

Changes to QuickSuper - addendum



Changes to QuickSuper

As part of the transfer of BT Super to Mercer Super you may notice some changes to the way you access and use QuickSuper.

This addendum is designed to help you navigate through the change of services between the BT QuickSuper portal and the Mercer QuickSuper portal.

A summary of these changes are outlined below.

You can find more detailed information about the Mercer QuickSuper portal <u>here</u>.

For further assistance please contact your Relationship Manager (if applicable), or call Mercer Super Helpline on **1800 682 525**, Monday-Friday, 8am-7pm (AEST/AEDT). Alternatively, you can email our support team at <u>clearinghouse@esuper.com.au</u>

Please note: You will have read-only access to BT QuickSuper for 12 months after the transfer to Mercer Super has been completed. Please ensure you retain your BT QuickSuper login details to access the read-only information as your new Mercer QuickSuper login will not allow you access to BT QuickSuper.

The read-only access to BT QuickSuper will allow you to search and extract reports. The reports run out of BT QuickSuper will reflect both the BT Super Member Number and Unique Superannuation Identifier (USI), as well as the Mercer Super Member Number and USI, against each member record.

If you are a BT QuickSuper user and you have not accessed the portal for more than 12 months prior to the transfer date (1 April 2023), you will not be transferred to the Mercer QuickSuper portal.

Making changes to Employer details

We're unable to automatically update our records following updates to QuickSuper. This means:

- As an employer if you need to make changes or updates to your contact details, you will need to contact Mercer Super as well as making the changes in QuickSuper. You can contact Mercer Super Helpline on 1800 682 525 between 8am – 7pm (AEST/AEDT), Monday to Friday.
- For multi-employers only if you add a new business in QuickSuper, it will immediately be active in Mercer QuickSuper. However, you must also notify Mercer Super immediately via an email to your relationship manager, if applicable, or our dedicated support team at <u>clearinghouse@esuper.com.au</u>. If you don't notify Mercer Super when you send through a Member Registration Request (MRR) to create a new default member under your Fund, the MRR may be rejected because the subemployer will not be known to Mercer Super.
 - When you add a new employer you will need to identify Mercer Super as a default fund to ensure new members and amendments are sent to the fund. You can do this in the "Fund Relationships" section.

Registering New Employees

Employee Fund choice

When setting up a new employee you will now be required to declare 'default' or 'non-default' fund.

) Home 5 SuperStream > View Messapes > Search > Search Contributions	Add Fund Membership Employee: SMITH, Jane (800827544)	0
Search Transactions Reports Contribution Reports Daily Reports	Default Fund Fund Name:	Use Default Fund
 Employees View Employees Jupload Employees Funds Administration Company Details Preferences Royment Method Settiment A/C 	Non-Default Fund Enter one of the name. ID, USI or ABN of the superannuation fund you wish to add to the employee. If you are having difficulties entering the at <u>AUNLOBERO</u> . Fund Name: ID Fund ID or USI: ID Fund ABN: ID	ABN you can check the status of the ABN
S Billing A/C Sund Relationships Users Nonifications Audit Documentation Contact Us	Back	Next

Additionally, the Member ID will not be automatically populated by Mercer Super. Initially, please select 'I don't have a member ID for this employee's fund'.

Mercer QuickSup	ber		MF1082
> Home > SuperStream > View Messages	Employee Deta	ils - Add Fund Membership	0
> Search	Employee: SMITH, Jane (2	100827544)	
 Search Contributions Search Transactions 	All information with an asterick	is mandatory.	
> Reports	Fund Details		
> Contribution Reports	Fund:	Mercer Business Super	
S Daily Reports	Fund ID:	19905422981708	
> View Employees	Fund ABN:	19 905 422 981	
> Upload Employees	Fund Employer ID:	N/A2	What is the Fund Employer ID?
> Funds	Member ID:	0	What is the Member ID?
Administration Company Details		I don't have a member ID for this employee's fund	>
> Preferences	Active:	Yes	

To obtain the Member ID download the daily report and manually update QuickSuper and/or your payroll system with the Member ID received in the Member Registration Outcome Response (MROR).

Those Member Numbers will be available sometime after the new employee has been applied to your Mercer Super Default Plan. For further information on this process, please see below.

Obtaining the Member ID of a newly registered employee

Up to five business days after adding a new member, you will be able to retrieve the new Member ID by following the below steps.

1. Log-in to Mercer QuickSuper and go to Reports > Daily Reports. Select 'SuperStream Response Report' and click 'Search'.

Wercer Quicksup	ber	MF1082
> Home		
> SuperStream > View Messages	Client Daily Reports	0
> Search > Search Contributions	Search Criteria	
> Search Transactions	Report Type: SuperStream Response Report 🛩	
> Reports > Contribution Reports		Search
> Daily Reports		
> Employees > View Employees		
> Upload Employees		
> Funds		
 > Administration > Company Details 		
> Preferences		
> Payment Method		
Settlement A/C		

2. Click to download the relevant report. An excel spreadsheet including all contribution and new member responses from all funds will begin to download.

Mercer QuickSu	per					
> Home						
> Online Contributions > Create New	Client Daily	Client Daily Reports				
> View In Progress	Search Criteria	Search Criteria				
> View Processed	Search Criteria					
Contribution Files Upload File	Report Type: SuperSt	tream Response Report				
> View In Progress			Change Search			
> View Files	Reports		Page 1 of 7			
> SuperStream	Report Date	Report Name				
 Search Search Contributions 	07 Mar 2023	SuperStream Response Report - 07 Mar 2023.csv	B			
> Search Transactions	18 Feb 2023	SuperStream Response Report - 18 Feb 2023.csv	B			
> Reports	17 Feb 2023	SuperStream Response Report - 17 Feb 2023.csv	b			

3. Column W – Returned Member ID - is where you will find the newly created Member ID.

K	L	м	N	0	Р	Q		R	S	T	U	V	W
Date of Birth	Member Name	Payroll ID	Member ID	Member Total	Component	Type	Error C	ode	Response Date	Severity	Short Description	Detailed Description	Returned Member II
1-Jan-67	SURNAME, First Name	123456	UNKNOWN			MEMBER_R	EG SUPERJ	GEN.CNTRBTN.1	7/03/2023 22:	35 Information	Member Registration request message was successfully processed	Member Registration request message was successfully processed	1001234
1-Jan-67	SURNAME, First Name	123456	UNKNOWN			MEMBER_R	EG SUPERJ	GEN.CNTRBTN.1	7/03/2023 22:	35 Information	Member Registration request message was successfully processed	Member Registration request message was successfully processed	1001234
1-Jan-67	SURNAME, First Name	123456	UNKNOWN			MEMBER_R	EG SUPERJ	GEN.CNTRBTN.1	7/03/2023 22:	15 Information	Member Registration request message was successfully processed	Member Registration request message was successfully processed	1001234
1-Jan-67	SURNAME, First Name	123456	UNKNOWN			MEMBER_R	EG SUPERJ	GEN.CNTRBTN.1	7/03/2023 22:	35 Information	Member Registration request message was successfully processed	Member Registration request message was successfully processed	1001234
1-lan-67	SURNAME, First Name	123456	UNKNOWN			MEMBER_B	EG SUPERJ	GEN.CNTRBTN.1	7/03/2023 22:	35 Information	Member Registration request message was successfully processed	Member Registration request message was successfully processed	10012345
1-Jan-67	SURNAME, First Name	123456	UNKNOWN			MEMBER_R	EG SUPERJ	GEN.CNTRBTN.1	7/03/2023 22:	35 Information	Member Registration request message was successfully processed	Member Registration request message was successfully processed	10012345
1-Jan-67	SURNAME, First Name	123456	UNKNOWN			MEMBER_R	EG SUPERJ	GEN.CNTRBTN.1	7/03/2023 22:3	35 Information	Member Registration request message was successfully processed	Member Registration request message was successfully processed	1001234
1-Jan-67	SURNAME, First Name	123456	UNKNOWN			MEMBER_R	EG SUPERJ	GEN.CNTRBTN.1	7/03/2023 22:	35 Information	Member Registration request message was successfully processed	Member Registration request message was successfully processed	10012345
1-Jan-67	SURNAME, First Name	123456	UNKNOWN			MEMBER_R	EG SUPERJ	GEN.CNTRBTN.1	7/03/2023 22:	35 Information	Member Registration request message was successfully processed	Member Registration request message was successfully processed	1001234

Example of SuperStream Response Report providing Member IDs. This report may also include any information regarding returned contributions from choice funds.

Entering an employee's annualised salary, occupation rating code and benefit category details

It's important care is taken when entering these details as they may affect the insurances provided to employees. If a mistake is made or a field left blank, you can go back and amend the employee's record as required.

Note: the salary (exclusive of superannuation contributions) you enter for each employee should be their annualised salary, not the salary they receive each pay period.

Salary For Benefits:				
Salary For Contributions:				
Salary For Contributions Start:				
Salary For Contributions End:				
Salary For Insurance:	120000.00	>		
Insurance Opt Out:	~			
Contributions Commence:				
Contributions Cease:	Ø			
Fund Registration:				
Benefit Category:	1ST101	1		

Employee occupation

When setting up your employees in Mercer QuickSuper, instead of entering an occupation description as you did with BT QuickSuper, you will now need to enter an occupation rating code as per the table below:

Occupation description	Occupation rating code	Occupation rating description
1. Managers, Office workers, Doctors, Lawyers (white collar)	w	White Collar
2. Retail sales, Supervising manual workers (light blue collar)	L	Light Blue Collar
3. Trade Qualified, Moderate manual work (blue collar)	В	Blue Collar
4. Skilled manual workers, Unqualified workers (heavy blue collar)	н	Heavy Blue Collar
5. Unskilled workers and Hazardous Occupations	S	Special Risk
6. Professional: Tertiary qualified, earning over \$100K per year for the last 3 years	Ρ	Professional

* Address:	1 Street Address	
 Suburb, State, Postcode: 	MELBOURNE	VIC, 3000
	Begin typing a suburb or postcode to display matching value	s
* Country:	Australia	
	Enter the country to display a list of matching values	
Usage:	Postal 🗸	
Employment Deta	ls	
* Payroll ID:	800827544	
Employment Status:	~	
* Employment Start Date:	01 Jan 2023	
* Occupation:	w	
Weekly Hours Worked:		

Benefit Category

There will no longer be a drop down for Benefit Category as there was with BT QuickSuper. Instead, Mercer Super will provide the Benefit Category codes, where applicable, once the data migration is completed.

Where relevant, your Mercer Super Relationship Manager will provide guidance about the Benefit Categories relevant to your Employer Plan. If you do not have a Mercer Super Relationship Manager, you can email our dedicated support team at mercersuper.employer.support@esuper.com.au.

It's important care is taken when entering these details as Benefit Categories, where relevant, will impact the benefits applicable to members of your Employer Plan.

Salary For Benefits:			
Salary For Contributions:			
Salary For Contributions Start:			
Salary For Contributions End:			
 Salary For Insurance: 	120000.00		
Insurance Opt Out:			
Contributions Commence:			
Contributions Cease:			
Fund Registration:			
Benefit Category:	1ST101	9	

How to download your migrated employee details

After transferring to Mercer Super, you can access the Mercer QuickSuper portal to receive the updated Member IDs for your employees. Depending on your superannuation solution you may have to update your payroll solution, or superannuation integration, with the updated Mercer Super Member IDs and USI.

Please see the below instructions outlining how to access these details.

Single employer facility

1. Login to Mercer QuickSuper. Click Employees > View Employees. Then click 'Export Employees'.



Multi-employer

1. Login to Mercer Super QuickSuper, Click Employers > View Employers. Select the employer and click 'View Details'.

> Online Contributions	A	٩
> Create New	Search Employers	0
> View In Progress (1)	Employers	Page 1 of 1
> View Processed		test de l'armonde
Contribution Files Upload File	You may enter the employer name, ID, or AIN to search.	
> View In Progress 1	For shows blooms	Employer ID
> View Files	MERCER (AUSTRALIA) PTY LTD	MF10761MERCERALISTR
> SuperStream > View Messages		MF10761TESTEMP
> Search		
Search Contributions	View Details View Employees	Create New Employer Employers
> Search Transactions		
Reports Contribution Reports		
> Daily Reports		
> Employers		
All and a second s		

2. Click the Employees tab and then click 'Export Employees'. Repeat this for all employers linked to your login.

> Home							
> Online Contributions > Create New	Search Em	ployees					0
> View In Progress 1	Employer: MERC	ER (AUSTRALIA) PT	Y LTD (MF10761MERCERAU	STR)			
> View Processed							
> Contribution Files > Upload File	Employer Details	Employees	Fund Relationships	Bank Account	Payment Method	Audit History	
> View In Progress 1							
> View Files	Include:	Active employee	5				
> SuperStream > View Messages	0.000000						Change Search
> Search	Employees						Page 1 of 1
> Search Contributions	Inactive employees appea	ar in italics					
> Search Transactions	Name				Payroll ID	Active Fund Memberships	Member ID
> Contribution Reports	EMPLOYEE, Test				TEST	Mercer SmartSuper Plan	TEST
> Daily Reports	FIELD, Comments				11111	Mercer SmartSuper Plan	UNKNOWN
> Employers	MEMBER, Example				PAYROLL1	Mercer SmartSuper Plan	UNKNOWN
> View Employers	SMITH, BIL				532225	Mercer SmartSuper Plan	UNKNOWN
> Upload Employees	SMITH, John				123456	Mercer SmartSuper Plan	UNKNOWN
Administration							
Company Details Preferencer						Create New Employee	Export Employees
> Payment Method							
> Default Settlement A/C							
> Billing A/C							
> Users							
> Notifications							
> Audit							
> Documentation [+]							
> Contact Us							

Further information

If you require further information please contact your Relationship Manager, if applicable, or call the Mercer Super Helpline on **1800 682 525**, Monday-Friday, 8am-7pm (AEST/AEDT). Alternatively, you can email our support team at clearinghouse@esuper.com.au.

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