AustralianSuper

Employer Portal set up checklist

Ensure you have completed all the key steps to make your first contribution. You can access help for step-by-step instructions and videos within the Employer Portal[1].

1. User set up

- ☐ I've received the email invitation to activate my Employer Portal account.
- ☐ I've activated my user account by providing my name and email address.
- ☐ I've verified my email and set up my password.

Note: you only need to verify your email once during registration.

- ☐ I've set up Multi-factor Authentication (MFA) using Google Authenticator or SMS to my mobile device and verified my mobile number. (This will be used as a backup, should you have trouble logging in).

2. Organisation set up

We've pre-populated your organisation's details where possible including your existing Employer Number.

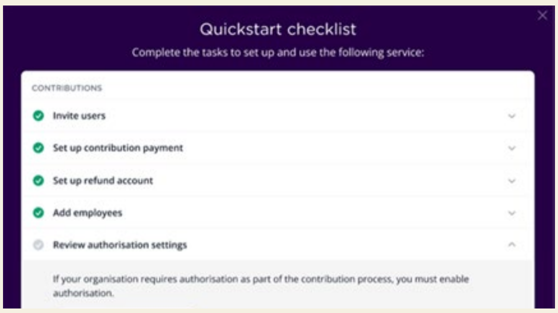
- ☐ I've reviewed these details and updated as required.
- ☐ I've read and accepted the declarations.

Your user account has been successfully created. Continue to the Quickstart checklist to set up your organisation.

3. Follow the Quickstart checklist

The Quickstart checklist will take you through the set-up steps required prior to submitting a contribution file. As you complete each step, the checklist will display a green tick.

- ☐ I've clicked on the Quickstart checklist which can be found at the top of the dashboard.



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4. Set up contribution payment method

- [ ] I've added my organisation's contribution payment details and selected EFT, BPAY or Direct Debit.

If using Direct Debit:

- [ ] I've verified my identity, entered the bank account details, and verified the bank account. (You will have 7 days to complete your bank account verification from when you initiate direct debit set up.)

To verify the bank account, a small deposit will be sent to your nominated account. This can take up to 3 business days to appear in the account. Once received, you will need to enter the Payment Reference Number of the deposit to complete verification.

ID verification is required to set up a Direct Debit account if Direct Debit is selected as the contribution payment method. The verification process is completed online, where you upload a photo of your driver's licence or passport and record a short selfie video to confirm your identity.

5. Set up refund account

- [ ] I've entered and verified the refund bank account details and verified my identity. (This must be completed within 7 days from when you initiate a refund account).

To verify the bank account, a small deposit will be sent to your nominated account. This can take up to 3 business days to appear in the account. Once received, you will need to enter the Payment Reference Number of the deposit to complete verification.

ID verification is required to set up a Refund account if EFT/BPAY is selected as the contribution payment method. The verification process is completed online, where you upload a photo of your driver's licence or passport and record a short selfie video to confirm your identity.

Note: ID verification does not need to be repeated if already completed for Direct Debit contribution payments.

6. Add employees

- [ ] I've clicked the button to auto populate my organisation's employee data.

Note: it may take some time for this process to be completed depending on the number of employees. You will be emailed as soon as it's finished.

7. Invite additional users

- [ ] I've invited any additional users onto the platform and set their permissions.

Note: this is an important step, especially if authorisation requirements are set up for contributions.

8. Submit your first contribution

Note: Depending on your preference, you can upload a contribution file or manually create a contribution.

- [ ] I've uploaded my organisation's contribution file (SAFF or QuickSuper V2 file).

OR

- [ ] I've or manually created my organisations contribution in the Employer Portal.

For connected organisations (e.g. Subsidiaries)

- [ ] Step 1 (registration and MFA) does not need to be repeated.
- [ ] From the View All Organisations button, locate the additional organisation.
- [ ] Repeat Steps 2 – 7 for each connected organisation.
- [ ] Once complete, proceed with Step 8 (Submitting a contribution) for each organisation.

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