Super Fund Onboarding Guide

For Employers

Contents

Introduction

Super Fund Onboarding (SFO) helps you make light work of onboarding for new employees. With SFO, you can add new employees and invite them to validate their details and complete their superannuation choice and Tax File Number (TFN) declaration digitally.

What you need to know

Beam is the technology behind SFO, and it's part of the Australian Retirement Trust (ART) group. The SFO tool is only a small part of what Beam can do. With years of experience processing and administering super payments, Beam is a great software solution to manage super.

For more information about Beam, visit beamconnect.com.au.

The benefits of SFO

SFO allows you to create a digital onboarding experience for your employees so you can manage their details easily to help meet your employer obligations. With SFO you can collect employee's details, TFN declaration and super choice. This removes the requirement to send and obtain paper forms for these items and more importantly lessens administrative work for you and ensures you are able to keep accurate records of your employee's super decisions readily at hand.

How to access SFO

SFO can be accessed via ART Employer Online (EOL). If you're an existing EOL user, simply login using your employer login details to access the SFO tool.

If you're not already using EOL you will need to register and agree to the terms and conditions to access SFO. To register to EOL visit art.com.au/EmployerJoinOnline

Find more information about EOL here.

Security

Beam is designed with multiple layers of security to protect your information.

Privacy

Both ART and Beam respect the privacy of the information you provide. We have a formal Privacy Policy that sets out how we do this. You can find a copy of the ART Privacy Policy on art.com.au. And for the Beam Privacy Policy, you can find a copy on beamconnect.com.au

Logging on to ART EOL to access SFO

To log in to ART EOL, simply follow the steps below:

1. Go to art.com.au

2. Click Log In, select Employer Log In.

3. Enter your username (this is your employer number) followed by your password[1].

4. Click Log in[2].

5. Confirming your identity – confirm where the verification code should be sent by providing either a pre-registered email address or mobile number and click Send.

6. The verification code should be received within 1 – 5 minutes, enter your verification code and click Verify to enter EOL

7. Once you are logged in, click on the Onboarding menu option, select 'Launch Super Fund Onboarding' and a new Beam window will open.

Important information

[1]If there are additional users on your employer account, these users enter their Username as your employer number_username (e.g. 666666_username). If you are logging on as the main user, simply enter your Australian Retirement Trust employer number.

[2]If logging in for the first time, you will be prompted to change your password and set up a security question.

While EOL can be accessed using different web browsers, we recommend using Google Chrome for the best user experience. For more information, on how to use other tools available on EOL, please take a look at the [EOL user guide](#).

Figure 1: An example of the Super Fund Onboarding screen

Navigating through SFO

Once logged in, employers will be directed to the Dashboard section of SFO on the Beam platform.

On initial log in, employers are required to set up their default super fund(s) first. Please refer to the 'How to add Default fund/s' section for instructions on how to complete this.

After an employer have started using SFO, the Dashboard provides a snapshot of where the SFO process is up to.

These are:

Employees	Onboarding	Not started
• Displays the total number of employees that have been Onboarded via the SFO tool.	• Displays the total number of employees that are in the process of completing their SFO.	• Displays the total number of employees who haven't started the SFO request.
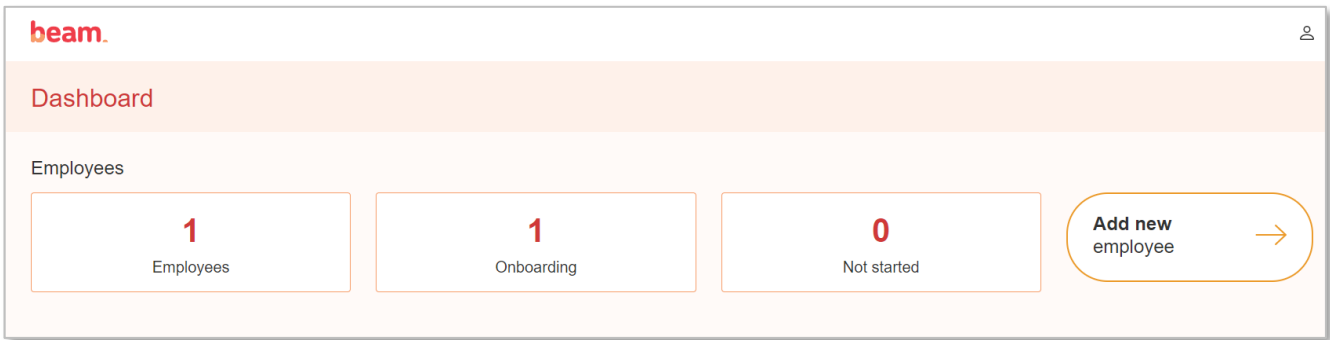
Figure 2: An example of the Dashboard section

Employees section

The Employees section allows you to add an employee and easily view the status of each employee. As they move through the onboarding process, the Status column for each employee will update to show what tasks have been completed. Once all tasks are completed, the employee's status will show as Active.
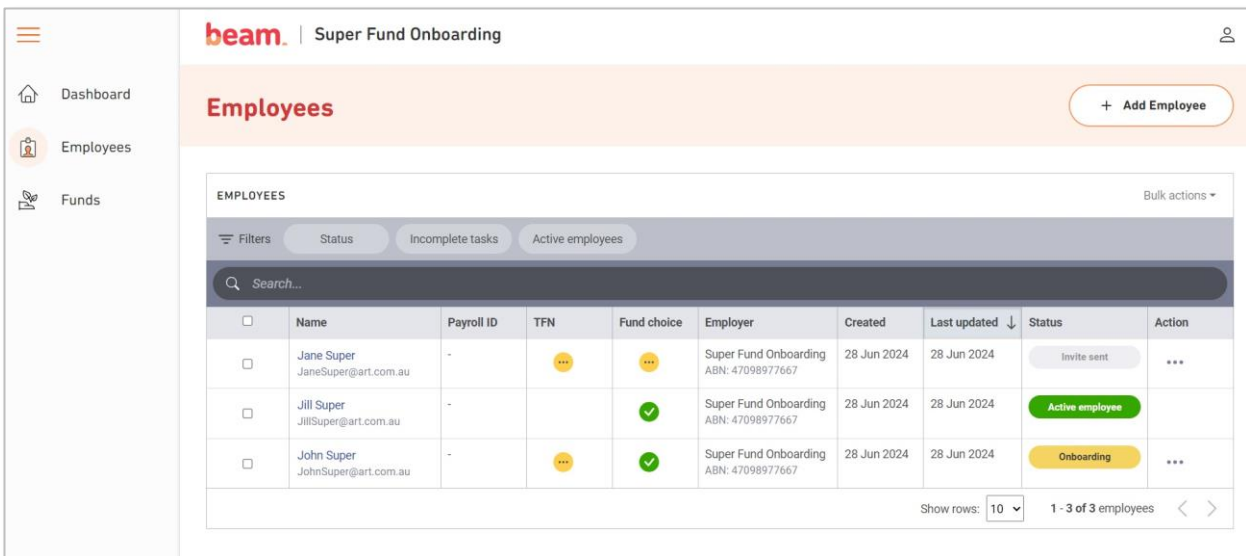
Figure 3: An example of the Employees section

Onboarding alerts

From time to time, you may notice messages at the top of the Employee section. These messages will provide the status of your employee's onboarding activity as well as details on identified issues, system downtime or specific action(s) that you need to take.

Tax File Number (TFN) declaration

You will receive the employee's TFN declaration in SFO on the Beam platform. The TFN declaration will also be verified and lodged with the ATO.

Super choice

You can receive the employee's Super choice in SFO on the Beam platform. Fund details will automatically be verified. If the employee opts to join Australian Retirement Trust directly as a new member, they will be automatically registered, and you will receive their Australian Retirement Trust member number.

If an employee doesn't make a valid super fund choice, you can find the details of the employee's stapled fund (if they have one) using the Stapled Fund Request feature in SFO. This feature will let you know if an employee has a stapled fund or not, and if they do, the details of that fund.

If the employee doesn't make a valid choice and no stapled fund information is found, you're permitted to pay the employee's super contributions to your default fund.

How to add Default fund/s

You must have a chosen default super fund before you are able to use SFO.

To add a new default super fund/s:

1. Click 'Funds' from the menu options
2. Click 'Add default fund'
3. Enter the Fund Name, USI or ABN
4. Select the appropriate fund for the displayed options
5. Enter the 'Fund Employer No. (FEN)' (if applicable)
6. Click 'Add' and you will be redirected back to the 'Funds' page
7. Check the new default fund listed has the correct Fund name and USI
8. If at any point during this process, you wish to exit, press the 'Cancel' button.
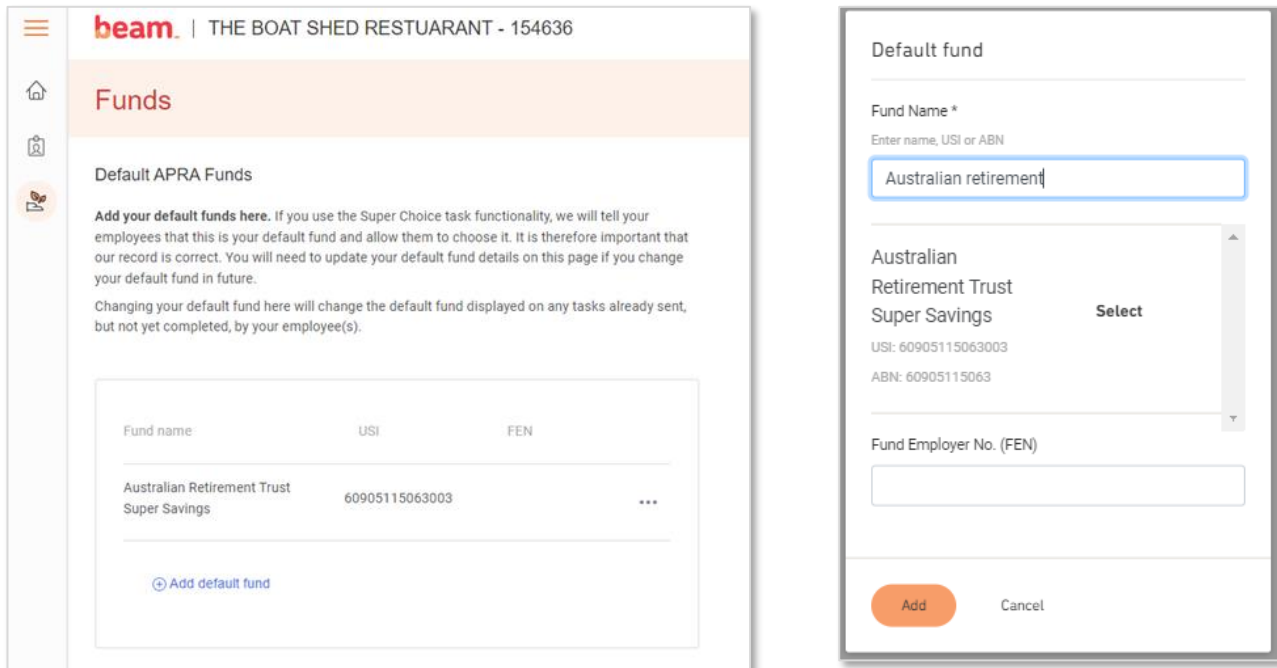
Figure 4: An example of the Default funds section (Left) and Adding Default fund section (Right)

How to edit Default fund/s

1. Click 'Funds' from the menu options

2. Click the three dots (…) to the right-hand side of the default fund and select 'Edit'

3. Update the appropriate details and click 'Update' and you will be redirected back to the 'funds' page

4. Check the correct edited details are reflected

5. If at any point during this process, you wish to exit, press the 'Cancel' button.

Figure 5: An example of an Edit Default fund

How to delete default funds

1. Click 'Funds' from the menu options

2. Go to the 'Default Fund/s' section

3. Click the three dots (…) to the right-hand side of the default fund and select 'Delete'

4. A pop-up box will appear to confirm the action, please click 'Delete' and you will be redirected back to the 'Funds' page

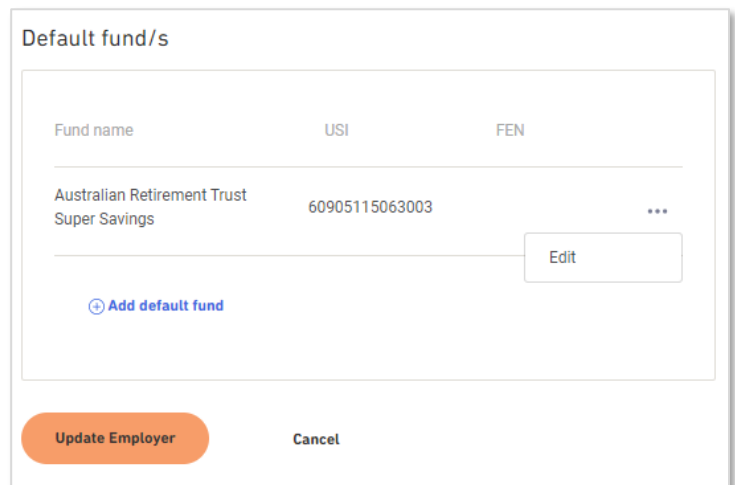5. If at any point during this process, you wish to exit, press the 'Cancel' button.

Important information

• You can only delete a default super fund when more than one is listed in your account.
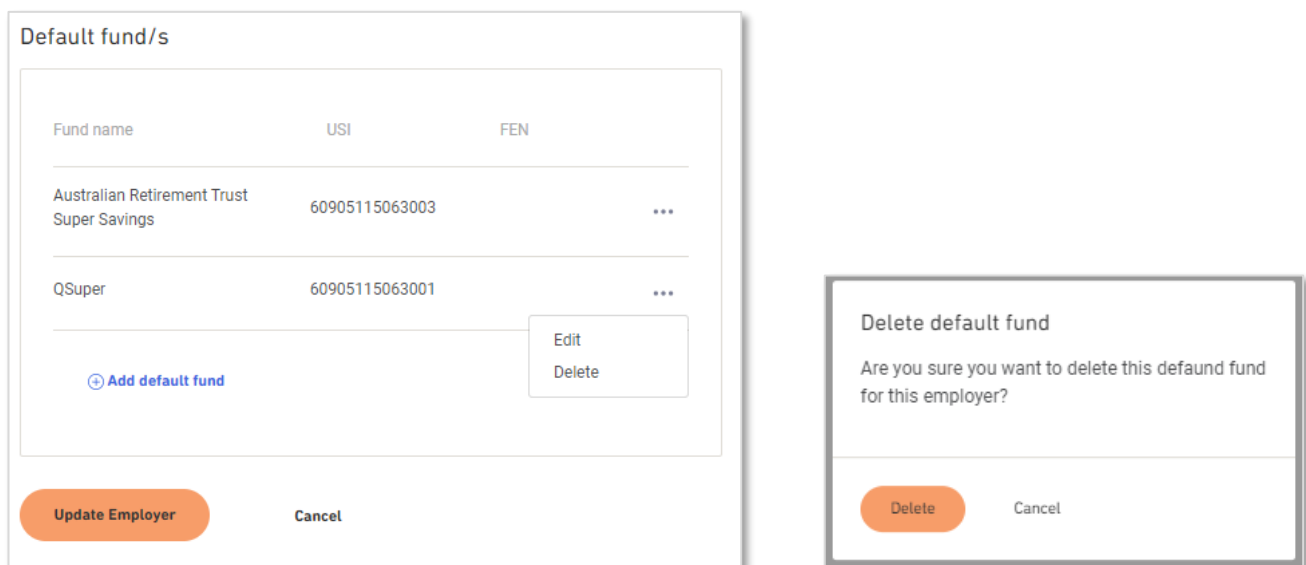

Figure 6: An example of delete Default fund/s

Steps to onboard your employees using SFO

1. Click 'Add Employee'

2. Select the tasks (TFN declaration and/or Super choice) you want the employee to fill out

3. Complete the Employee details section (Legal given name*, Last name*, Email address*, Mobile number* and Date of birth*)

4.   Complete the Employment details section (Payment basis*, Payroll ID and Employment start date)

5.   Check the details and click 'Send Onboarding Invite'

6.   The onboarding invite will then be sent to your employee

7.   If at any point during this process, you wish to exit, press the cancel button.

Important information

• Fields with * are mandatory fields and you will be unable to proceed until these details are entered

• Please ensure there are no spaces in the mobile number field e.g., 0411222333

Viewing an employee's status

You can view the status of each of your employee's onboarding activity under Employees section.

The different types of status are categorised as:

Status	Description
Invite sent	Onboarding invitation has been sent to the employee
Invite expired	Invitation has lapsed past 7 days with the employee taking no action
Authentication failed	Employee has not been successful in logging in through the secure link, either due to the name or DOB not matching your records after 5 attempts
Onboarding	Indicates an employee has started their onboarding journey and provided some of the information required
Pending Tax File Number Declaration (TFND)	Employee TFND is pending a response from the ATO
Tax File Number Declaration (TFND) failed/error	There was an error with the TFND provided to the ATO and it will need to be re-submitted
Active	Employee has completed all onboarding tasks

How to search for stapled fund details with Stapled Fund Request (SFR)

If your employee hasn't made a valid fund choice by the time you need to pay their first super contribution, you can use the Stapled Fund Request (SFR) in SFO to find out if they have a stapled fund, and if they do, the details of this fund will be provided.

How to use SFR

Setting up your permissions

1. When you're logged into SFO, there's two ways you can set up your permissions for SFR.

   If you see this banner, click on 'Learn how to set up your permissions' to go to the ATO Access Manager Settings page.
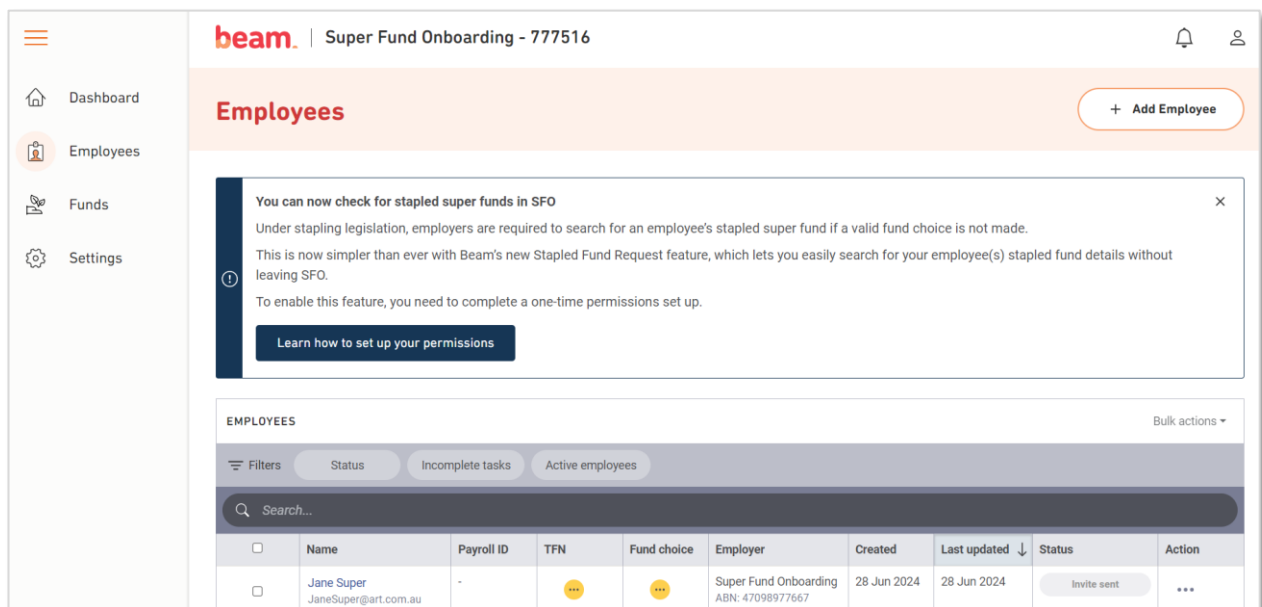

Figure 7: An example of the permissions setup banner

   If the pop-up has been dismissed or you don't see it, you can go to the Settings page by clicking on 'Settings' in the menu on the left side of the screen and choose the 'ATO Access Manager' tab from the menu.
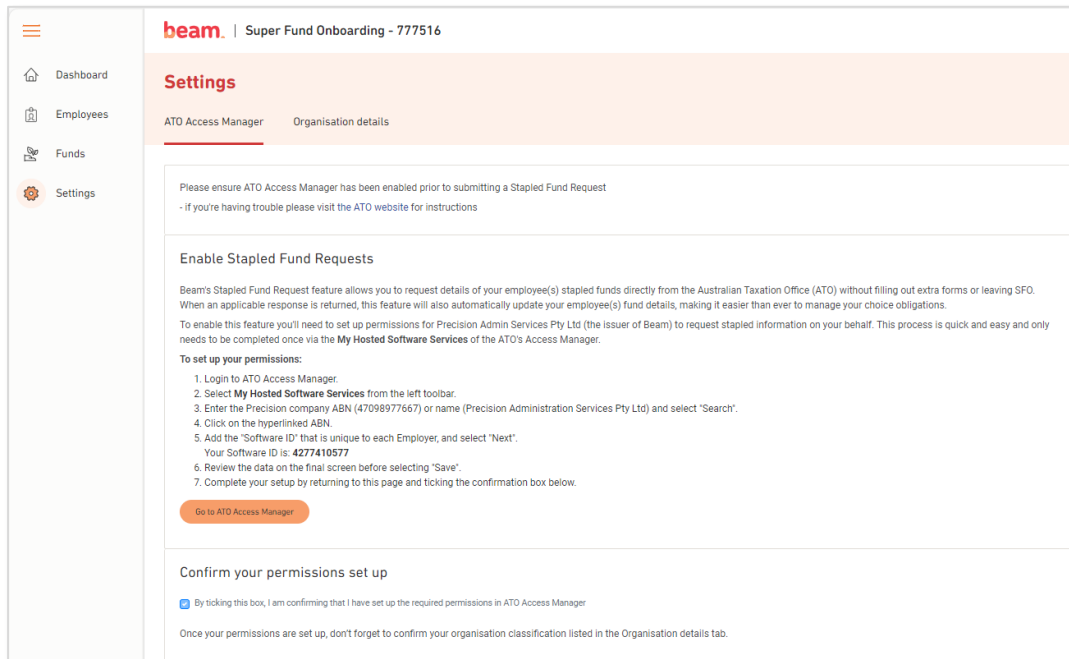
Figure 8: An example of the Access Manager setup page in Settings

Important information

- To set up your permissions, you'll need to have an Access Manager account with the ATO. If you don't have an account already, you find out more about Access Manager and create an account here.

2. From the ATO Access Manager Settings page, click 'Set up my permissions' to be directed to the ATO Access Manager. This will launch in a new window. Log into your ATO Access Manager account.

Important information

- Make note of your unique SSID number shown on the Settings page as you'll need this to complete your permissions set up with the ATO.

3. Once logged in, select 'My Hosted software services' and search for Precision as your software service. We recommend searching by ABN so you can get an exact match. You can find Precision's details like ABN on the ATO Access Manager Settings page in SFO. Click on Precision in your search results to select them.

4. Next, enter your unique SSID number in the 'Add Software IDs' field. This will create a relationship between your Access Manager account and Precision, which will allow SFO to search for stapled funds on your behalf. Click 'Next' to continue and finalise your set up.
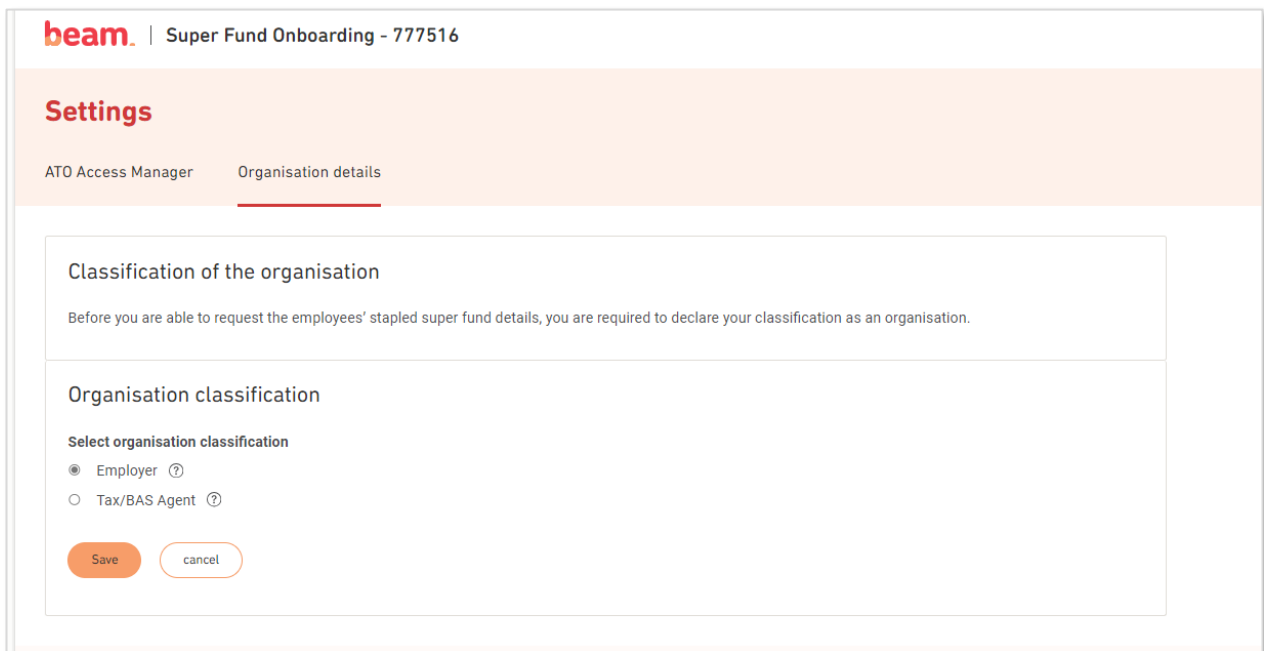
Who is Precision?

- Precision is the issuer of Beam and its range of supertech solutions, like Super Fund Onboarding (SFO). Precision Administration Services Pty Ltd is wholly owned by Australian Retirement Trust Pty Ltd (via its custodian) as Trustee for the Australian Retirement Trust.

5.   You can now close the Access Manager window and return to SFO. When you're back on the ATO Access Manager Settings page in SFO, finalise the setup of SFR by ticking the box at the bottom of the page confirming your permissions have been set up.

We also recommend you check your organisation classification details in the Organisation details tab at the top of the page to ensure your setup is correct and complete.

In the Organisation details tab, select the option that is most appropriate for you, either Employer or Tax/BAS Agent and include your RAN or TAN number if relevant. If you need to change this in future, you can return to this tab.

Figure 9: An example of confirming organisation classification details

6.   SFR will now be enabled. These permissions set up only needs to be completed once.

Searching for stapled fund details

Important information

Before you can request a stapled fund for an employee, you need to:

- Provide your employee an opportunity to make a super choice. If they don't choose a preferred fund through SFO, you'll need to provide them a Superannuation standard choice form before you check for stapled fund details.

- Establish a relationship between your employee and the ATO. This can be done either through a Single Touch Payroll (STP) pay event or through a TFN declaration.

1. To search for an employee's stapled fund details, go to the Employees page in SFO and filter employees using the 'Incomplete tasks' filter at the top of the table. This will show employees who have not completed their super fund choice.

2. If you've already provided the employee a Superannuation standard choice form and are ready to request stapled fund details for them, you can click on the three dots on the right side of the table. This will bring up an actions menu, where you'll be able to choose 'Request stapled super fund details.'

   You can also choose 'Request stapled super fund details' from within the Employee Details page for a specific employee.
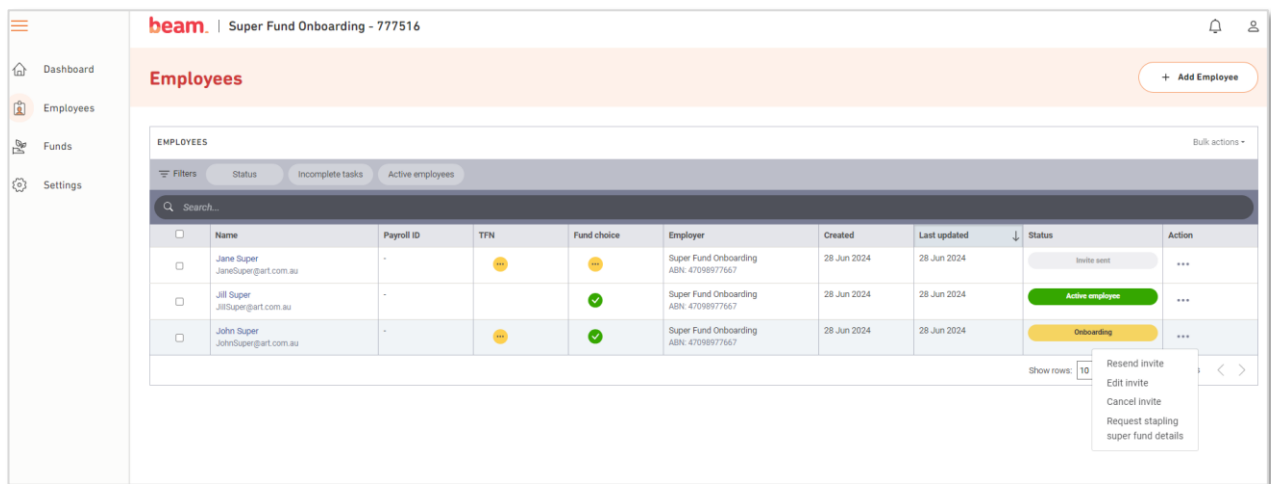

Figure 10: An example of the actions menu in the Employees section where you can request stapled fund details
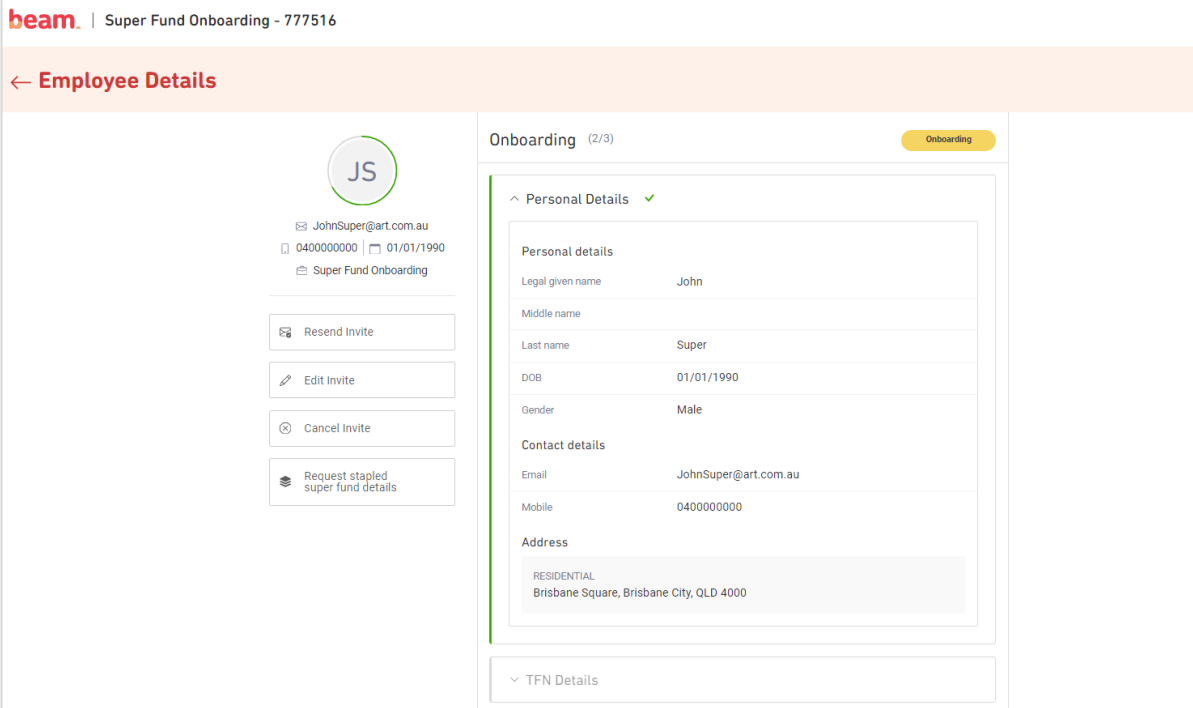
Figure 11: An example of a specific employee's profile with the Request stapled fund details button on the left side

3. Once you've selected this, you'll be prompted to select your Employer Classification if you didn't complete this earlier.

4. The form for the employee you are requesting details on will now show. If this employee has already completed their TFN declaration this detail will be pre-filled. If not, you will be able to enter their TFN manually.
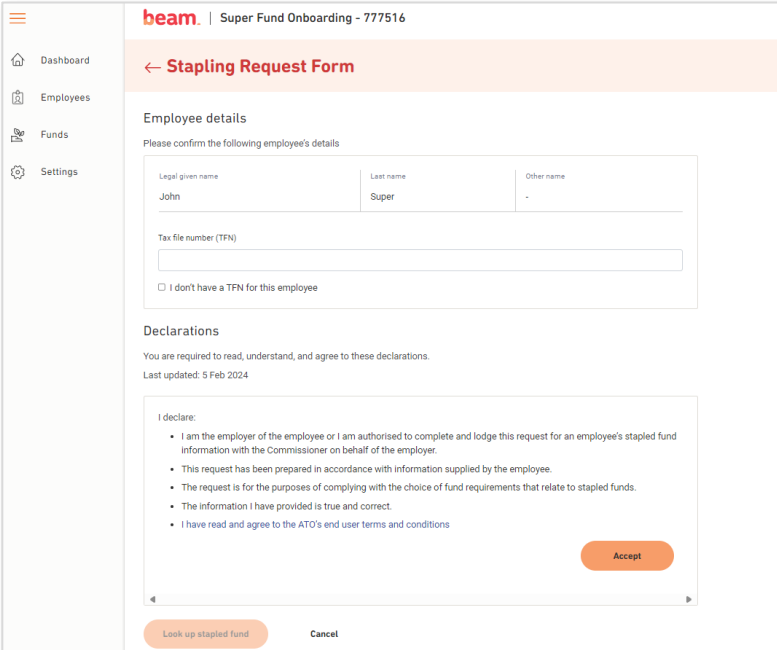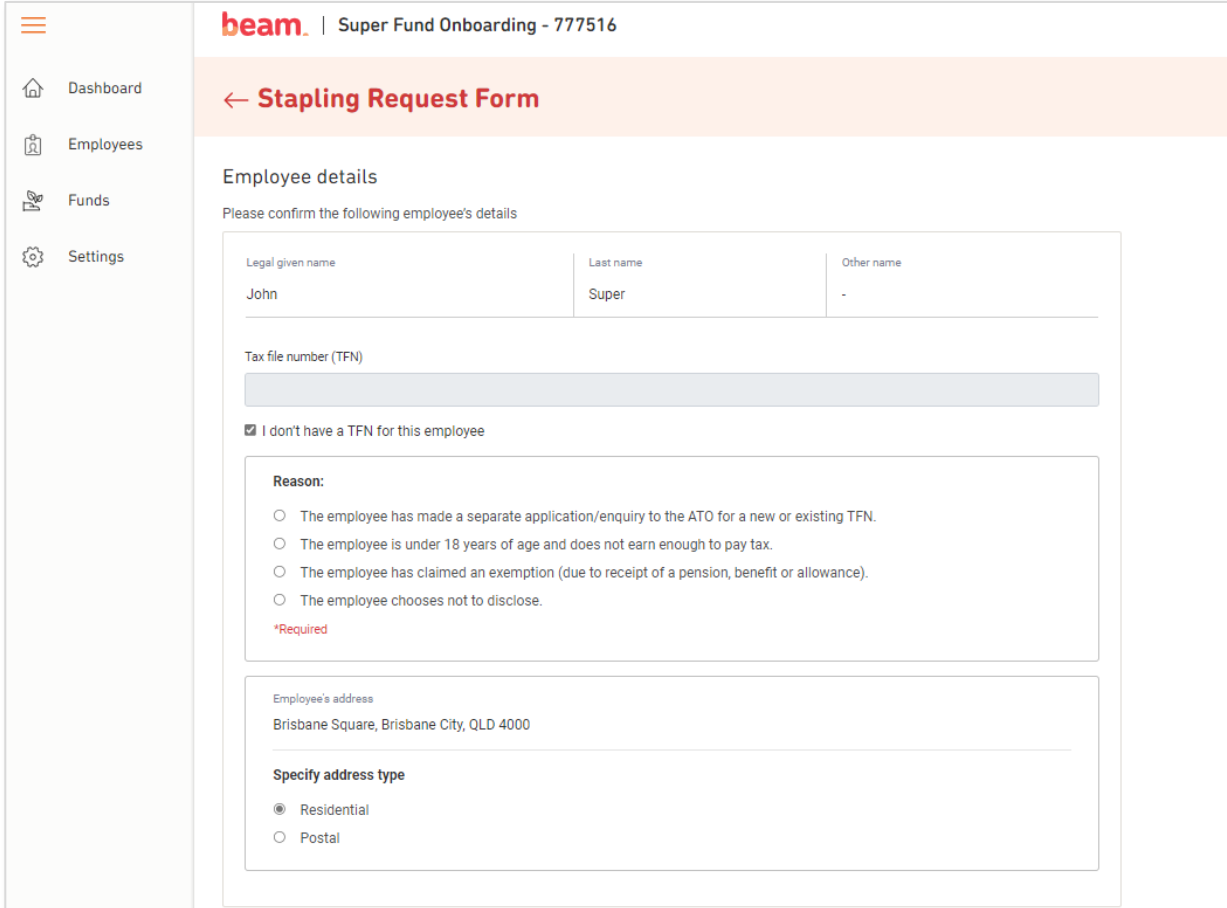

Figure 12: An example of the stapled fund request form

If the TFN for this employee is unknown, tick the 'I don't have a TFN for this employee' box and select a reason. You'll then need to enter the employee's address (residential or postal) to proceed with their stapled fund request.

Figure 13: An example of the details required when an employee's TFN is not known

Important information

- If you don't have the employee's TFN or address details, you won't be able to complete a stapled fund request. You'll be able to return and process your request at a later date once you have the required details available.

5. Once these details are completed, accept the declaration and click the 'Look up stapled fund' button.

6. Once the request has been sent to the ATO, you will generally receive a response within a few minutes. Once a response is returned, you'll receive an email confirming the details found for your employee. A notification will also appear in your notification centre in SFO, indicated by a red number next to the bell at the top of the page. You'll be able to view the results of your search on each employee's 'Employee Details' page under 'Fund Details'.

7. When a fund a stapled fund is found, these details will be automatically updated in your employee's profile.

If a stapled found isn't found, or more information is required, you may need to complete additional action to finalise your employee's super fund details. The notifications you receive in response to each request will include more information on the required action, if any.

How to resend an onboarding invite

If an onboarding invitation hasn't been actioned by the employee as a result of them not receiving the email, issues with logging in to complete the onboarding activity or the onboarding activity has expired, you have the ability to resend the onboarding invitation again to your employee.

To resend the onboarding invitation, follow these simple steps:

1. Go to the Employees section, Onboarding tab

2. Locate the record required and click the three dots (…) under the Action column
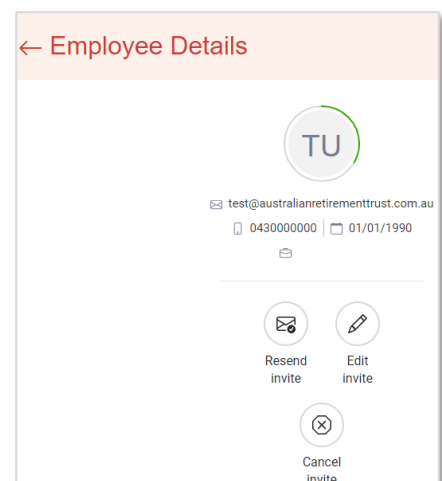
3. Click 'Resend invite'

Figure 14: An example of the Employee Details screen with the options to Resend invite, Edit invite or Cancel invite

How to cancel an onboarding invitation

To cancel an onboarding invitation to an employee, simply:

1. Go to the Employees section, Onboarding tab

2. Locate the record required and click the three dots (…) under the Action column

3. Click 'Cancel invite'

How to edit an onboarding invitation

To edit an onboarding invitation to an employee, simply:

1. Go to the Employees section, Onboarding tab

2. Locate the record required and click the employee's name under the Name column

3. On the Employee Details screen, click on 'Edit invite'

4. Update the required fields

5. Check the details and click 'Send Onboarding Invite'

How to proceed with Pending Tax File Number Declaration (TFND)

If a TFND status obtained from the ATO for a particular employee is Pending TFND then no action is required. Once the ATO have completed their checks on the TFND, the status on the Onboarding tab for a particular employee will be updated.
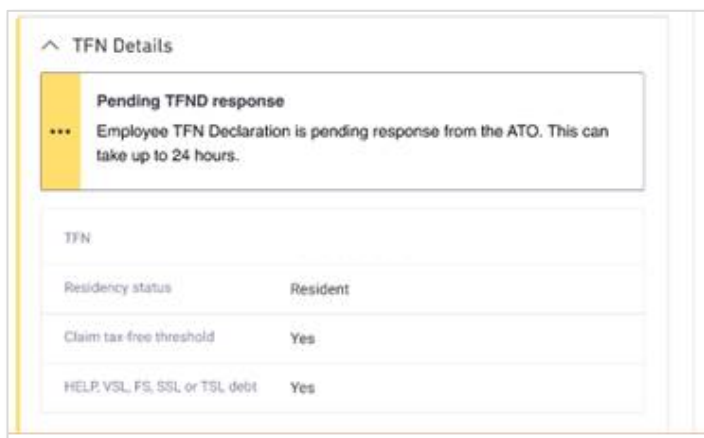

Figure 15: An example of a pending TFND response

How to proceed with Tax File Number Declaration (TFND) failure

If a TFND failed with the ATO, the status will be updated to 'TFND failed'. An employer will need to action the following steps:

1. Go to the Employees details screen by clicking on the employee's name in the Employee Section, Onboard tab

2. Scroll to the TFN Details section

3. Review the failure message and action accordingly

4. Select either 'Resend TFN invite to employee' or 'Remove TFND and move to Active'

5. An additional pop-up message will appear to select either 'Resend TFN request' or 'Remove TFND and move to Active'

6. If at any point during this process, you wish to exit, press the Cancel button.

7. Based on your selection, the onboarding invite will then be re-sent or cancelled. Please refer to further details for the actions available below.
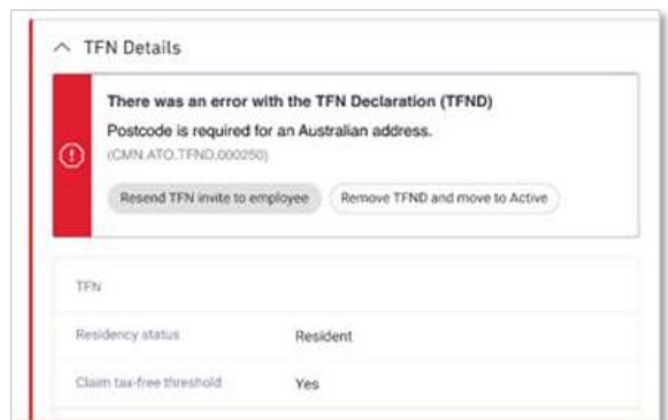

Figure 16: An example of the TFND failure

Resend TFN invite to employee

Allows you to resend the Tax File Number Declaration (TFND) invite to the employee so the employee can review, amend, and resend the details to the ATO.

Remove TFND and move to Active

Allows you to remove the Tax File Number Declaration (TFND) request if you and the employee are unable to resolve the TFND failure status.

Important information: Removing the TFND will mean an employee's TFND has not been completed or validated by the ATO – this could result in tax implications for your employee and failure to meet your obligations. For more information about lodging your TFN declaration you can visit the ATO website at **ato.gov.au/lodgetfndeclaration**

Onboarding activity sent

Once you have completed the steps, an email notification will be sent to your employee requesting they complete the super fund onboarding activity.

Onboarding activity completed

Once the employee has completed the Onboarding activity, the employee's Status will show as Active.

Australian Retirement Trust

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