

FirstChoice Employer
Super Clearing House

Creating and maintaining employees

This guide will cover adding new employees, maintaining employee records, and processing employee exits.

Adding a new employee

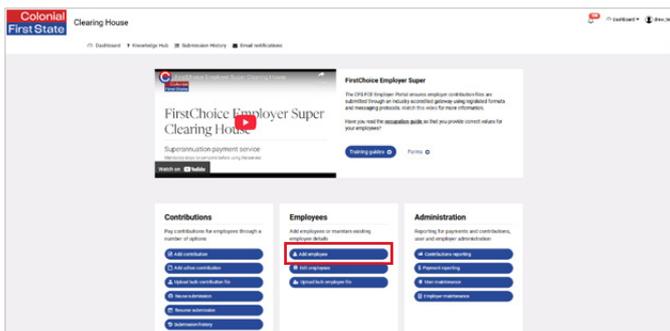
You can add new employees prior to uploading or manually keying a contribution. A new employee record can be created using the Add employee button in the dashboard under employees. Make sure you have all the employee information you require before creating a member record.

On the dashboard, there are two options for adding new employees in the FirstChoice Employer Super Clearing House: **Add employee** and **Upload bulk employee file**. In the portal, under the Employees section, select:

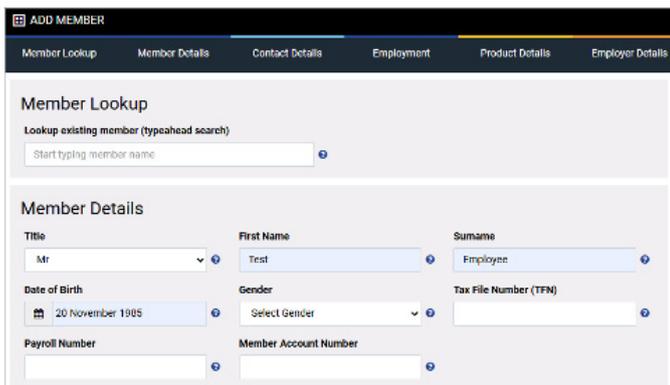
- 1 Add employee OR
- 2 Upload bulk employee file

1 Add single employee

To add a single employee, please follow the below steps:



- 1 From the Employees dashboard, select **Add employee**:
An add member box will pop up



- 2 Add in the following details:

Member details: Title, First and last name, date of birth, gender, tax file number, payroll number and Members super fund account number (only if they are not a new member).



Contact details: Add the member's personal contact details, this includes residential address, personal email, and personal mobile number.

Employment details: Add all member's employment details except termination reason and termination date.

If there is multiple Employers, select the Employer, the member will sit under:

Then in Product details: Add in member Superannuation details.

There are 3 options

CFS plan: If the employee has chosen the Employer plan, select the plan and appropriate category in the drop-down menu. You should leave the member account number (in the member details section) blank for a new employee joining FirstChoice Employer Super.

Please note

If the member has an existing CFS FirstChoice Employer super account (including choice accounts), then that will need to be entered as CFS plan with the member's account number.

Choice plan: Select Choice if the employee has provided a Superannuation standard choice form. Simply start typing the super fund's USI or super fund's ABN into the **Select Fund look up box** and select the super fund. You should also enter the member account number (in the member details section) the employee has provided with the nomination form.

SMSF: Select SMSF if the employee has chosen their own self-managed super fund.

Click Add SMSF button:

A box will appear called Manage SMSFs. The following information will be required:

- SMSF's ABN
- ESA (Electronic Service Address)
- SMSF bank account details (BSB, Account Number, Account Name).

Once the information is entered, press Save. The clearing house portal will perform a validation check to ensure the SMSF is a compliant and registered SMSF with the ATO. If the status is not compliant, you will need to check the details with the Employee.

3 Then click **Save**. The member has been added.

If there are missing details, you will receive a validation error message. In this case no category name was chosen. It is important to ensure these errors are amended to ensure a smooth employee contribution upload. Update any fields with errors and then click **Save**.

Review new member details and then click **Confirm and send**.

Select **Submission history** from the dashboard and you can see the employee/member has been added.

Status	File Name	Employee(s)	File Type	Last Updated	User	Client	Expected(s)	Received(s)	Revised(s)	Issues	Actions
Success	Add member	Test Employer	ADD	Fri, 11 Jan 2025, 14:49	CFS Test User	1				0	

2 Upload bulk Employee file

To add multiple employees

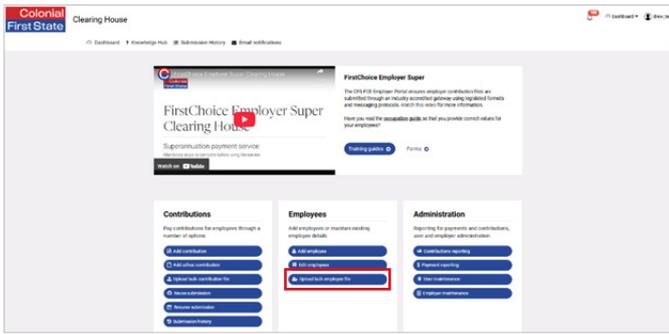
Ensure you have all necessary employee information before creating an employee record. Prepare the add multiple employees' template available here and add new employees to the file.

Important

When an employee **chooses a choice fund** you do not need to populate plan details, employment start date, occupation description, occupation group (collar type), employment status, weekly hours and salary details. The only details required are USI, fund name and member number. The plan number must be added for default members only. Do not populate plan number for choice of fund members.

Please note

If you have a choice member with a FirstChoice employer super account, then you need to populate plan details, employment start date, occupation description, occupation group (collar type), employment status, weekly hours and salary details.



1 Choose **Upload bulk employee file** from the dashboard:



2 Select specified format – **Bulk load new member**. Then select the file to upload.



3 Select the employer the employees will sit under.



4 If there are validation errors, these will need to be updated on this page. Once updated **click next**.

5 Complete a final review. Click back, if necessary to update details otherwise click **Confirm and send**.

6 On the submission history page, you can see the new employees have been added successfully.

Employee maintenance

The Employee maintenance function allows an employer to maintain their employee details.

On the dashboard, there are two options for maintaining employees in FirstChoice Employer Super Clearing House: editing a single employee or editing multiple employees in bulk. In the portal under “Employees,” choose:

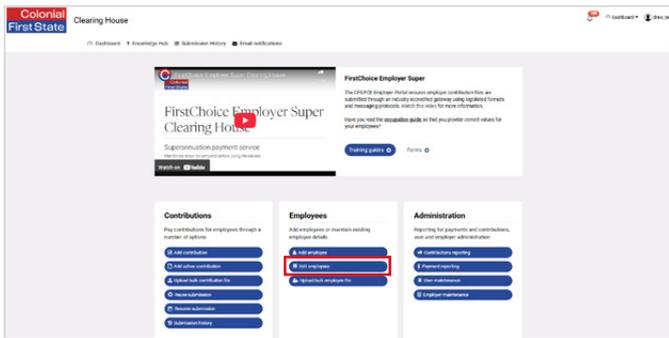
- 1 Edit Employees OR
- 2 Upload bulk employee file

Note

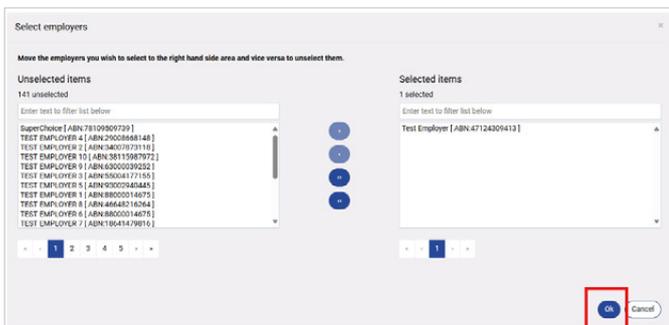
The plan number will display for default members. Do not populate plan number for choice of fund members.

Maintain single employee

To edit details of an employee, follow these easy steps:



- 1 On the Employees dashboard select **Edit employees**:

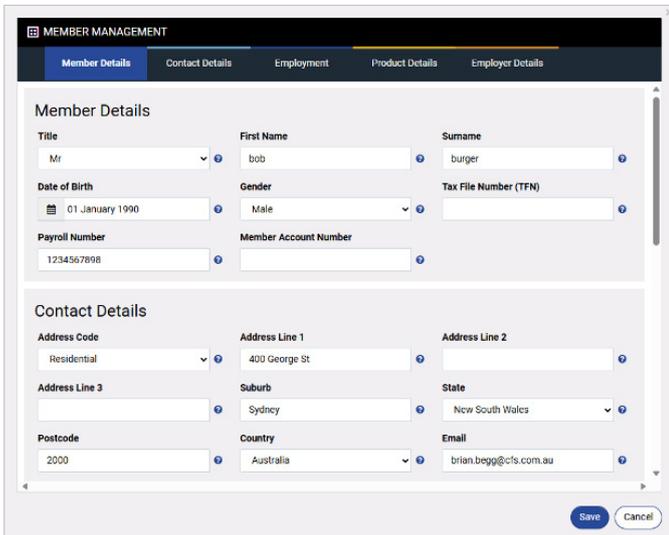


Note

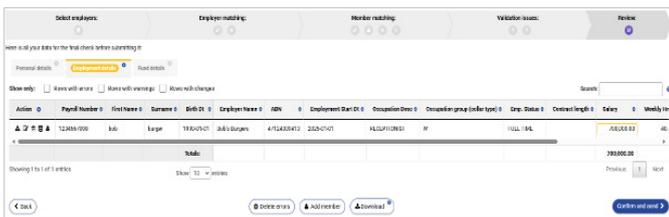
If you have access to multiple employers, you will also need to select the relevant employer(s) at this step. You can select multiple employers, and all associated employee records will be displayed. If you select one employer, then only those employees associated with that employer will be visible for maintenance. If you only have access to one employer, all employees will be loaded, and you will go straight to the **Review** step.



2 Choose the employee you need to update and then select edit employee, you can either click on the person's name or click on the person icon. (by clicking the person icon):



3 A pop-up screen will appear, and you can proceed to update the employee's details:



4 Once details have been updated, review the details on this screen and click **confirm and send**. If details are incorrect simply click back and start again.



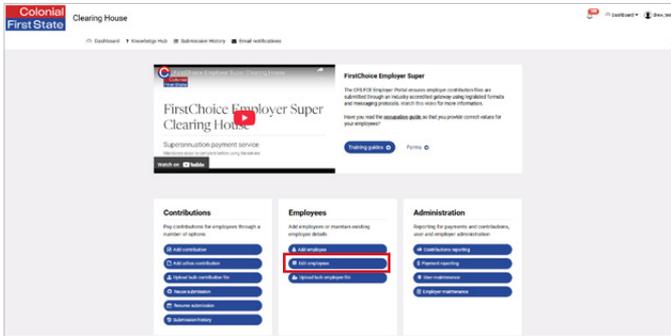
5 Once submitted the maintenance confirmation is added to the **Submission history**.

Important note

Any changes made to an employee's personal details such as name, address and contact details will be reflected in the CFS FirstChoice Employer Super portal for your records. Superfunds including Colonial First State may not update the personal details of an employees super account. You should advise your employee to contact their super fund directly to update their personal details on their super account. Employment details will be reflected in the CFS FirstChoice Employer Super portal, and it is an Employer's obligation to keep these details up to date.

Edit multiple Employees

To edit multiple employees, follow these easy steps:



1 Select **Edit employees** from the dashboard



2 Select the employer the employees sit under (if multiple) note this only presents when the user has access to more than one employer.

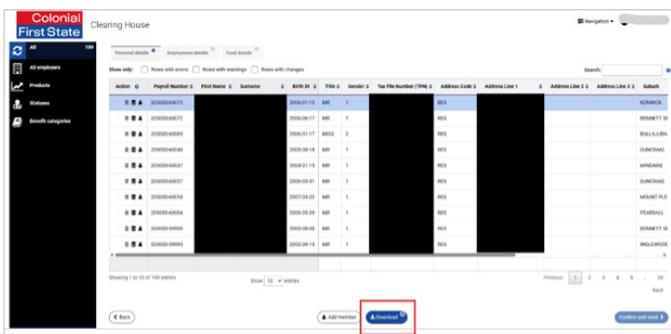


3 If there are outstanding exceptions (matching or data related) you will also see the exception screen, which you can click 'next' to skip through to the grid.

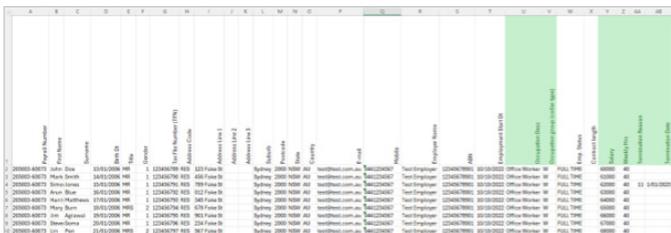
* The download button on this screen allows you to download the exception. If you click download here, you are just downloading the exceptions – this is *not* the right screen to click download on.



4 A grid of all employees will be presented – select **download** at the bottom of the page.



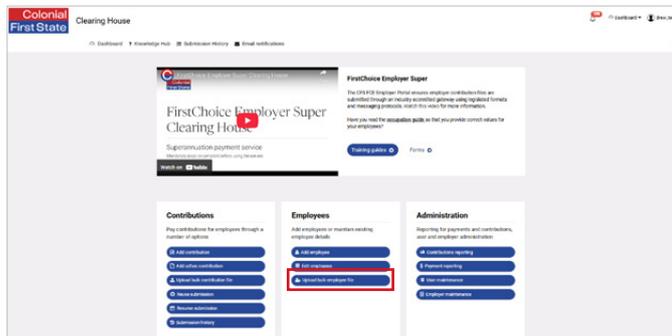
5 Browse for the downloaded file. Open excel and make the required updates – note you can use the payroll number or personal details for each record to identify and fill the data from your payroll system and do bulk updates. Once field updates are complete, save the file in preparation for uploading.



The following table is a list of the data you can update (do not delete or add columns):

Column	Column Header
1	Payroll number
2	First Name
3	Surname
4	Birth Date
7	Tax File Number (TFN)
16	E-mail
21	Occupation Desc
22	Occupation group (collar type)
25	Salary
26	Weekly Hrs.
27	Termination Reason
28	Termination Date

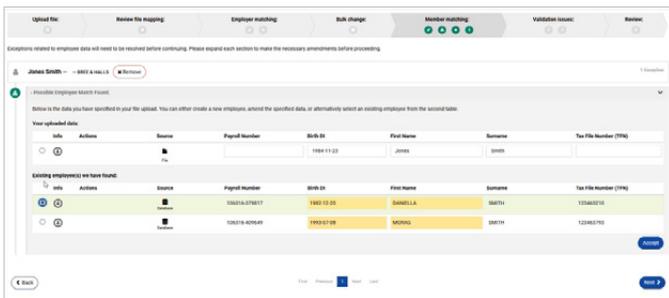
*Do not make changes to ABN or Employer name otherwise this will result in errors. If you make updates to any other fields updates will not be made. Please make any other updates via the grid for individual members.



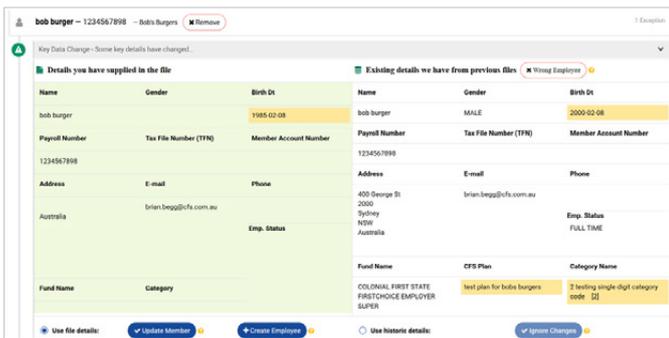
6 To upload the file, select **Upload bulk employee file**



7 Use specified format from the drop-down menu and select **Bulk member maintenance**, select the file and click **next**



8 Review validation and key data changes which include member number, payroll number, Surname, Date of birth, Tax file number and Product (USI, ABN). Once updated click **next**.



9 Another page will appear to check for key data changes, this is to verify the correct changes have been made as intended and these include payroll number, date of birth, surname and tax file number. In this screen you can either update member details, create new employee or ignore changes.



10 Then click **confirm and send**.

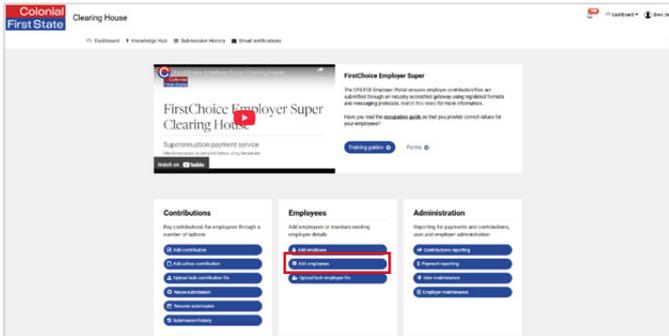
Once submitted the maintenance confirmation is added to the submission history.

Important note

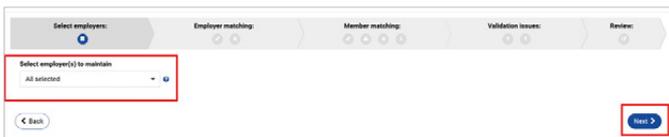
Any changes made to an employee's personal details such as name, address and contact details will be reflected in the CFS FirstChoice Employer Super portal for your records. Superfunds including Colonial First State may not update the personal details of an employees super account. You should advise your employee to contact their super fund directly to update their personal details on their super account. Employment details will be reflected in the CFS FirstChoice Employer Super portal, and it is an Employer's obligation to keep these details up to date.

Exit an employee

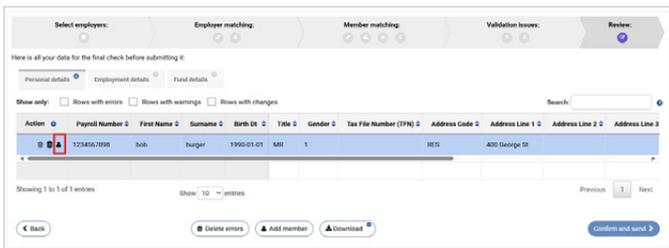
Before you exit an employee from the plan (default FCES Plan member or Choice/SMSF) you must have made the employee's last contribution or make it in the submission that you are exiting them in. For example, if the employee finishes their employment on 1 February, but still has super payable, then don't exit them until you're paying their last contribution.



1 Select **Edit employees** from the dashboard.

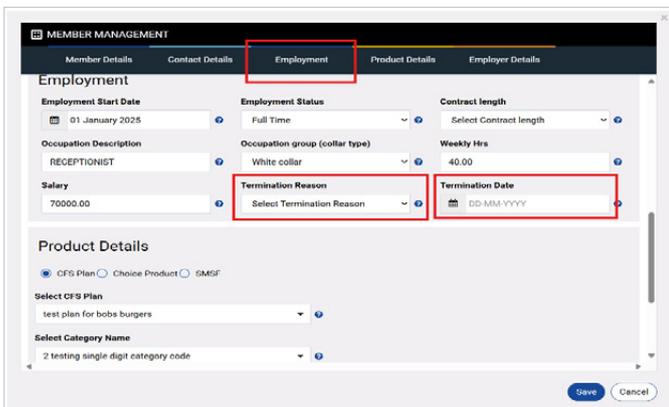


2 If you have multiple employers, select the employer the employee sits under, then select **next**.



3 All employees will appear on this screen, search for the employee you wish to exit.

4 Select the person icon in the action column in the employee's row in the grid.



5 Select the **Employment** tab, enter the date the employee finished their employment in the termination date field and select reason from the termination reason drop-down menu.

6 Click save.

Action	Payroll Number	First Name	Surname	Birth Dt	Title	Gender	Tax File Number (TFN)	Address Code	Address Line 1	Address Line 2	Address Line 3
	123456789	bob	burger	1990-01-01	MR	M		RES	400 George St		

7 Click the **Confirm and send** button on the bottom right corner.

This will update the database. The employee will be made inactive in FirstChoice Employer Super Clearing House overnight and no longer appear when you create a contribution. However, if you intend to create a contribution the same day, you can delete the member from the file when it loads.

More information

For further assistance, access the User Reference Guide in the clearing house portal.

Contact

FirstChoice Employer Super Services on 1300 654 666, 8:30am – 6pm AEST Monday to Friday.

Important information

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