

FirstChoice Employer  
Super Clearing House

# Creating and maintaining users

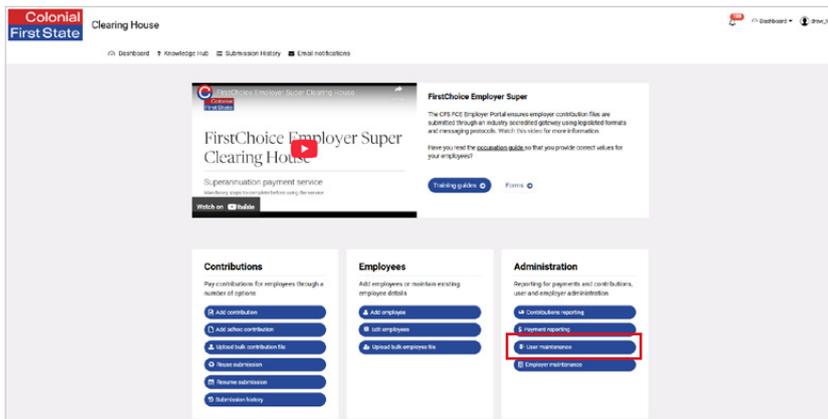
# Creating and maintaining users

The User Maintenance menu allows you to manage user accounts and access the CFS FirstChoice Employer Super Clearing House.

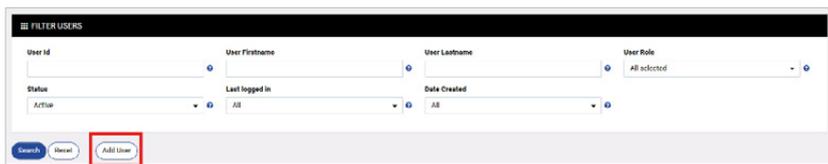
## Who

Users who have Employer master admin permissions can perform the functions described in this section.

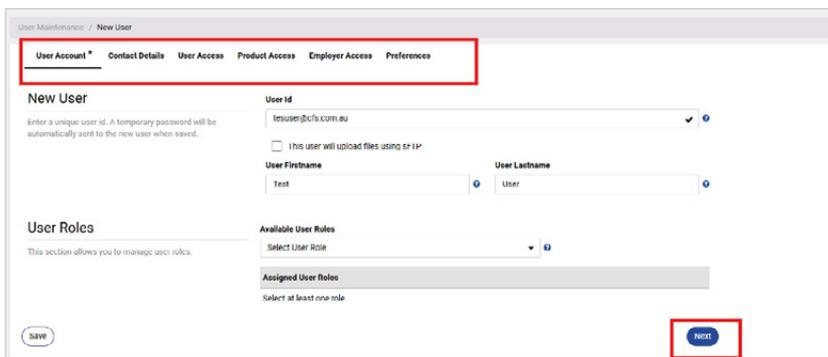
## Create new users



1 Select **User Maintenance** within the Administration dashboard



2 Select Add User from the **User Maintenance** page.



3 Use the tabs at the top of the page to navigate to each section.

4 In the **User Account** tab, enter the individual user ID (this will be their username used to log in), first name and last name.

**Note:** We recommend that the User ID is set as the email address of the user being created. The User ID is the username entered when logging into the portal.

Note: A single user can be assigned one access level to allow for segregation of duties, or multiple access levels depending on the functions they are required to perform.

- Select one or more of the permission types under **User Roles**. For more information about the different permissions, see the user access level guide. User access level guide.

- In the Contact Details tab, enter the contact details for the user (email address is the only mandatory field).
- In the Product access tab, no action is required. Move to the Employer access tab
- In the Employer Access tab, add or remove employers you wish the user to have access to.

User Maintenance / New User

User Account \* Contact Details User Access Product Access Employer Access Preferences

**New User**

Enter a unique user id. A temporary password will be automatically sent to the new user when saved.

User Id: tesuser@cfs.com.au

This user will upload files using sFTP

User Firstname: Test User Lastname: User

**User Roles**

This section allows you to manage user roles.

Available User Roles: Select User Role

Assigned User Roles: Select at least one role.

Save Next

5 Select save to create the new users.

## Maintaining existing users

User Maintenance / New User

User Account \* Contact Details User Access Product Access Employer Access Preferences

**New User**

Enter a unique user id. A temporary password will be automatically sent to the new user when saved.

User Id: tesuser@cfs.com.au

This user will upload files using sFTP

User Firstname: Test User Lastname: User

**User Roles**

This section allows you to manage user roles.

Available User Roles: Select User Role

Assigned User Roles: Select at least one role.

Save Next

1 Select **User Maintenance** within the Administration dashboard.

User Maintenance / New User

User Account \* Contact Details **User Access** Product Access Employer Access Preferences

**New User**

Enter a unique user id. A temporary password will be automatically sent to the new user when saved.

User Id: tesuser@cfs.com.au

This user will upload files using sFTP

User Firstname: Test User Lastname: User

**User Roles**

This section allows you to manage user roles.

Available User Roles: Select User Role

Assigned User Roles: Select at least one role.

Save Next

2 Search for the user by either User ID, User First name or user last name.

User Maintenance / New User

User Account \* Contact Details User Access **Product Access** Employer Access Preferences

**New User**

Enter a unique user id. A temporary password will be automatically sent to the new user when saved.

User Id: tesuser@cfs.com.au

This user will upload files using sFTP

User Firstname: Test User Lastname: User

**User Roles**

This section allows you to manage user roles.

Available User Roles: Select User Role

Assigned User Roles: Select at least one role.

Save Next

3 All users that match the name search will appear. Simply click on the user to proceed to the maintenance page.

4 You will be presented with the **User Maintenance** screen that has several tabs.

**Note:** Any fields you can click into can be amended, but some will be greyed out and are unable to be changed (i.e., User ID).

User account	Contact details	User access	Product access	Employer access	Preferences
The user details appear on this page. If the user has been locked out due to too many password attempts the user can be unlocked and the user's password can be reset here. If the user has left the group, the user can be deactivated.	The user contact details are stored here.	User access will always be set at CFS and cannot be changed.	The default CFS superfund will be listed here.	In the Employer access tab, you can add/remove employers which you would like the user to have access to.	No changes are allowed on this page.

## Deactivate user

Where a user no longer needs access to FirstChoice Employer Super Clearing House you can choose to deactivate their account to ensure that only the necessary people have access to the portal.

**Note:** User accounts can only be deactivated, not deleted. Once deactivated, a user account can be made active again if required.

## Reset password

Where a user is unable to reset their password themselves, you can select Reset Password to trigger the email to the user which contains the link to set a new password.

**Note:** A Password Reset Confirmation email will be sent to the user's registered address, with instructions on how to set a new password. Ensure that the email address associated with the user is correct before triggering.

5 After making changes, click save.

## Unlock user

If a user attempts to log into CFS FCES clearing house and is unsuccessful 5 times, the user account will become locked. Select Unlock User to return the number of invalid log in attempts back to zero (as shown in the image above).

**Note:** The option to Unlock User will only display when maximum invalid login attempts are exceeded.

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## 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.

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### Important information

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