



Multi-entity organisation set up checklist

Employer Portal quick reference guide

If you have more than one entity in your organisation structure to be added to the Employer Portal¹, you must consider a number of factors before starting the set up process, especially:

- The type of set up approach you need.
- The order in which to set up your entities.

It's strongly advised you work through this checklist prior to beginning set up in the Employer Portal.

1. Review organisational structure

- Confirm all entities that need to be set up for your organisation.
- Identify the *Parent* entity - when you start your set up, this must be set up first.
- Identify all *Child* organisations (branches or subsidiaries - see diagram below).
- Identify any standalone/unrelated entities, which will require separate set up.

1) Hierarchy Position

- **Parent:** An organisation that has one or more organisations beneath it.
- **Child:** An organisation placed under a Parent.
- An organisation can be **both** a Parent and a Child if it has an organisation beneath it. (e.g., Parent → Child → Grandchild)

Scenario 1
Parent entity with children

Scenario 2
Parent entity with children and grandchildren.

Scenario 3
Standalone entity with no children

2) Hierarchy Types (how a Child relates to its Parent)

- **Child – Branch:** Same ABN as Parent, **different** Employer Number
- **Child – Subsidiary:** Different ABN and **different** Employer Number
- **Unrelated organisations:** No hierarchical link (standalone), but **the same user** can be associated with multiple unrelated organisations.

Scenario 1
Parent entity with Branch vs Subsidiary

Scenario 2
Unrelated organisations

Note: Grandchildren can only be for subsidiaries (with their own ABN) and NOT branches.

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2. Confirm set-up approach (hierarchy vs. standalone)

Consider, 'Do your *Child* organisations need to inherit configuration from the *Parent*?'

- Do the entities within your organisational structure (branches and/or subsidiaries) need to **share any of the same characteristics as the *Parent***? This may include:

- Do they have the same contribution payment method (EFT/BPAY/direct debit)?
- Do they share the same refund account?
- Do they share the same Virtual Bank Account (VBA)?
- Do they share the same ATO stapling service?

If **YES to all of these questions**, you can set them up as *Child* entities of your *Parent*.

Note: You must set the *Parent* entity up first.



3. Double check for potential blockers

Double check that the following conditions/scenarios don't exist:

- Are different direct debit or refund accounts required per *Child*?
- Are there different contribution/payment settings across entities?
- Are there any privacy or ring-fencing requirements (e.g. exec teams)?
- Are there any QuickSuper legacy setups that don't map neatly into a *Parent/Child* hierarchy?

If the answer to **any of these questions is YES**, standalone setup is required.

4. Confirm set up readiness

Have you confirmed the following details?

- Parent* organisation details confirmed (ABN, Employer Number).
- Child* organisations mapped to correct type (can be set up as *Child*, vs must be set up as a standalone entity).
- Migration considerations understood (per organisation).
- You understand the setup order (parent first) and next steps.

5. You're ready to proceed

You're ready to proceed with set up if you have:

- Reviewed your organisation structure, and identified any *Parent/Child* relationships.
- Confirmed the required set up approach for your organisation, including whether any *Child* entities need to share/inherit characteristics, or need to be set up as standalone entities.
- Double checked for potential blockers.
- Confirmed set up readiness.

If anything feels unclear, pause and check before continuing.

We're here to help

If you have any questions or can't find the information you're looking for on the Employer Portal Hub, please contact us on **1300 300 273** 8am - 8pm AEST/AEDT weekdays.



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