5 February 2015

QuickSuper: Step by Step guide

Your online solution to automate your super payments

Super payments. Super fast.

QuickSuper helps you meet your SuperStream obligations, allowing you to submit all employee super payments quickly and easily online.

This step by step guide is to assist getting you started on QuickSuper. For more detailed instructions, simply refer to the QuickSuper User Guide located within the 'download' section of QuickSuper.

Need further assistance?

Contact our dedicated Employer Services Team on **1300 223 423**, 8am - 6pm (AEST), Monday to Friday or email us at **employersolutions@hostplus.com.au.**

QuickSuper – how to get started

Are you a multi-employer or single-employer?

Multi-employer: if you pay super contributions for more than one business – go to **Step 1.**

Single-employer: if you pay super contributions for one business only – go to **Step 2**

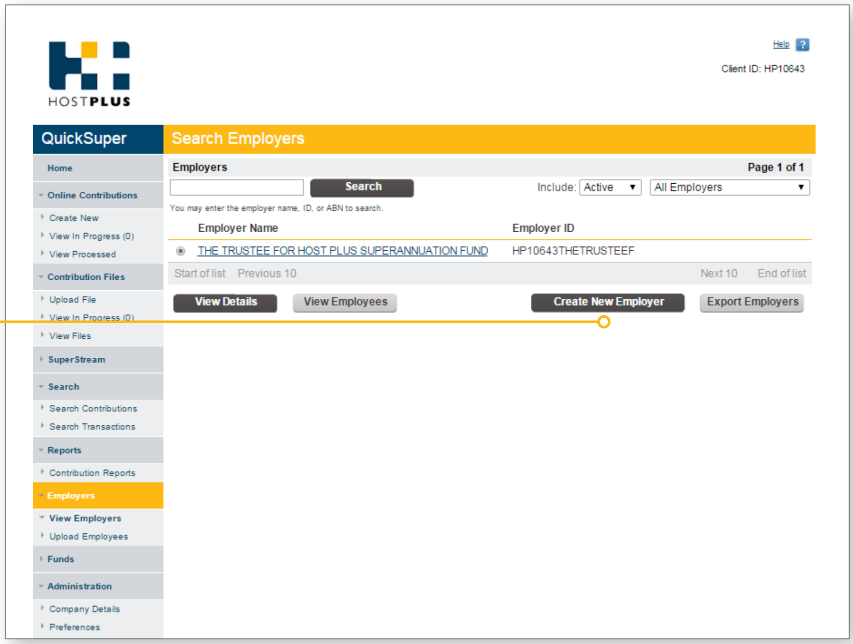
Step 1

(For multi-employers only)

Create New Employer

If you are registered as a multi-employer (ie. to pay contributions for more than one business) your first step will be to create new accounts for each of the businesses you will be contributing for. To do this, once logged into QuickSuper simply follow the steps below. Single-employers go to Step 2.

1. Select **Manage Employers** on the home screen.
2. Select **Create New Employer.**
3. Enter the required details and choose your QuickSuper *Employer ID*. If you are loading contribution files this ID will be used in your file to identify the business site you are paying for.
4. Add bank account details. This will only be used to credit amounts where contributions are to be returned.
5. Create a fund relationship between your business and your default super fund by entering the fund's name and your employer account number with them. This will ensure all contributions you make to your default fund will be applied against your employer account.



Step 2

Registering Self-Managed Super Funds (SMSFs)

To make contributions to a superannuation fund, the funds details must be pre-registered. The most common retail and industry superannuation funds, including Hostplus, already have their details pre-registered within QuickSuper.

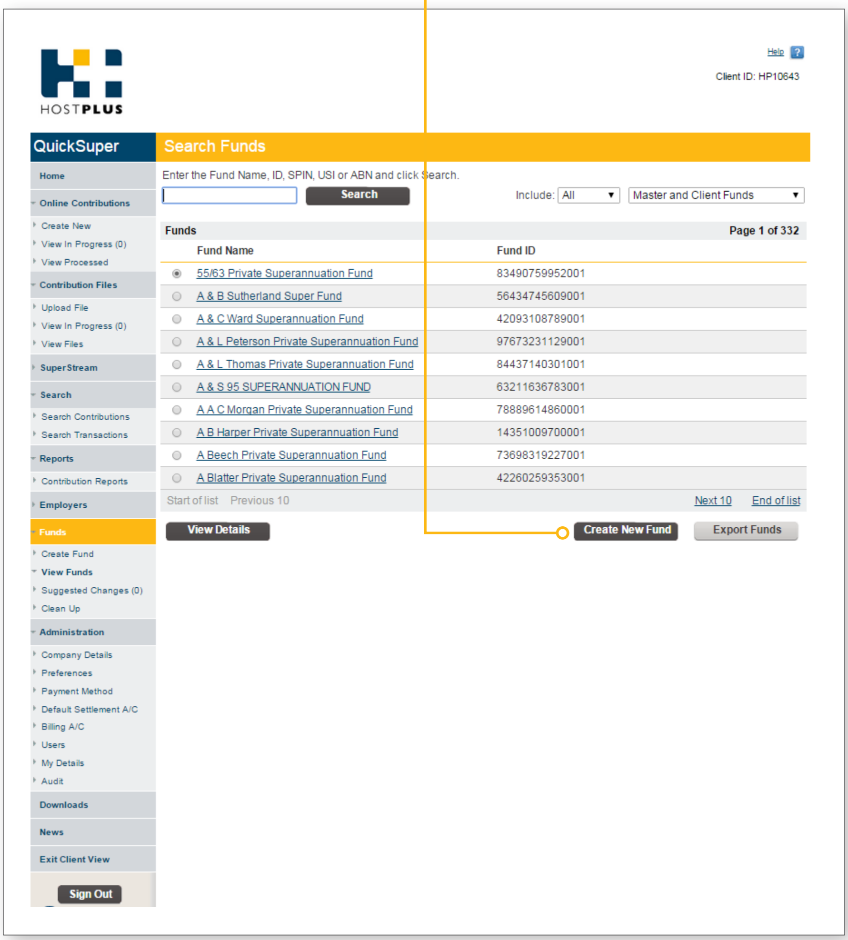
To find out if your employee's funds are pre-registered within QuickSuper:

Select **Manage Funds** on the home screen to search the pre-listed funds and their Superannuation Product Identification Numbers (SPIN) and Unique Superannuation Identifier (USI). These will be required in your file loads if you select this option.

Select **Export Funds** to download the full list.

For some funds (such as Self-Managed Superannuation Funds) you will need to create your own client fund to use.
To do so:

1. Select **Manage Funds.**
2. Select **Create New Fund.**
3. Enter either the **SPIN**, **USI** or **ABN** of the superannuation fund you wish to create.
4. Enter the funds details including payment details and create a **Fund ID**. The Fund ID will be used if the fund does not have a SPIN or USI.



Online contributions

If you have selected the option to '*create online contributions*' you will need to follow the below steps to either manually set up your employees or upload an Employee File. If you are setting up manually, follow **Step 1** or if you are registering multiple employees by file upload, follow **Step 2**.

Step 1

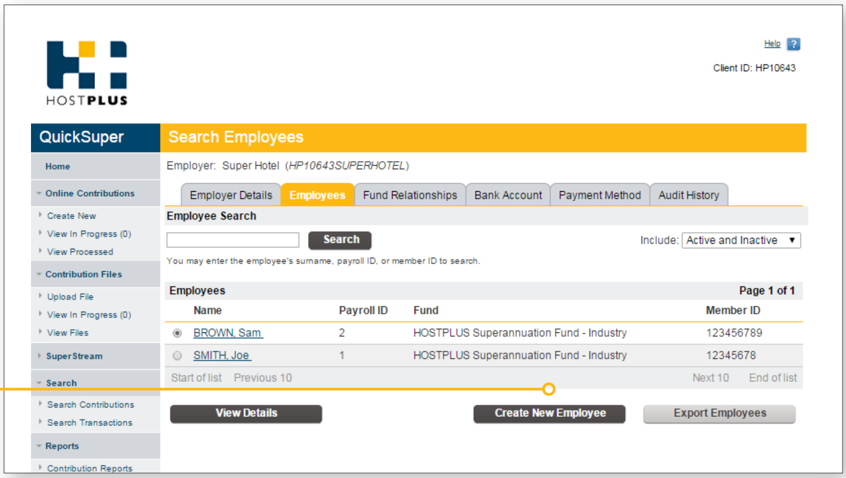
Registering individual employees in QuickSuper manually:

1. Select **Manage Employees** on the home screen.
2. Select Create **New Employee.**
3. Enter the new employee details on the 'Add Employee' page.
4. Select **Save.**
5. On the 'Add Employee Fund' page, enter the fund details. Repeat to add extra employees.

Step 2

Or, alternatively, upload a file to register multiple employees:

1. On the home screen select **Downloads**.
2. Select **Employee File Upload Specification V2** to download the file specification guide.
3. Select **Employee File Upload Starter** to download the employee starter template.
4. Populate the template file with all your employee's details including fund details and save in CSV (Comma delimited) (*.csv)' format.
5. Select **Upload Employees** under **Employees** on the home screen and check that the date format matches your file.
6. Select the **Choose file** button. Locate the employee file and click 'Open'.
7. Select **Upload Employee File**.



Creating online contributions

Once employees are registered you can create new online contributions for your employees. To do so:

1. Select **Create New** on the QuickSuper home screen under **Online Contribution.**

2. For multiple employers select the employer you are making contributions for and select **Next**.

3. Enter the start and end date of the contribution period and select **Next**

4. Add the employee contribution amounts and select Save and **Go to Summary**.

5. Review the summary details and select **Submit** to continue.

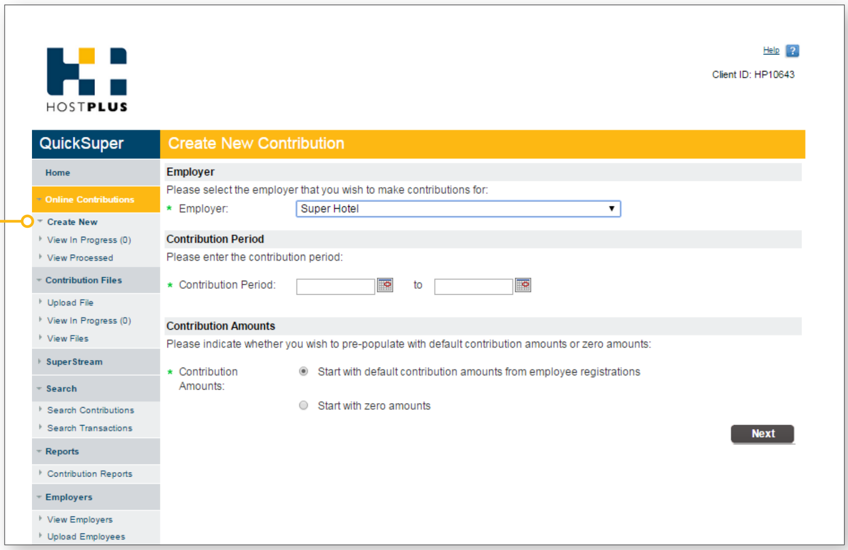
6. The 'Confirm Submission' page allows you to review the payment details before proceeding. Your selected payment method will also be displayed on the page. For employers that have chosen Direct Debit as the payment method this screen allows you to choose the debit date. Select **Confirm.**

7. The 'Contribution Summary' page now allows you to authorise the submission.

8. Once submitted and authorised the submission will show a status of 'Authorised'. *The next step depends on the payment method you have selected*:

9a. Paying via **Direct Debit**, QuickSuper will automatically debit your nominated Settlement Account on the date listed as 'Date Scheduled' for the full amount. *OR*

9b. Paying via **EFT**, you will need to log into your own financial institution's online banking and make the payment using the instructions displayed on the screen. Further processing of the contributions will be held until payment is received by QuickSuper.



Upload contribution file method

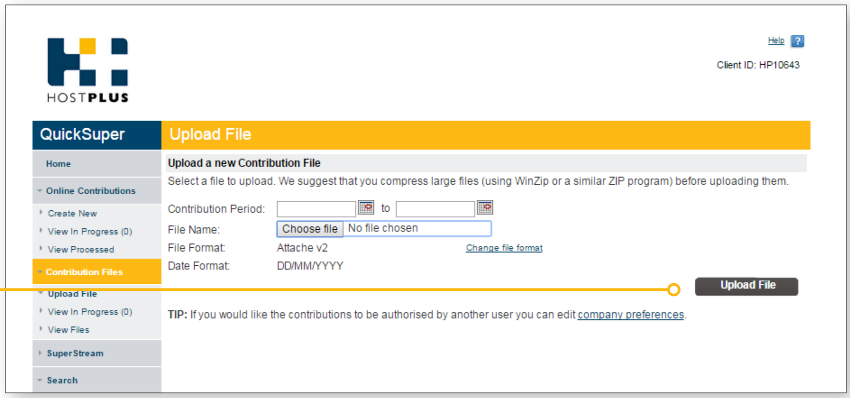
If you have chosen this option you are not required to register employees in QuickSuper.

Your file will need to be in a supported format. For assistance on support file formats simply contact our dedicated Employer Services Team on **1300 223 423**, 8am - 6pm (AEST), Monday to Friday or email us at **employersolutions@hostplus.com.au**

If your file is in a supported format of QuickSuper:

Step 1

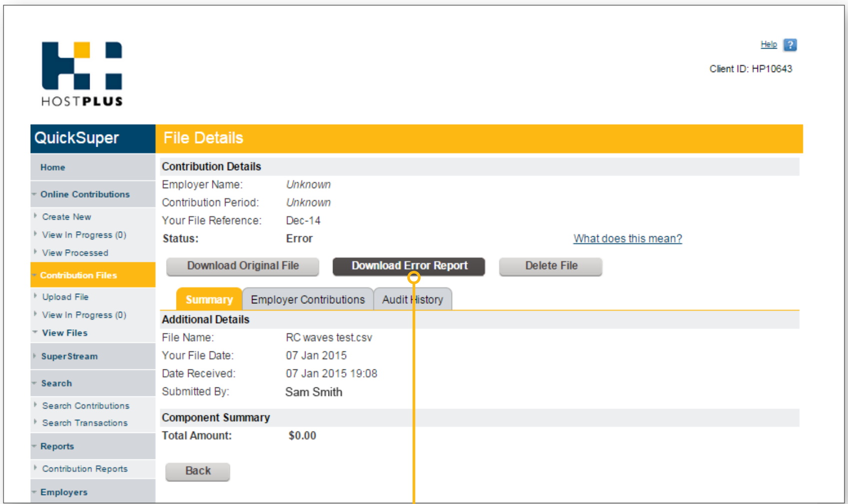
On the QuickSuper home screen select **Upload File**. Ensure the file format and date format matches your contribution file, select Choose File to locate your file and select **Upload File**.



Step 2

Status check

On the 'Upload File Progress' screen you will now be able to check the status of the upload on the 'File Details' screen.



Options that might be displayed within status of file upload are:

A. **Received:** this means the file successfully uploaded.

B. **Received – Part Reject**: meaning not all of the contributions were accepted. Select **Download Template File** to view the rejected contributions. Correct the errors or submit the file minus the rejected contributions.

C. **Error:** this means the entire file was rejected. Select **Download Error Report** to view the list of errors. Correct the errors and re-load the file. Refer to the Contribution CSV File Specification guide for a description of the Error Codes or contact the Employer Services Team for further assistance.

Step 3

Submitting file

When the file has successfully loaded under the **Summary** tab tick the box "I can confirm the changes the employee data are correct and should be passed onto Superannuation Funds when making contributions".

Select **Submit File.**

Common Errors

Uploaded file is not a valid contribution CSV file: Check that first line in the file contains the header fields in the correct order and correct wording.

Wrong Date Format: The date format set in QuickSuper must be in the same format as your file.

Paying for contributions

After the 'online' contribution is submitted (and authorised if required), it will display with a status of 'Received'. The next step will depend on the payment method you have selected:

Only use the banking details provided within your QuickSuper account for your payments.

A. If paying by Direct Debit: QuickSuper will automatically debit your nominated Settlement Account on the date listed as 'Date Scheduled' for the full amount. To cancel this before 4pm (Sydney time) on the scheduled date you must click on 'Delete File' and follow the prompts to remove the file. QuickSuper will wait three banking days for the debit to clear.

B. If paying by EFT: you will need to log into your own financial institution's online banking and make the payment using the account details displayed on the screen.

- If there is only one payment per contribution file, the payment details will be displayed on the screen. In some circumstances (eg. direct debit of multiple employers), there will be multiple payments per contribution file. In this case, the full list of payments can be downloaded via a link on the screen.
- You are able to view the ongoing status of contributions and payment transactions by selecting the View and Search links on the QuickSuper home screen menu.

We hope this quick step by step guide assists you getting started on QuickSuper. If you need any assistance, do not hesitate to call our dedicated Employer Services Team on **1300 223 423**, 8am - 6pm (AEST), Monday to Friday or email us at **employersolutions@hostplus.com.au**

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