

# Employer Online user guide

June 2016



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](mailto:employerservices@visionsuper.com.au)**



**[www.visionsuper.com.au/employers/employer-secure-site](http://www.visionsuper.com.au/employers/employer-secure-site)**

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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](http://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. To its right is a 'Need help?' link with a phone icon and the number 1300 304 947. Below this is a heading 'Enter your email address and password'. Underneath 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 that says '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](http://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.



 **Need help?**  
1300 304 947

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### Enter your email address and password


Registered employers can login by entering their email address and password below then clicking the login button.


Email address


Password

**Login**

[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.



 **Need help?**  
1300 304 947

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### Forgotten password


Please enter your email address and press 'Reset Password'. You will receive an email that will explain how to reset your password.

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](mailto:info@visionsuper.com.au)

Email address \*

Your Verification Code \*





Verification Code (as displayed above)

**Reset Password** **Cancel**

# Site navigation

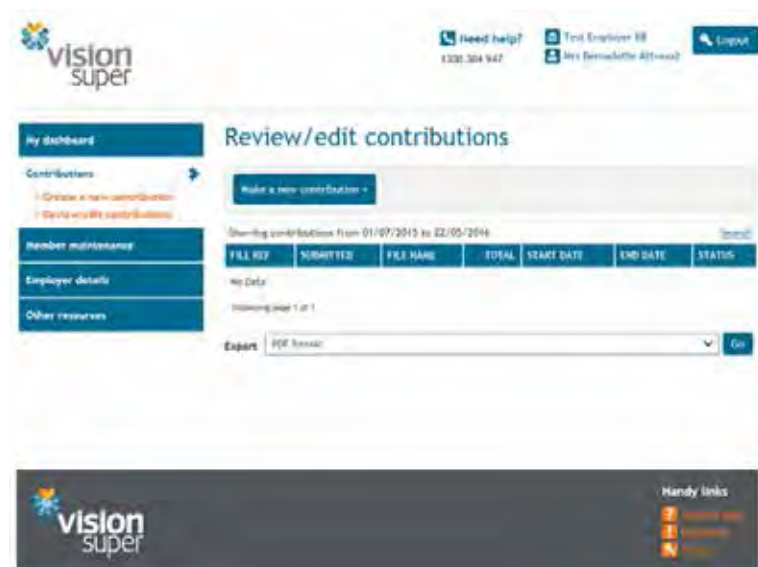
The landing page of the site consists of four icons:

- 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 Employer Online system. The page layout includes a sidebar on the left with links to 'My dashboard', 'Contributions', 'Member maintenance', 'Employer details', and 'Other resources'. The 'Contributions' link is active. The main header contains the Vision Super logo, a 'Need help?' link with the number 1300 304 947, a 'Test employer' button, and a 'Logout' button. The user is identified as 'Bernadette Attwood'. The main content area has 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 shows contributions from 01/07/2015 to 07/06/2016. The table has columns: FILE REF, SUBMITTED, FILE NAME, TOTAL, START DATE, END DATE, and STATUS. One contribution is listed: FILE REF 1894, SUBMITTED 04/06/2016, FILE NAME testfile.csv, TOTAL \$137,672.14, START DATE 11/04/2016, END DATE 24/04/2016, and STATUS In Progress. Below the table is a 'Displaying page 1 of 1' message. At the bottom, there is an 'Export' button and a dropdown menu set to 'PDF format' with a 'Go' button. A footer section contains the Vision Super logo and 'Handy links' to 'Vision Super', 'About Us', and 'Contact Us'.

vision super

Need help? 1300 304 947

Test employer Bernadette Attwood

Logout

My dashboard

Contributions

Create a new contribution

Review/edit contributions

Member maintenance

Employer details

Other resources

Review/edit contributions

You have one unconfirmed contribution.

Contribution 1894 for start date 11/04/2016 to 24/04/2016.

Resume Delete

Showing contributions from 01/07/2015 to 07/06/2016

Search

FILE REF	SUBMITTED	FILE NAME	TOTAL	START DATE	END DATE	STATUS
1894	04/06/2016	testfile.csv	\$137,672.14	11/04/2016	24/04/2016	In Progress

Displaying page 1 of 1

Export PDF format Go

vision super

Handy links

- Vision Super
- About Us
- Contact Us

## SuperStream

If you are currently using the ATO SuperStream file format you will continue to use it in the new Employer Online system. You will notice some changes in the layout of the contribution review screen which is explained in this section.

To upload your file, navigate to the file upload page and select the file to upload:

Contributions icon &gt; make a new contribution &gt; add files



The screenshot shows the Vision Super website interface. At the top, there is a navigation bar with the Vision Super logo on the left, a central menu with links like 'Home', 'My account', 'Help', 'Contact us', and 'Log out', and a 'Log out' button on the right. Below the navigation bar, the main heading 'Make a contribution' is displayed. Under this heading, there are two sections: 'Contribution data' and 'Payment method'. The 'Contribution data' section includes a link 'Upload a pre-formatted file'. The 'Payment method' section includes a link 'Direct debit'. At the bottom of the page, there is a 'Back' button and a 'Next' button. The footer of the page contains the Vision Super logo and a 'Handy links' section with links to 'Help', 'Contact us', and 'Log out'.

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.

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 for SuperStream 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.

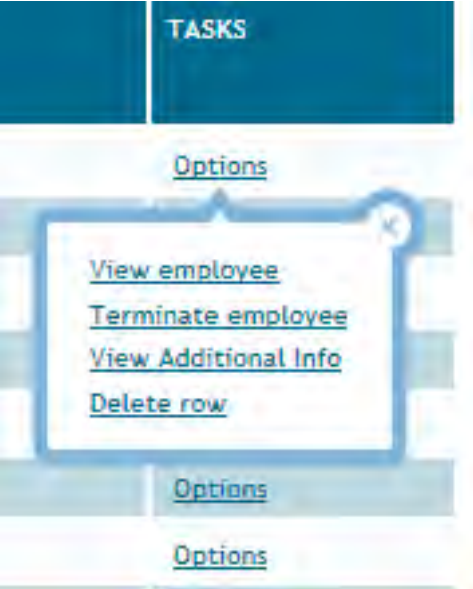
You can navigate through the pages of data by using the navigation buttons, next, previous, last, first.

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

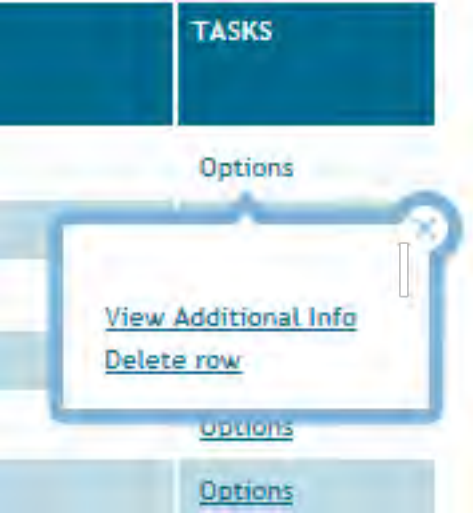
[illegible]



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	<a href="#">Options</a>
Hundo Superannuation	<a href="#">Options</a>
VicSuper	<a href="#">Options</a>
REST Superannuation	<a href="#">Options</a>
Self Managed Super Fund	<a href="#">Options</a> *Terminated 01/01/2016
Australian Super	<a href="#">Options</a>
Care Superannuation	<a href="#">Options</a>
North Personal Super & Pension Plan	<a href="#">Options</a>
Unisuper	<a href="#">Options</a>
Hesta Super Fund	<a href="#">Options</a> *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

#### Overall file details

Pay period start date: 16/01/2016

Pay period end date: 12/02/2016

#### Personal details

Title: ☐

Gender: Female ☐

Suffix:

Other given names: Example

Surname: Employee

Date of birth: 02/11/1954

Tax File Number: 123 456 789

Email:

Home phone number:

Mobile phone number: 0400 152 600

#### Super fund info

Self-managed super fund (SMSF): ☐

Product, Fund, ABN or USI:

Fund name: Hesta Super

Super fund USI: 42574421650001

Super fund ABN: 42 574 421 450

Member client id: 03214785

#### Address details

Address type: Res ☐

Residential country: Australia ☐

Address line 1:

Address line 2:

Address line 3:

Address line 4:

Residential suburb:

Residential state: ☐

Residential postcode:

#### Employment details

Payroll id: 1011

Employment end date:

Employment start date:

At work indicator: ☐ True ☐ False

Salary benefit: \$0.00

Salary insurance: \$0.00

Salary contributions: \$0.00

Employment status: ☐

Weekly hours worked: 0

Occupation:

Insurance opt out: ☐

Fund registration date:

Contribution start date:

Contribution end date:

Salary contribution start date:

Salary contribution end date:

Member registration amendment reason:

Termination reason: ☐

Benefit category:

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

Mrs Rebecca Atwood

Logout

Review and submit - contribution summary

File details

Employer

Test Employer 88

Remittance Id

613

Period start date

15/04/2016

Payment method

Direct Debit

File name

Testfile.csv

Period end date

28/04/2016

Payment instructions

Direct debit date:

10/06/2016

Account name:

Test Employer bank account

BSB:

083-894

Account No.:

10052147

Amount due:

\$26,544.81

Internal direct debit:

\$20,085.74

External direct debit:

\$6,459.07

Contribution breakdown

Internal employees

Employees contributed to

62

Employer Confs

\$13,706.14

Post-Tax Member Confs

\$180.00

Salary Sacrifice Confs

\$6,199.60

Spouse Confs

\$0.00

Child Conf

\$0.00

Other 3rd Party

\$0.00

Employer Voluntary Confs

\$0.00

Employer Award Confs

\$0.00

Total Internal contributions

\$20,085.74

External employees

Employees contributed to

24

Employer Confs

\$5,123.69

Post-Tax Member Confs

\$20.00

Salary Sacrifice Confs

\$1,315.38

Spouse Confs

\$0.00

Child Conf

\$0.00

Other 3rd Party

\$0.00

Employer Voluntary Confs

\$0.00

Employer Award Confs

\$0.00

Total External contributions

\$6,459.07

Export

PDF Format

Go

Back

Submit

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## 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**

vision super

Need help? 1300 304 947

Test employee (Employee ID: 123456789)

Login

### Make a contribution

Contribution data

☐ Review my last contribution table

☐ Use a new contribution table

☒ Upload a pre-formatted file

Pay period

From:  To:

Payment method

☒ Direct debit

Add files...

Back

Next

vision super

Handy links

- Help
- Contact us
- FAQs
- Terms

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.

vision super

Need help? 1300 304 947

Test employee (Employee ID: 123456789)

Login

### Make a contribution

Contribution data

☐ Review my last contribution table

☐ Use a new contribution table

☒ Upload a pre-formatted file

Pay period

From:  To:

Payment method

☒ Direct debit

Add files...

Back

Next

vision super

Handy links

- Help
- Contact us
- FAQs
- Terms

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.

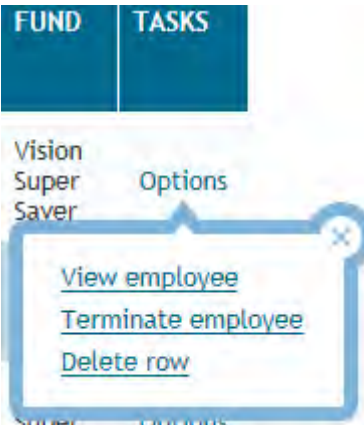
The tasks column allows you to see additional information about the employee and has links to other tasks you can perform for the employee.

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.**

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



Need help?

1300 304 947

View Employer RB

View Summary RB

Logout

Review and submit - contribution summary

File details

Employer

Remittance id

Period start date

Test Employer RB

613

15/04/2016

Payment method

File name

Period end date

Direct Debit

Testfile.csv

28/04/2016

Payment instructions

Direct debit date:

Account name:

B58:

Account No.:

10/06/2016

Test Employer bank account

083-894

10052147

Amount due:

Internal direct debit:

External direct debit:

\$26,544.81

\$20,085.74

\$6,459.07

Contribution breakdown

Internal employees

Employees contributed to

62

Employer Contributions

Post-Tax Member Contributions

Salary Sacrifice Contributions

Spouse Contributions

Child Contributions

Other 3rd Party

Employer Voluntary Contributions

Employer Award Contributions

\$13,706.14

\$180.00

\$6,199.60

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

Total Internal contributions

\$20,085.74

External employees

Employees contributed to

24

Employer Contributions

Post-Tax Member Contributions

Salary Sacrifice Contributions

Spouse Contributions

Child Contributions

Other 3rd Party

Employer Voluntary Contributions

Employer Award Contributions

\$5,123.69

\$20.00

\$1,315.38

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

Total External contributions

\$6,459.07

Export


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Contribution summary screen with Vision Super only members



Need help?

1300 304 947

View Employer RB

View Summary RB

Logout

Review and submit - contribution summary

File details

Employer

Remittance id

Period start date

Test Employer RB

33

01/06/2016

Payment method

File name

Period end date

Direct Debit

Testfile.csv

07/06/2016

Payment instructions

Due date:

Account name:

B58:

Account Number:

10/06/2016

Vision Super

083-155

8064 54299

Amount due:

Payment reference:

\$1,600.00

80200000000001

Please quote this reference with your EFT

Contribution breakdown

Internal employees

Employees contributed to

8

Employer Contributions

Member Contributions

Salary Sacrifice Contributions

Spouse Contributions

\$1,380.00

\$10.00

\$200.00

\$0.00

Total Internal contributions:

\$1,600.00

Export

PDF Format

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Submit

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.

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## Manual contribution grid

For small employers there is the option to use a manual contribution grid instead of uploading a preformatted file. The grid only caters for the Vision Super file format, not the SuperStream format. If you are a large employer using SuperStream and need to make a one off contribution for a staff member please upload a file as per the above instructions.

The manual grid allows you to manually enter contribution amounts for your employees and submit the grid to Vision Super.

To make a contribution via the manual grid navigate to the make a new contribution page.

**Contributions icon > make a new contribution > select use a new contribution table > enter date range > click next**

The contribution details screen contains basic information for the employee, fields to enter 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.**

Enter the contribution amounts for the employees you need to pay super for. Note that all current employees linked to Vision Super will appear in the grid however you can choose to only submit contribution amounts for certain employees.

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.

**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	08/06/2016	Amount due	\$1,600.00
Account name	Vision Super	Payment reference	932000000000033
BSB	083-155	Please quote this reference with your EFT	
Account number	6064 56299		

**Contribution breakdown**

<b>Internal employees</b>	
Employees contributed to	5
Employer Contribution	\$1,290.00
Member Contribution	\$10.00
Salary Sacrifice Contribution	\$300.00
Spouse contribution	\$0.00
<b>Total Internal contributions</b>	<b>\$1,600.00</b>

Export: PDF Format [Go]

[Back] [Submit]


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.

## 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:



[Need help?](#)  
1300 354 647

[Track investments](#)  
[Download statements](#)

[Log out](#)

## Review and submit - contribution summary

### File details

Employer	Test employer	Payment method	Direct Credit
Business type ID	33	File name	Testfile.csv
Paid/plan date	01/08/2016	Paid/act date	07/08/2016

### Payment instructions

Due date	01/08/2016	Account due	\$1,600.00
Account name	Vision Super	<b>Payment reference</b>	<b>810000000000011</b>
BIC	061100	Please quote this reference with your EFT	
Account number	606456299		

### Contribution breakdown

#### Internal employees

Employers contributed to	1
Employer's Contribution	\$1,300.00
Member Contributions	\$10.00
Salary Sacrifice Contributions	\$200.00
Spouse contributions	\$0.00
<b>Total Internal contributions:</b>	<b>\$1,600.00</b>


Export




PDF Export

Go

[Back](#)
[Next](#)

Summary screen with Vision Super and external members:



 Need help?  
1300 304 947
  Your Employee ID  
985 89642634 - Active
  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
BSE	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 Costs	\$13,706.14	Employer Costs	\$5,123.69
Post-Tax Member Costs	\$160.00	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

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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](http://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.



[Need help?](#)  
1300 304 947

[Test Employer 88](#)  
View Summary/Details/Accounts

[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
BSEI:	083-894	External direct debit:	\$6,459.07
Account No.:	10052147		

**Contribution breakdown**

Internal employees		External employees	
Employees contributed to		Employees contributed to	
Employer Costs	\$13,706.14	Employer Costs	\$5,123.69
Post-Tax Member Costs	\$160.00	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
<b>Total Internal contributions</b>	<b>\$20,085.74</b>	<b>Total External contributions</b>	<b>\$6,459.07</b>

Export PDF Format

Go

Back

Submit

# 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 Vision Super web application interface. At the top, there's a header with the Vision Super logo, a 'Need help?' link with the number 1 300 304 947, a 'Test Employer RB' link with 'RB's Superbatter Account', and a 'Logout' button. On the left, a sidebar menu includes 'My dashboard', 'Contributions', 'Member maintenance' (which is highlighted with a blue arrow), 'Employer details', and 'Other resources'. Under 'Member maintenance', there are links: 'Add new member', 'Add new employer/employee', 'Outstanding payments', and 'Search for member'. The main content area is titled 'Add new member' and contains a form with the following fields: 'TFN' (with value 552 479 750), 'Surname' (with value Test), 'Given names' (with value Member A), and 'Date of birth' (with value 05/07/1985). A red asterisk and the text '\* required field' are visible next to the 'Date of birth' field. At the bottom of the form is a 'Next' button. The footer of the page features the Vision Super logo and a 'Handy links' section with icons for 'Help', 'Contact us', and 'Feedback'.

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 in the Vision Super application. It displays the same header, sidebar menu, form fields (TFN, Surname, Given names, Date of birth), and footer. The 'Date of birth' field is highlighted with a red asterisk and the text '\* required field'. The 'Next' button is at the bottom of the form.

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. On the left is a sidebar with navigation links: 'My dashboard', 'Contributions', 'Member maintenance' (with sub-links for adding new, adding new residential, outstanding approvals, and search for members), 'Employer details', and 'Other resources'. The main form area is titled 'Add new member' and contains the following fields: 'Last name' (Test), '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 Testing Street), 'Mailing address line 2' (empty), 'Mailing suburb' (Bonython), 'Mailing state' (empty), '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. Below this checkbox, there are additional fields for a separate residential address: 'Residential country' (Australia), 'Residential address line 1' (empty), 'Residential address line 2' (empty), 'Residential suburb' (empty), 'Residential state' (empty), and 'Residential postcode' (empty). All other fields remain the same as in the previous screenshot.

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 \*

Mrs

Gender \*

Female

Mailing country \*

Australia

Mailing address line 1 \*

1 Testing Street

Mailing address line 2

Mailing suburb \*

Richmond

Mailing state \*

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

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

Select a 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 \*

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

☒

Home phone no

Work phone no

Mobile no

Email

Test@visionsuper.com.au

Payroll number \*

TEST001

Date joined employer \*

01/09/2015

Plan start date \*

01/09/2015

Salary (gross annual) \*

\$75,000.00

Location

Select a location...

Employment status \*

Non-casual

At work statement \*

Yes

Add member

Cancel

vision

super

Handy links

?

Account page

!

Help page

🔍

Find page

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

Employer details

Other resources

→ Add new member

→ Add new external member

→ Outstanding approvals

→ Search for member

## 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	<a href="mailto:Test@helenesuper.com.au">Test@helenesuper.com.au</a>
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.

The screenshot shows the 'Search for member' page in the Vision Super system. The top navigation bar includes the Vision Super logo, a 'Need help?' link with the number 1300 304 947, a 'Test Employer RB' link with the name Mrs Bernadette Jarmoud, and a 'Logout' button. The left sidebar contains a 'My dashboard' section with links to 'Contributions', 'Member maintenance' (highlighted), 'Employer details', and 'Other resources'. The 'Member maintenance' section lists links: 'Add new member', 'Add new external member', 'Outstanding approvals', and 'Search for member'. The main content area is titled 'Search for member' and features 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 with columns: MEMBER #, PAYROLL #, NAME, DATE OF BIRTH, EMPLOYED FROM, ACCOUNT NAME, STATUS, and EMPLOYMENT STATUS. Below the table is an 'Export' dropdown menu set to 'PDF format' and a 'Go' button. At the bottom, there is a 'Handy links' section with icons for 'Help', 'Feedback', and 'Privacy'.

Enter the new external member details:

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

**Select next to proceed**

The screenshot shows the 'Add new external member' page in the Vision Super system. The top navigation bar is identical to the previous screenshot. The left sidebar is also identical, with the 'Member maintenance' section highlighted. The main content area is titled 'Add new external member' and features a form with the following fields: 'TFN \*' (with value 909 312 406), 'Surname \*' (with value Test), 'Given names \*' (with value Member B), and 'Date of birth \*' (with value 01/07/1994). A red asterisk indicates that the 'Date of birth' field is required. Below the form is a 'Next' button. At the bottom, there is a 'Handy links' section with icons for 'Help', 'Feedback', and 'Privacy'.

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 324 547 | Test Username: ID | Test Password: 12345678 | [Logout](#)

**My dashboard**

**Contributions**

Member experience

- [Add new member](#)
- [Add new external member](#)
- [Add existing dependent](#)
- [Search for member](#)

**Employer details**

**Other resources**

### Add new external member

Last name \* Test

Given names \* member S

Date of birth \* 01-01-1984

Tax File Number \* 929 212 806

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

Residential address same as mailing address ☒

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

**vision super**

Need help? 1300 324 547 | Test Username: ID | Test Password: 12345678 | [Logout](#)

**My dashboard**

**Contributions**

Member experience

- [Add new member](#)
- [Add new external member](#)
- [Add existing dependent](#)
- [Search for member](#)

**Employer details**

**Other resources**

### Add new external member

Last name \* Test

Given names \* member S

Date of birth \* 01-01-1984

Tax File Number \* 929 212 806

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

Residential address same as mailing address ☐

Residential country \* Australia

Residential address line 1 \* 1 Address Road

Residential address line 2 \*

Residential suburb \* MELBOURNE

Residential state \* VIC

Residential postcode \* 3001



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

[illegible]

Enter the member number for the other fund and select a fund for the new external member. To select a fund begin typing the name of the fund and a list of available funds will be available to select from.

Membership number

Self-managed super fund (SMSF) ☐

Product, fund, AFI or UFI

Payment method

**HEALTH EMPLOYEES SUPERANNUATION TRUST AUSTRALIA (HESTA)**  
 C/O HESTASIA 400 14 071 799 121

**HEALTH EMPLOYEES SUPERANNUATION TRUST AUSTRALIA (HESTA) (Income Stream)**  
 C/O HESTASIA 400 14 071 799 121

**MEERAC SUPER TRUST**  
 Saver Super (Super Superannuation) (Saver Plan)  
 C/O MEERAC 400 14 000 412 401

**MEERAC SUPER TRUST**  
 Saver Super (Super Superannuation) (Saver Plan)  
 C/O MEERAC 400 14 000 412 401


**vision**  
super

**Hardy Links**  
[Home](#)  
[About Us](#)  
[Contact Us](#)

If the external member has a Self Managed Super Fund that is not in the list you can add it by selecting the SMSF check box and entering all required details.

Membership number *	<input type="text" value="181214"/>
Self-managed super fund (SMSF) <input checked="" type="checkbox"/>	
Fund name *	<input type="text"/>
ABN *	<input type="text"/>
Payment method	Direct Credit
BBS *	<input type="text"/>
Account number *	<input type="text"/>
Contact given name *	<input type="text"/>
Contact surname *	<input type="text"/>
Contact email *	<input type="text"/>
Electronic service address *	<input type="text"/>

\* Required Field

[Download Statement](#)

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 employee](#)  
[Add new external member](#)  
[Outstanding approvals](#)  
[Search for member](#)

Employer details

Other resources

### Add new external member

Last name \*

Given names \*

Date of birth \*

Tax File Number \*

TFN \*

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

Paysroll number \*

Date joined employer \*

Membership number \*

Self-managed super fund (SMSF)

Product, fund, ABN or UIN \*

Unique superannuation identifier

Super fund ABN

Fund name

Product name

Paysroll method

Test

Member B

22/02/1984

958-312-806

Ms

Australia

PO Box 100

WELSH ROAD

VIC

3000

☐

Australia

1 Address Road

WELSH ROAD

VIC

3000

12370000

07/01/2016

962214

☐

Foreign Employee Superannuation Trust Australia

HST010000

64 971 749 021

Foreign Employee Superannuation Trust Australia

HECFA

Direct Credit

Required fields

Download statement

☒

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

Add member

Cancel

vision super

Helpful links

1

2

3

4

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



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).

**Outstanding approvals**

Name: Mr Member S Tard

Mailing address: PO Box 100, MELBOURNE VIC 3000

Residential address: 1 Address Road, MELBOURNE VIC 3001

Home phone:

Work phone:

Mobile:

Email:

Date of birth: 01/01/1984

Tax File Number: Tax file number supplied

Membership number: R62216

Payroll no: T12370001

Self managed super fund (SMPF): ☐

Unique superannuation identifier: 1070000000

Super fund ABN: 66 971 748 321

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 displays the 'Search for member' page in the Vision Super system. On the left is a navigation menu with options like 'My dashboard', 'Contributions', 'Member maintenance', 'Employer details', and 'Other resources'. The 'Member maintenance' section is expanded, showing links for adding new members, outstanding approvals, and the 'Search for member' option. The main area features a search bar, a filter for 'Display members' (set to 'Active members only'), and a table of results. The table lists two members, both with 'TEST' names. Below the table is an 'Export' dropdown set to 'PDF format' and a 'Go' button. At the bottom, a 'Handy links' section provides quick access to the website, downloads, and videos.

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	

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.

**vision super**

Need help? 1300 304 547

Test Employee 88 My Super Smithy Viewing 89941988

Logout

**Member information**

**Member details**

**Terminate**

Member number: 89941988

Name: Mrs Member A Test

Plan: Vision Super Saver

Date joined: 01/06/2015

Mailing address: 1 Testing Street, RICHMOND VIC 3121

Residential address: 1 Testing Street, RICHMOND VIC 3121

Horse phone:

Work phone:

Mobile:

Email: <mailto:vision@vision-support.co.uk>

Date of birth: 05/07/1985

Tax File Number: Tax file number supplied

**Edit**

Export PDF format: Go

**vision super**

Handy links:


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](#)

- Add new member
- Add new external member
- Outstanding approvals
- Search for member
- Member information
- Salary information
- Additional information
- Fund choice
- Contribution history

[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	<div>Australia</div>
Mailing address line 1 *	<div>1 Testing Street</div>
Mailing address line 2	<div></div>
Mailing suburb *	<div>RICHMOND</div>
Mailing state *	<div>VIC</div>
Mailing postcode *	<div>3121</div>
Residential address same as mailing address	<div><input checked="" type="checkbox"/></div>
Home phone	<div></div>
Work phone	<div>(03) 9911 3222</div>
Mobile	<div>0423 568 468</div>
Email	<div>btest@visionsupport.com</div>
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.

[SAVE](#) [CANCEL](#)

\* required fields



## 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 displays the Vision Super Saver Member Information page. The top navigation bar includes the Vision Super logo, a 'Need help?' link with the number 1300 304 947, a user profile for 'Test Employer B8' (Mr Steve Smith) viewing record 89941990, and a 'Logout' button. The left sidebar contains a 'My dashboard' menu with options: 'My dashboard', 'Contributions', 'Member maintenance' (selected), 'Employer details', and 'Other resources'. The 'Member maintenance' section lists several actions: 'Add new member', 'Add new external member', 'Outstanding approvals', 'Search for member', 'Member information' (highlighted), 'Salary information', 'Additional information', 'Fund choice', and 'Contribution history'. The main content area is titled 'Member information' and 'Member details'. It features a 'Terminate' button at the top left of the details section. Below this, a table lists member information: 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 located at the bottom left of the details section. At the bottom of the main content area, there is an 'Export' section with a dropdown menu set to 'PDF format' and a 'Go' button. The footer contains the Vision Super logo and a 'Handy links' section with icons for 'Website ENQ', 'Feedback', and 'Privacy'.

**vision super**

Need help?  
1300 304 947

Test Employer B8  
Mr Steve Smith Viewing 89941990

Logout

**My dashboard**

Contributions

Member maintenance

- » Add new member
- » Add new external member
- » Outstanding approvals
- » Search for member
- » Member information
- » Salary information
- » Additional information
- » Fund choice
- » Contribution history

**Employer details**

**Other resources**

## Member information

### Member details

**Terminate**

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
Tax File Number	Tax file number supplied

**Edit**

Export PDF format Go

**vision super**

**Handy links**

- Website ENQ
- Feedback
- Privacy

Complete the following information:

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

**Select next to proceed**

The screenshot shows a web application interface for 'vision super'. A modal window titled 'Terminate employment' is open, displaying a form to complete member termination details. The form is divided into 'Member details' and 'Termination details' sections. The 'Member details' section includes fields for Employer code (010000), Payroll no. (TEST003), Plan (Vision Super Saver), Member number (89941990), Name (Mr Member C Test), and Date of birth (03/07/1954). The 'Termination details' section includes a dropdown for Termination reason (Resignation / Dismissal) and a text field for Termination date (26/04/2016). Below these are two questions with radio button options: 'Are there any further contributions due for this employee?' (Yes/No) and 'Change member address?' (Yes/No). A red asterisk indicates required fields. At the bottom of the form are 'Next >' and 'Cancel' buttons. The background shows a sidebar with navigation links like 'My dashboard', 'Contributions', 'Pension Member', 'Employment Details', and 'Other members'.

**Terminate employment**

Please fill out the details of the member termination.

**Member details**

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.

**Terminate employment**

**Review changes**

Please review the changes and submit to complete the termination.

Employer code	010000
Payslip no	7637000
Plan	Vision Super Saver
Member number	89441990
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

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

**Terminate employment**

**Termination successful**

The following details have been successfully submitted.  
Please print a copy if you require.

Employer code	010000
Payslip no	7637000
Plan	Vision Super Saver
Member number	89441990
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

[Close](#)

Export PDF format [Go](#)

## Defined Benefit

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

The screenshot shows the 'Member information' page in the Vision Super system. At the top, there's a header with the Vision Super logo, a 'Need help?' link with the number 1300 304 947, a 'Test employer' button, and a 'Logout' button. Below the header, there's a sidebar with links: 'My dashboard', 'Contributions', 'Member maintenance', and 'Add new member'. The main content area is titled 'Member information' and 'Member details'. A 'Terminate' button is visible in the 'Member details' section.

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

The screenshot shows the 'Terminate employment' form. It starts with a title 'Terminate employment' and a sub-header 'Please fill out the details of the member termination.' Below this is a section titled 'Member details' which contains a table with the following information: Employer code (123456), Payroll no (101260), Plan (Defined Benefit Plan), Member number (80857527), Name (Mr David Crowthers), and Date of birth (19/10/1958). Below the 'Member details' section is a 'Termination details' section. It contains two required fields: 'Termination reason' (a dropdown menu with 'Retirement' selected) and 'Termination date' (a text box with '23/05/2016'). Below these are two questions with radio button options: 'Are there any further contributions due for this employee?' (Yes/No) and 'Change member address?' (Yes/No). A red asterisk indicates that the first two fields are required. At the bottom, there are 'Next >' and 'Cancel' buttons.

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**

The screenshot shows the 'Additional information' section of the 'Terminate employment' form. It starts with a title 'Terminate employment' and a sub-header 'Additional information'. Below this is a sub-header 'Please complete the details below to ensure the employees defined benefit is calculated correctly.' This section contains four questions with radio button options: 'Update salary?' (Yes/No), 'Update service fraction?' (Yes/No), 'Was this employee on leave without pay at termination?' (Yes/No), and 'Are contributions owed?' (Yes/No). At the bottom, there are 'Back', 'Next >', and 'Cancel' buttons.

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**.

The screenshot shows the Vision Super website interface. At the top, there is a navigation bar with the Vision Super logo, a 'Need help?' link with the number 1300 304 547, a 'Last accessed' timestamp of 26/04/2018 10:11:18, and a 'Logout' button. Below the navigation bar, there is a sidebar menu on the left with options: 'My dashboard', 'Contributions', 'Member maintenance' (with a sub-menu including 'Add new member', 'Add new external member', 'Outstanding payments', 'Cancel fee member', 'Payment information', 'Salary information', 'Withdrawal information', 'Fund choice', and 'Contribution history'), 'Employer details', and 'Other resources'. The main content area is titled 'Member information' and contains a 'Member details' section with a 'Terminate' button. The details listed are: Member number (80321457), Name (Miss Sarah Smith), Plan (Defined Benefit Plan), Date joined (25/04/1981), Mailing address, Residential address (1 Test Street, WILLIAMSTOWN VIC 3082), Home phone, Work phone, Mobile, Email (Address@vision-super.com.au), Date of birth (20/09/1953), and Tax File Number (Tax File number supplied).

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.

<sup>\*</sup> 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 displays the 'Salary information' page in the Vision Super Employer Online system. The interface includes a left-hand navigation menu with options such as 'My dashboard', 'Contributions', 'Member information', 'Employer details', and 'Other resources'. The main content area is titled 'Salary information' and shows 'Salary information for Member A Test'. A table displays salary data with columns 'SALARY COMMITMENT DATE' and 'SALARY'. The table shows a commitment date of 01/01/2016 and a salary of \$75,000.00. Below the table, there is an 'Add new salary' button and an 'Export' button with a dropdown menu set to 'PDF format'. A 'Back to member information' button is also present. The footer of the page features the Vision Super logo and a 'Handy links' section.

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

Need help?  
1300 304 947

Test Employer ID:  
My Name: Sarah Thompson 89941588

Logout

My dashboard

Contributions

Member maintenance

- Add new member
- Add new external member
- Outstanding approvals
- Search for member
- Member information
- Salary information
- Additional information
- Fund choice
- Contribution history

Employer details

Other resources

Salary information

Salary commencement date \*

Salary \*

Save

Edit

vision super

Handy links:

- Add new member
- Add new external member
- Search for member
- Member information

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

Need help?  
1300 304 947

Test Employer ID:  
My Name: Sarah Thompson 89941588

Logout

My dashboard

Contributions

Member maintenance

- Add new member
- Add new external member
- Outstanding approvals
- Search for member
- Member information
- Salary information
- Additional information
- Fund choice
- Contribution history

Employer details

Other resources

Salary information

Account:

Salary information for Member A Test

SALARY COMMENCEMENT DATE	SALARY
01/01/2018	\$185,000.00
01/01/2018	\$82,000.00
01/01/2018	\$75,000.00

Add new salary

Export: 

Go

Back to member information

vision super

Handy links:

- Add new member
- Add new external member
- Search for member
- Member information

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## 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 portal. The left sidebar contains navigation links: 'My dashboard', 'Contributions', 'Member maintenance', 'Employer details', and 'Other resources'. The 'Member maintenance' section is expanded, showing options like 'Add new member', 'Add new existing member', 'Outstanding payments', 'Search for member', 'Member information', 'Salary information', 'Additional information', 'Fund status', and 'Contribution history'. The main content area displays 'Salary information' with the following details: 'Salary commencement date' as 01/05/2016 and 'Salary' as \$80,000.00. A message states: 'New salary can't be lower than previous salary. Please enter a reason for this salary change and attach supporting documentation.' Below this, 'Document type' is set to 'Change of salary'. The 'File upload' section has a 'Select File' button. A 'Comment' text box is empty. At the bottom are 'Previous', 'Save', and 'Cancel' buttons. The footer includes the Vision Super logo and 'Handy links'.

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.

This screenshot shows the same 'Salary information' page after a file has been uploaded and a comment has been entered. The 'File upload' section now shows a 'Details' button and the following information: 'File name: E.docx' and 'Upload complete: 22:47:40'. The 'Comment' text box now contains the text 'Salary update is permanent'. The 'Previous', 'Save', and 'Cancel' buttons remain at the bottom. The footer is identical to the previous screenshot.

**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 'Testing Member A'. The page includes a sidebar with navigation links: My dashboard, Contributions, Member maintenance (Add new member, Add new external member, Outstanding approvals, Search for member, Member information, Salary information, Additional information, Fund choice, Contribution history), Employer details, and Other resources. The main content area displays the member's account information: Vision Super Saver V555 / 296542. Below this, the 'Additional information for Testing Member A' section shows fields for Payroll no (TEST0001), Location (No Location), Employment start date (03/11/2015), and Current salary (580,000.00). An 'Edit' button is present. The 'Employment history' section shows a table with columns for COMMENCEMENT DATE and WORK STATUS, with one entry for 03/11/2015 with a status of Non-Casual. A 'New work history >' button is available. At the bottom, there is an 'Export' dropdown set to 'PDF format' and a 'Go' button. The footer contains the Vision Super logo and 'Handy links' for Helpdesk, My account, and Privacy.

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.

This screenshot shows the 'Additional information' page with the edit fields highlighted. The 'Payroll no' field (TEST0001) and the 'Location' dropdown (No Location) are both highlighted with red boxes. The 'Employment start date' (03/11/2015) and 'Current salary' (580,000.00) fields are also visible. Below the fields, there are 'Save' and 'Cancel' buttons. A red asterisk and the text '\* required field' are shown next to the 'Location' dropdown. The sidebar and footer are identical to the previous screenshot.

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.



Need Help?

1300 354 547

Test Enrolment ID

For Enrolment ID - need Visioning 89940377

Logout

My dashboard

Contributions

Member information

Employer details

Other resources

➔ Add new member

➔ Add new external member

➔ Outstanding payments

➔ Search the member

➔ Member information

➔ Salary information

➔ Additional information

➔ Fund choice

➔ Contribution history

Additional information

Payroll no

EE570003

Commencement date \*

Work status \*

Casual

Non-Casual

Save

Cancel



Handy links

➔ Enrolment ID

➔ Payments

➔ Funds

## 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 includes a sidebar with navigation links, a top header with contact information, and several data sections.

**Header:** vision super logo, Need help? 1300 304 947, Take a tour, Passwords Allowed: Strongly Recommended, Login

**Left Sidebar:**

- My dashboard
- Contributions
- Member maintenance
  - Add new member
  - Add new internal member
  - Outstanding approvals
  - Details for member
  - Member profile details
  - Salary information
  - Additional information
  - Contribution history
- Employer details
- Other resources

**Main Content Area:**

**Additional information**

Account: [Dropdown: Defined benefit Stan VSOB / 440533]

**Additional information for Trevor Smith**

Payroll no.	9999	Employment start date	29/04/1996
Location	No Location	Current salary	\$108,841.00

**Service fraction history**

COMMENCEMENT DATE	SERVICE FRACTION
29/04/1996	100.00%

**Contribution rate history**

COMMENCEMENT DATE	MEMBER'S %	EMPLOYER'S %	PRI-TAX %
01/01/2016	6.00%	9.50%	3.00%
01/01/2015	6.00%	9.50%	3.00%
01/01/2014	6.00%	9.50%	3.00%
01/01/2013	6.00%	9.50%	3.00%
01/01/2012	6.00%	9.50%	3.00%

**Leave without pay history**

START DATE	END DATE
No leave without pay history	

**Footer:** vision super logo, Handy links (Add new member, Add new internal member, Outstanding approvals, Details for member, Member profile details, Salary information, Additional information, Contribution history)

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.

The screenshot shows the 'Additional information' form in the Vision Super system. The form is titled 'Additional information' and includes a sidebar on the left with navigation links: '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 payments', 'Search for member', 'Member information', 'Salary information', 'Additional information', and 'Contribution history'. The main form area contains the following fields: 'Payroll no' (with value '9919'), 'Commencement date' (with a date picker), and 'Service fraction' (with a percentage input field). There are 'Save' and 'Cancel' buttons at the bottom of the form. A red asterisk indicates a required field. The footer of the page includes the Vision Super logo, contact information, and 'Handy links'.

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.

The screenshot shows the 'Additional information' form in the Vision Super system, similar to the one above but for adding a new contribution rate. The form is titled 'Additional information' and includes the same sidebar on the left. The main form area contains the following fields: 'Payroll no' (with value '9919'), 'Commencement date' (with a date picker), 'Member %' (with a percentage input field), 'Employer %' (with a percentage input field), and 'Pre Tax %' (with a percentage input field). There are 'Save' and 'Cancel' buttons at the bottom of the form. A red asterisk indicates a required field. The footer of the page includes the Vision Super logo, contact information, and 'Handy links'.

## 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 Vision Super web interface. At the top, there's a header with the Vision Super logo, a 'Need help?' link with the number 1300 304 942, a 'Test Employee ID' field with the value '400 (permission: Admin)', and a 'Logout' button. On the left, a sidebar menu includes 'my dashboard', 'Contributions', 'Member maintenance' (with sub-links like 'Add new member', 'Add new external member', 'Outstanding approvals', 'Search for member', 'Member information', 'Salary information', 'Additional information', 'Fund choice', and 'Contributions history'), 'Employer details', and 'Other resources'. The main content area is titled 'Fund choice' and 'Fund choice details for Test Member'. It displays a table with two columns: 'START DATE' (01/04/2018) and 'FUND NAME' (TEST EMPLOYER SCHEDULED DISCLOSURE). Below the table is an 'Add new fund choice' button. There's also an 'Export' dropdown menu set to 'RDR format' with a 'Go' button, and a 'Back to member information' button. At the bottom, there's a 'Handy links' section with icons for 'Home', 'My dashboard', 'Fund choice', and 'Employer details'.

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 Vision Super web interface with the 'Add new fund choice' form. The header and sidebar are the same as in the previous screenshot. The main content area is titled 'Fund choice' and shows the 'Add new fund choice' form. The form has 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 with 'Direct Credit' selected). There's a red asterisk and the text 'required fields' next to the 'Payment method' field. 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 of the form are three buttons: 'Save', 'Download statement', and 'Cancel'. The 'Handy links' section at the bottom is also present.

## Maintain member records – contribution history

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.

The screenshot shows the Vision Super website interface. At the top left is the Vision Super logo. To its right are contact details: "tired help?" with a phone icon and the number "1300 204 917". Further right are links for "Text enquire!" and "Feedback & Enquiry" with a speech bubble icon. On the far right is a login button labeled "Log In".

The main navigation bar includes "My Dashboard" and "Contributions". The "Contributions" section is expanded, showing a sidebar menu with options like "Add new member", "Add new internal member", "Check existing approvals", etc.

## Contribution history

**Account:** vision super cover 000 - 247107

### Contribution history for Trevor Smith

**Transaction type \***: All Contributions  
**Start date \***: 28/05/2015  
**End date \***: 28/05/2016

[Search]

EFFECTIVE DATE	CONTRIBUTION DESCRIPTION	AMOUNT
08/02/2015	EMPLOYER SG - Test employer (08/02/2015 - 08/02/2016)	\$245.29
21/01/2016	EMPLOYER SG - Test employer (20/01/2016 - 20/01/2016)	\$35.82
01/01/2016	EMPLOYER SG - Test employer (01/01/2016 - 01/01/2016)	\$97.18
20/12/2015	EMPLOYER SG - Test employer (20/12/2015 - 20/12/2015)	\$721.38
09/12/2015	EMPLOYER SG - Test employer (09/12/2015 - 09/12/2015)	\$180.01
25/11/2015	EMPLOYER SG - Test employer (24/11/2015 - 24/11/2015)	\$149.82
22/11/2015	EMPLOYER SG - Test employer (11/11/2015 - 11/11/2015)	\$153.42
20/10/2015	EMPLOYER SG - Test employer (18/10/2015 - 18/10/2015)	\$148.90
15/10/2015	EMPLOYER SG - Test employer (14/10/2015 - 14/10/2015)	\$205.05



# 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.

The screenshot shows the 'Office details' page in 'View' mode. The left sidebar contains navigation links: 'My dashboard', 'Contributions', 'Member maintenance', 'Employer details' (selected), and 'Other resources'. Under 'Employer details', there are links for 'Office details', 'Locations', 'Key contacts', 'My contact details', and 'Change password'. The main content area displays the following information:

- Employer code: 010000
- Employer name: Test Employer 00
- Business address: 1 Test Street, MELBOURNE VIC 3000
- Postal address same as business address: ☐
- Postal address: (empty)
- Telephone: (empty)
- Fax: (empty)
- Email: (empty)
- ABN/ACN: 50 062 924 561

An 'Edit' button is located at the bottom of the main content area. The top of the page includes the Vision Super logo, a 'Need help?' link (1300 304 943), a 'Test Employer 00' link (my supercentre account), and a 'Logout' button. The bottom of the page features a 'Ready links' section with icons for 'My dashboard', 'Contributions', 'Key contacts', and 'My contact details'.

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.

The screenshot shows the 'Office details' page in 'Edit' mode. The left sidebar is identical to the previous screenshot. The main content area displays the same information as before, but with input fields for editing:

- Employer code: 010000
- Employer name: Test Employer 00
- Business address line 1\*: 1 Test Street
- Business address line 2\*: (empty)
- Business suburb\*: MELBOURNE
- Business state\*: VIC
- Business postcode\*: 3000
- Postal address same as business address: ☐
- Postal address line 1\*: PO Box 100
- Postal suburb\*: EAST MELBOURNE
- Postal state\*: VIC
- Postal postcode\*: 3002
- Telephone: 010 000 0000
- Fax: (empty)
- Email: (empty)
- ABN/ACN: 50 062 924 561

'Save' and 'Cancel' buttons are at the bottom. A red asterisk indicates a required field. The top and bottom of the page are identical to the previous screenshot.

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



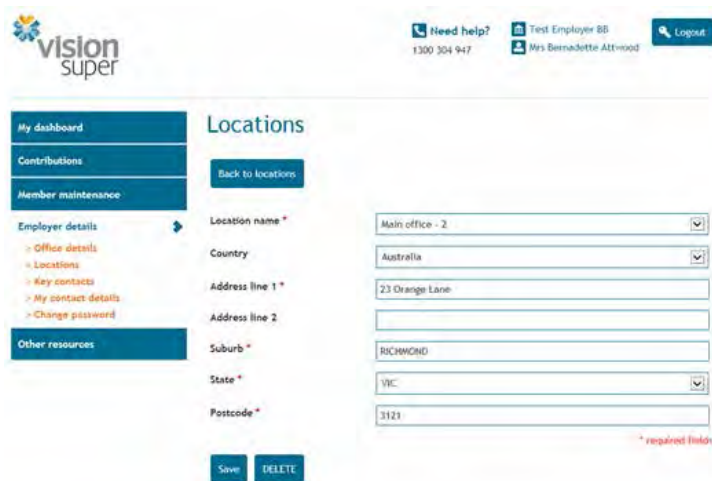
## Maintain locations

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.

vision  
super

Need help?  
1300 354 947

Test Employer ID:  
M13 Bernadette Brown

Logout

My dashboard

Contributions

Member maintenance

Employer details

Other resources

1 Official details

2 Locations

3 Key contacts

4 Key contact details

5 Change password

Locations

LOCATION NAME	ADDRESS	
Main office 1	1 Test Street MELBOURNE VIC 3000	
MAIN OFFICE 2	23 Orange Lane MELBOURNE VIC 3221	Delete X
Branch 1	74 Wilson Street ADELPHIDE VIC 3047	Delete X
Branch 2	88 Anderson Street CARLTON VIC 3053	Delete X

New employer location

vision  
super

Handy links

1

2

3

4

### 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.

vision  
super

Need help?  
1300 354 947

Test Employer ID:  
M13 Bernadette Brown

Logout

My dashboard

Contributions

Member maintenance

Employer details

Other resources

1 Official details

2 Locations

3 Key contacts

4 Key contact details

5 Change password

Key contacts

NAME	JOB TITLE	LOCATION	WEB USERNAME	SECURITY ROLE	
M13 Bernadette Brown	Payroll Officer	No Location	test@visionsuper.com.au	Employer User	Delete X
M13 Bernadette	Payroll Officer	No Location	test@visionsuper.com.au	Employer User	Delete X

New employer contact

vision  
super

Handy links

1

2

3

4

## 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 left sidebar contains navigation links: 'My dashboard', 'Contributions', 'Member statements', 'Employer details' (with sub-links for 'Office details', 'Locations', 'Key contacts', 'My contact details', and 'Change password'), and 'Other resources'. The main form area is titled 'Key contacts' and contains the following fields: 'Title \*', 'Given names \*', 'Surname \*', 'Work phone number', 'Mobile phone number', 'Fax number', 'Email address \*', 'Category \*', 'Job title \*', 'Location \*' (with a dropdown menu showing 'No Location'), 'Create web user' (checkbox), and 'Role \*'. At the bottom right, there is a red asterisk indicating required fields. At the bottom left, there are 'Save' and 'Cancel' buttons.

Enter data in the required fields and select save

The screenshot shows the 'Key contacts' form with data entered into the fields. The 'Title' field is set to 'Ms'. The 'Given names' field is set to 'Jenny'. The 'Surname' field is set to 'Bright'. The 'Work phone number' field is set to '(02) 9911 2012'. The 'Email address' field is set to 'testing@visionsuper.com.au'. The 'Category' field is set to 'Human Resources - Other'. The 'Job title' field is set to 'Human Resources Officer'. The 'Location' field is set to 'No Location'. The 'Create web user' checkbox is unchecked. The 'Role' field is empty. At the bottom right, there is a red asterisk indicating required fields. At the bottom left, there are 'Save' and 'Cancel' buttons.

## 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.

vision super

Need help? 1300 304 947

Test Employer ID My immediate Attorney

Logout

My dashboard

Contributions

Member maintenance

Employer details

- Office details
- Locations
- Key contacts
- My contact details
- Change password

Other resources

### Key contacts

Title \*

Given names \*

Surname \*

Work phone number

Mobile phone number

Fax number

Email address \*

Category \*

Job title \*

Location \*

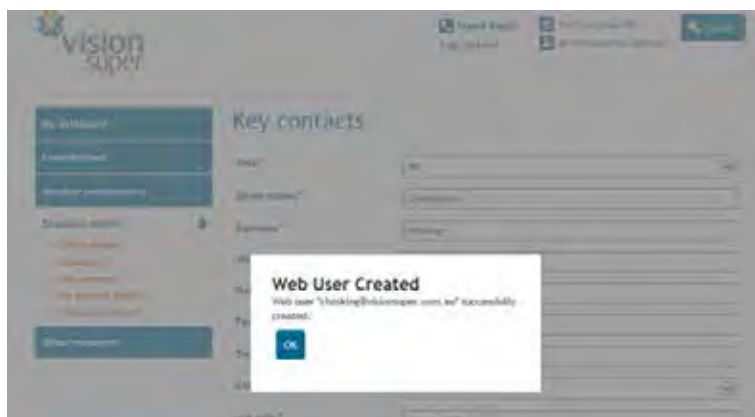
Create web user ☒

Web user ID

Role \*

Save Cancel

\* required fields



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:

[chosing@visionsuper.com.au](mailto:chosing@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.

Need help?

1300 204 947

Test Employee ID

Mrs Bernadette Atwood

Logout

My dashboard

Contributions

Member maintenance

Employer details

Office details

Locations

Key contacts

My contact details

Change password

Other resources

My contact details

TitleMrs

Given namesBernadette

SurnameAtwood

Work phone number(07) 9911 2223

Mobile phone number

Fax number

Email addressbernadette@visionsuper.com.au

CategoryPayroll - Main

Job titlePayroll Officer

LocationMy Location

Create web user

Web usernamebernadette@visionsuper.com.au

RoleEmployer User

Save

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.

Need help?

1300 204 947

Test Employee ID

Mrs Bernadette Atwood

Logout

My dashboard

Contributions

Member maintenance

Employer details

Office details

Locations

Key contacts

My contact details

Change password

Other resources

My contact details

Title \*Mrs

Given names \*Bernadette

Surname \*Atwood

Work phone number(07)99112223

Mobile phone number

Fax number

Email address \*bernadette@visionsuper.com.au

Category \*Payroll - Main

Job title \*Payroll Officer

Location \*My Location

Create web user

Web usernamebernadette@visionsuper.com.au

Role \*Employer User

Save

Cancel

Required fields



## 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 Vision Super website's 'Change password' page. At the top, there's a header with the Vision Super logo, a 'Need help?' link with the number 1300 204 947, and links for 'Find Employer ID' and 'My Beneficiary Account'. Below the header is a sidebar menu with options: 'My dashboard', 'Contributions', 'Member maintenance', 'Employer details' (which is expanded to show 'Office details', 'Locations', 'Key contacts', 'My contact details', and 'Change password'), and 'Other resources'. The main content area is titled 'Change password' and includes a sub-header: 'To reset your password, enter your current password first, then your new password twice. Passwords are case sensitive.' There are three input fields labeled 'Old password \*', 'New password \*', and 'Confirm password \*', followed by a 'Save' button. At the bottom right, there are 'Handy links' for 'Employers', 'Employees', and 'Pensioners'.

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 similar to the one above, but the input fields for 'Old password \*', 'New password \*', and 'Confirm password \*' are now masked with asterisks (\*\*\*\*\*). The 'Save' button remains visible below the fields.

This screenshot shows the same Vision Super interface, but with a white confirmation box in the center. The box has the title 'Password changed' and the message 'Your password has been changed.' Below the message is a blue 'OK' button.

# 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.





