super	Default
Column Totals				\$1,361.00	\$10.00	\$330.00				
Grand Totals				Vison: \$1,400.00	External: \$281.00			GrandTotal: \$1,681.00		

If the employee is a Vision Super member the tasks column will contain several options to choose from. These links can be used to view details about the member, terminate them or delete the row.



If the employee is a member of another fund the tasks column will contain several options to choose from. These links can be used to view details about the external member, terminate them or delete the row.



If your file contains errors you should try to fix them online. If you have trouble fixing an error please contact our Employer Hotline on 1300 304 947. Once your file is error free and you would like to submit the file to Vision Super for processing press the submit button in the bottom right corner.

Upon clicking submit the file will be revalidated to check for any new errors in the data. If new errors are found the contribution details page will refresh and show the lines with errors. These new errors will need to be fixed before the file can be submitted.

If no new errors are found a contribution summary page will be displayed showing the overall details of the file. It will show the amount owing for the file and the split between internal members (Vision Super) and external members (other fund members).

Contribution summary screen with Vision Super and external members

vision super | Need help? 1300 304 947 | Test Employer 88 | Log out

Review and submit - contribution summary

File details

Employer	Test Employer 88	Payment method	Direct Debit
Remittance id	613	File name	Testfile.csv
Period start date	15/04/2016	Period end date	28/04/2016

Payment instructions

Direct debit date:	10/06/2016	Amount due:	\$26,544.81
Account name:	Test Employer bank account	Internal direct debit:	\$20,085.74
BSB:	083 894	External direct debit:	\$6,459.07
Account No.:	10052147		

Contribution breakdown

Internal employees		External employees	
Employees contributed to	62	Employees contributed to	24
Employer Conis	\$13,706.14	Employer Conis	\$5,123.69
Post-Tax Member Conis	\$180.00	Post-Tax Member Conis	\$20.00
Salary Sacrifice Conis	\$6,199.60	Salary Sacrifice Conis	\$1,315.38
Spouse Conis	\$0.00	Spouse Conis	\$0.00
Child Conis	\$0.00	Child Conis	\$0.00
Other 3rd Party	\$0.00	Other 3rd Party	\$0.00
Employer Voluntary Conis	\$0.00	Employer Voluntary Conis	\$0.00
Employer Award Conis	\$0.00	Employer Award Conis	\$0.00
Total Internal contributions	\$20,085.74	Total External contributions	\$6,459.07

Export PDF Format

Contribution summary screen with Vision Super only members

vision super | Need help? 1300 304 947 | Test Employer 88 | Log out

Review and submit - contribution summary

File details

Employer	Test Employer	Payment method	Direct Credit
Remittance id	33	File name	Testfile.csv
Period start date	01/06/2016	Period end date	07/06/2016

Payment instructions

Due date:	06/06/2016	Amount due:	\$1,600.00
Account name:	Vision Super	Payment reference:	81200000000011
BIB:	081 155	<i>Please quote this reference with your EFT</i>	
Account number:	8064 54299		

Contribution breakdown

Internal employees	
Employees contributed to	1
Employer Contribution	\$1,390.00
Member Contribution	\$10.00
Salary Sacrifice Contribution	\$300.00
Spouse contribution	\$0.00
Total Internal contributions:	\$1,600.00

Export PDF Format

Once you have reviewed the details on the summary screen select the final submit button to commit this file to the Vision Super database. The file will wait with Vision Super until payment is received either via EFT or direct debit. The payment methods are explained further below.

The contribution amounts entered will save when you move away from the cell you entered the amount in.



If the employees listed in the grid are free from error you can submit your contribution data to Vision Super by selecting the submit button in the bottom right corner.

Upon clicking submit the data will be revalidated to check for any new errors. If new errors are found the contribution details page will refresh and show the lines with errors. These new errors will need to be fixed before the file can be submitted.

If no new errors are found a contribution summary page will be displayed showing the overall details of the data. It will show the amount owing for the file and the amount for each contribution type.



Once you have reviewed the details on the summary screen select the final submit button to commit this data to the Vision Super database. The data will wait with Vision Super until payment is received either via EFT or direct debit. The payment methods are explained further below.

Payment methods

EFT

If you are paying via EFT you will be provided with a payment reference number when you submit your file. Please ensure you quote this number when making the payment. This will provide our system with the unique identifier to match your payment with your file and provide enhanced processing for your employees super contributions.

It is important to note that the SuperStream legislation requires you to pay your super payment on the same day the file is sent.

Summary screen with only Vision Super members:

Review and submit - contribution summary

File details

Employer: Test Employer 23	Period start date: 01/08/2016	Payment method: Direct Debit	File name: Testfile.csv
Remittance id:		Period end date:	07/08/2016

Payment instructions

Direct debit date: 08/08/2016	Account name: Vision Super	Amount due: \$1,400.00
BSB: 081 155	Account number: 8064 56299	Payment reference: 82000000000011

Contribution breakdown

Internal employees

Employer Contribution: \$1,390.00	Member Contributions: \$10.00	Salary Sacrifice Contributions: \$300.00	Spouse contributions: \$1.00
Total Internal contributions: \$1,400.00			

Export: PDF Format [Go] [Back] [Submit]

Summary screen with Vision Super and external members:

Review and submit - contribution summary

File details

Employer: Test Employer 88	Period start date: 15/04/2016	Payment method: Direct Debit	File name: Testfile.csv
Remittance id: 613		Period end date:	28/04/2016

Payment instructions

Direct debit date: 10/08/2016	Account name: Test Employer bank account	Amount due: \$26,544.81
BSB: 083 894	Account No.: 10052147	Internal direct debit: \$20,085.74
		External direct debit: \$6,459.07

Contribution breakdown

Internal employees		External employees	
Employees contributed to: 62		Employees contributed to: 24	
Employer Confs: \$13,706.14	Post-Tax Member Confs: \$180.00	Employer Confs: \$5,123.69	Post-Tax Member Confs: \$20.00
Salary Sacrifice Confs: \$6,199.60	Spouse Confs: \$0.00	Salary Sacrifice Confs: \$1,315.38	Spouse Confs: \$0.00
Child Confs: \$0.00	Other 3rd Party: \$0.00	Child Confs: \$0.00	Other 3rd Party: \$0.00
Employer Voluntary Confs: \$0.00	Employer Award Confs: \$0.00	Employer Voluntary Confs: \$0.00	Employer Award Confs: \$0.00
Total Internal contributions: \$20,085.74		Total External contributions: \$6,459.07	

Export: PDF Format [Go] [Back] [Submit]

Direct Debit

If you are using the Vision Super clearing house your payment method will be direct debit. You don't have to be using our clearing house service to choose direct debit as your payment method. If you would like to make your payments via direct debit simply complete our direct debit request form available on our website www.visionsuper.com.au/images/forms/form16.pdf and send it to us to register your bank details.

The cut off time to submit files using direct debit is 2.00pm. If your file is submitted before 2.00pm the direct debit date will be the date the file was submitted. If your file is submitted after 2.00pm the direct debit date will be the next day.

It is important to note that the SuperStream legislation requires you to pay your super payment on the same day the file is sent. Our system caters for this to happen automatically when using direct debit.

If you are paying your super for all of your staff, whether they are with Vision Super or another fund, two direct debit amounts will be deducted from your nominated account. The amounts will be split between the Vision Super members and all other staff. The confirmation report will provide you with the totals for each direct debit.

vision super [Need help?](#) 1300 304 947 [Test Employer 88](#) [My Superstream Account](#) [Logout](#)

Review and submit - contribution summary

File details

Employer:	Test Employer 88	Payment method:	Direct Debit
Remittance id:	613	File name:	Testfile.csv
Period start date:	15/04/2016	Period end date:	28/04/2016

Payment instructions

Direct debit date:	10/06/2016	Amount due:	\$26,544.81
Account name:	Test Employer bank account	Internal direct debit:	\$20,085.74
BSB:	083 394	External direct debit:	\$6,459.07
Account No.:	10052147		

Contribution breakdown

Internal employees		External employees	
Employees contributed to:	62	Employees contributed to:	24
Employer Costs:	\$13,706.14	Employer Costs:	\$5,123.69
Post-Tax Member Costs:	\$180.00	Post-Tax Member Costs:	\$20.00
Salary Sacrifice Costs:	\$6,199.60	Salary Sacrifice Costs:	\$1,315.38
Spouse Costs:	\$0.00	Spouse Costs:	\$0.00
Child Cost:	\$0.00	Child Cost:	\$0.00
Other 3rd Party:	\$0.00	Other 3rd Party:	\$0.00
Employer Voluntary Costs:	\$0.00	Employer Voluntary Costs:	\$0.00
Employer Award Costs:	\$0.00	Employer Award Costs:	\$0.00
Total Internal contributions	\$20,085.74	Total External contributions	\$6,459.07

Export PDF Format

Member maintenance

Add a new Vision Super member

To add a new Vision Super member select the member maintenance icon from the landing page and select the add new member link from the left hand menu

The screenshot shows the 'Add new member' form in the Vision Super system. The form has the following fields:

- TFN*: 552 479 750
- Surname*: Test
- Given names*: Member A
- Date of birth*: 05/07/1985

A 'Start' button is located below the form. The page also features a navigation menu on the left and a 'Handy links' section at the bottom right.

Enter the new member details:

- Tax File Number
- Surname
- Given names
- Date of birth

Select next to proceed

This screenshot is identical to the one above, showing the 'Add new member' form with the same fields and layout.

Based on the information provided the system performs a search of the Vision Super database to look for an exact match. If a match is found you will proceed with the new member registration however the details will be linked to the existing member.

If no match is found a brand new member record will be created.

Complete all required details for the add new member screen.

Required details are marked with an *.

When entering the members address details you must enter a mailing address, the system defaults this to also be their residential address.

The screenshot shows the 'Add new member' form. The left sidebar contains navigation links: 'My dashboard', 'Contributors', 'Member maintenance' (with sub-links for adding new members, adding new residential members, outstanding approvals, and search for members), 'Employer details', and 'Other resources'. The main form fields are: Last name* (Text), Given names* (Member A), Date of birth* (06/07/1985), Tax File Number* (552-479-750), Title* (Mrs), Gender* (Female), Mailing country* (Australia), Mailing address line 1* (1 Tacking Street), Mailing address line 2* (empty), Mailing suburb* (Berrima), Mailing state* (dropdown), Mailing postcode* (empty), and a checkbox for 'Residential address same as mailing address' which is checked.

If the member has a separate residential address un-tick the box and enter separate residential address details.

This screenshot shows the same 'Add new member' form, but with the 'Residential address same as mailing address' checkbox unchecked. Additional fields for residential details are visible: Residential country* (Australia), Residential address line 1* (empty), Residential address line 2* (empty), Residential suburb* (empty), Residential state* (dropdown), and Residential postcode* (empty).

When entering a suburb you will be presented with a list of available selections, select the one that matches the members address.

My dashboard

Contributions

Member maintenance

- + Add new member
- + Add new external member
- + Outstanding approvals
- + Search for member

Employer details

Other resources

Add new member

Last name * Test

Given names * Member A

Date of birth * 05/07/1985

Tax File Number * 552-479-750

Title *

Gender *

Mailing country *

Mailing address line 1 *

Mailing address line 2

Mailing suburb *

MOUNT RICHMOND	3305	VIC
NORTH RICHMOND	2754	NSW
RICHMOND	2753	NSW
RICHMOND	3121	VIC
RICHMOND	4740	QLD
RICHMOND	4822	QLD
RICHMOND	5033	SA
RICHMOND	7025	TAS
RICHMOND EAST	3121	VIC
RICHMOND HILL	2480	NSW

Mailing state *

Mailing postcode *

Residential address same as mailing address

Home phone no

Work phone no

Mobile no

Email

Payroll number *

Date joined employer *

Plan start date *

Salary (gross annual) *

Location

Employment status *

At work statement *

* required fields

Once the entire new member data is entered select add member or associate. The add member button is presented when a brand new member is being registered. The associate button is presented when the system found a match to the TFN, name and date of birth entered and the new details are being matched to the existing member.

My dashboard

Contributions

Member maintenance ➔

- Add new member
- Add new external member
- Outstanding approvals
- Search for member

Employer details

Other resources

Add new member

Last name *	Test
Given names *	Member A
Date of birth *	05/07/1985
Tax File Number *	552-479-750
Title *	<input type="text" value="Mrs"/>
Gender *	<input type="text" value="Female"/>
Mailing country *	<input type="text" value="Australia"/>
Mailing address line 1 *	<input type="text" value="1 Testing Street"/>
Mailing address line 2	<input type="text"/>
Mailing suburb *	<input type="text" value="RICHMOND"/>
Mailing state *	<input type="text" value="VIC"/>
Mailing postcode *	<input type="text" value="3121"/>
Residential address same as mailing address	<input checked="" type="checkbox"/>
Home phone no	<input type="text"/>
Work phone no	<input type="text"/>
Mobile no	<input type="text"/>
Email	<input type="text" value="Test@visionsuper.com.au"/>
Payroll number *	<input type="text" value="TEST001"/>
Date joined employer *	<input type="text" value="01/09/2015"/>
Plan start date *	<input type="text" value="01/09/2015"/>
Salary (gross annual) *	<input type="text" value="\$75,000.00"/>
Location	<input type="text" value="Select a location..."/>
Employment status *	<input type="text" value="Non-casual"/>
At work statement *	<input type="text" value="Yes"/>

* required fields

Add member
Cancel

Handy links

- ? [About page](#)
- ! [Help page](#)
- 🔍 [Privacy](#)

Upon adding the member a new member report will be provided with the member number. You can elect to add another member, print or you can navigate away from the page to perform another function.

My dashboard

Contributions

Member maintenance ➔

- ➔ Add new member
- ➔ Add new external member
- ➔ Outstanding approvals
- ➔ Search for member

Employer details

Other resources

Add new member

New member (89941988) has been successfully created.

Last name	Test
Given names	Member A
Date of birth	05/07/1985
Tax File Number	552-479-750
Title	Mrs
Gender	Female
Mailing country	Australia
Mailing address line 1	1 Testing Street
Mailing address line 2	
Mailing suburb	RICHMOND
Mailing state	VIC
Mailing postcode	3121
Residential address same as mailing address	Yes
Home phone no	
Work phone no	
Mobile no	
Email	Test@shsinsuper.com.au
Payroll number	TEST001
Date joined employer	01/09/2015
Plan start date	01/09/2015
Salary (gross annual)	\$75,000.00
Location	
Employment status	Non-casual
At work statement	Yes

Add another member

Print

Add a new non Vision Super member

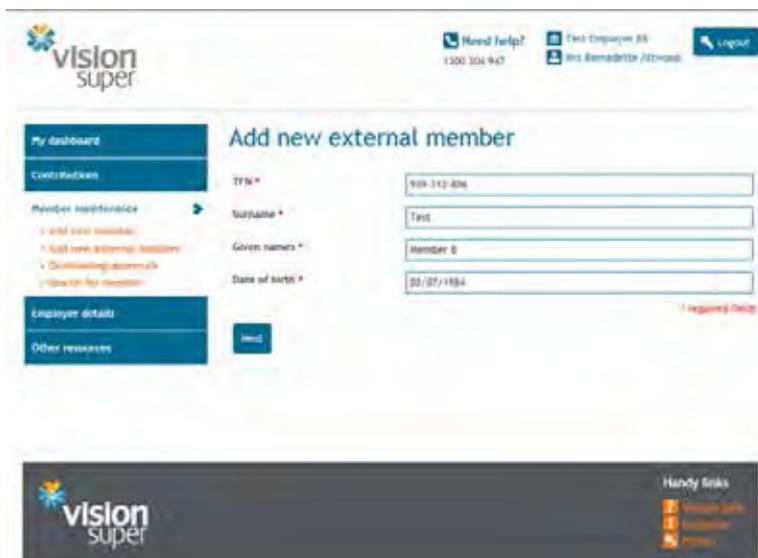
To add a new non Vision Super member select the member maintenance icon from the landing page and select the add new external member link from the left hand menu.



Enter the new external member details:

- Tax File Number
- Surname
- Given names
- Date of birth

Select next to proceed



Based on the information provided the system performs a search of the Vision Super database to look for an exact match. If a match is found you will proceed with the new external member registration however the details will be linked to the existing external member.

If no match is found a brand new external member record will be created.

Complete all required details for the add new external member screen. Required details are marked with an *.

When entering the external members address details you must enter a mailing address, the system defaults this to also be their residential address.

vision super | [Need help?](#) 1300 224 847 | [Test Environment ID](#) | [Mrs. Bernadette Atkinson](#) | [Logout](#)

Add new external member

Last name *	Test
Given names *	Member B
Date of birth *	01-01-1984
Tax File Number *	929 712 806
Title *	Mr
Gender *	Male
Mailing country *	Australia
Mailing address line 1 *	PO Box 100
Mailing address line 2	
Mailing suburb *	MELBOURNE
Mailing state *	VIC
Mailing postcode *	3000
<input checked="" type="checkbox"/> Residential address same as mailing address	<input type="checkbox"/>

If the member has a separate residential address un-tick the box and enter separate residential address details.

vision super | [Need help?](#) 1300 224 847 | [Test Environment ID](#) | [Mrs. Bernadette Atkinson](#) | [Logout](#)

Add new external member

Last name *	Test
Given names *	Member B
Date of birth *	01-01-1984
Tax File Number *	929 712 806
Title *	Mr
Gender *	Male
Mailing country *	Australia
Mailing address line 1 *	PO Box 100
Mailing address line 2	
Mailing suburb *	MELBOURNE
Mailing state *	VIC
Mailing postcode *	3000
<input type="checkbox"/> Residential address same as mailing address	<input checked="" type="checkbox"/>
Residential country *	Australia
Residential address line 1 *	1 Address Road
Residential address line 2	
Residential suburb *	MELBOURNE
Residential state *	VIC
Residential postcode *	3001

Download the privacy statement and provide it to the employee. Once the entire new member data is entered select add member or associate. The add member button is presented when a brand new member is being registered. The associate button is presented when the system found a match to the TFN, name and date of birth entered and the new details are being matched to the existing member.

My dashboard

Configure roles

Member maintenance

- Add new member
- Add new external member
- Outstanding approvals
- Search by member

Employer details

Other resources

Add new external member

Last name * Test

Given names * Member B

Date of birth * 22/02/1984

Tax File Number * 930-312-806

Title *

Gender *

Mailing country *

Mailing address line 1 *

Mailing address line 2 *

Mailing suburb *

Mailing state *

Mailing postcode *

Residential address same as mailing address

Residential country *

Residential address line 1 *

Residential address line 2 *

Residential suburb *

Residential state *

Residential postcode *

Home phone no.

Work phone no.

Mobile no.

Email

Payroll number *

Date joined employer *

Membership number *

Terminated super fund (MSF)

Product, fund, ABN or TFN *

Unique superannuation identifier

Super fund ABN

Fund name

Product name

Payment method

Check the box to acknowledge a statement of disclosure has been provided to the employee.

vision super

Helpful links

- Home
- My dashboard
- Member maintenance
- Employer details
- Other resources

Upon selecting add member the new external member record moves to the outstanding approvals page for a second contact to approve.

Outstanding approvals

The outstanding approvals list contains all new external members and all fund choice changes awaiting approval.

Note: the user that created the new external member or changed the fund choice cannot see the record in the outstanding approvals list.

To approve the record select the external member by clicking on their name

NAME	PAYROLL	FUND NAME	STATUS	ENTERED BY	DATE ENTERED
Mr Andrew S Ford	Unrecorded	Health Employees Superannuation Trust Australia	Pending approval	First Choice Database	22/08/2014

Check that the details match the new external member or fund choice change and select an authorisation status of approved and add a comment (if required).

Name: Mr Andrew S Ford

Mailing address: PO Box 100
461, 600496 VIC 3000

Residential address: 1 Address Road
461 600496 VIC 3000

Name prefix:

Work phone:

Mobile:

Email:

Date of birth: 03/20/1964

Tax File Number: Tax file number supplied

Membership number: 662214

Payroll no: 12370001

Self managed super fund (SMPF):

Unique superannuation identifier: 107102040

Super fund ABN: 66 971 748 221

Fund name: Health Employees Superannuation Trust Australia

Product name: HESTA

Payment method: Direct Credit

Authorisation status: Pending approval

Comment:

Note: if there is an error with the record and it needs to be amended you can reject the record. You must contact Vision Super to remove the record from our database so that the new external member or fund choice change can be added again.

Search for member

The search for member screen lists all active members listed with Vision Super. If you are using the SuperStream file format this will only be Vision Super members. If you are using the Vision Super file format this will be Vision Super and external members. To navigate to the search for member screen select the member maintenance icon from the landing page.

The list defaults to show active members only. You can change this to show active and terminated members.

You can also export the list to either PDF or excel format.

Note: if the member has multiple accounts with Vision Super (Defined Benefit and Super Saver) they will have multiple records to choose from.

To view a member's information you can use the search for member screen to find the member. You can search using:

- Member number
- Payroll number
- Name
- Account name

The screenshot shows the 'Search for member' interface. At the top right, there are links for 'Need help?' (1300 304 947), 'Test Employer 88 Mr Steve Smith', and 'Logout'. On the left, there is a navigation menu with 'My dashboard', 'Contributions', 'Member maintenance' (with sub-links: 'Add new member', 'Add new external member', 'Outstanding approvals', 'Search for member'), 'Employer details', and 'Other resources'. The main area is titled 'Search for member' and contains a search terms input field, a 'Display members' section with radio buttons for 'Active members only' (selected) and 'Active and terminated members', and a table of members.

MEMBER #	PAYROLL #	NAME	DATE OF BIRTH	EMPLOYED FROM	ACCOUNT NAME	STATUS	EMPLOYMENT STATUS
89941988	TEST001	MEMBER A TEST	05/07/1985	01/09/2015	Vision Super Saver	Active	Non-Casual
89941989	TEST0002	MEMBER B TEST	03/07/1984	07/01/2016	External Fund	Active	

At the bottom of the table area, there is an 'Export' dropdown menu set to 'PDF format' and a 'Go' button. At the bottom right, there is a 'Handy links' section with icons for 'Website help', 'Disclaimers', and 'Privacy'.

Once a member is selected additional links appear under the member maintenance option.

These additional links are:

- Member information
- Salary information
- Additional information
- Fund choice
- Contribution history

These pages are discussed in detail in the following sections.

Maintain member records – member information

You can maintain a members personal details via the member information page. Using the search for member screen search and find the member and click on their name to enter their record.

You can terminate the member or edit their personal details from this screen.

The screenshot displays the 'Member information' page in the Vision Super system. The page is divided into a sidebar on the left and a main content area. The sidebar contains navigation links such as 'My dashboard', 'Contributors', 'Member maintenance', 'Employer details', and 'Other resources'. The main content area is titled 'Member information' and 'Member details'. It features a 'Terminate' button at the top. Below this, a list of member details is shown, including Member number (89941988), Name (Mrs Member A Test), Plan (Vision Super Silver), Date joined (01/09/2015), Mailing address (1 Testing Street, RICHMOND VIC 3121), Residential address (1 Testing Street, RICHMOND VIC 3121), Horse phone, Work phone, Mobile, Email (wilm@vision-support.co.uk), Date of birth (05/07/1985), and Tax File Number (Tax file number supplied). An 'Edit' button is located below the details. At the bottom of the page, there is an 'Export' dropdown menu set to 'PDF format' and a 'Go' button.

Select edit to update the members personal details. You can update the following details:

- Mailing address
- Residential address
- Phone numbers
- Email address

Enter the details to be changed, select the declaration and click the save button to finalise the changes.

If updating an address you must enter the members mailing address, this can be copied to their residential address or a separate residential address can be entered.

If updating phone numbers home and work phone must contain the area code.



[Need help?](#)
1300 304 947

[Test Employer BB](#)
Mr Steve Smith Viewing 89941988

[Logout](#)

[My dashboard](#)

[Contributions](#)

[Member maintenance](#)

[Employer details](#)

[Other resources](#)

Member information

Member details

Terminate

Member number	89941988
Name	Mrs Member A Test
Plan	Vision Super Saver
Date joined	01/09/2015
Mailing country	<input type="text" value="Australia"/>
Mailing address line 1 *	<input type="text" value="1 Testing Street"/>
Mailing address line 2	<input type="text"/>
Mailing suburb *	<input type="text" value="RICHMOND"/>
Mailing state *	<input type="text" value="VIC"/>
Mailing postcode *	<input type="text" value="3121"/>
Residential address same as mailing address	<input checked="" type="checkbox"/>
Home phone	<input type="text"/>
Work phone	<input type="text" value="(03) 9911 3222"/>
Mobile	<input type="text" value="0423 568 468"/>
Email	<input type="text" value="bttest@visionsupport.com"/>
Date of birth	05/07/1985
Tax File Number	Tax file number supplied

I declare I have the appropriate authority to make changes to this member's information.

* required fields

SAVE

CANCEL

Maintain member records – termination

Super Saver

You can terminate a member via the member information page. Using the search for member screen search and find the member and click on their name to enter their record.

Select the terminate button

The screenshot shows the Vision Super member information page. At the top left is the Vision Super logo. At the top right, there are links for 'Need help? 1300 304 947', 'Test Employer 88 Mr Steve Smith Viewing 89941990', and a 'Logout' button. On the left side, there is a navigation menu with 'My dashboard', 'Contributions', 'Member maintenance' (with a sub-menu including 'Add new member', 'Add new external member', 'Outstanding approvals', 'Search for member', 'Member information', 'Salary information', 'Additional information', 'Fund choice', and 'Contribution history'), 'Employer details', and 'Other resources'. The main content area is titled 'Member information' and 'Member details'. A 'Terminate' button is highlighted in blue. Below it, the member details are listed: Member number (89941990), Name (Mr Member C Test), Plan (Vision Super Saver), Date joined (15/03/2016), Mailing address (Test address 3, SURREY HILLS VIC 3127), Residential address (Test address 3, SURREY HILLS VIC 3127), Home phone, Work phone, Mobile, Email, Date of birth (03/07/1954), and Tax File Number (Tax file number supplied). An 'Edit' button is also visible. At the bottom, there is an 'Export' dropdown menu set to 'PDF format' and a 'Go' button. The footer contains the Vision Super logo and 'Handy links' for Website, Help, and Privacy.

Complete the following information:

- Termination reason
- Termination date
- Contributions owing
- Address change for the member

Select next to proceed

Terminate employment

Please fill out the details of the member termination.

Member details

Employer code	010000
Payroll no.	TEST003
Plan	Vision Super Saver
Member number	89941990
Name	Mr Member C Test
Date of birth	03/07/1954

Termination details

Termination reason *	Resignation / Dismissal
Termination date *	26/04/2016

Are there any further contributions due for this employee?
 Yes No

Change member address?
 Yes No

* required field

Next > **Cancel**

Review the termination details and **click submit** to finalise the termination.

The screenshot shows a web interface for terminating employment. A modal window titled "Terminate employment" is open, displaying a "Review changes" section. The text above the form reads: "Please review the changes and submit to complete the termination." The form contains the following fields:

Employer code	010000
Payslip no	7637001
Plan	Vision Super Saver
Member number	8941990
Name	Mr Member C Test
Date of birth	01/07/1954
Termination reason	Resignation / Dismissal
Termination date	26/04/2016
Are there any further contributions due for this employee?	No
Change member address?	No

At the bottom of the form are three buttons: "Back", "Submit", and "Cancel".

If there are errors click back to make changes or cancel to not proceed with the termination. Upon submitting a termination report will be presented that can be exported to PDF or excel format.

The screenshot shows the same web interface, but the modal window now displays "Termination successful". The text above the form reads: "The following details have been successfully submitted. Please print a copy if you require." The form contains the following fields:

Employer code	010000
Payslip no	7637001
Plan	Vision Super Saver
Member number	8941990
Name	Mr Member C Test
Date of birth	01/07/1954
Termination reason	Resignation / Dismissal
Termination date	26/04/2016
Transfer to another Vision super employee?	No
Are there any further contributions due for this employee?	No
Change member address?	No

A "Close" button is located at the bottom left of the form. Below the form is an "Export" dropdown menu set to "PDF format" and a "Go" button.

Defined Benefit

To process a termination select the member from the search for member screen and click the terminate button.



Enter the termination reason and termination date and click next to proceed

Terminate employment

Please fill out the details of the member termination.

Member details

Member details

Employer code	123456
Payroll no	101260
Plan	Defined Benefit Plan
Member number	80857527
Name	Mr David Crowthers
Date of birth	19/10/1958

Termination details

Termination reason *

Termination date *

Are there any further contributions due for this employee? Yes No

Change member address? Yes No

* required fields

Enter yes/no to advise Vision Super if the member:

- ▶ Salary needs updating
- ▶ Service fraction needs updating
- ▶ Is on leave without pay
- ▶ Owes contributions

Click next

Terminate employment

Additional information

Please complete the details below to ensure the employees defined benefit is calculated correctly.

Update salary? Yes No

Update service fraction? Yes No

Was this employee on leave without pay at termination? Yes No

Are contributions owed? Yes No

Some resignation/retirement terminations will require a declaration to be acknowledged in relation to possible additional funding obligations. The declaration will be on the final

termination summary screen for you to acknowledge prior to submitting the termination (see the retrenchment process for the declaration).

Review the termination details, if data is incorrect click back to make changes. If the data is correct select the check box to acknowledge the declaration (if applicable) and click submit to finalise the termination.

Terminate employment

Review changes

Please review the changes and submit to complete the termination.

Employer code	123456
Payroll no	101260
Plan	Defined Benefit Plan
Member number	80857527
Name	Mr David Crowthers
Date of birth	19/10/1958
Termination reason	Retirement
Termination date	23/05/2016
Are there any further contributions due for this employee?	No
Change member address?	No
Update salary?	No
Update service fraction?	No
Was this employee on leave without pay at termination?	No
Are contributions owed?	No

* required fields

Back

Submit

Cancel

A confirmation report is provided for the termination. This can be extracted to PDF or excel format.

Terminate employment

Termination successful

The following details have been successfully submitted.

Please print a copy if you require.

Employer code	123456
Payroll no	101260
Plan	Defined Benefit Plan
Member number	80857527
Name	Mr David Crowthers
Date of birth	19/10/1958
Termination reason	Retirement
Termination date	23/05/2016
Are there any further contributions due for this employee?	No
Change member address?	No
Update salary?	No
Update service fraction?	No
Was this employee on leave without pay at termination?	No
Are contributions owed?	No

* required fields

Close

Export

PDF format

Go

Retrenchment

If a Defined Benefit member has ceased work due to retrenchment there may be additional funding required to be paid to the member for their Defined Benefit entitlement. If you would like to know if any additional payments will be required due to a retrenchment please contact Vision Super directly.

To process a termination select the member from the search for member screen and **click the terminate button**.



Select the reason for the termination – retrenchment and the termination date and **click next**.

Terminate employment

Please fill out the details of the member termination.

Member details

Member details

Employer code 123456
Payroll no 100423
Plan Defined Benefit Plan
Member number 80321457
Name Miss Sarah Smith
Date of birth 20/09/1953

Termination details

Termination reason *

Termination date *

Are there any further contributions due for this employee?
 Yes No

Change member address?
 Yes No

* required fields

Enter yes/no to advise Vision Super if the member:

- ▶ Salary needs updating
- ▶ Service fraction needs updating
- ▶ On leave without pay
- ▶ Owes contributions

Click next

Terminate employment

Additional information

Please complete the details below to ensure the employee's defined benefit is calculated correctly.

- Update salary? Yes No
- Update service fraction? Yes No
- Was this employee on leave without pay at termination? Yes No
- Are contributions owed? Yes No

[Back](#) [Next >](#) [Cancel](#)

The final screen provides a summary of the details entered for the termination and a declaration in relation to possible additional funding obligations. Review the termination details, if data is incorrect click back to make changes. If the data is correct select the check box to acknowledge the declaration and click submit to finalise the termination.

Terminate employment

Review changes

Please review the changes and submit to complete the termination.

Employer code	123456
Payroll no	100423
Plan	Defined Benefit Plan
Member number	80321457
Name	Miss Sarah Smith
Date of birth	20/09/1953
Termination reason	Retrenchment
Termination date	25/05/2016
Are there any further contributions due for this employee?	No
Change member address?	No
Update salary?	No
Update service fraction?	No
Was this employee on leave without pay at termination?	No
Are contributions owed?	No

I hereby certify that the employee named above has been 'retrenched' for the purposes of the Trust
 Deed. I understand that a 'top-up' contribution for funding purposes will be calculated by Vision Super and any cost will be invoiced to us.

* required fields

[Back](#) [Submit](#) [Cancel](#)

A confirmation report is provided for the termination. This can be extracted to PDF or excel format.

Terminate employment

Termination successful

The following details have been successfully submitted.

Please print a copy if you require.

Employer code	123456
Payroll no	100423
Plan	Defined Benefit Plan
Member number	80321457
Name	Miss Sarah Smith
Date of birth	20/09/1953
Termination reason	Retrenchment
Termination date	25/05/2016
Are there any further contributions due for this employee?	No
Change member address?	No
Update salary?	No
Update service fraction?	No
Was this employee on leave without pay at termination?	No
Are contributions owed?	No

I hereby certify that the employee named above has been 'retrenched' for the purposes of the Trust

- Deed. I understand that a 'top-up' contribution for funding purposes will be calculated by Vision Super and any cost will be invoiced to us.

* required fields

Close

Export

PDF format

Go

Death or disability terminations

Death or disability terminations cannot be submitted via Employer Online. You can download a pre-populated termination form by following the termination steps outlined above, select death or disability as the reason and a download form button will be available.

Terminate employment

Review changes

Please review the changes and submit to complete the termination.

Employer code	123456
Payroll no	102784
Plan	Vision Super Saver
Member number	80321457
Name	Miss Sarah Smith
Date of birth	27/11/1955
Termination reason	Death
Termination date	16/05/2016

Termination Form

Please fill out the following PDF form and print it out for a Death or Disability / Ill Health Termination notice before you continue.

[Download PDF](#)

[Back](#) [Cancel](#)

Maintain member records – salary information

The salary information page lists all salaries for the member that relate to their employment with the employer logged in to the site. If the member has previous employment records with other Vision Super employers the details will not be displayed. To navigate to the salary information screen search for the member and select their name from the list, click the salary information hyperlink in the left hand menu.

New salaries can be added by using the add new salary button.

The salaries can be exported to PDF or excel format.

The screenshot shows the 'Salary information' page for a member named 'A Test'. The page includes a sidebar with navigation options and a main content area with a table of salary commitments. The table has two columns: 'SALARY COMMITMENT DATE' and 'SALARY'. A row shows a date of 01/01/2015 and a salary of 67,888.60. There are buttons for 'Add new salary' and 'Export' (with a dropdown menu set to 'PDF format'). A 'Back to member information' button is also present. The footer includes the Vision Super logo and 'Handy links'.

Enter the commencement date and the new salary amount and **click save**.

The screenshot shows the 'Salary information' page in the Vision Super system. On the left is a navigation menu with 'My dashboard', 'Contributions', 'Member maintenance', 'Employer details', and 'Other resources'. The 'Member maintenance' section is expanded, showing options like 'Add new member', 'Add new external member', 'Outstanding approvals', 'Search for members', 'Member information', 'Salary information', 'Additional information', 'Fund choice', and 'Contribution history'. The 'Salary information' section contains two input fields: 'Salary commencement date' with the value '01/01/2016' and 'Salary' with the value '\$82,000.00'. Below these fields are 'Save' and 'Cancel' buttons. At the top right, there are links for 'Need help?', 'Test Employer ID', and 'Logout'. A 'Handy links' section at the bottom right includes 'Employer ID', 'Employment', and 'Funds'.

The new record will be added to the list of salaries for the member.

The screenshot shows the 'Salary information' page after a new record has been added. The 'Salary information for Member A Test' section displays a table with the following data:

SALARY COMMENCEMENT DATE	SALARY
01/01/2015	\$85,000.00
01/01/2016	\$82,000.00
01/01/2017	\$75,000.00

Below the table is an 'Add new salary' button. At the bottom, there is an 'Expert' dropdown menu set to 'PDF format' and a 'Go' button. A 'Back to member information' button is also visible. The navigation menu and 'Handy links' section are the same as in the previous screenshot.

Defined Benefit salaries outside allowable limits

There are certain rules around updating a salary for a Defined Benefit member. These rules require additional information and supporting documentation to be provided as part of the salary update. They are:

- ▶ New salary cannot be less than previous salary
- ▶ New salary cannot be more than 5% greater than previous salary
- ▶ New salary cannot be more than 180 days in the past
- ▶ New salary cannot be more than 45 days in advance

Where a salary is entered for a Defined Benefit member and it requires additional information the following page will be displayed.

The screenshot shows the 'Salary information' page in the Vision Super system. The page displays the following details:

- Salary commencement date: 01/05/2016
- Salary: 580,000.00
- Document type: Change of salary
- File upload: A button labeled 'Select File' is present.
- Comment: A text input field with a red asterisk indicating it is required.
- Navigation: 'Previous', 'Save', and 'Cancel' buttons are at the bottom.

Select a file to provide evidence for the salary change and enter any comments about the change. **Click save** to send this salary update to Vision.

The screenshot shows the 'Salary information' page after a file upload. The page displays the following details:

- Salary commencement date: 01/05/2016
- Salary: 580,000.00
- Document type: Change of salary
- File upload: A button labeled 'Details' is present, and a file named 'Salary update 16.pdf' (224.47 KB) is listed.
- Comment: A text input field containing the text 'Salary update is permanent'.
- Navigation: 'Previous', 'Save', and 'Cancel' buttons are at the bottom.

Note: The salary update will be transferred to Vision Super for review. We may contact you for further information about the change.

Maintain member records – additional information

Super Saver

The additional information page displays the members:

- ▶ Payroll number
- ▶ Location
- ▶ Employment start date
- ▶ Current salary
- ▶ Employment history

To navigate to the additional information screen search for the member and select their name from the list, click the additional information hyperlink in the left hand menu.

You can edit the member's payroll number and location on this page. You can also add a new employment history (casual/non-casual) for the member. The information on this page can also be exported to PDF or excel if required.

The screenshot shows the 'Additional information' page for a member. The page title is 'Additional information' and the account is 'Vision Super Saver V555 / 296542'. The member's name is 'Testing Member A'. The page displays the following information:

Payroll no	TEST0001	Employment start date	03/11/2015
Location	No Location	Current salary	580,000.00

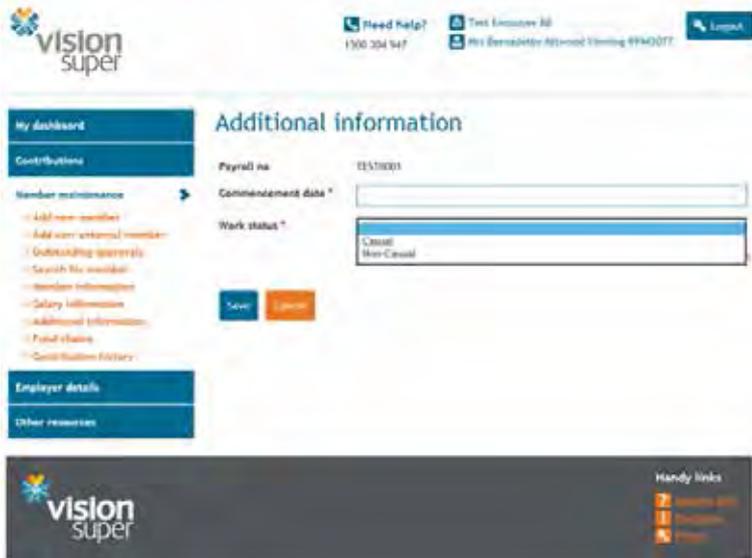
There is an 'Edit' button below the table. Below the table is the 'Employment history' section, which shows a table with columns 'COMMENCEMENT DATE' and 'WORK STATUS'. The table contains one row with '03/11/2015' and 'Non-Casual'. There is a 'New work history >' button below the table. At the bottom of the page, there is an 'Export' dropdown menu set to 'PDF format' and a 'Go' button.

To edit the member's payroll number or location click the edit button. Enter the new payroll number or select a location for the member and click save. These changes will be visible online immediately and will also pass through to the Vision Super administration database.

The screenshot shows the 'Additional information' page with the edit fields highlighted. The 'Payroll no' field contains 'TEST0001' and the 'Employment start date' is '03/11/2015'. The 'Location*' field is a dropdown menu with 'No Location' selected. The 'Current salary' is '580,000.00'. There are 'Save' and 'Cancel' buttons below the fields. A red asterisk and the text '* Required field' are visible next to the 'Location*' field.

To add a new employment history record (change the member's employment status) click the new work history button. Enter the effective date of the change as well as the employment status of either casual or non-casual. These changes will be visible online immediately and will also pass through to the Vision Super administration database.

Note: if changing the member from casual to non-casual an updated salary is required for insurance purposes. Please add a new salary record in the salary information section of the site that reflects the member's salary for the employment status change.



Defined Benefits

The additional information page for a Defined Benefit member contains:

- ▶ Payroll number
- ▶ Location
- ▶ Employment start date
- ▶ Current salary
- ▶ Service fraction history
- ▶ Contribution rate history
- ▶ Leave without pay history

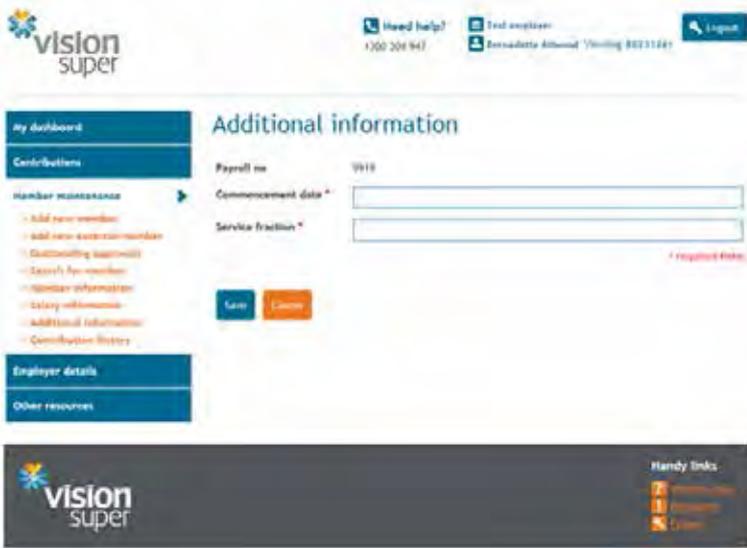
You can edit the member's payroll number and location on this page. You can also add/amend service fraction details and contribution rates. The leave without pay form can be downloaded, completed and sent to Vision Super. The information on this page can also be exported to PDF or excel if required.

Where there are a large number of records for service fraction history and contribution rates navigation buttons are available to scroll through the records.

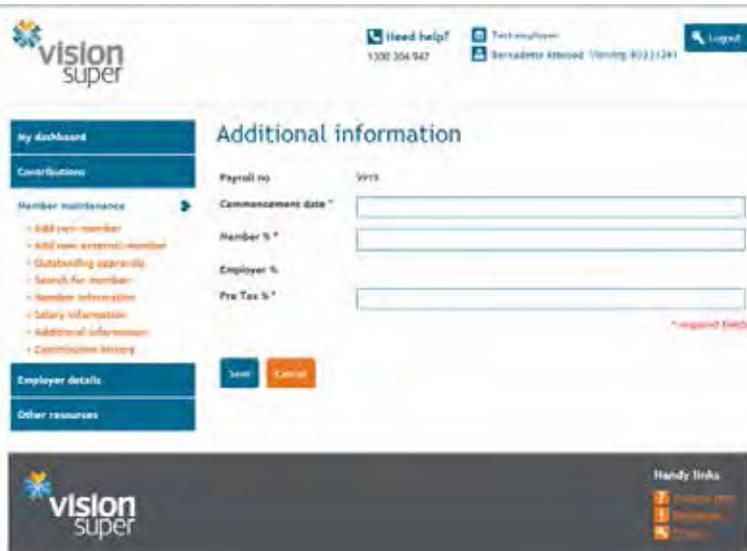
The screenshot shows the 'Additional information' page for a member named Trevor Smith. The page is divided into several sections:

- Header:** Vision Super logo, 'Need help?' (1300 304 947), 'This member' (Kernathia Aboumad - ID: 8077381), and a 'Logout' button.
- Left Navigation:** 'My dashboard', 'Contributions', 'Member maintenance' (with sub-links: Add new member, Add new internal member, Outstanding approvals, Details for member, Member self service, Salary information, Additional information, Contribution history), 'Employer details', and 'Other resources'.
- Account:** 'Additional information' dropdown menu, 'Account: Defined Benefit Plan VDB / 440533'.
- Member Information:** 'Additional information for Trevor Smith'. Fields include: Payroll no: 9999, Employment start date: 29/04/1996, Location: No Location, Current salary: \$18,841.00. A 'Go' button is present.
- Service fraction history:** Table with columns 'COMMENCEMENT DATE' and 'SERVICE FRACTION'. One record is shown: 29/04/1996, 99.00%. A 'View service fraction' button is below.
- Contribution rate history:** Table with columns 'COMMENCEMENT DATE', 'MEMBER %', 'EMPLOYEE %', and 'PRE-TAX %'. Five records are shown, all with 4.00% member and employee contributions and 3.00% pre-tax contributions.
- Navigation:** 'First', 'Prev', '1 of 5', 'Next', 'Last' buttons.
- Leave without pay history:** 'View contribution rate' button, 'Leave without pay history' section with 'START DATE' and 'END DATE' columns. A message states 'No Leave Without Pay history'. A 'Download LWP form' button is below.
- Export:** 'Export' dropdown menu (set to 'PDF format') and a 'Go' button.
- Footer:** Vision Super logo and 'Handy links' section with three icons.

To add a new service fraction click the new service fraction button. Enter the commencement date and the new service fraction percentage for the member and click save. You can also edit service fraction details within the previous two years by clicking on the commencement date hyperlink. These changes will be visible online immediately and will also pass through to the Vision Super administration database.

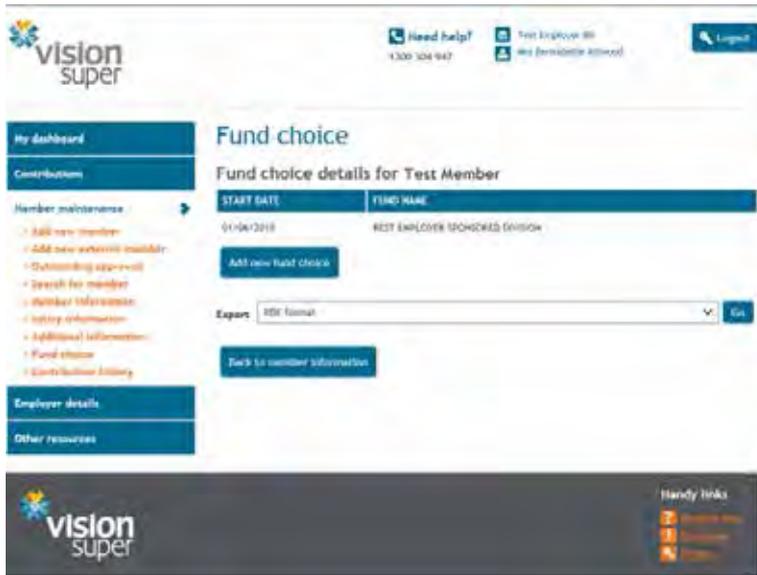


To add a new contribution rate click the new contribution rate button. Enter the commencement date, member percentage and/or pre-tax percentage and click save. You can also edit contribution rate details within the previous two years by clicking on the commencement date hyperlink. These changes will be visible online immediately and will also pass through to the Vision Super administration database.



Maintain member records – fund choice

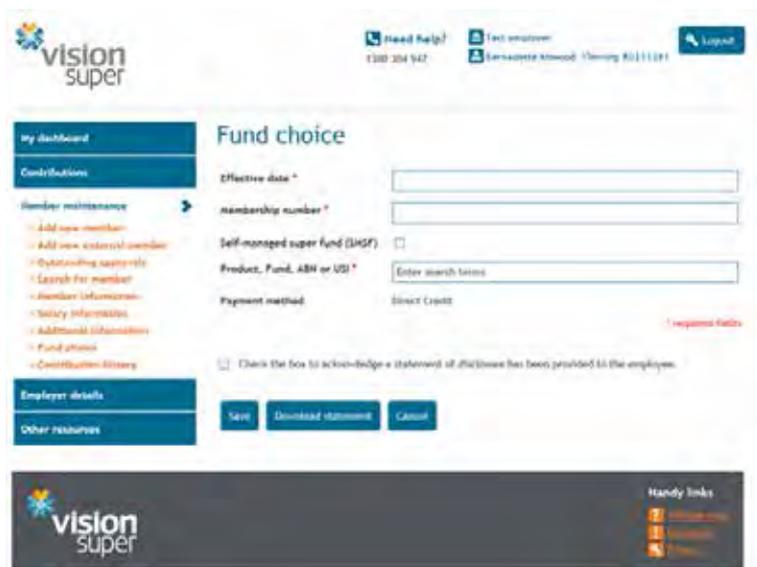
The fund choice screen displays the fund choice history for the member. For employers still using the Vision Super file format this will display details for Vision Super members and non-Vision Super members. To navigate to the fund choice screen search for the member and select their name from the list, click the fund choice hyperlink in the left hand menu.



The screenshot shows the 'Fund choice' page for a member named 'Test Member'. The page has a header with the Vision Super logo, 'Need help?' (1300 204 942), 'Test Employee ID' (400 0000000000000000), and a 'Logout' button. A left-hand navigation menu includes 'my dashboard', 'Contributions', 'Member maintenance', 'Employer details', and 'Other resources'. The main content area is titled 'Fund choice details for Test Member' and contains a table with columns 'START DATE' and 'FUND NAME'. The table has one row with '01-04-2018' and 'BEST EMPLOYER SCHEDULED OPTION'. Below the table is an 'Add new fund choice' button, an 'Export' dropdown menu set to 'PDF format', and a 'Back to member information' button. A footer section contains the Vision Super logo and 'Handy links'.

To add a new fund choice for the member click the add new fund choice button. Enter the effective date of the change, the member number for the other fund, add the other fund details, and provide the employee with the statement of disclosure and click save.

If the employee is changing from another fund to Vision Super please add a new Vision Super member record and we will match the details to the existing member number.



The screenshot shows the 'Fund choice' form. The header is identical to the previous screenshot. The left-hand navigation menu is the same. The main content area is titled 'Fund choice' and contains the following fields: 'Effective date *' (text input), 'membership number *' (text input), 'Self-managed super fund (SMSF)' (checkbox), 'Product, Fund, ABN or USI *' (text input with placeholder 'Enter search terms'), and 'Payment method' (dropdown menu set to 'Direct Credit'). A red asterisk indicates that the first four fields are required. Below the form is a checkbox labeled 'Check the box to acknowledge a statement of disclosure has been provided to the employee.' At the bottom are 'Save', 'Download statement', and 'Cancel' buttons. The footer section contains the Vision Super logo and 'Handy links'.

If the employee is a member of a Self Managed Super Fund select the SMSF check box and enter the required details for the SMSF. This will add the new SMSF to our database.

Fund choice

Effective date *

Membership number *

Self managed super fund (SMSF)

Fund name *

ABN *

Payment method

BBS *

Account number *

Contact given name *

Contact surname *

Contact email *

Electronic service address *

Check the box to acknowledge a statement of disclosure has been provided to the employee.

Save Download statement Cancel

Maintain member records – contribution history

The contribution history screen displays all contributions for the selected member that are linked to the current employer logged in to Employer Online. To navigate to the contribution history screen search for the member and select their name from the list, click the contribution history hyperlink in the left hand menu.

The list of contributions can be filtered to display:

- ▶ All contributions
- ▶ Employer SG
- ▶ Member after-tax
- ▶ Salary sacrifice
- ▶ Spouse

The data can also be filtered for a certain date range.

Contribution history

Account: Vision Super Super 1955 - 247124

Contribution history for Trévor Smith

Transaction type *

Start date *

End date *

Search

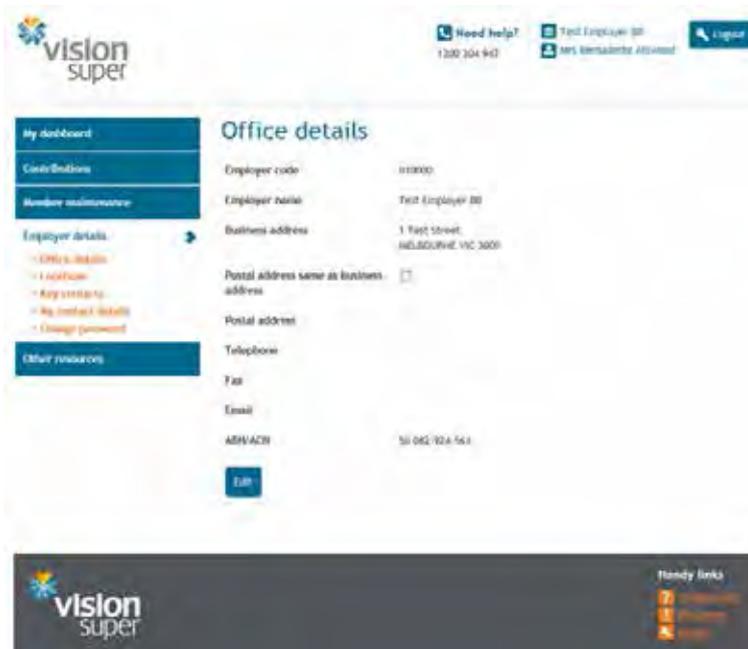
EFFECTIVE DATE	CONTRIBUTION DESCRIPTION	AMOUNT
01/01/2015	EMPLOYER SG - Text employer [01/01/2015 - 01/01/2015]	5240.29
21/01/2015	EMPLOYER SG - Text employer [21/01/2015 - 21/01/2015]	105.82
01/01/2016	EMPLOYER SG - Text employer [01/01/2016 - 01/01/2016]	107.08
20/11/2015	EMPLOYER SG - Text employer [20/11/2015 - 20/11/2015]	3121.28
01/12/2015	EMPLOYER SG - Text employer [01/12/2015 - 01/12/2015]	3180.91
28/11/2015	EMPLOYER SG - Text employer [28/11/2015 - 28/11/2015]	3189.02
27/11/2015	EMPLOYER SG - Text employer [27/11/2015 - 27/11/2015]	5183.42
28/10/2015	EMPLOYER SG - Text employer [28/10/2015 - 28/10/2015]	3189.90
15/10/2015	EMPLOYER SG - Text employer [15/10/2015 - 15/10/2015]	3205.19

Employer details

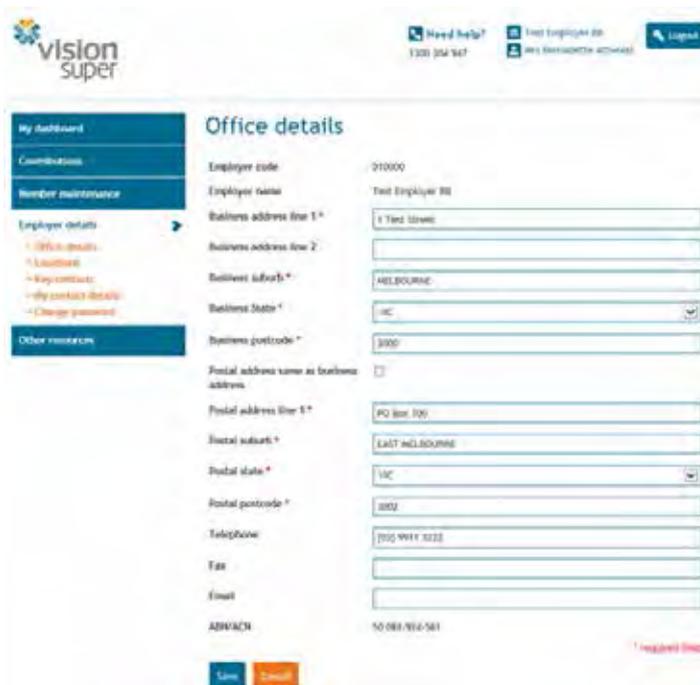
Maintain office details

To view the office details for your employer select the employer details icon from the landing page. The office details we have associated with the employer record are displayed as the main office details.

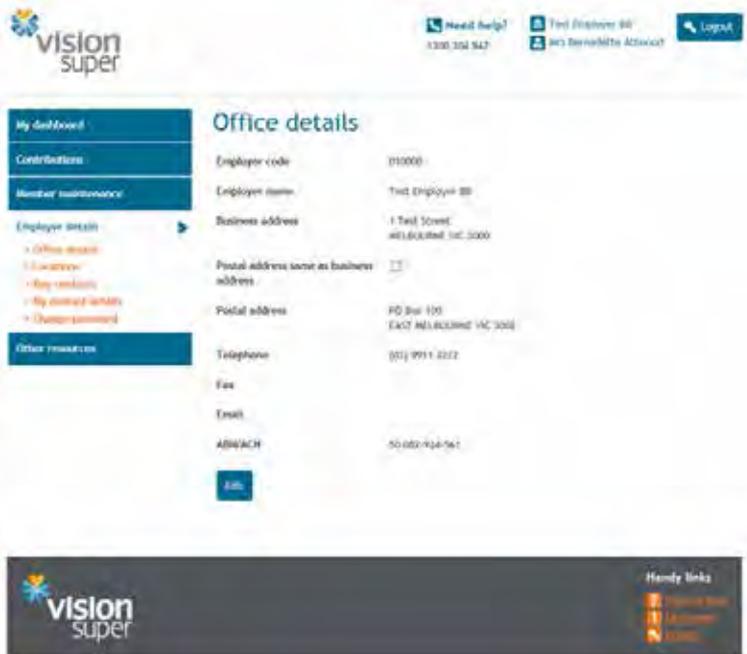
These details can be edited by selecting the edit button on the office details screen.



You can edit the address details, main telephone number, fax and main email address. If you are editing the phone or fax numbers you must include the area code.



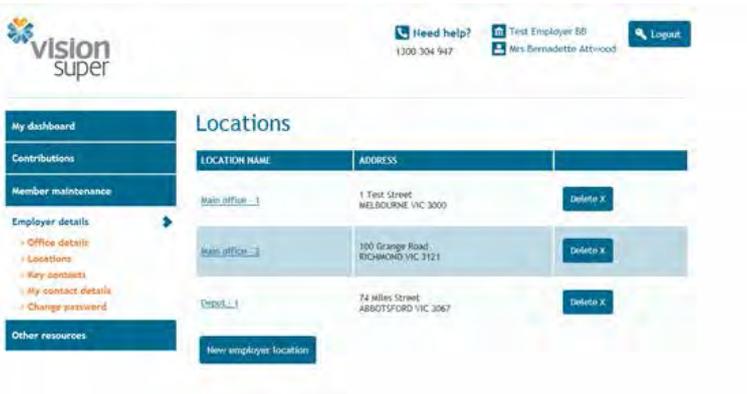
Once you have entered the required changes click save. Changes appear in Employer Online immediately.



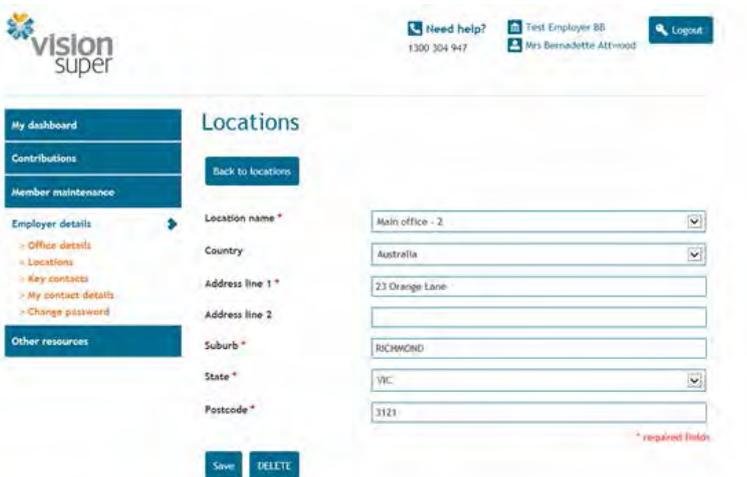
Maintain locations

To navigate to the locations page select the employer details icon from the landing page and select the locations link from the left hand side menu. This page shows a list of all locations for the employer currently in the Vision Super database.

You can add new locations and delete locations from the location page.



To add a new location select the new employer location button. Enter all of the required data and click save.



To delete a location either select delete from the list or enter the location details screen and select delete.

Note: a location cannot be deleted if it is linked to an employer contact or member. The location must be removed from the contact(s) or member(s) before it can be deleted.

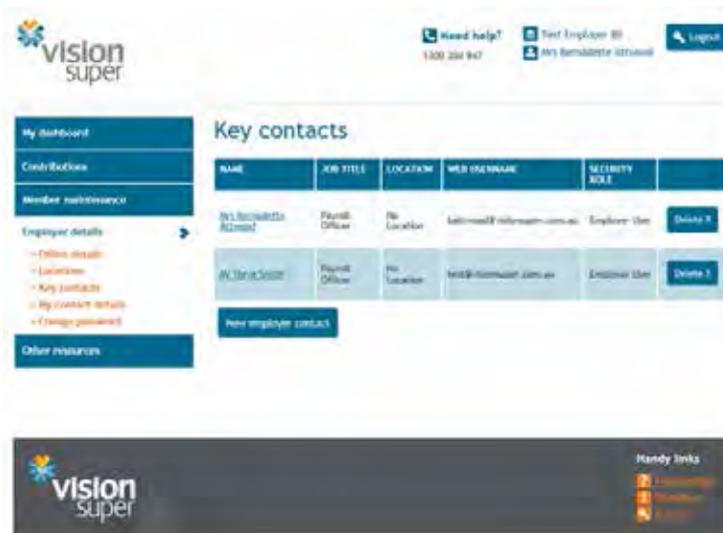
In the list below the main office – 1 location has been linked to an employer contact so it cannot be deleted.



Maintain key contacts

To access the key contacts page select the employer details icon from the landing page and click the key contacts link on the left hand side. This page lists all contacts that are listed in the Vision Super database. The contact may or may not use the Employer Online site.

New contacts can be added by selecting the new employer contact button and contacts can be deleted by selecting the delete button beside the contact.



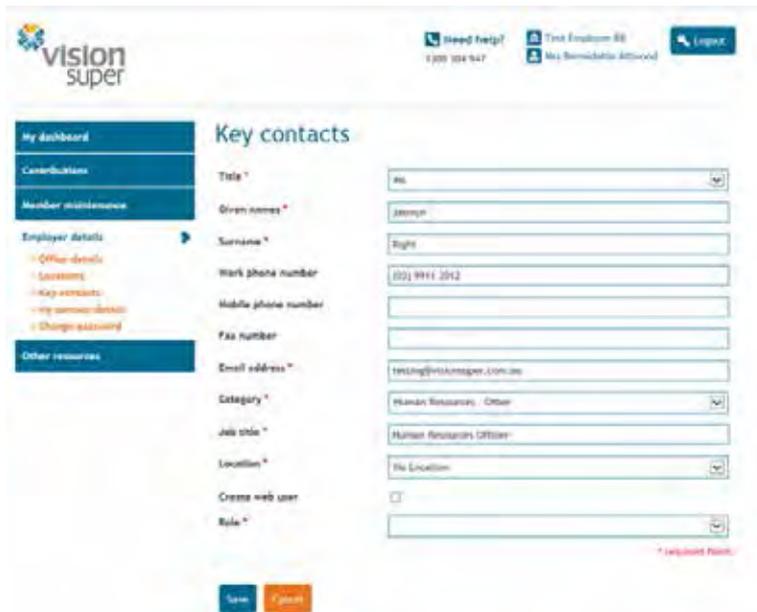
Add a new contact

To add a new contact select the new employer contact button.



The screenshot shows the 'Key contacts' form in the Vision Super system. The form is currently empty, with all input fields blank. The fields include: Title, Given names, Surname, Work phone number, Mobile phone number, Fax number, Email address, Category, Job title, Location, Create web user, and Role. A red asterisk indicates that the fields marked with an asterisk are required. The 'Save' and 'Cancel' buttons are visible at the bottom of the form.

Enter data in the required fields and select save



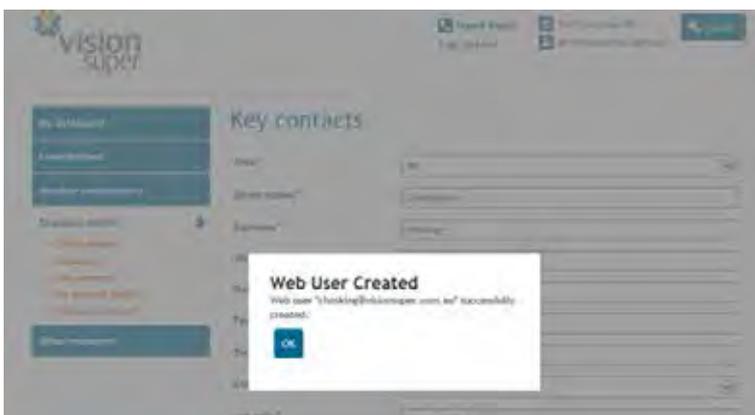
The screenshot shows the 'Key contacts' form with data entered in the required fields. The fields are filled with the following information: Title (HR), Given names (Jenny), Surname (Bright), Work phone number (021 911 2012), Mobile phone number (blank), Fax number (blank), Email address (testing@visionuper.com.au), Category (Human Resources - Other), Job title (Human Resources Officer), Location (No Location), Create web user (checked), and Role (blank). A red asterisk indicates that the fields marked with an asterisk are required. The 'Save' and 'Cancel' buttons are visible at the bottom of the form.

Add a web user

To add a new web user select the new employer contact button. Enter all required data, click the create web user box and click save.

Key contacts form fields:

- Title *
- Given names *
- Surname *
- Work phone number
- Mobile phone number
- Fax number
- Email address *
- Category *
- Job title *
- Location *
- Create web user
- Web user ID: chosting@visionsuper.com.au
- Role: Web User



The new web user contact will receive an email from Vision Super to activate their account and create a password.

From: aol-adminuat@visionsuper.com.au [mailto:aol-adminuat@visionsuper.com.au]
Sent: Monday, 23 May 2016 12:13 PM
To: Christopher Hosking
Subject: Employer Account Activation

Hi Mr Christopher Hosking,

You have been set up as a new user for Vision Online, a system that lets you easily manage staff superannuation contributions.

Your new username is:

chosting@visionsuper.com.au

You can create a password and activate your account by clicking this link:

<http://aolint1uat.8080/aol/index.html?action=reset&token=63183359>

This email was sent by: Mrs Bernadette Attwood

If you have any questions, please call the Vision Super Employer Hotline on 1300 304 947.

Maintain your contact details

You can maintain your personal contact details via the key contacts pages or via the my contact details page. The my contact details page shows the details of the user currently logged in to the site.

The screenshot shows the 'My contact details' page in the Vision Super system. The page is divided into a left-hand navigation menu and a main content area. The navigation menu includes 'My dashboard', 'Cover/leave', 'Member maintenance', 'Employer details', and 'Other resources'. The 'Employer details' section is expanded, showing links for 'Office details', 'Locations', 'Key contacts', 'My contact details', and 'Change password'. The main content area displays the user's contact details in a table format. The details are as follows:

Title	Mrs
Given names	Bernadette
Surname	Aitwood
Work phone number	(07) 911 2223
Mobile phone number	
Fax number	
Email address	bernadette@visionuper.com.au
Category	Payroll - Main
Job title	Payroll Officer
Location	90 Location
Create web user	<input type="checkbox"/>
Web username	bernadette@visionuper.com.au
Role	Employee User

At the bottom of the main content area, there are two buttons: 'Save' and 'Edit'.

To make changes click the edit button. You can change any of the data and you must provide information in the fields marked as required. If you are editing phone or fax numbers the area code must be included.

The screenshot shows the 'My contact details' page in the Vision Super system, now in edit mode. The page layout is the same as the previous screenshot, but the 'Edit' button is highlighted in orange. The main content area displays the user's contact details in a form with input fields and dropdown menus. The fields are as follows:

Title *	<input type="text" value="Mrs"/>
Given names *	<input type="text" value="Bernadette"/>
Surname *	<input type="text" value="Aitwood"/>
Work phone number	<input type="text" value="(07) 911 2223"/>
Mobile phone number	<input type="text"/>
Fax number	<input type="text"/>
Email address *	<input type="text" value="bernadette@visionuper.com.au"/>
Category *	<input type="text" value="Payroll - Main"/>
Job title *	<input type="text" value="Payroll Officer"/>
Location *	<input type="text" value="90 Location"/>
Create web user	<input type="checkbox"/>
Web username	<input type="text" value="bernadette@visionuper.com.au"/>
Role *	<input type="text" value="Employee User"/>

At the bottom of the main content area, there are two buttons: 'Save' and 'Cancel'. A red asterisk icon is visible next to the 'Required field' label.

Change password

To change your current password select the employer details icon from the landing page and then the change password link from the left hand side.

The screenshot shows the 'Change password' page on the Vision Super website. The page title is 'Change password'. Below the title, there is a instruction: 'To reset your password, enter your current password first, then your new password twice. Passwords are case sensitive.' The form contains three input fields: 'Old password', 'New password', and 'Confirm password'. A 'Save' button is positioned below the 'Confirm password' field. On the left side, there is a navigation menu with 'Employer details' selected, and a sub-menu with 'Change password' highlighted. At the top right, there are links for 'Need help?', 'Find Employer ID', and 'My Beneficiary Account'. At the bottom right, there is a 'Handy links' section with icons for 'Employer ID', 'Log out', and 'Forgot password'.

Enter your old/current password and then enter your new password and confirm it. If any of the details provided do not match you will be presented with an error.

Password must contain:

- At least eight characters
- At least one lowercase letter(s) (abcdefghijklmnopqrstuvwxyz)
- At least one capital letter(s) (ABCDEFGHIJKLMNOPQRSTUVWXYZ)
- At least one numeric character(s) (0123456789)

This screenshot is identical to the one above, but the password input fields are masked with asterisks. The 'Old password', 'New password', and 'Confirm password' fields all contain a series of asterisks. The 'Save' button remains visible below the 'Confirm password' field.

The screenshot shows a success message overlay on the 'Change password' page. The message is titled 'Password changed' and contains the text 'Your password has been changed.' Below the message is a blue 'OK' button. The background of the page is dimmed.

Resources

General correspondence

The correspondence section of Employer Online will display information from Vision Super to employers. To navigate to the correspondence page select other resources icon from the landing page then select correspondence from the menu options on the left hand side.

The main documents that will be published online are the Defined Benefit invoices and Vested Benefit Index letters.



Send files to Vision Super

To send ad hoc files to Vision Super select the resources icon from the landing page. Select a document type from the available options, select the file you would like to securely send to Vision Super, add a comment and click submit.

This will ensure the file is received by Vision Super securely and be actioned by our administration team.

