

Paying super for employees is easy

# Clearing house start-up guide



This guide will help you set up and use our free clearing house service.

Our clearing house makes paying super for your employees easy. Using our clearing house, you can:

- pay into multiple super funds using one data file and one payment
- send your super contributions electronically when it suits you
- add and remove employees
- update your company and employees' details
- keep track of your super payments

It's SuperStream-compliant and any employer registered with us can use it. Signing up is free and only takes about five minutes.

## Registering for our clearing house

### Things you'll need

To help you complete the application as easily as possible, have the following information on hand:

- your ABN
- employer code (if you don't have one or don't know it, enter 'unknown' when prompted)
- contact details
- bank account details, in case payments are refunded to you
- contact details of your super administrator and main clearing house users
- number of employees
- payroll system name, if you have one



### Register in three easy steps

1. Visit [quicksuper.caresuper.com.au](https://quicksuper.caresuper.com.au) and click Apply now
2. Enter your **company details** and complete the steps
3. Confirm **your details** are correct then submit your application

Once you've submitted your application and it's been approved, we'll email your clearing house login details to you.

## Set up your account

Once you've registered and have received your login details, you can set up your account.

### What you'll need to do

There are several small tasks you'll need to complete before your clearing house is ready to use.

1. Log in using the details we sent to you.
2. You'll be taken through multi-factor enrolment which involves receiving another email containing a verification code.
3. You'll then be asked to confirm your mobile number. You can choose not to register this device.
4. You'll then be asked to set up your security questions and change your password.
5. Read and accept the terms and conditions and *Product disclosure statement*.
6. Confirm your Settlement account. This will only be used to credit amounts where contributions are returned to you.
7. Choose how you'll submit contributions:
  - file upload, using the CSV template or converting your payroll system file
  - direct entry, manually entering the super details of your employees
  - or both

### Changing your password

You'll need to create a new password when you log in for the first time.

Your new password will need to have:

- at least eight characters
- at least one letter
- at least one number

You'll be asked to change this password every 180 days as a security measure.

You can change your password at any time by going to the Administration tab, selecting My details and then selecting Change password.

If you've forgotten your password, you can request a new one on the sign-in page.

### Multi-factor authentication

For increased security, each time you sign in you'll be required to provide your password and a verification code. You can choose to receive the verification code by either email or SMS.

## Adding employees and super funds

If you choose to submit employee payments using the direct entry method, you'll need to add both the employee and super fund information into the clearing house either manually or by file upload.

This is a good option for businesses with less than 40 employees, as you only need to enter each employee into the system once, and you can edit their details at any time.

### How to add employee information manually

1. Below the Employees tab in the left hand menu, choose View employees.
2. Choose Create new employee.
3. Enter your employee's details and then choose Save.
4. Add Fund membership by selecting either the Default fund or Non default fund. You'll need to enter only one of the following: Fund name, Fund ID or USI or Fund ABN. Entering more will result in an unsuccessful search.
5. If the name of the desired fund appears, choose Next. Otherwise, choose Back and try again.
6. Add the employee's member number with their super fund in the highlighted field.
7. Repeat this process for each employee.

### How to add employees by uploading a spreadsheet

1. Below the Employees tab choose Upload employees.
2. Download a file template from Learn more about the employee upload process.
3. Add your employee information to the file template and save it.
4. Browse and click Upload file. If your status shows Error, click View detailed report. Use this information to edit your file and upload it again.
5. When the upload is successful, confirm the details.

If you're a multiple employer, you'll need to choose the relevant employer in each case.





## Adding a self-managed super fund (SMSF)

### What you'll need from your employee

Before you add an SMSF to the clearing house, you'll need the following information from your employee:

- their SMSF's ABN
- their SMSF's BSB, account number and account name
- an electronic service address to receive contribution data messages. An electronic service address makes an SMSF easily identifiable, lets an SMSF trustee receive employer contribution messages through SuperStream and ensures contribution messages can be sent to the correct SMSF. If your employee doesn't have an electronic service address, they can view the full list of providers on the ATO website.

Once you have this information, follow these steps to find and add the SMSF to the clearing house:

1. Below the Funds tab on the left, choose Create fund.
2. Enter the ABN to generate the SMSF's details. The SMSF must have an active ABN to use our clearing house.
3. Create a unique reference and enter it beside the Fund ID. The Fund ID might look something like this: TA10298. The unique reference could be as simple as the employee's first name.
4. Complete the SMSF account and banking details.
5. Enter the electronic service address for the employee's SMSF.
6. When you've entered all the details, click Create fund.



## Creating and submitting payments

You can choose to submit payments through both the file upload and direct entry methods

### File upload

This is a good way for businesses with 40 or more employees with an established payroll system to add and schedule super payments at the same time.

To upload a contribution file:

- make sure your data format and columns match the file specifications
- save your data as a CSV file and upload it

### File specifications

Log in to the clearing house, choose the Downloads tab and download one of these:

- *Contribution CSV File Specification*
- *SuperStream Alternative File Format (SAFF) Specification*

For example files, download either:

- *Contribution CSV File Starter file*
- *SuperStream Alternative File Format (v1.0) (SAFF) Starter file*

### How to upload a file

1. Run your payroll system and save the data as a CSV file.
2. Go to Contribution files then choose Upload file. Browse for the file and upload it.

### How to check your uploaded file

If your upload status is New, your employee data has been accepted.

If you're happy, then you can click Submit and the status will change to Authorised and your EFT details including BSB, account, reference number and amount will display on your screen.

If there's a problem with your file, the status will read Error. You can download the error report and the file specifications to resolve the error, or call us on **1800 005 166**.

## Direct entry

Similar to adding employees and funds into the clearing house, making payments by direct entry involves manually entering data into a contribution file for each employee.

### Sending super payments

1. From the Online contributions menu on the left, choose Create new.
2. Enter the desired contribution period, then choose either Start with default contributions or Start with zero amounts, then choose Next.
3. Enter the payment amounts for each employee.
4. Check that the payment amounts and member details are correct, then choose Save and go to Summary.
5. Check that the total amount of your contribution is correct and choose Submit and then Confirm.

Once confirmed, your EFT details and reference number will display on the screen.

## Tracking and reports for your payments

Tracking your super payments is easy.

To search transactions:

- use the search function from the lefthand menu and choose Search transactions
- choose the relevant payment date to see its progress

To search individual employee payments:

- use the search function from the lefthand menu and choose Search contributions
- enter the employee's surname to see their payment history

## Clearing house reports

The clearing house gives you a detailed reporting history of your super payments.

### Contribution summary report

From the Reports tab you can access a Contribution report. This report shows your total super payment amounts and the total number of payments.

To export this report, you can choose your report period by:

- month
- calendar year
- financial year

Then it's ready to download.

### Monthly contribution report

This report gives you a breakdown of your recent super payment parts, such as:

- your employer contributions
- any employee salary sacrifice amounts
- any extra contributions you've made

To export this information, choose your report type and report period, then download it.

### Refunds from super funds

If a payment to a super fund doesn't work, the money is sent back to you. You'll get an email confirming the details.

You can also use the search function and choose Search transactions to view refunds to your account.

Here to help

**1800 005 166** (+61 3 7042 2723 if overseas)  
**caresuper.com.au**

 [info@caresuper.com.au](mailto:info@caresuper.com.au)  GPO Box 1547, Hobart TAS 7001

  
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