

Adviser Portal: Extracting Centrelink schedules and Client profile reports

A how to guide

13 December 2023

Print a client profile



1. Select a client from the list in the 'Clients' page

AustralianSuper Adviser

Home Clients Tools & Resources Support Upload forms

Home > Clients

Clients

Listed below are your clients who've provided you authority to view their AustralianSuper account details.

PRINT EXPORT LIST

Search by name or client number

Show: All

| | | | | | |
|----------------------------------|-----------------|---------------------------|-----------------------------|-----------------|---|
| <input checked="" type="radio"/> | Name [REDACTED] | Account number [REDACTED] | Plan type Superannuation | Status active | > |
| <input type="radio"/> | Name [REDACTED] | Account number [REDACTED] | Plan type Retirement Income | Status inactive | > |
| <input checked="" type="radio"/> | Name [REDACTED] | Account number [REDACTED] | Plan type Superannuation | Status active | > |

Export Client Report



2. In your client's profile, select "Export Client Report". The Adviser Portal will generate a client profile report as a PDF file and save the file to your desktop. (This may take up to one minute.)

The screenshot displays the AustralianSuper Adviser interface. At the top, the header includes the AustralianSuper logo and the word 'Adviser'. A navigation menu below the header contains 'Home', 'Clients', 'Tools & Resources', 'Support', and 'Upload forms'. The 'Clients' tab is selected, and the breadcrumb 'Home > Clients' is visible. The main content area shows a client profile with a red arrow pointing to the 'EXPORT CLIENT REPORT' button. Other visible elements include a 'PRINT' button, a 'Superannuation' label, and fields for 'Account number' and 'DOB'. Below this, there are two summary cards: 'Balance estimate' and 'Division type' (displaying 'Industry'). A secondary navigation menu at the bottom includes 'Client details', 'Transactions', 'Investment', 'Benefit estimate', 'Beneficiaries', and 'Insurance'. The 'Client details' section is expanded, showing 'Personal details' and 'Contact details' with redacted fields for Name, Address, Member number, and Postal address.

Export a Centrelink Schedule



3. If you have a Choice Income client, you have the option of exporting a Centrelink Schedule. Select Export, and choose between the two options:

The screenshot shows the AustralianSuper Adviser interface. At the top, the logo 'AustralianSuper Adviser' is visible on the left, and a user profile icon is on the right. Below the logo, there is a navigation menu with 'Home', 'Clients', 'Tools & Resources', 'Support', and 'Upload forms'. The 'Clients' tab is selected. The main content area shows a client's details, including a 'Retirement Income' tab, 'Account number', and 'DOB'. A red arrow points to the 'EXPORT' button in the top right corner of the client details section. A dropdown menu is open, showing two options: 'CLIENT REPORT' and 'CENTRELINK SCHEDULE'. Below this, there are three summary cards: 'Balance estimate', 'Next Quarterly payment due on', and 'Division type' (Choice Income Pension). At the bottom, there are tabs for 'Client details', 'Transactions', 'Investment', 'Benefit estimate', and 'Beneficiaries'. The 'Client details' tab is selected, showing 'Personal details' and 'Contact details' sections.

More information

Visit: australiansuper.com/AdviserResources

Login: <https://adviser.australiansuper.com/login>

Email: adviserservices@australiansuper.com

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It's super.
And it's yours.**