



MLC SuperEzy

User Guide



Using our online service to make contributions is an efficient way to manage your super obligations. *You can make contributions for employees within your MLC MasterKey Business Super Plan, and for those who have chosen another super fund.*

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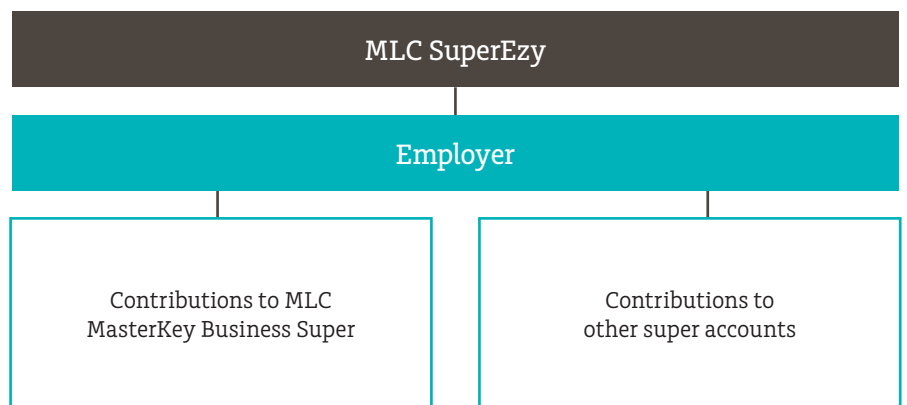
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How does MLC SuperEzy work?

MLC SuperEzy is an online administration and contribution processing service designed to help you easily meet your super obligations.

MLC SuperEzy works with your payroll system so you can:

- enrol new employees, update salaries and change
- personal details
- reduce data entry while making it easier to keep
- employee(s) details up to date
- eliminate the need for paper and cheques, and
- automatically reconcile payments.



Getting Started

What you'll need to start using MLC SuperEzy

To start using MLC SuperEzy, you'll need to read and complete the Application form and send it to us. This form is included with the MLC SuperEzy PDS and available on mlc.com.au/mlcsuperezy

Once we've received your signed Application form and set your Plan up on MLC SuperEzy, we'll provide you and your employee representative with a username and password.

Your computer must be set up to access the Internet, using a reasonably current browser. You should also have a list of current members and their normal contribution amounts.

Levels of access

For your security, you're able to select the level of access you want to give your employees representative. The table below provides an explanation of the two levels of access available:

Access level	What employees can do
Level A Employee contribution details and submission for processing	<ul style="list-style-type: none">• View company information• View and update employee details• Update and create MLC SuperEzy authorised user details; and• Create, submit and authorise contribution schedules, contribution data and member data.
Level B Employee contribution details only	<p>The same access as Level A but does not allow the authorisation of contributions.</p> <ul style="list-style-type: none">• View company information• View and update employee details• Update and create MLC SuperEzy authorised user details; and• Create, submit and authorise contribution schedules, contribution data and member data.

Logging In

To start using the system, go to mlc.com.au/mlcsuperezy, type in your username and password and click **Login**.

Step One: Enter your username and password

Step Two: Click **Login**

Important!

When navigating through MLC SuperEzy, make sure you don't use any of your internet browser buttons, such as the 'back' button on your menu. Click on **Return** to go back to the previous page or select an item from the menu.



Getting Started

Confirming your details

To confirm your Employer details are correct, you'll need to select **Change Details** from the top menu and click on **Employer**:



Step One: Select **Change Details** from the top menu

Step Two: Click on **Employer**

You'll be able to update your email address however if any other details are incorrect, please contact us on **132 652**.

Using your payroll with MLC SuperEzy

MLC SuperEzy can accept a file generated by your payroll program and automatically enter the details into the contribution schedule.

To ensure that we're able to match your details to those in our system, please send a sample of an extract from your payroll file to mlcsuperezy@mlc.com.au

Please include the following information:

- Name and version of the software you use (eg. MYOB version 2.1)
- File saved in either CSV or text format

For further information on setting up this facility, call us on **132 652**.

Setting up your members

Adding a new member on screen

To add new members to your Plan, select the **Members** menu and click on **New Members**. The following screen will display:

Step One: Click on the **Add** button to take you to the **New Member Application** page.

Step Two: Select the fund by clicking on the **Fund for New Member Application** drop down box

Step Three: Click **Continue** and the New Member application page will open.

New member application

This is where you enter the new member's details. Once you've entered all the details, click on **Submit Now** and the new member's details will be generated.

Step One: Once you've entered all the details, click on **Submit Now**.

Important!

If you've missed any fields or entered information incorrectly, a reminder will display on screen to enter that information before you can proceed.

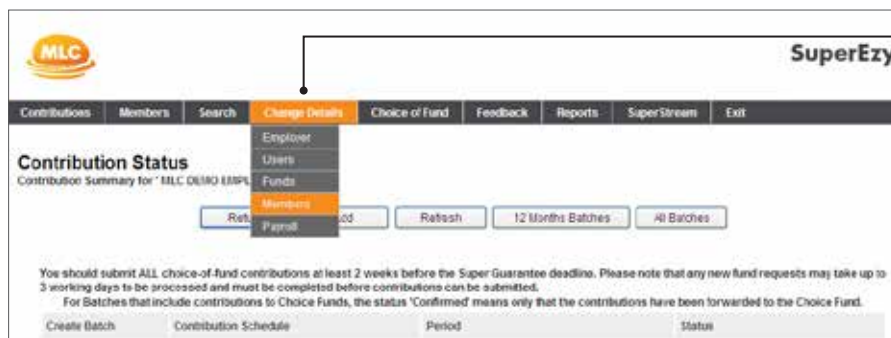
Adding new members by payroll file upload

MLC SuperEzy makes it simple to conveniently upload a payroll file to make changes to your Plan. If you don't have this facility and would like to use it, please call us on **132 652**.

Setting up your members

Confirming member details

To view your member details, you'll need to select **Change Details** from the top menu and click on **Members**:



Step One:
Click on **Change Details**.

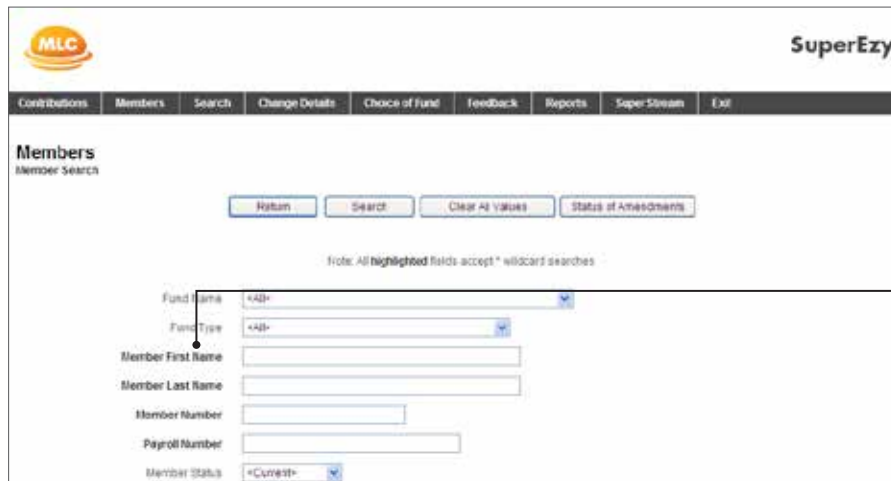
Step Two: Click on **Members**.

There are two options when searching for members:

List all members in the Fund – select the Fund from the **Fund Name** drop down box.

Search for an individual member – type the member's details into the search fields.

Click **Search**.



Step One: Click on **Member First Name** to view and their amend details.

To view the member's details: Click on their name.

If any of the member's details are incorrect, they'll need to be amended.

Refer to page 16 for information on how to do this.

Managing your Contributions

There are two ways of making contributions. You can either enter the contributions on screen or upload a payroll file.

If you would like to use the upload facility, please call us on **132 652** to set this up for you.

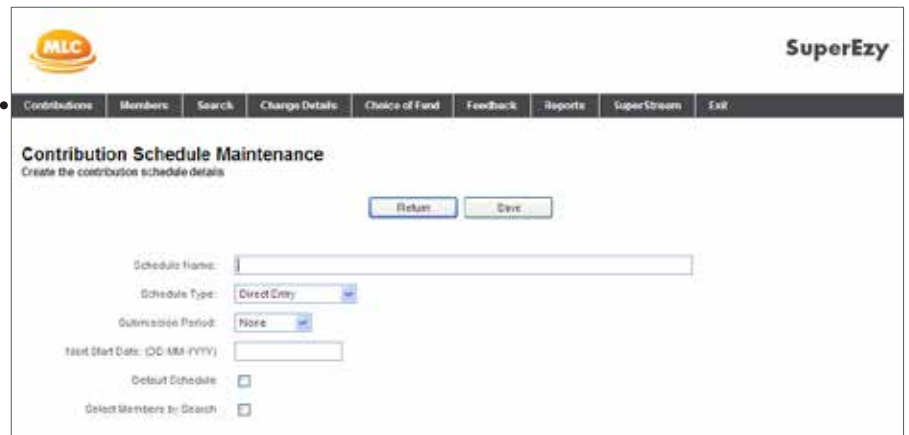
Step One: Click on **Contributions**

Step Two: Select **Add**.

Creating a new contribution schedule

If this is the first time you're making contributions, you'll need to create a template for your contribution schedule. You only need to set up a contribution schedule once, which you can then use to submit regular contributions. To do this, click on **Contributions** and select **Add**.

The following screen will display:



The screenshot shows the 'Contribution Schedule Maintenance' form in the SuperEzy system. The form is titled 'Contribution Schedule Maintenance' and includes the instruction 'Create the contribution schedule details'. It features a navigation bar with 'Contributions' selected, and buttons for 'Return' and 'Save'. The form fields include: 'Schedule Name' (text input), 'Schedule Type' (dropdown menu with 'Direct Entry' selected), 'Submission Period' (dropdown menu with 'None' selected), 'Next Start Date: (DD-MM-YYYY)' (text input), 'Default Schedule' (checkbox), and 'Select Members by Search' (checkbox).

Then complete the following fields:

Schedule Name

Schedule Type – this will be either **Direct entry** or **Payroll transfer**

Submission Period – (eg weekly/fortnightly/monthly)

Enter the next start date

Select the **Default Schedule** tickbox if you want all future members automatically added to the schedule. This is for Direct Entry only.

Tick **Select Members by Search** if you want to add members individually to the schedule.

Click **Save** once all the fields have been entered

You can only select one contribution schedule as the default. If you have more than one schedule, you'll need to add new members to all except the default.

Managing your Contributions

If you have selected **Direct entry** and did not select **Members by Search** the following screen will display:

Members in Schedule	Member Name	Member No	Payroll No	Fund
<input type="checkbox"/>	BEVERLEY ANNE ASSPIN	20440714		INBS
<input type="checkbox"/>	PAUL BLACK	20440715		INBS
<input type="checkbox"/>	MICHEL CLIFTON BOUNDY	24485182		INBS

You can then either select members one by one by ticking the box next to their name, or click on the **Select all** then click **Save** and the contribution schedule will be saved.

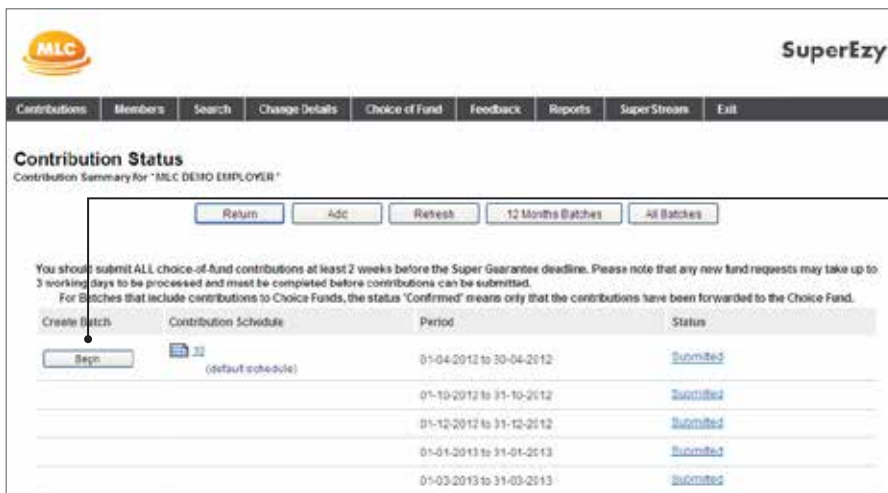
The **Contribution Schedule Maintenance** page then opens. Check that the information is correct. If you need to make changes, click on **Modify** to update the information, otherwise click on **Return** and your new Contribution Schedule will be ready for use.

Members in schedule 'Schedule 2'	Member No	Payroll No	Fund
BEVERLEY ANNE ASSPIN	20440714		INBS
PAUL BLACK	20440715		INBS
BRYANTON HERBERT BURGE	21713832		INBS

Step One: Click **Modify** to make changes, or click **Return** for your new **Contribution Schedule**.

Entering contributions on screen

On the **Contributions** screen, under the **Create batch** heading, click on **Begin**.



Step One: Click **Begin** and the Batch Input screen will open.

Step Two: Enter the contribution details for each member in the relevant fields.

Step Three: Select **Save and Continue** and the Batch Payment Details page will open.

Understanding the contribution schedule fields

It's important to understand each of the contribution categories to ensure your employees' contributions are processed correctly. The table below outlines the contribution categories:

Category Access Level	Contribution type
SGC	<ul style="list-style-type: none"> The standard compulsory contributions you're required to make, either SG or award.
Employer additional	<ul style="list-style-type: none"> Employer contributions over and above the employer compulsory contributions.
Member voluntary	<ul style="list-style-type: none"> Additional contributions made by an employee from their after-tax income and processed by you on your employee's behalf. This type of contribution is also referred to as a non-concessional contribution.
Salary sacrifice	<ul style="list-style-type: none"> Additional contributions made by an employee from pre-tax income and processed by you on your employee's behalf.
Spouse	<ul style="list-style-type: none"> An after-tax contribution made by an employee's spouse.

Managing your Contributions

If you regularly submit the same contribution amounts for your employees and you want these to be pre-populated on screen for next time, just select the tickbox **Set as defaults** beside the members' names. Then click **Save and Continue**.

The **Batch payment details** page will open:

Batch Payment Details
Enter Payment Details for Schedule 'Defect 270 retest'

Return Transmit Batch Delete

Period: 20-02-2012 to 21-02-2012 Batch ID: 72433

Enter Password

Total Amount Due (\$) 0.00 Confirm Total Amount Due (\$)

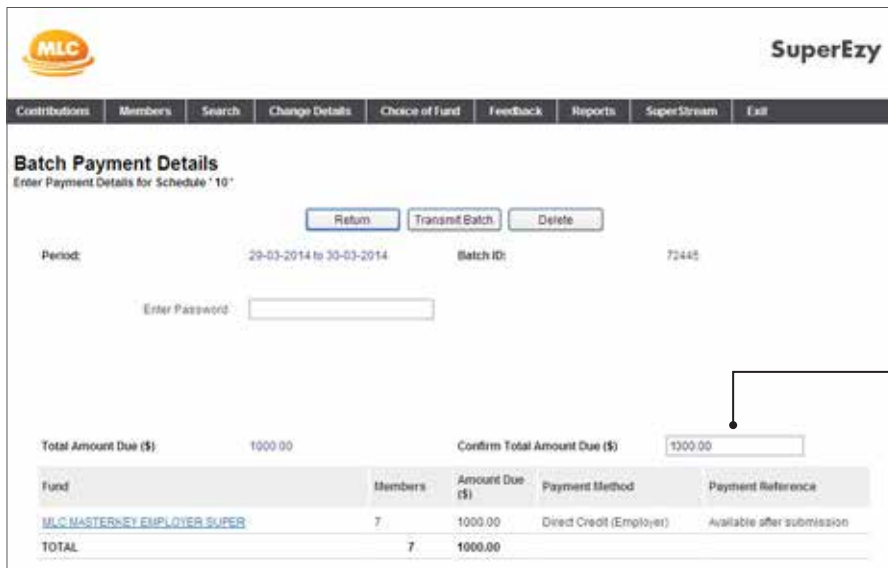
Fund	Members	Amount Due (\$)	Payment Method	Payment Reference
MLC BASTERNEY EMPLOYER SUPER	1	0.00	Direct Credit (Employer)	Available after submission
TOTAL	1	0.00		

Important!

You should check the contribution period on the screen before processing. If this is incorrect, click on **Delete** and create a new batch for the correct period.

Process a contribution batch

To finalise the contribution batch you will need to confirm the total amount due by entering this in the **Confirm Total Amount Due (\$)** box.

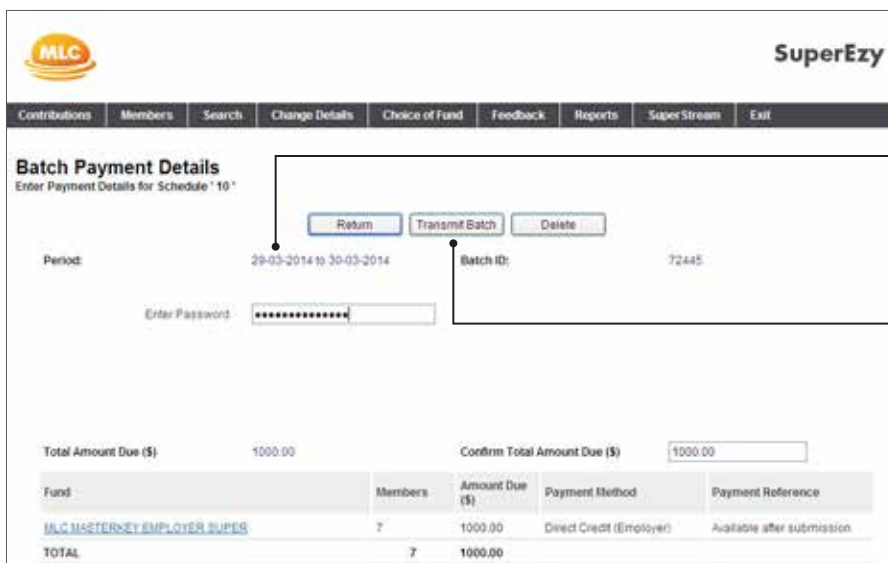


The screenshot shows the 'Batch Payment Details' page in the SuperEzy system. The page includes a navigation menu at the top with options: Contributions, Members, Search, Change Details, Choice of Fund, Feedback, Reports, SuperStream, and Exit. The main content area is titled 'Batch Payment Details' and includes the instruction 'Enter Payment Details for Schedule * 10*'. There are three buttons: 'Return', 'Transmit Batch', and 'Delete'. The 'Period' is set to '29-03-2014 to 30-03-2014' and the 'Batch ID' is '72445'. An 'Enter Password' field is present. Below this, the 'Total Amount Due (\$)' is '1000.00' and the 'Confirm Total Amount Due (\$)' is '1300.00'. A table below shows the following data:

Fund	Members	Amount Due (\$)	Payment Method	Payment Reference
MLC MASTERSKEY EMPLOYER SUPER	7	1000.00	Direct Credit (Employer)	Available after submission
TOTAL	7	1000.00		

Step One: Enter the total amount due in the **Confirm Total Amount Due (\$)** box.

You then need to enter your password and click **Transmit batch**.



The screenshot shows the 'Batch Payment Details' page with the 'Enter Password' field filled with asterisks. The 'Confirm Total Amount Due (\$)' field is now '1000.00'. The 'Transmit Batch' button is highlighted with a callout box.

Step Two: Enter your password.

Step Three: Click **Transmit batch**.

Managing your Contributions

Once the Amount and passwords entered are correct the **Batch Confirmation** page will be displayed:

The screenshot shows the 'Batch Confirmation' page. At the top, there is a navigation bar with links: Submit, Contributions, Members, Search, Choice of Fund, Change Details, Feedback, Reports, SuperStream, and Exit. Below the navigation bar, the page title is 'Batch Confirmation' with a subtitle 'Batch Confirmation for Schedule' Ad Hoc'. There are two buttons: 'Batch' and 'Employee History'. The main content area displays a table with the following data:

Period	Amount	Date Submitted	Amount (\$)	Reference #	Batch ID
12-19-2015 to 12-31-2015	2454.88	12-19-2015	2454.88	88517	CONFIRM BY SUBMITTER
TOTAL			2454.88		

At the bottom of the page, there is a footer with the text: 'Copyright © 1998-2015 MLC SuperEzy. All rights reserved. MLC SuperEzy is a registered trademark of MLC SuperEzy, Inc.'

Important!

Only Level A access users are able to perform this function. Level B access users are able to prepare and save contribution schedules but they cannot transmit the batch.

If you have dual authorisation, a second employer representative must authorise the batch before it can be transmitted.

Submitting contributions using the payroll file upload

Once we've set up this facility for you, follow these steps to conveniently upload a payroll file to make contributions:

Create Batch	Contribution Schedule	Period	Status
<input type="button" value="Begin"/>	(default schedule)	01-04-2012 to 30-04-2012	Submitted
		01-13-2012 to 31-12-2012	Submitted
		01-12-2012 to 31-12-2012	Submitted

Step One: Select **Begin** button next to the icon with the red arrow

From this screen, select **Begin** button next to the icon with the red arrow which indicates that the contribution schedule can be used to upload payroll files.

Period From: 19-01-2015

Period To: 19-01-2015

Tick to send an email to: contributor_email@mlc.com.au when the validation of the payroll contribution file is finished.

Step Two: Select **Browse** to select the file you want to upload.

Step Three: Click **Submit**.

On this screen, click on **Browse** to select the file you want to upload. You can select the tickbox to receive an email confirming that the file was validated correctly. Then click **Submit**.

When the file has been successfully uploaded, you'll be returned to the **Contribution Status** page where the status will show as **Ready for Submission**.

To transmit the batch, you'll need to confirm the total amount due and type in your password.

If you're using Direct Credit, the **Batch Confirmation** page will then open, where you can view and print out reports for each super fund.

Click on **Payment Instructions** to view the following screen:

Click on **Return** to go back to the **Contribution Status** page.

Managing your Contributions

MLC **SuperEzy**

Contributions | Members | Search | Change Details | Choice of Fund | Feedback | Reports | SuperStream | Exit

Payment Instructions

Payment Instructions
Note: This is not a receipt

Employer: MLC DEMO EMPLOYER
Bicfile: 84017
Period from: 20-06-2011 Period to: 26-06-2011

Please be sure to quote the payment reference below when paying.
Failure to do so may result in a delay of the allocation of this payment to the member accounts.

Payment Method	Bank Account	Payee	Payment Reference	Amount Payable
Direct Credit (Employer)	082401 11508056	MLC LTD - SUPERANNUATION/CLEARING	1445	1000.00

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Managing your Choice employees

MLC SuperEzy enables you to make contributions to all Complying Super funds in Australia (including Self Managed Super Funds) from the one Payroll file and in one payment.

Setting up a Choice fund

Important information!

Before adding a Choice fund, you should make sure that the fund accepts employer contributions.

If you are adding a Self Managed SuperFund (SMSF), you will also need to provide the electronic service address of the SMSF.

The first step in making contributions to Choice employees is to make sure you're linked to the Complying Fund.

Step One: Click on the **Choice of Fund** and select **Link to Choice Fund**.

Step Two: Enter the USI, SPIN, ABN or SFN of the fund and then select Search (Either the USI or the SPIN is highly recommended). If the fund is available in MLC SuperEzy, the **Link to Choice Fund** page opens.

If the fund is already available in MLC SuperEzy, the **Link to Choice Fund** page opens:

If no error messages were displayed, click on **Link**. You'll now be able to add new members to the fund and start making contributions.

If the Fund is not available, follow the steps on page 14, **Applying for a new Choice fund**.

Managing your Choice employees

Each Choice fund being linked will have a message displayed which outlines the rules applicable to the fund. Some funds require certain information before contributions can be processed.

If a fund has been terminated or cannot accept contributions, a message will display saying that the fund has been blocked.

If you believe that you can contribute to that fund, contact that Fund Administrator.

Applying for a new Choice fund

All institutional funds and many SMSFs will already be available on MLC SuperEzy.

Important!

If an Institutional fund does not appear, you will need to contact MLC to have it validated and added to your Choice of Fund list.

If you need to link a new SMSF to MLC SuperEzy, follow these steps:

Click on **Payment Method** for the fund and select **Continue**

Select your payment type, ie **EFT** or **Cheque**

Enter the following details depending on your payment type:

Payment type	Details
EFT	<ul style="list-style-type: none">• Fund Email Address• Fund Electronic Service Address• Fund BSB• Fund Bank Account Number
Cheque	<ul style="list-style-type: none">• Fund Address• Fund Suburb• Fund State• Fund Post Code

Click on **Request** to submit the application.

To check on the status of any requests for new funds click on **Choice of Fund** menu and select **Outstanding Requests**. A list of the super funds that are requested but not yet available will be provided.

Making contributions to your Choice employees

Once you're linked to the Choice fund, you'll be able to process contributions as outlined in **Managing your Plan**, on page 5.

Receiving feedback from Choice funds

Should there be any issues with Choice funds, we'll communicate these with you. This includes information being received by the Choice fund or that a refund has been sent back to you.

You'll need to action these requests to ensure that contributions can be allocated in a timely manner. If you receive a refund and a new contribution is not remitted, you may be in breach of Superannuation Guarantee liabilities.

Below are three types of errors or feedback you may receive:

Message	Explanation
Change notification	This means that either the Member or Employer number has been changed. You'll need to update your payroll system if you get this message.
Return	This means that money has been returned and you'll need to make a new contribution for the affected member to avoid SG liabilities.
Feedback	This means that money has been allocated but information in MLC SuperEzy and your payroll system needs to be changed to avoid the money being returned in the future.
Salary sacrifice	Additional contributions made by an employee from pre-tax income and processed by you on your employee's behalf.
Spouse	An after-tax contribution made by an employee's spouse.

Important Information!

You'll need to action all requests within 4 days of receiving the errors or feedback otherwise they'll automatically be deleted.

Updating member details

You can update your members' details two ways, either by making changes on screen or uploading a payroll file.

Updating members on screen

To make changes on screen, click on **Change Details** then select **Members**. The following page will display:

Step One: Click on **Change Details** then select **Members**.

Step Two: Enter the member's first and last names, or
Enter the member number or payroll number.

Step Three: Click **Search**.

Then the following screen will display:

Step Four: Click on the member's name.

Member Name	Fund	Member Number	Payroll Number	Status	TEN Suggested Status
DOE, JOHN	C-SPIN-ANZ0415AU	074234		Active	Not supplied

Number of members: 1 (Active: 1)

Select on the member's name and this screen will display:

Step Five: Select **Amend member** and you'll be able to update their details on screen.

Once you've completed the details, click on **Submit** and the changes will be implemented on the member's account.

Important!

Some member details, such as name and date of birth, cannot be changed by you. Ask the member to contact us directly to update these details.



Amend Member Details

Submit member amendments for CAPSALES.COM

Under SuperStream, MLC SuperEzy will immediately pass on all amendments to the receiving fund. Please ensure the information is correct and complete before submitting the request. MLC SuperEzy cannot guarantee that any of the optional fields below will be actioned by the receiving Fund. To ensure details are actioned, you or the Member should contact the Fund directly.

* Change any of the fields that require amendment

* To request the contents of a field to be deleted from the administration system, either blank out the field or enter ONLY an exclamation mark (!)

* The contents of highlighted fields cannot be requested to be deleted

* If you are updating an address, please enter the full address details, including suburb, state and postcode.

Fund	<input type="text"/>
Member Number	<input type="text"/>
First Name	<input type="text"/>
Middle Name	<input type="text"/>
Last Name	<input type="text"/>
Address 1	<input type="text"/>
Address 2	<input type="text"/>
Address 3	<input type="text"/>
Address 4	<input type="text"/>

Updating member details

Updating members by uploading a payroll file

If you're using a payroll file and you need to make changes, complete the following steps:

MLC SuperEzy

Contributions Members Search Change Details Choice of Fund Feedback Reports SuperStream Exit

Members Member Search

Return Search Clear All Values Upload Amendments Today's Amendments Status of Amendments

Note: All highlighted fields accept * wildcard searches

Fund Name: <select>=All</select>
Fund Type: <select>=All</select>
Member First Name: <input type="text">
Member Last Name: <input type="text">
Member Number: <input type="text">
Payroll Number: <input type="text">
Member Status: <select>=Current</select>
TPI Supplier Status: <select>=All</select>
Maximum Number of Members in Search Result: 500

Step One: Click on **Change details** then select **Members**.

Step Two: Click on **Upload amendments**.

The following screen will display:

MLC SuperEzy

Contributions Members Search Change Details Choice of Fund Feedback Reports SuperStream Exit

Member Amendment File Upload
Payroll File for MLC DEMO EMPLOYER

Return Test Upload

File to Upload: <input type="text"/> Browse...

Records for New Members: <select>=All Errors</select>
Upload Options: <select>=Upload correct entries, edit the rest</select>
Results Display: <select>=First 5</select>
Error Display: <select>=First 20</select>

Tick to send an email to: <input type="text"/> when the validation of amendments upload is finished.

There are a few settings you can choose:

- Whether the records for new members are errors or are ignored
- How many results to display
 - first 5 or all records
- How many errors to display
 - first 20 or all records

Then click on **Browse** to select the file you want to upload.

You can now **Test** the file or go straight to **Upload**. By testing the file first, you'll be able to identify any errors and correct them before uploading it.

To upload the file, click **Upload** and your amendments will be saved.

Exiting members

There are two ways to exit a member from your Plan, either by making changes on screen or by uploading a payroll file.

Important!

Before you exit a member, please make sure you've submitted all their contributions. Once they've been exited, you won't be able to submit any more contributions for them.

Step One: Click on **Members** then **Exit Members**.

Exiting a member on screen

Click on **Members** then **Exit Members** and the following screen will display:

Member Name	Fund	Member Number	Payroll Number	Status
SHIPSOHL, BART	MXBS	BC000092	123456	Exit Incomplete
DELANEY, DAVID	MXBS	MLC-00006091		Exit Requested

Click on **Exit Member** and this screen will display:

Step Two: Enter the member's name, member number or payroll number and select **Search**.

Then enter the member's name, member number or payroll number and select **Search**. The following screen will display:

Step Three: Select the member's name.

Member Name	Fund	Member Number	Payroll Number	Status
JONES, LUCAS	MXBS	789645	13354478	Active

Exiting members

Select the member's name and the following screen will display:

Then click on **Exit Member** and the following screen will display:

Step Four: Enter the **Date left employment** and the **Exit reason**, ie Fund Choice or Left Employment.

Fund	C-PENLCHGR
Member Number	2976021
First Name	ANNAWILLIE
Middle Name	
Last Name	ADAMS
Payroll Number	90901
Address 1	
Address 2	
Address 3	
Address 4	

Step Five: Click **Exit Member**.

A final warning message will display reminding you that once you exit the member, you'll not be able to submit any contributions for them.

To proceed, select **Yes** and the exit will be processed.

Step Six: Click **Yes** and the exit will be processed.

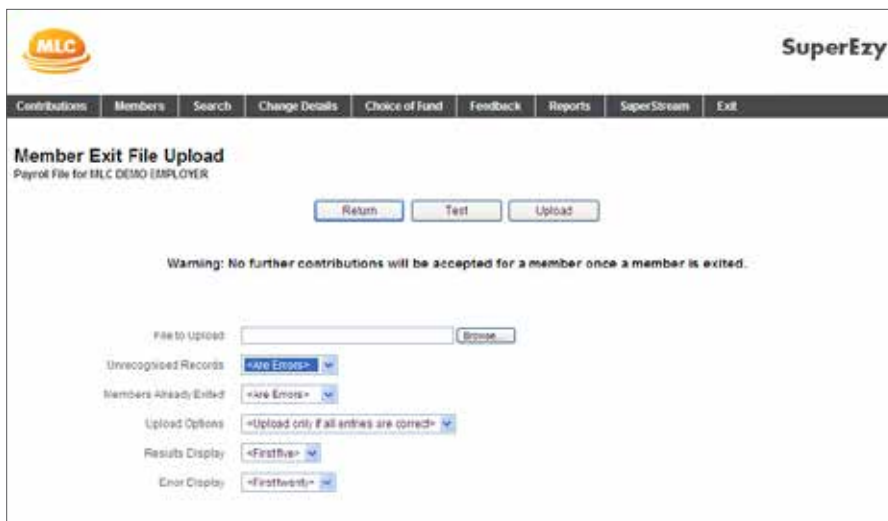
Fund	IKBS
Member Number	9000002
First Name	BAKI
Middle Name	
Last Name	SIMPSON
Payroll Number	12345
Exit Date (dd-mm-yyyy)	15-04-2014
Exit Reason	Fund Choice

Exiting a member by uploading a payroll file

Click on **Members** then select **Exit Members**. The following screen will display:



Now click on **Upload Exits** and the following screen will display:



There are a few settings you can choose:

- Whether unrecognised records are ignored or create an error
- Whether members who already exited are ignore or create an error
- Upload options
- How many results to display – first 5 or all records
- How many errors to display – first 20 or all records

Then click on **Browse** to select the file you want to upload.

You can now **Test** the file or go straight to **Upload**. By testing the upload first, you'll be able to identify any errors in the file and correct them before uploading it.

To upload the file, click **Upload** and your exits will be processed.

What if I get an error?

Any errors detected during the upload are displayed on the **Member Exit Uploads Results** page.

Click on Yes to confirm that the exits should proceed or on No if not.

The **Status of Member Exits** page opens and the **Edit Queue** is updated with the results of the upload. The member's status is set to **Exit Requested** or **Exit Waiting** if the member still has outstanding contributions in MLC SuperEzy.

Once we've processed the exit request, the Member's status will be updated.

A final warning message will display reminding you that once you exit the member, you'll not be able to submit any more contributions for them.

Reports

View contribution history

You can easily view the history of all contributions submitted within any given date range. To display this information, select **Search** and click on **Batch** or **Member**.

The following screens will display:

Batch:

The screenshot shows the 'Transaction Search' interface. At the top, there is a navigation bar with the following items: Contributions, Members, Search, Change Details, Choice of Fund, Feedback, Reports, SuperStream, and Exit. Below the navigation bar, the page title is 'Transaction Search' with the subtitle 'Search For Transactions'. There are four buttons: Return, Batch Search, Fund Search, and Clear All Values. The search criteria include: Batch ID (text input), Reference ID (text input), Input Type (dropdown menu with '<All>' selected), Contribution Schedule (dropdown menu with '<All>' selected), Contribution Status (dropdown menu with '<All>' selected), Fund (dropdown menu with '<All>' selected), Contribution Amount (text input), and Date Sent (dd-mm-yyyy) (text input with 'to' field). At the bottom, there is a field for 'Maximum number of transactions returned in search list' set to 500.

To search by batch, click **Batch Search** to display a list of all previous batch payments made. Alternatively, to limit your search, complete any or all of the fields shown above and then click **Batch Search**.

Member:

The screenshot shows the 'Member Contributions' interface. At the top, there is a navigation bar with the following items: Contributions, Members, Search, Change Details, Choice of Fund, Feedback, Reports, SuperStream, and Exit. Below the navigation bar, the page title is 'Member Contributions' with the subtitle 'Member Search'. There are three buttons: Return, Search, and Clear All Values. A note states: 'Note: All highlighted fields accept * wildcard searches'. The search criteria include: Fund Name (dropdown menu with '<All>' selected), Member First Name (text input), Member Last Name (text input), Member Number (text input), Payroll Number (text input), Member Status (dropdown menu with '<Current>' selected), and Batch Id (text input). At the bottom, there is a field for 'Maximum Number of Members in Search Result' set to 500.

To search contribution made to an individual member click **Search**, this will display all active members in your plan. To view a specific transaction, click on the member's name.

You can limit your search by entering any or all of the above fields.

If you want to print the Contribution Advice Report, click on the **Reference ID** and select **Print**.

Status of Member Amendments

You can check the status of amendments you have made for a member or group of members. To do this, click on **Change Details** and select **Members**.

Click on **Status of Amendments** and the following page will display:

Member Name	Fund	Member Number	Amendment Status
ALLEN, DAPHNE	MKBS	80225	UNCONFIRMED
CRAZY, DIRK MIDDLE	MKBS	122233	UNCONFIRMED
DELANEY, DAVID	MKBS	MLC-90000091	UNCONFIRMED

Step One: Click on **Change details** then select **Members**.

Step Two: Click on the **hyperlink** beside the applicable amendment to display more information on the amendment.

To display more information on the amendment, click on the hyperlink beside the applicable amendment and the information will display:

Fund	MKBS
Member Number	27530744
Amendment Status	UNCONFIRMED
First Name	XXXXXXXX
Middle Name	XXXXXXXX
Last Name	XXXXXXXX
Address 1	XXXXXXXX
Address 2	XXXXXXXX
Address 3	XXXXXXXX
Suburb	XXXXXXXX
State	XXX
Postcode	9999
Country	9999 9999
Home Telephone	9999 9999
Business Telephone	9999 9999
Mobile Phone	

Reports

View submitted New Member applications

You can view any New Member applications you have submitted by following these steps:

Step One: Click on the **Members** menu and select **New Members**. Any new members that haven't been submitted or accepted are listed.

Step Two: Click on **Today's Members**.

New Member Application Status Summary
New Members for MLC DEMO EMPLOYER

Buttons: Return, Add, Refresh, Today's Members, Upload Members, Sequential Completion

Last Name	First Name	Birth Date	Fund	Status
ANDERSON	AMANDA	09-12-1990	MLCS	Entering Sent
BARBER	MITCHELL	01-01-1980	MLCS	Entering Sent
BEETORRE	TEST	10-05-1983	MLCS	Entering Sent

Step Three: Type the required date range in the **New members submitted from (DD-MM-YYYY)** and **To** fields.

Step Four: Click on **Submit** and all New Members submitted will display.

Recent New Member Applications
List of Recent New Members for MLC DEMO EMPLOYER

Buttons: Return, Submit

New members submitted from (DD-MM-YYYY) is: 30-01-2011 to 30-01-2012

Fund	Member Number	Parish Number	Last Name	First Name	Birth Date	Status
MLCS		1011603	ANDERSON	AMANDA	09-12-1990	Entering Sent
MLCS			BLOOM	JAMES	01-01-1980	Entering Sent
C-SPN-HOBBE100AU	123456	123222222222	BOLAND	TIMOTHY	21-01-1989	Entered
C-SPN-MLC0440AU	123456	123222222222	BOLAND	TIMOTHY	21-01-1989	Entered
C-SPN-AZ09815AU	3541	3	CALDWELL	RAYMOND	11-01-1963	Active

Employee Contribution Advices

You can create advice documents for your employees, which outline the contributions that have been remitted by you through MLC SuperEzy.

You can download the Advices either by date range or per batch.

Employee Contribution Advices – Date Range Report

To download the Advice for a date range, click on **Reports** and select **Employee Advices**.

Type the required date range in the **Period From** and **To** fields. Please note that the report cannot be for a period greater than 12 months (at a time).

The screenshot shows the MLC SuperEzy interface. At the top left is the MLC logo, and at the top right is the SuperEzy logo. A navigation bar contains the following items: Contributions, Members, Search, Change Details, Choice of Fund, Feedback, Reports (highlighted), SuperStream, and Exit. Below the navigation bar, the page title is "Contribution Advices for Employees" with the subtitle "Report all confirmed contributions for period". A warning message states: "Warning: Ensure that all contributions for the period have been submitted and confirmed before downloading the Contribution Advices." Below this, it says "The Contribution Advices will include all contributions that satisfy the following conditions:" followed by two bullet points: "a. The end date of the contribution period associated with the batch must fall in the selected reporting period" and "b. The batch must be confirmed". There is a "Period from" field followed by a "to" field. A note below the fields states: "NOTE: Results will be restricted to a 12 month period". Further down, it says "You may download one of two types of Contribution Advices for Employees. Select the one that best fits your requirements." Under the heading "Fixed format Contribution Advices", there are two buttons: "PDF Advices" and "PDF Sample". At the bottom, a small note reads: "If you use this option, the Contribution Advices will be downloaded in PDF format and can not be amended. Use this option if the format of the contribution advice suits your requirements."

Click on **PDF Advices** for Adobe Acrobat format.

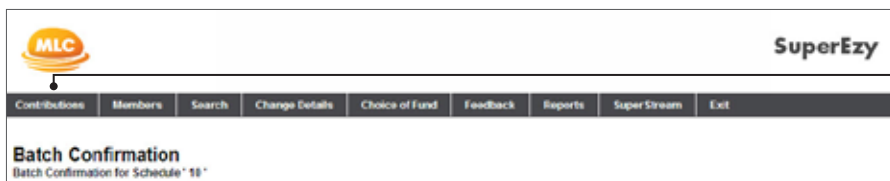
Click on **Advice Details** for the report to be in CSV format.

Reports

Employee Contribution Advices – Batch Report

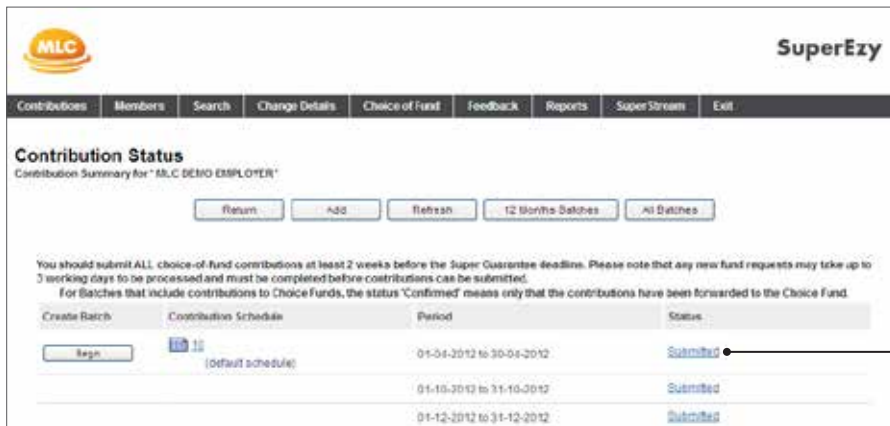
To download the Advice for a batch, you need to be in the **Batch Confirmation** page.

To get to the batch confirmation page, you would need to be on the **contribution status** page by clicking **contributions** menu.



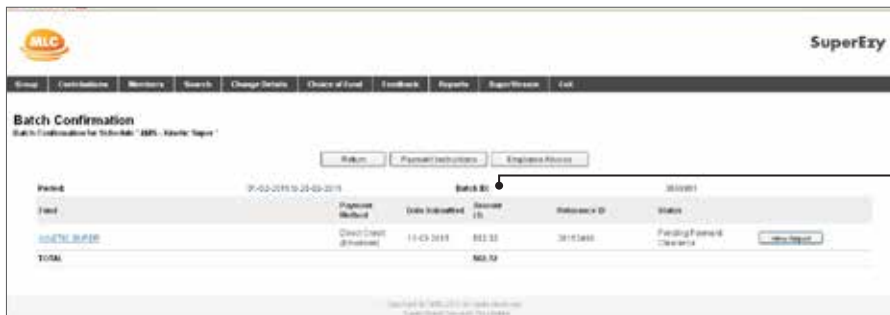
Step One: Access the **contribution status** page by clicking **contributions** menu.

Then click on the **“submitted”** hyper link corresponding to your desired batch.



Step Two: Click on the **submitted** hyper link corresponding to your desired batch.

You will now be on the Batch confirmation page:



Step Three: Click on **Employee Advices**.

From this page, click on **Employee Advices** and the following page will display:

Click on **PDF Advices** for Adobe Acrobat format.

The screenshot shows the SuperEzy web interface. At the top left is the MLC logo, and at the top right is the SuperEzy logo. Below the logos is a navigation menu with the following items: Contributions, Members, Search, Change Details, Choice of Fund, Feedback, Reports, SuperStream, and Exit. The main content area is titled "Contribution Advices for Employees" and "Advices for batch 64048". There is a "Return" button. Below this, the "Period" is listed as "2012-04-01 to 2012-04-30" and the "Batch ID" is "64048". A message states: "You may download one of two types of Contribution Advices for Employees. Select the one that best fits your requirements." Under the heading "Fixed format Contribution Advices", there are two buttons: "PDF Advices" and "PDF Sample". A note below these buttons says: "If you use this option, the Contribution Advices will be downloaded in PDF format and can not be amended. Use this option if the format of the contribution advice suits your requirements." Below this, it says: "Click on PDF Sample to view an example. Click on PDF Advices to download the contribution advices for all employees in the batch." Another note states: "This option is only available if your batches contained fewer than 150 employees." Under the heading "Flexible format Contribution Advices", there are two buttons: "Advice Details" and "Advice Sample". A final note at the bottom says: "Use this option if you want to edit the contribution advices for your employees or if your batches contained more than 150 employees."

Click on **Advice Details** for the report to be in CSV format.

Reports

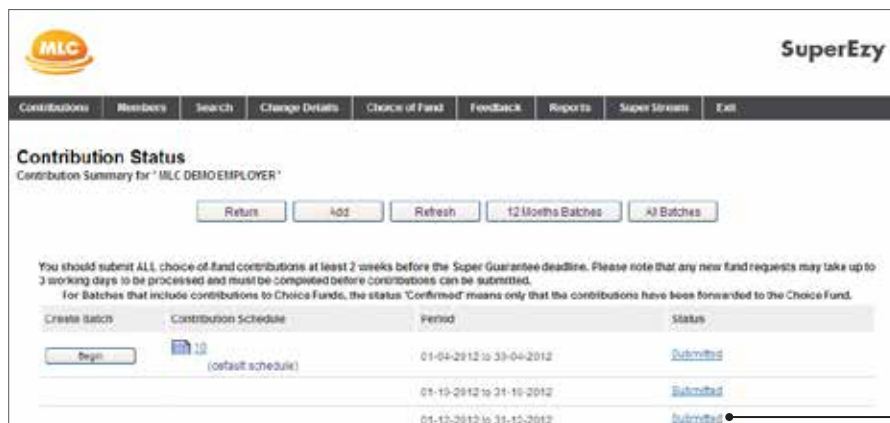
Payment Instructions (Applicable to Direct Credit users only)

To view the Payment Instructions for a batch, the easiest way is through the **Batch Confirmation** page, accessible through the **Contributions** menu.



Step One: Access the **contribution status** page by clicking **contributions** menu.

Once you have selected the contributions menu, the Contributions Status page will display:



Step Two: Click on the **submitted** hyper link corresponding to your desired batch.

Click on the **Submitted** hyperlink for the batch that the Payment Instructions are required to make payment for.

Click on **Payment Instructions** and the following screen will display:

Step Three: Click on **Payment Instructions**.

To view the report, click on **Payment Instructions** and the following page will display:

You can then print the report.

SuperStream

Amending member data

Use this page to download member details in a Microsoft Excel® file. You can amend member details and then upload the file to change the details in SuperEzy.

Step One: Click on SuperStream, then select Download Member Data.

Step Two: Select the Fund from the drop down box.

Step Three: Click Download Members to save the fund's member details as an Excel spreadsheet.

Amending member information

In the spreadsheet, the first four data columns are protected. You cannot change these details.

Add the missing information or amend the existing information, then save the file. Do not change the spreadsheet layout or formatting, or the filename.

When you are finished, click Test to check your changes and display error information.

If your upload file has errors, the upload fails and no data is changed.

Where the upload is unsuccessful, an errors page will display. This shows whether the error is with the file format, or with the data that the file contains.

Resolve any errors, then click Upload to upload the corrected file and modify member details in SuperEzy.

The screenshot shows the SuperEzy logo and navigation menu. The main heading is "Member Data Augmentation" with the sub-heading "Upload Member Data File". There are "Test" and "Upload" buttons. Below them is a "File to Upload" field with a "Browse" button.

The screenshot shows the "Member Data File Upload Errors - data-error.xlsx" page. It displays a summary table and a detailed error table.

File Name	Upload	Error
1	Some DUES	All error of same sort.

The screenshot shows the "Member Data File Upload Errors - file-error.xlsx" page. It displays a message: "The file is corrupted." and a "Return" button.

The screenshot shows the SuperEzy logo and navigation menu. The main heading is "Member Data Augmentation" with the sub-heading "Upload Member Data File". There are "Test" and "Upload" buttons. Below them is a "File to Upload" field with a "Browse" button. A tooltip is visible over the "SuperStream" menu item, listing "Download Current Member Data" and "Upload Current Member Data".

Glossary

1.1 Contribution Batch Statuses

Below is a summary of the different Batch Statuses

Batch Status	Description
Input Error	There is an error in the input of the Contribution Schedule. Any errors must be rectified before the batch can be submitted.
Ready for Submission	Means that the Contribution Schedule has been completed.
Awaiting Authorisation	Only shows if the you have selected to have dual authorisation and it is waiting for the 2nd authorisation.
Submitted	The batch has been submitted to MLC.
Confirmed	The batch has been received and reconciled. The batch may contain both Default and Choice monies. The status does not mean that the funds have been accepted by the Choice Fund.
Fund Rejected	A contribution or contributions at Member level have failed in the Default Fund. Although the batch status is Fund Rejected, the Choice monies could in fact have been accepted by the Choice Fund/s. To see whether any Choice contributions have been rejected, the Employer must refer to the Advice Status (discussed later in this section).
Ready for Submission	An batch has errors previously, which have been rectified, but have not been submitted to MLC.
Confirmed with Stop Payments	All Choice monies in the batch have been stopped. This status can only be used if the Choice monies have not debited from the NAB Bank Account and paid to the Choice Funds. The entire batch status changes to "Confirmed with Stop Payments", but the status only refers to the Choice portion of the batch.
Confirmed with Choice Refunds	The Direct Debit dishonours or one or more Choice contributions has been rejected / returned by a Choice Fund after the Choice monies have been debited from the NAB Bank Account and are being "held" (for 3 days) before sending to the Choice Funds. The entire batch status changes to "Confirmed with Choice Refunds", but the status only refers to the Choice portion of the batch. If the Direct Debit dishonours, MLC update the status. If monies are rejected/returned by the Choice Funds, the status will be updated in SuperEzy.
Incomplete	The batch has failed validation and has not been submitted to MLC. All missing information must be rectified updated before the batch can be submitted.

Note: In the Search functions, "Confirmed with Variation" is a status available for selection in search criteria. This status is a legacy title in SuperEzy which is no longer available for new batches. Therefore, MLC batches will never have a status of 'Confirmed with Variation'.

1.2 Contribution Advice Statuses

Like batches have a status, Advices do too. These codes are used to progress the advice through the stages of transmission from Employers to the Fund Administrator. The other status codes possible for an advice are as follows:

Advice Status	Description
CNF (Confirmed)	The advice has been confirmed by the Fund.
CRE (Created)	The advice is ready to be submitted to a Fund. The advice has not yet been placed in the SuperEzy submission queue.
QUE (Queued)	The advice has been placed in the SuperEzy submission queue, for submission to a Fund.
RSM (Resubmitted)	The advice is ready for resubmission to the Fund, following its rejection by the Fund. The advice has not yet been placed in the SuperEzy submission queue.
CAN (Cancelled)	The advice has been cancelled because it has been replaced with another advice that has been resubmitted to the Fund.
ERR (Rejected)	The advice has been rejected by the Fund Administrator.
CSP (Confirmed with Stopped Payment)	All Choice Advices have been Stopped, after submission, from being paid.
CPR (Confirmed with Payment Refund)	A Choice payment has been rejected by a Fund and Money returned.

1.3 New Member & Member Amendment Statuses

Below is a listing and explanation of each of the statuses resulting from a New Member or a Member Amendment being processed in SuperEzy.

Status	Description
Incomplete	The Member information that has been entered or uploaded did not pass validation in SuperEzy. Therefore, nothing is submitted. The error(s) must be fixed before anything can be submitted.
Entering	The new Member or Amendment sits at this status for a split second, so the you probably won't see this status. If it does happen to sit for longer on this status, it indicates a problem with SuperEzy.
Entering Sent	A message has been sent to MLC and SuperEzy is waiting for a reply back. The New Member or Amendment will potentially have this status for up to a day or two. If you notices that the status hasn't changed, there may be a problem and they will contact MLC to rectify.
Active	New Members only - Once MLC confirms that the Member has been set up in MLC's Admin System, the Member status changes to Active.
Inactive	This is a status that MLC can set via the Fund Administrator view.

Glossary

1.4 Exit Statuses

Below is a listing and explanation of each of the statuses resulting from a Member being exited in SuperEzy.

Amendment Status	Description
Exiting	The exiting member has this status for a split second so you shouldn't see Members with this status. If a Member does have an 'Exiting' status for a day or two, there is an issue with SuperEzy.
Exit Queued	The exiting member has this status for a split second so you shouldn't see Members with this status. If a Member does have an 'Exit Queued' status for a day or two, there is an issue with SuperEzy.
Exit Waiting	The exit has been processed by you but there are outstanding contributions that are waiting to be confirmed. Once these contributions are confirmed, the status will change to Exit Requested. This exit is stored by SuperEzy until the contributions are processed by MLC.
Exit Requested	The Exit message has been sent to MLC for processing.
Exited	MLC has processed the termination and confirmed back to SuperEzy.
Exit Rejected	This status can only be achieved by manually changing the Member's status in SuperEzy.



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