



vision  
super

Employer Online user guide  
June 2016



# Welcome

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

 **Employer Hotline 1300 304 947**

 **[employerservices@visionsuper.com.au](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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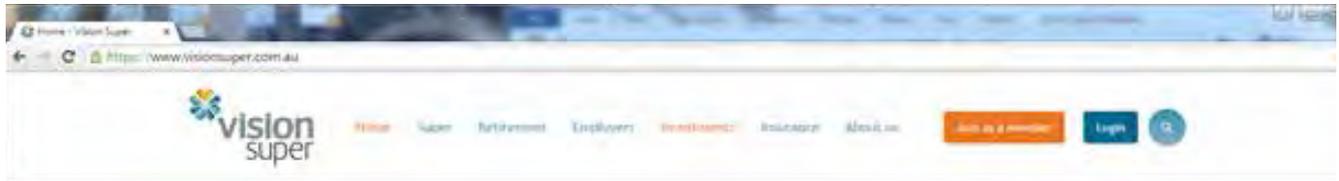
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# Accessing the site

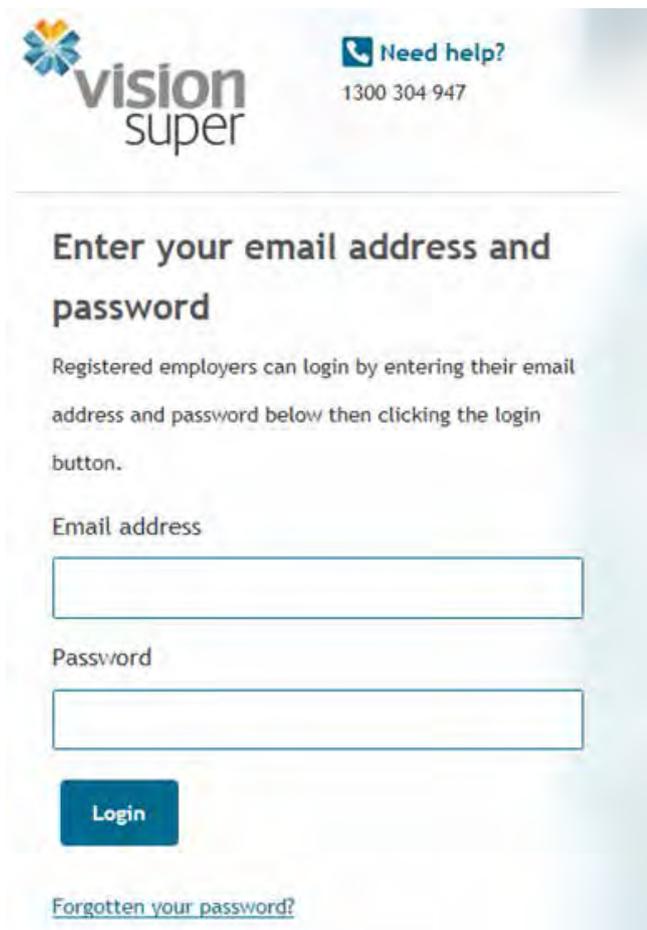
## Logging in

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:

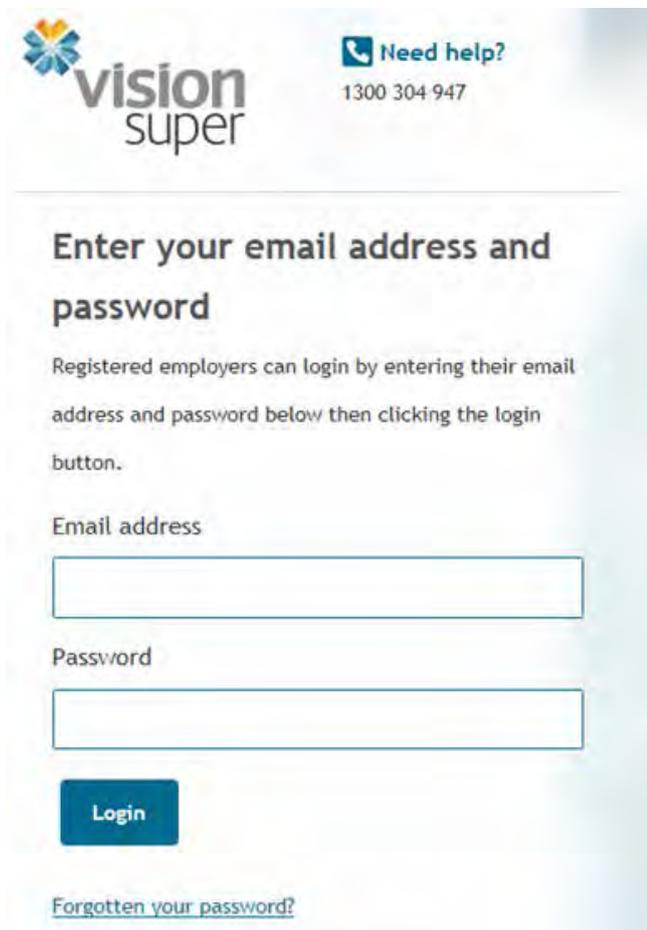


Enter your email address and password:

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

## Resetting a password

If you have forgotten your password you can request it to be reset via the log in page. Go to the Vision Super website [www.visionsuper.com.au](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.



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

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



The screenshot shows the 'Forgotten password' page. At the top left is the Vision Super logo. At the top right is a 'Need help?' link with the phone number 1300 304 947. The main heading is 'Forgotten password'. Below this is a paragraph: 'Please enter your email address and press 'Reset Password'. You will receive an email that will explain how to reset your password.' Another paragraph follows: 'To advise us of your email address or for any problems logging on to this site, please call the Vision Super contact centre on 03 9911 3222 (regional 1300 300 820) or email [info@visionsuper.com.au](mailto:info@visionsuper.com.au)'. There are three input fields: 'Email address \*', 'Your Verification Code \*', and 'Verification Code (as displayed above)'. The 'Your Verification Code \*' field contains a blue, distorted image of the text 'Yyscrpn'. To the right of this field is a refresh icon. Below the 'Verification Code' field are two buttons: 'Reset Password' (orange) and 'Cancel' (blue).

# Site navigation

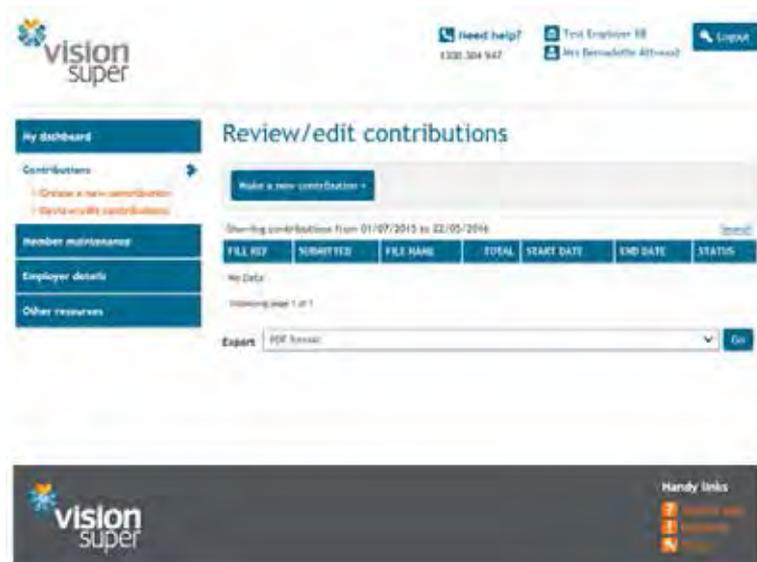
The landing page of the site consists of four icons:

- Contributions
- Member maintenance
- Employer details
- Other resources

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



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



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

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

# Contributions

The contributions section of Employer Online has two parts:

- Create a new contribution
- Review/edit contributions

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

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

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

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

vision super

Need help? 1300 304 947

Test employer: Bernadette Atwood

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	5137,672.14	11/04/2016	24/04/2016	In Progress

Displaying page 1 of 1

Export PDF format [Go](#)

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Handy links

- What's new
- About us
- Contact

## 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 > make a new contribution > add files**



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.

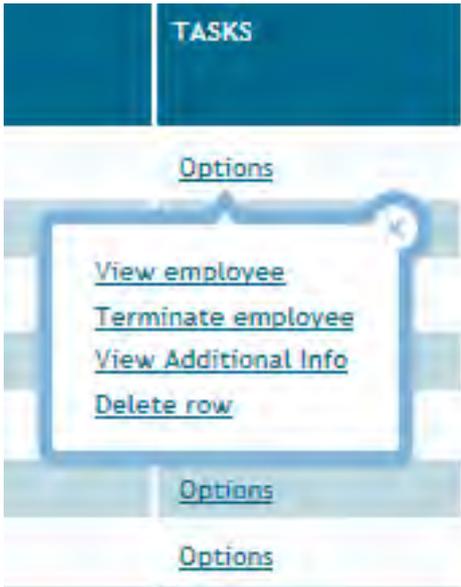
You can change the page to show more than the default 10 lines by changing the page size field in the bottom right corner.

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

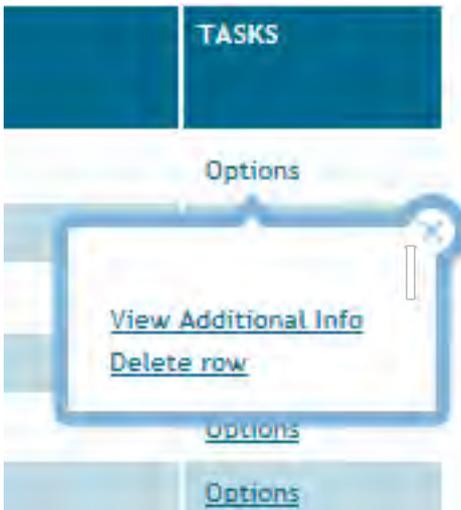
**To return to the review/edit contribution list select the back button.**

PAYROLL NUMBER	CHYR NAME	SUBNAME	EMPLOYEE	EMPLOYEE CONTRIBUTIONS	FUND CONTRIBUTIONS	SALARY SERVICES CONTRIBUTIONS	SUPERANNUATION CONTRIBUTIONS	OTHER CONTRIBUTIONS	TOTAL CONTRIBUTIONS	EMPLOYEE PAYROLL TOTALS	EMPLOYEE SUPERANNUATION TOTALS	EMPLOYEE TOTALS	FUND
0001	Example	Employee		1760.50					1760.50	2790.50		2790.50	Wells Super
12000				2422.74					2422.74	3482.54		3482.54	Self-Employed Unfunded Super
0002a				1111.26					1111.26	2411.84		2411.84	Colonial First State Top Class
0002b				1292.81					1292.81	4293.52		4293.52	Self-Managed Super Fund
0003				588.40					588.40	588.40		588.40	Colonial First State First Class
4004				158.74					158.74	158.74		158.74	SelfPlus Super
800				129.94					129.94	129.94		129.94	ETF Investment
0005				1417.08					1417.08	1417.08		1417.08	REDF Superannuation
0006				581.01		3400.48			3981.49	3981.52		3981.52	Yieldgen
1000				187.20					187.20	187.20		187.20	REDF Superannuation
Column Totals				170,998.40	1558.78	618,379.99			780,937.17			780,937.17	
Page Totals				Value: 14,569.43					Value: 14,569.43			Page Total: 14,569.43	
Grand Totals				Value: 184,567.17					Value: 184,567.17			Grand Total: 184,567.17	

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

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

Submit
Cancel

If the employee is a member of a Self Managed Super Fund, select the check box to filter the super fund info section. This will display the key details of the SMSF – bank details, ESA and the member ID for the employee.

### Super fund info

**Self-managed super fund (SMSF)**

**BSB**

**Account number**

**Account name**

**Electronic service address**

**Member client Id**

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

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

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

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



[Need help?](#)  
1300 304 947

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

[Logout](#)

## Review and submit - contribution summary

**File details**

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

**Payment instructions**

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

**Contribution breakdown**

<b>Internal employees</b>		<b>External employees</b>	
Employees contributed to:	62	Employees contributed to:	24
Employer Conts	\$13,706.14	Employer Conts	\$5,123.69
Post-Tax Member Conts	\$180.00	Post-Tax Member Conts	\$20.00
Salary Sacrifice Conts	\$6,199.60	Salary Sacrifice Conts	\$1,315.38
Spouse Conts	\$0.00	Spouse Conts	\$0.00
Child Cont	\$0.00	Child Cont	\$0.00
Other 3rd Party	\$0.00	Other 3rd Party	\$0.00
Employer Voluntary Conts	\$0.00	Employer Voluntary Conts	\$0.00
Employer Award Conts	\$0.00	Employer Award Conts	\$0.00
<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](#)

## Vision Super file format

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

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

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

The screenshot shows the 'Make a contribution' page on the Vision Super website. At the top, there is a navigation bar with the Vision Super logo, a 'Need help?' link (1300 334 947), a 'Test employer' link (Employer ID: 123456789), and a 'Logout' button. The main heading is 'Make a contribution'. Below this, there are three radio button options under 'Contribution data': 'Review my last contribution table', 'Use a new contribution table', and 'Upload a pre-formatted file' (which is selected). Under 'Upload a pre-formatted file', there is a 'Pay period' section with 'From' (01/05/2016) and 'To' (31/05/2016) date pickers. Below that is a 'Payment method' section with a dropdown menu set to 'Direct debit'. There is a blue 'Add files...' button. At the bottom of the form area, there are 'Back' and 'Next' buttons. At the very bottom of the page, there is a footer with the Vision Super logo and a 'Handy links' section with icons for 'Help', 'My account', and 'My contributions'.

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

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

This screenshot shows the same 'Make a contribution' page, but with the upload progress visible. The 'Add files...' button is now disabled. Below the form area, there is a 'Test employer ID' field with the value '123456789' and a 'Cancel' button. At the bottom of the page, there is a message: 'Uploading completed on Wednesday, 7 June 2016 9:28:52 AM'. The 'Back' and 'Next' buttons are still present.

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

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

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

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



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



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

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

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

Contribution summary screen with Vision Super and external members

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

### Review and submit - contribution summary

**File details**

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

**Payment instructions**

Direct debit date:	10/06/2016	Amount due:	\$26,544.81
Account name:	Test Employer bank account	Internal direct debit:	\$20,085.74
BSB:	082 894	External direct debit:	\$6,459.07
Account No.:	10052147		

**Contribution breakdown**

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

Contribution summary screen with Vision Super only members

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

### Review and submit - contribution summary

**File details**

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

**Payment instructions**

Direct debit date:	06/06/2016	Amount due:	\$1,600.00
Account name:	Vision Super	Payment reference:	81200000000011
BIB:	081 155	<b>Please quote this reference with your EFT</b>	
Account number:	4064 54299		

**Contribution breakdown**

Internal employees	
Employees contributed to	1
Employer Contributions	\$1,390.00
Member Contributions	\$10.00
Salary Sacrifice Contributions	\$300.00
Spouse Contributions	\$0.00
<b>Total Internal contributions:</b>	<b>\$1,600.00</b>

Export PDF Format

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



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



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

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

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



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

## Payment methods

### EFT

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

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

Summary screen with only Vision Super members:

**Review and submit - contribution summary**

**File details**

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

**Payment instructions**

Direct debit date: 08/08/2016	Amount due: \$1,400.00	
Account name: Vision Super	Payment reference: 01000000000011	
BSB: 001 155	<b>Please quote this reference with your EFT</b>	
Account number: 0064 56299		

**Contribution breakdown**

**Internal employees**  
Employees contributed to: 1

Employer Contribution	\$1,390.00
Member Contributions	\$10.00
Salary Sacrifice Contributions	\$300.00
Spouse contributions	\$1.00
<b>Total Internal contributions:</b>	<b>\$1,690.00</b>

Export: PDF Format

Summary screen with Vision Super and external members:

**Review and submit - contribution summary**

**File details**

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

**Payment instructions**

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

**Contribution breakdown**

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

## 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.

**Review and submit - contribution summary**

**File details**

Employer:	Test Employer 86	Payment method:	Direct Debit
Remittance id:	613	File name:	Testfile.csv
Period start date:	15/04/2016	Period end date:	28/04/2016

**Payment instructions**

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

**Contribution breakdown**

Internal employees		External employees	
Employees contributed to		Employees contributed to	
Employer Costs	\$13,706.14	Employer Costs	\$5,123.69
Post-Tax Member Costs	\$180.00	Post-Tax Member Costs	\$20.00
Salary Sacrifice Costs	\$6,199.60	Salary Sacrifice Costs	\$1,315.38
Spouse Costs	\$0.00	Spouse Costs	\$0.00
Child Cost	\$0.00	Child Cost	\$0.00
Other 3rd Party	\$0.00	Other 3rd Party	\$0.00
Employer Voluntary Costs	\$0.00	Employer Voluntary Costs	\$0.00
Employer Award Costs	\$0.00	Employer Award Costs	\$0.00
<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 'Add new member' form in the Vision Super system. The form has the following fields:

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

A 'Start' button is located below the 'Date of birth' field. The page also features a navigation menu on the left with options like 'My dashboard', 'Contributions', 'Member maintenance', 'Employer details', and 'Other resources'. At the bottom right, there is a 'Handy links' section.

Enter the new member details:

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

### Select next to proceed

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

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 with the following fields and values:

Lead 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 Tacking Street
Mailing address line 2	
Mailing suburb *	Stonyhurst
Mailing state *	
Mailing postcode *	
Residential address same as mailing address	<input checked="" type="checkbox"/>

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

The screenshot shows the 'Add new member' form with the following fields and values:

Lead 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 Tacking Street
Mailing address line 2	
Mailing suburb *	Richmond
Mailing state *	
Mailing postcode *	
Residential address same as mailing address	<input type="checkbox"/>
Residential country *	Australia
Residential address line 1 *	
Residential address line 2	
Residential suburb *	
Residential state *	
Residential postcode *	

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

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 state \*

Mailing postcode \*

Residential address same as mailing address

Home phone no

Work phone no

Mobile no

Email

Payroll number \*

Date joined employer \*

Plan start date \*

Salary (gross annual) \*

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

\* required fields

Add member
Cancel

Handy links

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

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

**My dashboard**

**Contributions**

**Member maintenance** ➔

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

**Employer details**

**Other resources**

## Add new member

New member ( 89941988) has been successfully created.

Last name	Test
Given names	Member A
Date of birth	05/07/1985
Tax File Number	552-479-750
Title	Mrs
Gender	Female
Mailing country	Australia
Mailing address line 1	1 Testing Street
Mailing address line 2	
Mailing suburb	RICHMOND
Mailing state	VIC
Mailing postcode	3121
Residential address same as mailing address	Yes
Home phone no.	
Work phone no.	
Mobile no.	
Email	<a href="mailto:Test@sheltonsuper.com.au">Test@sheltonsuper.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

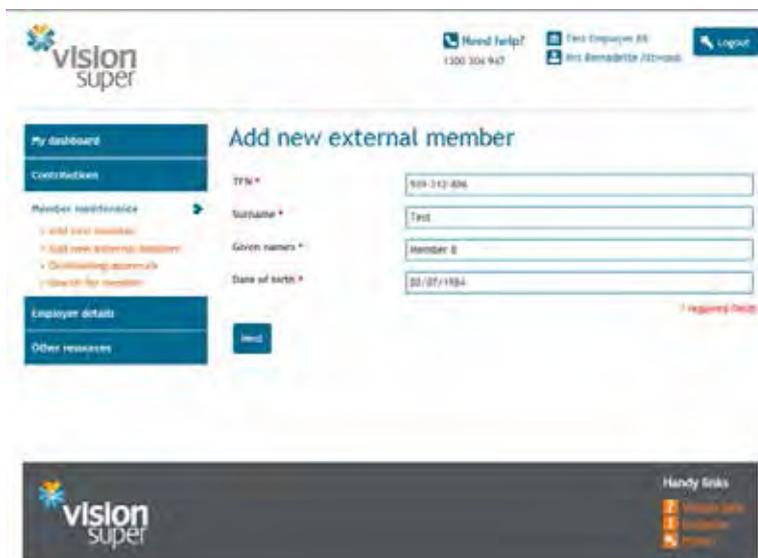
To add a new non Vision Super member select the member maintenance icon from the landing page and select the add new external member link from the left hand menu.



Enter the new external member details:

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

### Select next to proceed



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

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

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

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

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

### Add new external member

<b>Last name *</b>	Test
<b>Given names *</b>	Member B
<b>Date of birth *</b>	01-01-1984
<b>Tax File Number *</b>	929 212 806
<b>Title *</b>	Mr
<b>Gender *</b>	Male
<b>Mailing country *</b>	Australia
<b>Mailing address line 1 *</b>	PO Box 100
<b>Mailing address line 2</b>	
<b>Mailing suburb *</b>	MELBOURNE
<b>Mailing state *</b>	VIC
<b>Mailing postcode *</b>	3000
<input checked="" type="checkbox"/> Residential address same as mailing address	<input type="checkbox"/>

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

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

### Add new external member

<b>Last name *</b>	Test
<b>Given names *</b>	Member B
<b>Date of birth *</b>	01-01-1984
<b>Tax File Number *</b>	929 212 806
<b>Title *</b>	Mr
<b>Gender *</b>	Male
<b>Mailing country *</b>	Australia
<b>Mailing address line 1 *</b>	PO Box 100
<b>Mailing address line 2</b>	
<b>Mailing suburb *</b>	MELBOURNE
<b>Mailing state *</b>	VIC
<b>Mailing postcode *</b>	3000
<input type="checkbox"/> Residential address same as mailing address	<input checked="" type="checkbox"/>
<b>Residential country *</b>	Australia
<b>Residential address line 1 *</b>	1 Address Road
<b>Residential address line 2</b>	
<b>Residential suburb *</b>	MELBOURNE
<b>Residential state *</b>	VIC
<b>Residential postcode *</b>	3001

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

**vision super** Member help? 1300 264 847 Fast Enrolment 80 My Superability Account Login

**My settings** **Contributions** **Member administration** **Employer details** **Other resources**

**Add new external member**

Last name \*  Title   
 Given name \*  Gender   
 Date of birth \*  01/07/1984  
 Tax File Number \*  978 412 456  
 Title \*   
 Gender \*   
 Mailing country \*  Australia  
 Mailing address line 1 \*  PO Box 123  
 Mailing address line 2   
 Mailing suburb \*  Melbourne  
 Mailing state \*   
 Mailing postcode \*   
 Residential address same as mailing address   
 Home phone no   
 Work phone no

LAST MELBOURNE	3000	VIC
LAST MELBOURNE	3000	VIC
EAST MELBOURNE	3002	VIC
MELBOURNE	3000	VIC
MELBOURNE	3009	VIC
MELBOURNE	3004	VIC
MELBOURNE	3001	VIC
MELBOURNE	3045	VIC
MELBOURNE	3031	VIC
MELBOURNE	3090	VIC
MELBOURNE	3071	VIC

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 \*  982214  
 Self-managed super fund (SMSF)   
 Product, fund, ABN or UID \*  HESTA  
 Payment method   
  
 Check the box to administer

HEALTH EMPLOYERS SUPERANNUATION TRUST AUSTRALIA (HESTA)	489 44 411 199 (24)
HEALTH EMPLOYERS SUPERANNUATION TRUST AUSTRALIA (HESTA) (NON-RES)	489 44 411 199 (24)
MERCER EMPLOYERS SUPERANNUATION TRUST AUSTRALIA (MERCER SUPER TRUST)	489 44 411 199 (24)
HEALTH EMPLOYERS SUPERANNUATION TRUST AUSTRALIA (HESTA) (NON-RES)	489 44 411 199 (24)

**vision super** Helpful links

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 \*  982214  
 Self-managed super fund (SMSF)   
 Fund name \*   
 ABN \*   
 Payment method  Direct Credit  
 BSB \*   
 Account number \*   
 Contact given name \*   
 Contact surname \*   
 Contact email \*   
 Electronic service address \*   
 \* Required field

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

**My dashboard**

**Configure roles**

**Member maintenance**

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

**Employer details**

**Other resources**

### Add new external member

Last name \* Test

Given names \* Member B

Date of birth \* 22/02/1984

Tax File Number \* 930-312-806

Title \*

Gender \*

Mailing country \*

Mailing address line 1 \*

Mailing address line 2 \*

Mailing suburb \*

Mailing state \*

Mailing postcode \*

Residential address same as mailing address

Residential country \*

Residential address line 1 \*

Residential address line 2 \*

Residential suburb \*

Residential state \*

Residential postcode \*

Home phone no.

Work phone no.

Mobile no.

Email

Payroll number \*

Date joined employer \*

Membership number \*

Terminated super fund (MSF)

Product, fund, ABN or TFN \*

Unique superannuation identifier

Super fund ABN

Fund name

Product name

Payment method

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

**vision super**

Handy links

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

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

## Outstanding approvals

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

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

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

NAME	PAYROLL	FUND NAME	STATUS	ENTERED BY	DATE ENTERED
Mr Member B Test	Testroll	Health (Employee Superannuation Trust Australia)	Pending approval	Testroll@vision	22/08/2014

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

**Name:** Mr Member B Test

**Mailing address:** PO Box 100  
461,600496 VIC 3000

**Residential address:** 1 Address Road  
461,600496 VIC 3000

**Name prefix:**

**Work phone:**

**Mobile:**

**Email:**

**Date of birth:** 01/20/1984

**Tax File Number:** Tax file number supplied

**Membership number:** 462214

**Payroll no:** 12370001

**Self managed super fund (SMSF):**

**Unique superannuation identifier:** 107100040

**Super fund ABN:** 44 971 748 221

**Fund name:** Health (Employee 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' interface. At the top, there is a navigation bar with the Vision Super logo, a 'Need help?' link with the phone number 1300 304 947, and a user profile for 'Test Employer BS' with the name 'Mr Steve Smith' and a 'Logout' button. On the left, there is a sidebar menu with options: 'My dashboard', 'Contributions', 'Member maintenance' (with sub-options: 'Add new member', 'Add new external member', 'Outstanding approvals', and 'Search for member'), 'Employer details', and 'Other resources'. The main content area is titled 'Search for member' and features a search input field, a 'Search terms' label, and a 'Display members' section with radio buttons for 'Active members only' (selected) and 'Active and terminated members'. Below this is a table with the following data:

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

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

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

These additional links are:

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

These pages are discussed in detail in the following sections.

## Maintain member records – member information

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

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

The screenshot shows the 'Member information' page in the Vision Super system. The page is divided into a sidebar on the left and a main content area. The sidebar contains navigation links: 'My dashboard', 'Contributors', 'Member maintenance' (with a sub-menu including 'Add new member', 'Add new external member', 'Unlinking approval', 'Assign full member', 'Member information', 'Salary information', 'Additional information', 'Fund choice', and 'Contribution history'), 'Employer details', and 'Other resources'. The main content area is titled 'Member information' and 'Member details'. It features a 'Terminate' button at the top. Below this is a table of member details:

Member number	89941988
Name	Mrs Member A Test
Plan	Vision Super Silver
Date joined	01/09/2015
Mailing address	1 Testing Street, RICHMOND VIC 3121
Residential address	1 Testing Street, RICHMOND VIC 3121
Horse phone	
Work phone	
Mobile	
Email	<a href="mailto:wilm@vision-support.co.uk">wilm@vision-support.co.uk</a>
Date of birth	05/07/1985
Tax File Number	Tax file number supplied

Below the table is an 'Edit' button. At the bottom of the page, there is an 'Export' dropdown menu set to 'PDF format' and a 'Go' button.

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

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

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

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

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



[Need help?](#)  
1300 304 947

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

[Logout](#)

---

**My dashboard**

**Contributions**

**Member maintenance**

- > 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	<input type="text" value="Australia"/>
Mailing address line 1 *	<input type="text" value="1 Testing Street"/>
Mailing address line 2	<input type="text"/>
Mailing suburb *	<input type="text" value="RICHMOND"/>
Mailing state *	<input type="text" value="VIC"/>
Mailing postcode *	<input type="text" value="3121"/>
Residential address same as mailing address	<input checked="" type="checkbox"/>
Home phone	<input type="text"/>
Work phone	<input type="text" value="(03) 9911 3222"/>
Mobile	<input type="text" value="0423 568 468"/>
Email	<input type="text" value="bttest@visionsupport.com"/>
Date of birth	05/07/1985
Tax File Number	Tax file number supplied

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

\* required fields

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

## Maintain member records – termination

### Super Saver

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

#### Select the terminate button

The screenshot shows the Vision Super member information page. At the top, there is a navigation bar with the Vision Super logo on the left, a 'Need help?' link with the number 1300 304 947, and a user profile for 'Test Employer 88' with the name 'Mr Steve Smith' and the number 'Viewing 89941990'. A 'Logout' button is also present.

The main content area is titled 'Member information' and 'Member details'. A 'Terminate' button is prominently displayed at the top of the details section. Below it, the following member information is listed:

Member number	89941990
Name	Mr Member C Test
Plan	Vision Super Saver
Date joined	15/03/2016
Mailing address	Test address 3 SURREY HILLS VIC 3127
Residential address	Test address 3 SURREY HILLS VIC 3127
Home phone	
Work phone	
Mobile	
Email	
Date of birth	03/07/1954
Tax File Number	Tax file number supplied

Below the member details, there is an 'Edit' button. At the bottom of the page, there is an 'Export' section with a dropdown menu set to 'PDF format' and a 'Go' button.

The footer of the page features the Vision Super logo on the left and a 'Handy links' section on the right with icons for 'Website help', 'Feedback', and 'Privacy'.

Complete the following information:

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

**Select next to proceed**

**Terminate employment**

Please fill out the details of the member termination.

**Member details**

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

**Termination details**

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

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

Change member address?  
 Yes  No

\* required field

Next > Cancel

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

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

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

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

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

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

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

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

## Defined Benefit

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



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

### Terminate employment

Please fill out the details of the member termination.

#### Member details

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

#### Termination details

Termination reason *	<input type="text" value="Retirement"/>
Termination date *	<input type="text" value="23/05/2016"/>

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

Change member address?  
 Yes  No

\* required fields

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

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

### Click next

### Terminate employment

#### Additional information

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

Update salary?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Update service fraction?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Was this employee on leave without pay at termination?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Are contributions owed?	<input type="radio"/> Yes <input checked="" type="radio"/> No

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

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

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

## Terminate employment

### Review changes

Please review the changes and submit to complete the termination.

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

\* required fields

Back

Submit

Cancel

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

## Terminate employment

### Termination successful

The following details have been successfully submitted.

Please print a copy if you require.

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

\* required fields

Close

Export

PDF format

Go

## Retrenchment

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

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



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

## Terminate employment

Please fill out the details of the member termination.

### Member details

#### Member details

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

#### Termination details

Termination reason \*

Termination date \*

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

Change member address?  
 Yes  No

\* required fields

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

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

**Click next**

## Terminate employment

### Additional information

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

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

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

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

## Terminate employment

### Review changes

Please review the changes and submit to complete the termination.

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

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

\* required fields

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

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

## Terminate employment

### Termination successful

The following details have been successfully submitted.

Please print a copy if you require.

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

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

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

\* required fields

Close

Export PDF format Go

## Death or disability terminations

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

### Terminate employment

#### Review changes

Please review the changes and submit to complete the termination.

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

#### Termination Form

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

[Download PDF](#)

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

## Maintain member records – salary information

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

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

The salaries can be exported to PDF or excel format.

The screenshot displays the 'Salary information' page in the Vision Super system. The page includes a sidebar with navigation options such as 'My dashboard', 'Contributors', 'Member information', 'Employer details', and 'Other resources'. The main content area shows a table with columns for 'SALARY COMMITMENT DATE' and 'SALARY'. A table entry is visible with a date of 01/01/2016 and a salary of 67,888.60. There are buttons for 'Add new salary' and 'Export' (with options for PDF format and Excel). A 'Back to member information' button is also present.

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

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

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

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

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

Below the table is an 'Add new salary' button. At the bottom of the page, there is a dropdown menu for 'Expert' set to 'PDF format' and a 'Go' button. A 'Back to member information' button is also visible. The rest of the page layout, including the navigation menu and top right links, remains the same as in the previous screenshot.

## Defined Benefit salaries outside allowable limits

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

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

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

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

- Salary commencement date:** 01/05/2016
- Salary:** 580,000.00
- Document type:** Change of salary
- File upload:** A button labeled 'Select File' is present.
- Comment:** A text input field is provided for the user to enter a reason for the salary change and attach supporting documentation.

At the bottom of the page, there are buttons for 'Previous', 'Save', and 'Cancel'. A 'Handy links' section is also visible at the bottom right.

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. The 'File upload' button is now labeled 'Details'. The 'Comment' text area contains the text 'Salary update is permanent'. The rest of the page, including the salary information and navigation buttons, remains the same.

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

## Maintain member records – additional information

### Super Saver

The additional information page displays the members:

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

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

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

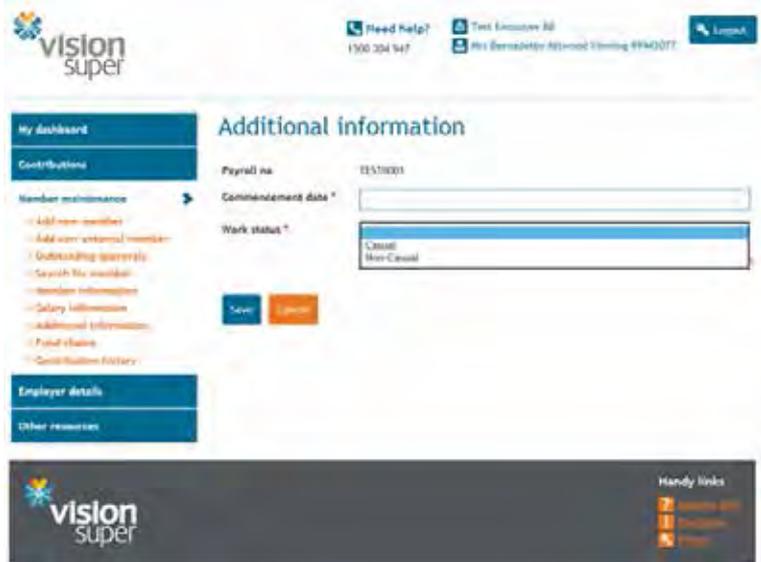
The screenshot shows the 'Additional information' page for a member. The page includes a navigation menu on the left with options like 'My dashboard', 'Contributions', 'Member maintenance', 'Employer details', and 'Other resources'. The main content area displays the member's account information: 'Vision Super Saver V555 / 296542'. Below this, the 'Additional information for Testing Member A' is shown, including fields for 'Payroll no' (TEST0001), 'Employment start date' (03/11/2015), 'Location' (No Location), and 'Current salary' (\$80,000.00). There is an 'Edit' button. The 'Employment history' section shows a table with columns for 'COMMENCEMENT DATE' and 'WORK STATUS', with one entry for '03/11/2015' and 'Non-Casual'. There is a 'New work history >' button. At the bottom, there is an 'Export' dropdown menu set to 'PDF format' and a 'Go' button. The footer contains the Vision Super logo and 'Handy links'.

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 contains 'TEST0001' and the 'Employment start date' is '03/11/2015'. The 'Location\*' dropdown menu is set to 'No Location' and is highlighted with a red box. The 'Current salary' is '\$80,000.00'. There are 'Save' and 'Cancel' buttons. A red asterisk and the text '\* Required field' are visible next to the location dropdown. The rest of the page layout is 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.



## Defined Benefits

The additional information page for a Defined Benefit member contains:

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

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

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

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

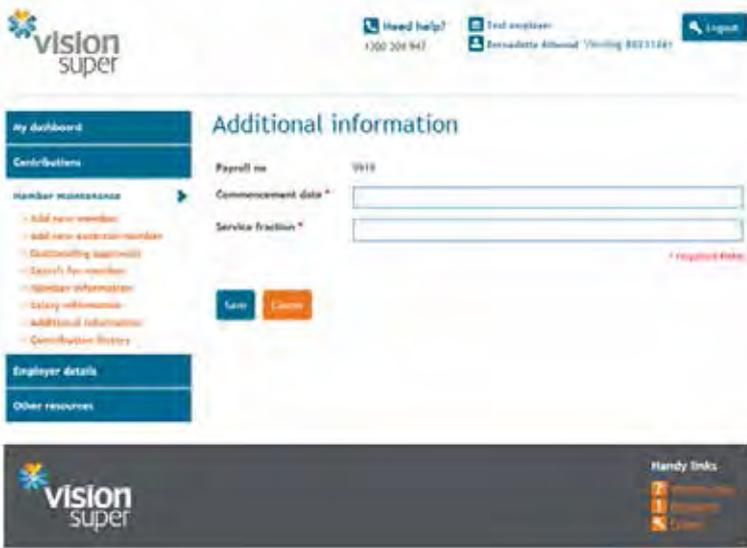
- Header:** Vision Super logo, 'Need help?' (1300 304 947), 'This member' (Kernathia Abouad - ID: 8077381), and a 'Logout' button.
- Left Navigation:** My dashboard, Contributions, Member maintenance (Add new member, Add new internal member, Outstanding approvals, Details for member, Member self service, Salary information, Additional information, Contribution history), Employer details, Other resources.
- Account:** Defined Benefit Plan VDB / 440533
- Additional information for Trevor Smith:**
  - Payroll no: 9999
  - Employment start date: 29/04/1996
  - Location: No Location
  - Current salary: \$18,841.00
- Service fraction history:**

COMMENCEMENT DATE	SERVICE FRACTION
29/04/1996	99.00%
- Contribution rate history:**

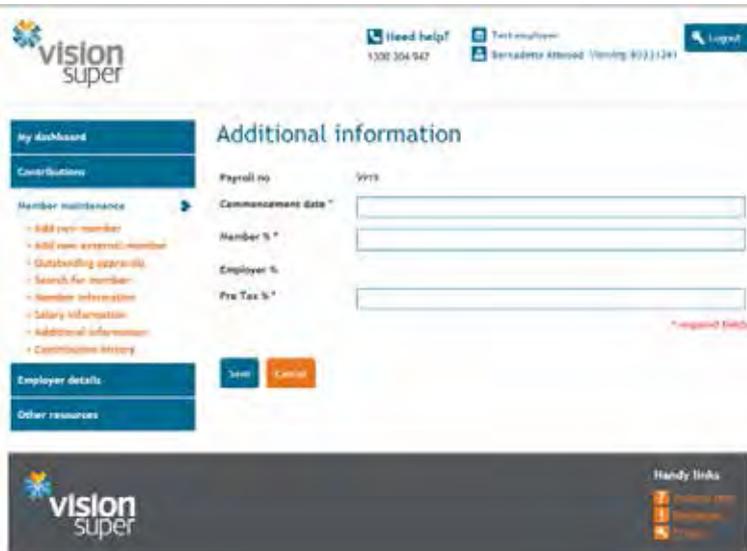
COMMENCEMENT DATE	MEMBER'S %	EMPLOYEE'S %	PRE-TAX %
01/01/2016	4.00%	4.50%	3.00%
01/01/2015	4.00%	4.50%	3.00%
01/01/2014	4.00%	4.50%	3.00%
01/01/2013	4.00%	4.50%	3.00%
01/01/2012	4.00%	4.50%	3.00%
- Leave without pay history:**

START DATE	END DATE
No Leave Without Pay history	
- Export:** PDF format
- Footer:** Vision Super logo and Handy links.

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



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





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

**Fund choice**

Effective date \*

Membership number \*

Self managed super fund (SMSF)

Fund name \*

ABN \*

Payment method

BBS \*

Account number \*

Contact given name \*

Contact surname \*

Contact email \*

Electronic service address \*

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

Save Download statement Cancel

### Maintain member records – contribution history

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

The list of contributions can be filtered to display:

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

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

**Contribution history**

Account: Vision Super Super 1955 - 247124

Contribution history for Trévor Smith

Transaction type \*

Start date \*

End date \*

Search

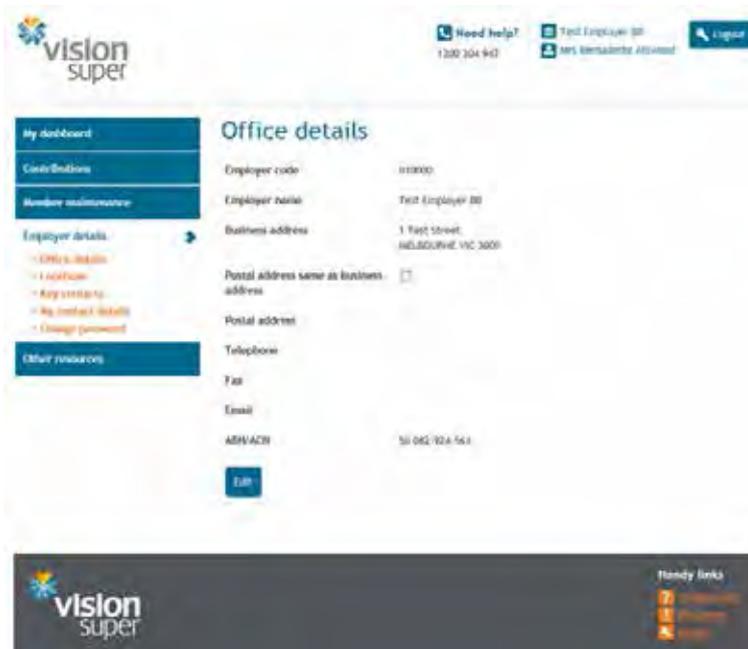
EFFECTIVE DATE	CONTRIBUTION DESCRIPTION	AMOUNT
01/01/2015	EMPLOYER SG - Text employer [01/01/2015 - 01/01/2015]	5240.29
21/01/2015	EMPLOYER SG - Text employer [21/01/2015 - 21/01/2015]	105.82
01/01/2016	EMPLOYER SG - Text employer [01/01/2016 - 01/01/2016]	107.08
20/11/2015	EMPLOYER SG - Text employer [20/11/2015 - 20/11/2015]	3121.28
01/12/2015	EMPLOYER SG - Text employer [01/12/2015 - 01/12/2015]	3180.91
28/11/2015	EMPLOYER SG - Text employer [28/11/2015 - 28/11/2015]	3189.02
27/11/2015	EMPLOYER SG - Text employer [27/11/2015 - 27/11/2015]	5183.42
28/10/2015	EMPLOYER SG - Text employer [28/10/2015 - 28/10/2015]	3189.90
18/10/2015	EMPLOYER SG - Text employer [18/10/2015 - 18/10/2015]	3205.19

# Employer details

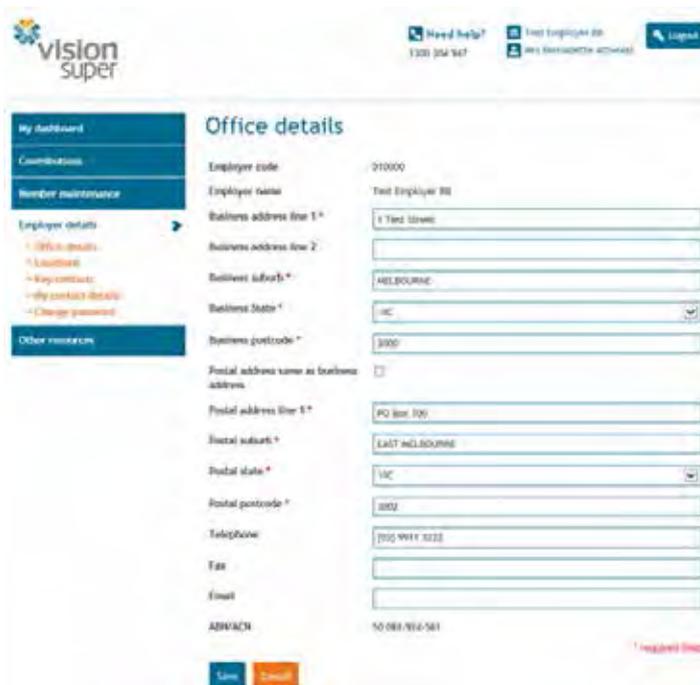
## Maintain office details

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

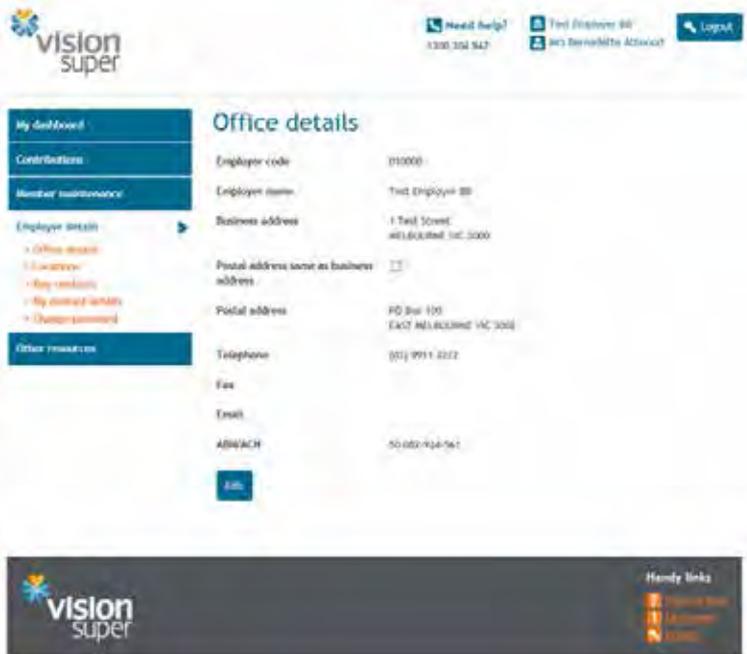
These details can be edited by selecting the edit button on the office details screen.



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



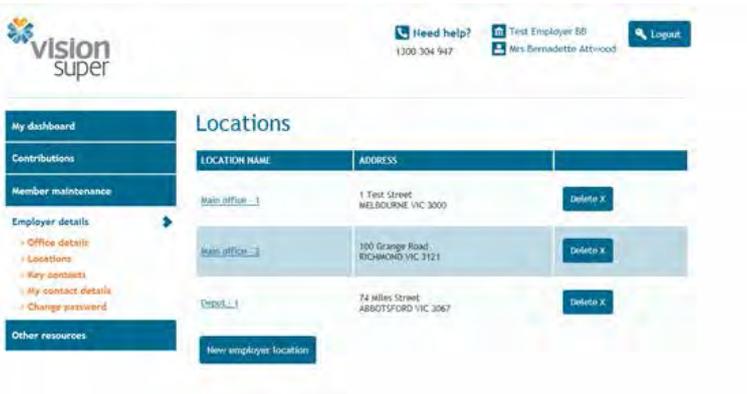
Once you have entered the required changes click save. Changes appear in Employer Online immediately.



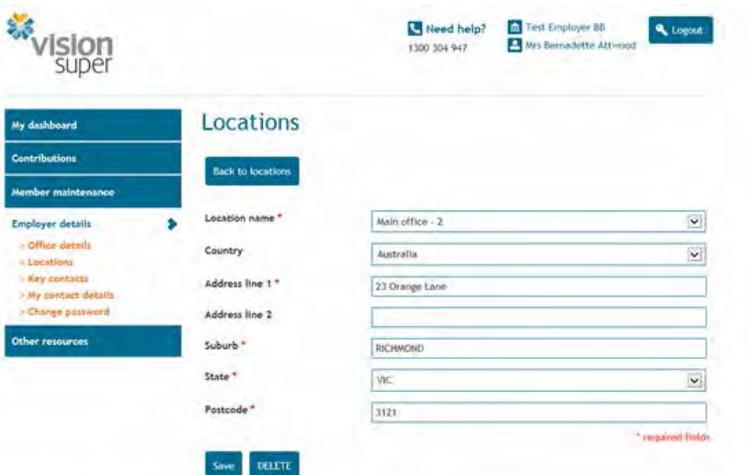
## Maintain locations

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

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



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



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

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

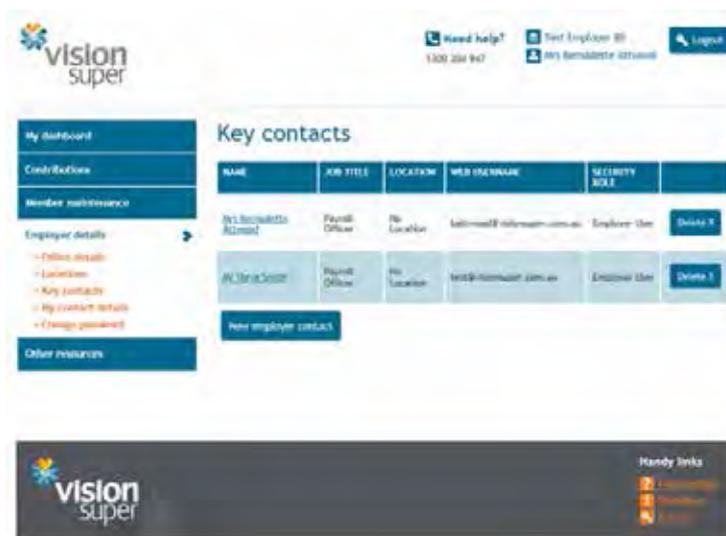
In the list below the main office – 1 location has been linked to an employer contact so it cannot be deleted.



## Maintain key contacts

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

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



## Add a new contact

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

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

Enter data in the required fields and select save

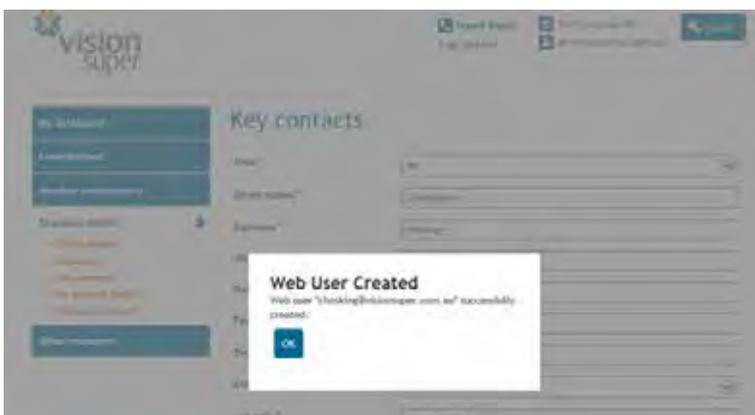
The screenshot shows the 'Key contacts' form with data entered. The fields are filled with: Title (Ms), Given names (Jenny), Surname (Bright), Work phone number (021 911 2012), Mobile phone number, Fax number, Email address (testing@visionsuper.com.au), Category (Human Resources - Other), Job title (Human Resources Officer), Location (No Location), Create web user (unchecked), and Role. The 'Save' button is highlighted in orange, indicating it is the active action. A red asterisk indicates required fields.

## Add a web user

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

Key contacts form fields:

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



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

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

Hi Mr Christopher Hosking,

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

Your new username is:

[chosting@visionsuper.com.au](mailto:chosting@visionsuper.com.au)

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

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

This email was sent by: Mrs Bernadette Attwood

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

## Maintain your contact details

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

The screenshot shows the 'My contact details' page in the Vision Super system. The page header includes the Vision Super logo, a 'Need help?' link with the number 1300 204 947, and a 'Test Employee ID' field with the value 'Mrs Bernadette Atwood' and a 'Logout' button. The left sidebar contains navigation options: 'My dashboard', 'Cover/Location', 'Member maintenance', 'Employer details' (with sub-links for 'Office details', 'Locations', 'Key contacts', 'My contact details', and 'Change password'), and 'Other resources'. The main content area displays the following details:

Title	Mrs
Given names	Bernadette
Surname	Atwood
Work phone number	(07) 9911 2222
Mobile phone number	
Fax number	
Email address	bernadette@visionuper.com.au
Category	Payroll - Main
Job title	Payroll Officer
Location	NS Location
Create web user	<input checked="" type="checkbox"/>
Web username	bernadette@visionuper.com.au
Role	Employee User

At the bottom of the details section are 'Save' and 'Edit' buttons.

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

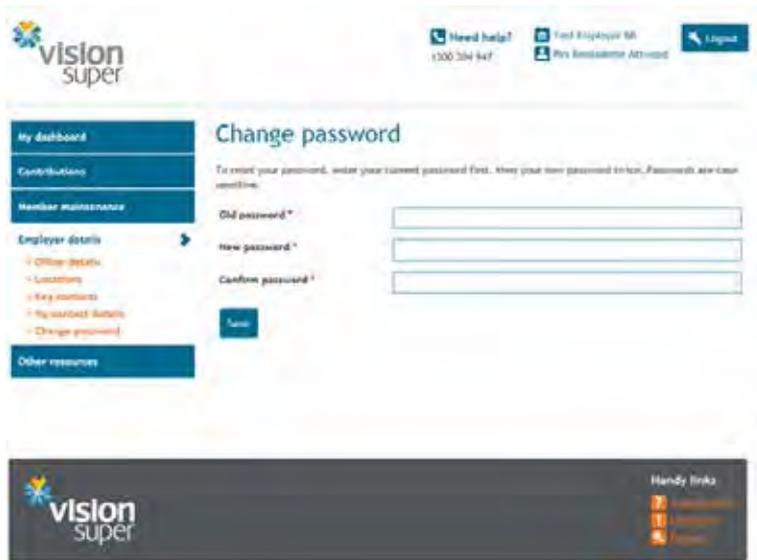
The screenshot shows the 'My contact details' page in the Vision Super system in edit mode. The layout is identical to the previous screenshot, but the 'Save' and 'Edit' buttons at the bottom are now 'Save' and 'Cancel'. The input fields are as follows:

Title *	<input type="text" value="Mrs"/>
Given names *	<input type="text" value="Bernadette"/>
Surname *	<input type="text" value="Atwood"/>
Work phone number	<input type="text" value="(07) 9911 2222"/>
Mobile phone number	<input type="text"/>
Fax number	<input type="text"/>
Email address *	<input type="text" value="bernadette@visionuper.com.au"/>
Category *	<input type="text" value="Payroll - Main"/>
Job title *	<input type="text" value="Payroll Officer"/>
Location *	<input type="text" value="NS Location"/>
Create web user	<input checked="" type="checkbox"/>
Web username	<input type="text" value="bernadette@visionuper.com.au"/>
Role *	<input type="text" value="Employee User"/>

A red asterisk icon and the text 'Required field' are visible at the bottom right of the form area.

## Change password

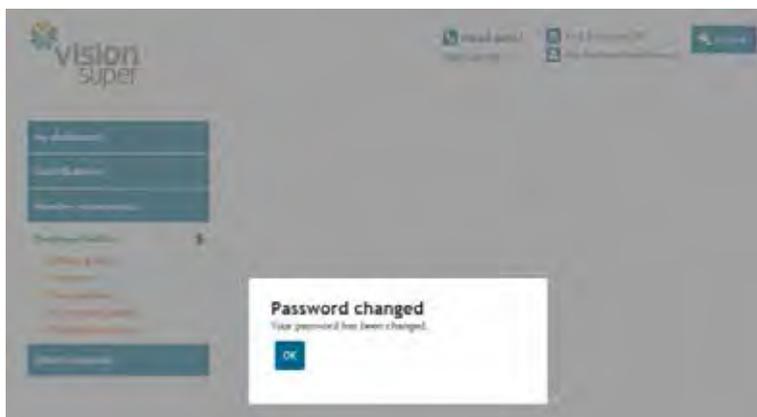
To change your current password select the employer details icon from the landing page and then the change password link from the left hand side.



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)



# 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.

