

FirstChoice Employer
Super Clearing House

Contribution guide

Submitting contributions

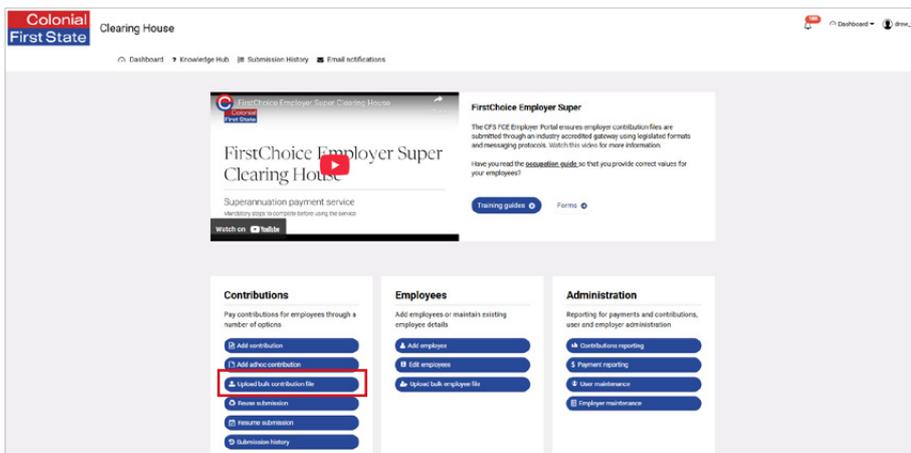
Introduction

The contribution menu has four options for submitting your data:

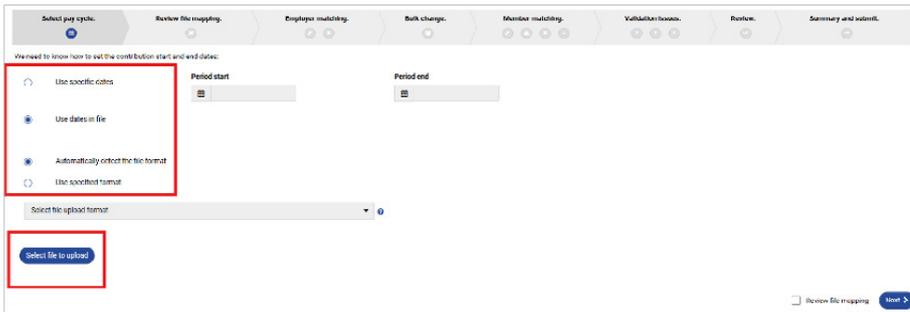
- **Upload a bulk contribution file** – use this option if you are going to upload a file extracted from your payroll system (in SAFF file format) or if you use a custom file with CFS.
- **Add contribution** – use this option to create an empty contribution table with your current employees in it. The amounts will be blank ready for you to enter the right information.
- **Reuse submission** – use this option if your employees have similar contributions each cycle. Changes can be made to amounts before submission.
- **Resume submission** – use this option when you have loaded a contribution file however have not submitted the file.

The contribution menu also offers the Submission history option which will let you view files which have been uploaded, and the status of the files. You can filter, search and sort by various data elements.

Upload a contribution from a file



- 1 From the Contributions menu, select **Upload bulk contribution file**.
- 2 Define the dates that are applied to your contribution file:
 - Use specific dates option allows you to manually specify a Period Start and Period End date.
 - Use dates in File (default option) to use the dates that are present in the contributions file you are uploading.
 - If you have multiple employers with the group and use different file formats you will be shown this page and will need to select **Use Specified format** and choose the upload format from the drop-down menu.



- 3 Click **Select file to upload**.
- 4 Navigate to where you've saved your contribution file and click **Open**.
- 5 Click **Next** to upload your file.
- 6 If there are no errors in your file, you will proceed straight to the Summary and submit screen.

Employer matching exceptions

If the file you are uploading includes any lines where the employer ABN differs from the registered FirstChoice Employer Super Clearing House employer ABN you are logged in for, it will present an Employer Matching Exception.

If prompted, it is important you select the correct employer as this selection will override the employer details in the file upload.

Note: This can occur if you process super contributions for more than one employer. Please check you have used the correct employer login details before proceeding.

- 1 In the Employer **Matching Exceptions** tab, click on the **X** icon next to the exception to expand the window.
- 2 To expand the exception and show the available options, click the expandable arrow to the right of the exception. The orange icons are a visual cue that there are exceptions.
- 3 If you are certain you want to change the employer recorded, select the correct employer from the **Pick an employer** drop-down list.
- 4 Correct each employer exception or click Apply to **All to apply** the same employer to all exceptions and click **Confirm to continue**.

Member matching exceptions

When you load a contribution file to FirstChoice Employer Super Clearing House Super Clearing House, the system may find a possible match between 'your uploaded data' file with an existing employee record found in the database. If a member matching exception is generated, you'll need to check and confirm the employee's information.

Member matching exceptions occur when:

- The database cannot create a member record based on the information in a file upload
- There is a possible match with an existing member record, i.e., a file may not contain the complete details for a member's Self-Managed Super Fund.

Possible employee match

In this example the payroll number in 'Your uploaded data' file is different to the payroll number recorded in the 'Existing employee(s) we have found' in the database file. You will need to determine if the possible employee match is an actual match and then reject or confirm the match:

To reject the match:

- Select the file record under **Your uploaded data** which contains the new employee information from the file.
- Click **Create New Employee**.

To confirm the match:

- Select the database record under **Existing employee(s) we have found**.

Key data change

Your options to correct a key data change include:

- Use the details in the new upload by clicking the **Update Existing Member** button
- Use the details previously uploaded by selecting **Use historic details** and then clicking the Ignore Changes button that becomes available.
- Remove the comparison to the existing employee by clicking **Wrong Employee**.

Compare the data in the Details you have supplied in the file view to the data in Existing details we have from previous files. The field or fields that differ are highlighted.

Accept or ignore the employee changes in the uploaded file:

To **accept** the changes and update the employee's details:

- Select the Use file details radio button.
- Click **Update Existing Member**.

To **ignore** the changes:

- Select the Use historic details radio button.
- Click **Ignore Changes**.

Note: If you have selected the database employee and then decide that this employee is not the same as the file, click the **Wrong Employee** button to take you back to the previous screen.

Continue working through each exception so that your contribution file can progress towards submission.

Validation issues

FirstChoice Employer Super Clearing House validates your employee's data to make sure we have the right information. You will be prompted to correct the issues in the Validation Issues tab. There are three types of validation issues.

- **Warnings** – May be ignored but should be checked for updates.
- **Errors** – Must be fixed, and
- **Information** – should be checked for updates.

Validation Issues are the error messages that relate to Member, Employment, Contribution, Employer or Fund data.

The icons and number counts will change as you resolve the Validation Issues. Once a validation issue has been resolved, FirstChoice Employer Super Clearing House Super Clearing House validates the data in real time and removes it from the screen.

There are three ways to review and correct validation issues in FirstChoice Employer Super Clearing House Super Clearing House:

- The Validation Issues page
- The Contribution Grid
- The Download feature to create a .csv file.

Validation issues screen

The Validation Issues page displays a count of the errors and warnings that are present and the reason for the failure:

- **Errors** – the submitter will not be permitted to submit a file with error validations. Errors must be corrected within the source payroll system and in FirstChoice Employer Super Clearing House Super Clearing House before you submit a file.
- **Warnings** – the submitter will be permitted to submit a file with warning validations.

If there are any validation issues with your file upload, the Validation Issues page will display showing the number of issues to be resolved. All lines entered are validated to ensure that the data is correct. If a rule or rules are not met, Validation Issues are triggered.

- 1 In the **Validation Issues** tab, note the Errors/Warnings/Information indicators that display if there are issues to be resolved.
- 2 Under each listed member, click the rows with errors to expand the details. Once expanded, fields with errors will display with a red border.
- 3 Hover your mouse over the error to reveal the validation rule then make the required changes to resolve it.
- 4 Once you've changed a field, navigate away from the field (click outside the field) to revalidate the data entered.
- 5 Once all messages have been cleared, click **Next** to proceed to Summary and submit.

Summary and submit

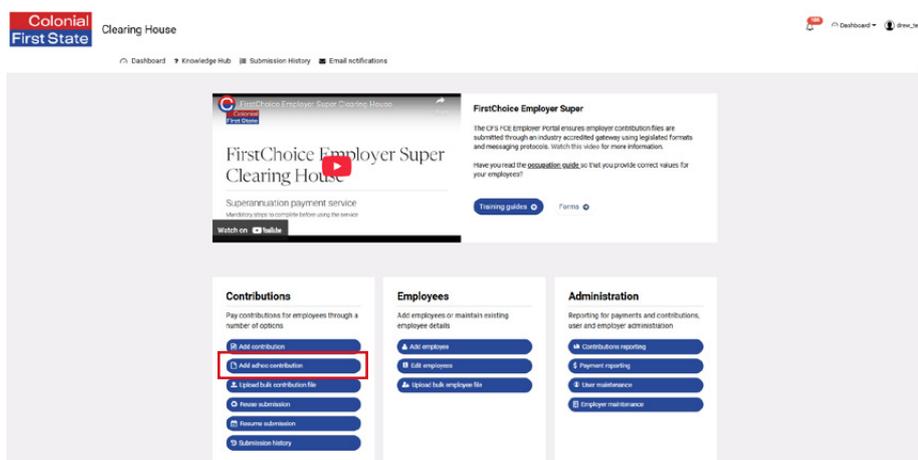
Once all exceptions and validation issues have been resolved, you can proceed to the Summary and Submit screen. If payment method is:

- **Direct Debit** – Confirm the details on the summary screen are correct.
- **Direct Credit** – Take note of the **Payment Reference Number** and the **account details** to make payment to. Make sure you enter the payment reference number (PRN) in the reference field when you make payment for your contribution. This will ensure that the money can be matched.
- Click **Confirm and Send** to submit the contribution.

Add a contribution

Add an adhoc contribution

You may add an adhoc contribution to single/multiple employees across one or multiple employers. To add an adhoc contribution, please complete the following steps:



- 1 From the Contributions menu, select **Add Adhoc contribution**

Colonial First State Clearing House

Navigation | Drew_Just

Select pay cycle: Review file mapping: Employer matching: Bulk change: Member matching: Validation issues: Review: Summary and submit:

We need to know how to set the contribution start and end dates:

Use specific dates

Period start: Period end:

Automatically detect the file format

Use specified format:

Select file upload format:

New filename: Data entry file

Review file mapping **Next >**

2 Enter the **Start** and **Period End** dates and click **Next**.

Colonial First State Clearing House

Navigation | Drew_Just

Select pay cycle: Review file mapping: Employer matching: Bulk change: Member matching: Validation issues: Review: Summary and submit:

Here is all your data for the final check before submitting it:

Contribution: Personal details: Employment: Fund:

Show only: Rows with errors Rows with warnings Rows with changes

Search:

Action	Payroll Number	First Name	Surname	Birth Dt	Fund Name	Pay Period Start Dt	Pay Period End Dt	Superannuation Guarantee %	Employer Additional %	Productivity Award %	Personal %	Salary Sec. %	Spouse
No data available in table													

Showing 0 to 0 of 0 entries | Show 10 entries | Previous Next

Add member Download

Back

3 Click **Add Member**.

ADD MEMBER

Member Lookup | Member Details | Contact Details | Employment | Product Details | Employer Details

Member Lookup

Lookup existing member (typeahead search)

Start typing member name

Member Details

Title: Select Title

First Name:

Surname:

Date of Birth: DD-MM-YYYY

Gender: Select Gender

Tax File Number (TFN):

Payroll Number:

Member Account Number:

Contact Details

Address Code: Residential

Address Line 1:

Address Line 2:

Address Line 3:

Suburb:

State: Select State

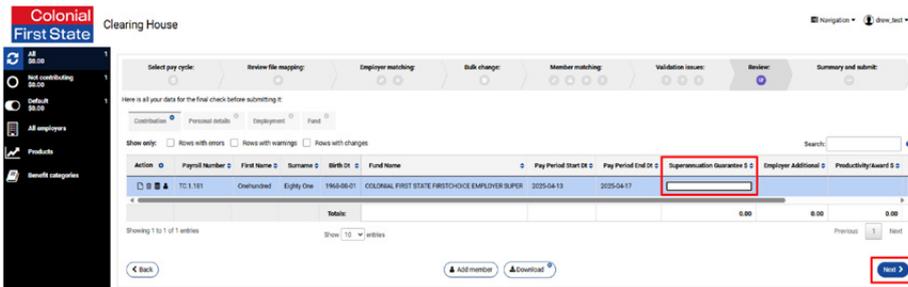
Postcode:

Country: Australia

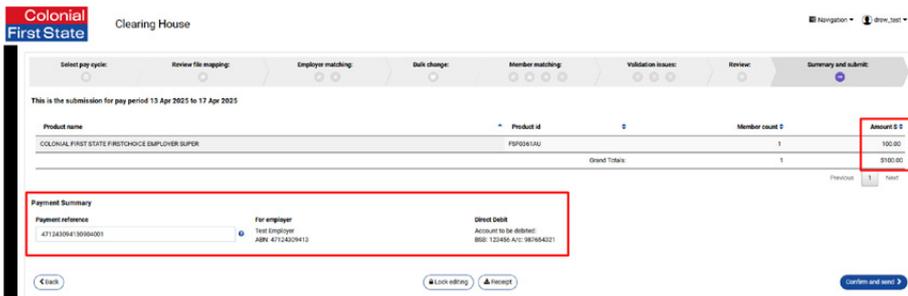
Email:

Save Cancel

4 Search for the member in **Member Lookup** and click **Save**.



5 Enter the amount for contribution type. If you wish to add more members, repeat steps 3-5. Click **Next**.



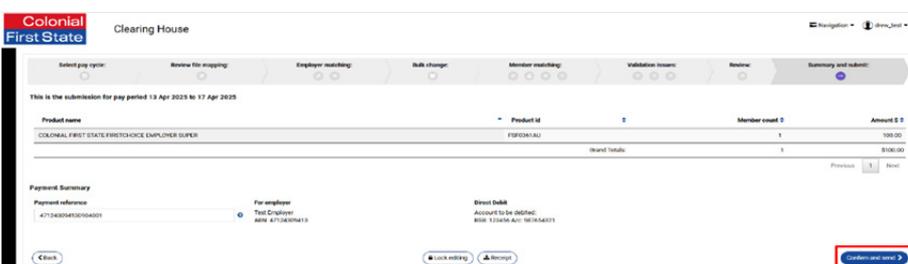
6 Check the amount and payment summary details are correct.

If payment method is:

a **Direct Debit** – Confirm the details on the summary screen are correct.

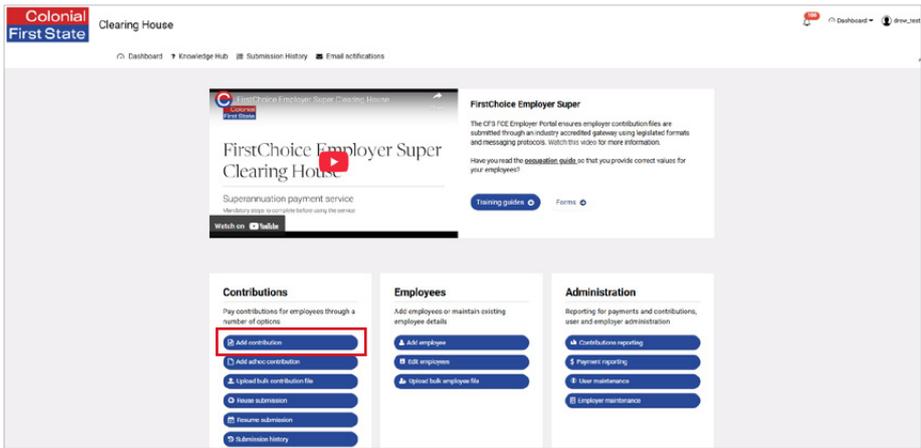
b **Direct Credit** – Take note of the **Payment Reference Number** and the **account details** to make payment to. Make sure you enter the payment reference number (PRN) in the reference field when you make payment for your contribution. This will ensure that the money can be matched.

*You can create your own payment reference number. In the payment reference section click on the question mark to view the rules of creating your own payment reference number.

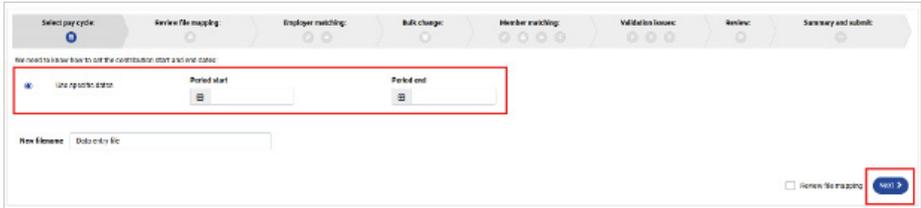


7 Click **Confirm and Send**.

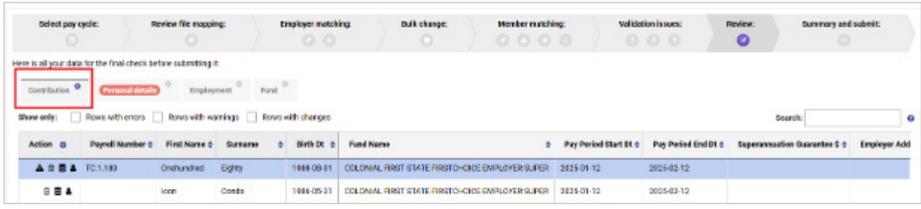
Manually key a contribution



1 From the Contributions menu, select **Add contribution**.



2 Enter the **Start** and **Period End** dates and enter a New Filename for the contributions.



3 Click Next to proceed to the **Review** screen.

4 Select the **Contribution** tab and **search** to find the member/s you wish to add a contribution for.



5 For each member, enter the **contribution amounts** in the relevant column, using the below table as a guide for the column options.

This is the submission for pay period 12 Jun 2025 to 12 Feb 2025

Product name	Product id	Member count	Amount
COOLMPL198215111181010001EMPLOYER SUPER	112 826792	2	268.00
	Grand Total	2	268.00

Payment Summary

Payment reference: 4715439413030001

For employer: Test Employer1 AON: 4712428493

Direct Debit: Account to be debited: 000 123456 A/C: 901894321

Buttons: < Back, Lock entry, Accept, Confirm and send >

Note: On the summary and submit screen you will see total member count that was selected on the grid that you may or may not have made contributions or made updates for.

If payment method is:

- **Direct Debit** – Confirm the details on the summary screen are correct.
- **Direct Credit** – Take note of the **Payment Reference Number** and the **account details** to make payment to. Make sure you enter the payment reference number (PRN) in the reference field when you make payment for your contribution. This will ensure that the money can be matched.

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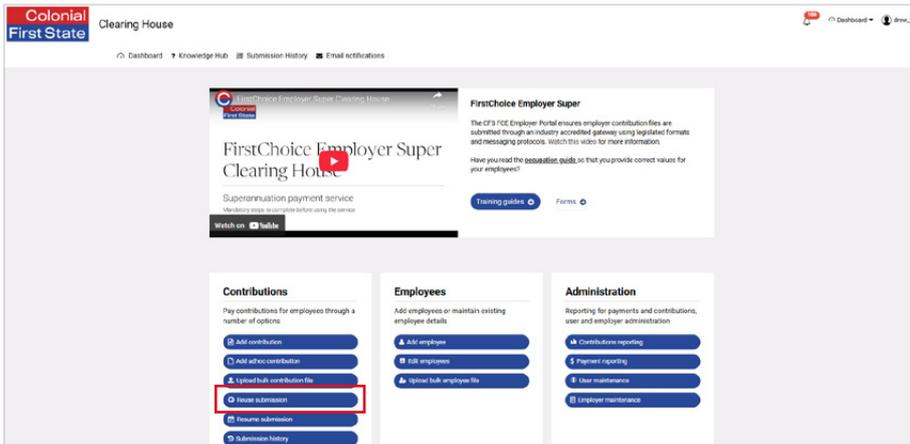
6 Any warning/errors will appear on this page. If you have members with error's and there is no contribution to be made you can delete them from the grid by clicking on the rubbish bin. Once warnings/errors have been resolved and the relevant contribution amounts have been added, to continue, click **Next** to proceed to **Summary and Submit**.

7 Click **Confirm and Send** to submit the contribution.

Reuse submission

Reuse submission can be used if your employees have similar contributions each cycle, it allows you to select from your previously submitted contributions and replicate it for your current submission.

Changes can be made to the contribution amounts before submission.



1 From the Contributions menu, select **Reuse submission**.

2 Select the contribution you want to replicate from the available list and enter a new **file name**.

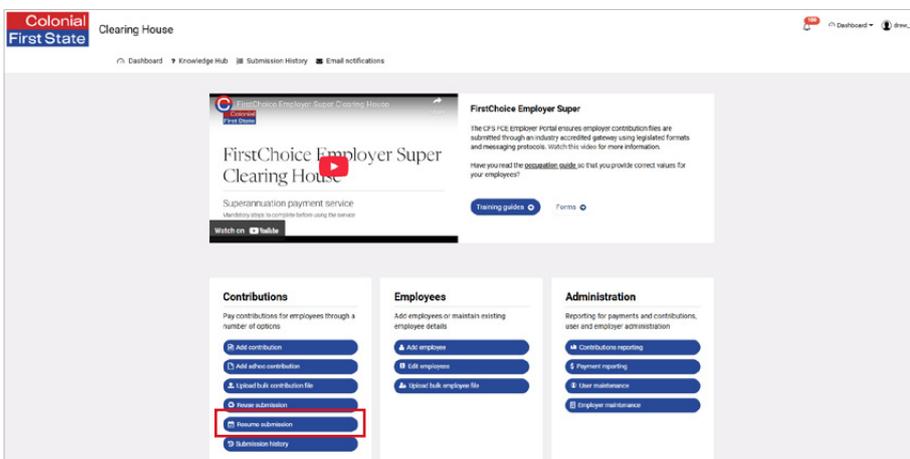
3 Click **Next** to proceed with the contribution as described in Manually key a contribution.



Resume submission

Resume submission can be used when a contribution file has been loaded however not submitted.

To Resume submission:



1 From the dashboard click on **Resume submission**.

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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