

Record Superannuation information

Introduction

Recording superannuation is part of the onboarding steps for all VCAA casual employees (both new Hire or Rehire) and may also be completed by current employees at any time they may need to change their superannuation details.

The electronic entry of superannuation allows you to record your choice of fund directly onto eduPay and avoid the need to print, complete and submit choice of superannuation fund forms to your school or the department for manual processing.

Record your Superannuation Guarantee Contribution (SGC) fund directly onto eduPay by entering your superannuation details using Employee Self Service (ESS). Superannuation can also be recorded before you commence employment after you receive your login details.

Recent updates to eduPay provide a simplified guided process to record your superannuation. This document contains additional help and instructions for completing these steps.

***Note:** Employees who are members of a Defined Benefit Fund (New, Revised or SERBS) are unable to change their fund membership using this process. Contact [ESSSuper](#) for further information in relation to these funds.*

What to have available before you start:

Before commencing this process, ensure you have the most current information about you and your fund as follows:

- Your employee ID and eduPay login details – If you have not been provided with these details please contact VCAA HR;
- Superannuation fund details (if you have one)*;
- Unique Superannuation Identifier (USI)** for your fund; and
- Membership identifier (number) for your superannuation account.

For a Self-Managed Superannuation Fund (SMSF) you will need the Australian Business Number (ABN) of your fund. If necessary, contact your superannuation fund to obtain or confirm your current details.

In some circumstances, your fund may not be available for selection on eduPay. If your fund is not available on eduPay, an opportunity is provided to create a new USI or SMSF. Additional information will be required and will be requested throughout the process.

* If you are not a current member of any fund and/or wish to use the Department's default product – Aware Super Future Saver (part of Aware Super), then selecting this option via the prompts will automatically populate the Aware Super Future Saver USI. A membership identifier is not required in this circumstance and will be provided to you in a welcome pack from the fund and automatically updated on eduPay when it is created by Aware Super.

** The USI identifies your superannuation product and the fund that manages that product. Please note this is not your University Student Indicator/Identifier which is commonly recorded as the Unique Superannuation Identifier. If the incorrect number is recorded your request will be rejected and you will need to start again.

Types of Funds

The following are types of funds an employee may elect to make contributions to:

APRA Registered Fund: The Australian Prudential Regulation Authority (APRA) is responsible for regulating certain types of super funds. An APRA regulated fund must be registered by APRA before it can accept transfers, rollovers or contributions. These funds have a Unique Superannuation Identifier (USI) which determines the superannuation product you are a member of. The majority of funds on eduPay are APRA funds. This is also known as an 'accumulation' fund.

SMSF: A Self-Managed Superannuation Fund is regulated by the Australian Taxation Office (ATO) and managed by a Trustee, sometimes in consultation with a financial planner or accountant. A SMSF does not have a USI and is identified by the ABN on eduPay. A SMSF has an Electronic Service Address. A SMSF is also an accumulation type fund.

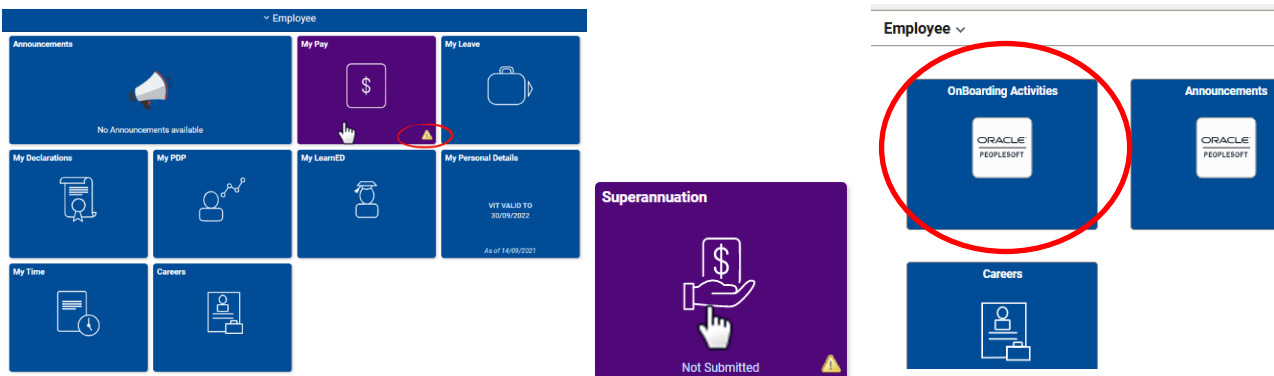
Disclosure of superannuation information

The SuperStream process introduced by the Australian Taxation Office (ATO) is the means by which an employer, via a Clearing House, makes payments to an employee's superannuation fund. The department has nominated Aware Super to act as its Clearing House. This means that Aware Super, through its providers SuperChoice and PayClear, collects details of all employees' superannuation arrangements, whether or not the employee uses Aware Super as their provider, processes payments, and provides this information to the ATO on the department's behalf.

Your superannuation data is not shared. Please note however that if you ever apply for credit, the credit provider may ask for your consent to access this data, held by Aware Super or its related companies, in order to process your application. This data is only released to a third party such as a credit provider with your active and specific consent.

Login to eduPay

- Login to eduPay:
- Below is a view of the Employee menu tiles display. The order and layout of the tiles may differ depending on the device being used.
 - The Yellow Exclamation icon on the tile indicates that Superannuation has not been recorded and is yet to be completed.
 - Onboarding tiles will also display. Part of the Onboarding process includes recording your Superannuation and this will be completed through the onboarding process but can be updated any time from the main menu.



- Click the My Pay tile. Once the My Pay menu is opened. Click the Superannuation tile. The tile turns purple when clicked/tapped.
 - The yellow exclamation icon and words "Not Submitted" indicate that superannuation has not been recorded.
 - On rehire of VCAA Casuals eduPay will determine the most recent fund you were enrolled in and replicate that entry to the new employment instance. A new entry should only be required where you have not been employed with VCAA before or if you wish to change your nominated fund.
 - *Note: Although the automated process should enroll you into your last known fund, you are required to check that the correct information has been recorded.*
 - For employees of Government Schools, where you have changed your superannuation details with one employer, you may need to review and edit to change your superannuation details for each role you are currently employed.

- The same eight-digit Employee ID applies for all employment instances. If you have been a previous employee of the Department or any Government School and you have been issued with a new employee ID it is possible you have a duplicate employee ID. Please contact VCAA HR if you believe this has occurred.

Next steps:

Click the link below to 'jump' to the relevant section of the guide for the action to be taken

- [Add / Edit a Superannuation Choice of fund \(Employer Contribution – SGC\)](#)
- [Add / Amend or Delete an Additional Superannuation contribution made by you](#)
- [Create a new USI or ABN \(for SMSF\)](#)
- [Changing your Bank, ESA or contact details for your SMSF](#)

Add/Edit a Superannuation Choice of fund

- Recording superannuation on eduPay in self-service is the same as producing a Choice of Superannuation Fund form in hard copy. Using eduPay avoids the need to complete the form and provide to the VCAA HR Team.
- New Employee – no previous employment with the Department or with any Government School on any School Local Payroll.
- The following page displays. *Click Nominate Fund*

- Nominate Fund will start the series of questions indicated below

Previous Employee (any employer – DOE/Government School) - Rehire

Where previous employment (at any location DOE/Government school/VCAA) is identified, click the row for the location to review or update your superannuation. Only active locations (current employment) will display.

Superannuation Details		
Please select the relevant employment record from the list below applicable to this transaction. Where this transaction applies to more than one employment record you will need to access each employment record separately to apply the change.		
Select Job 3 rows		
Job Title	Department	Company
Casual Relief Teacher	Round Table High School	School Local Payroll >
Casual Relief Teacher	Little John Secondary College	School Local Payroll >
Casual Relief Teacher	Robin Hood Primary School	School Local Payroll >

The system will identify the most recent previous superannuation record and replicate this on any new employment instance. The page will display any previous or current superannuation entry (entries) which may be amended or verified and confirmed. The page will display similar to the below:

Superannuation Details

Superannuation Contributions

Before making any updates, we strongly recommend reading the available [Help](#) document. Changes will take effect from the next available pay period.

Superannuation contributions made by your employer

Contribution Type	Fund Name	Unique Superannuation Identifier (USI)	Product Name	Membership Number	
Employer Contribution (SGC)	AWARE SUPER	53226460365001	Aware Super - Future Saver	98765432	

Additional superannuation contributions made by you

Contribution Type	Fund Name	Unique Superannuation Identifier (USI)	Product Name	Membership Number	
Employee After Tax Super	AWARE SUPER	53226460365001	Aware Super - Future Saver	98765432	

The top section – ‘[Superannuation contributions made by your employer](#)’ is the mandated Employer Contribution or Superannuation Guarantee Contribution (SGC). SGC is paid in addition to your pay based on Ordinary Time Earnings.

The ‘[Additional superannuation contribution made by you](#)’ section will only display if you have an additional payment being made by you to your superannuation fund. You may choose to add or end any additional contributions at any time. This is NOT your employer contribution and is an extra deduction out of your pay.

Recording your Choice of Fund

Click anywhere on the row/entry to review the details recorded as read only.

To edit or change currently recorded information click the **Pencil** icon. On the following page that opens, click the **Pencil** icon again (In the [Superannuation Fund Type Nomination](#) section). The following Questions will help to select your fund...

Employees who wish to choose the Department’s default fund – Aware Super Future Saver (part of Aware Super), but do not already contribute to this fund:

Nominate Fund Type

*Do you have a current Superannuation Fund?

No

Do you want to nominate the employer's default Superannuation Fund?

Yes

Do you have a current Superannuation Fund?

A: No – if you do not already have a fund and wish to nominate the default fund

Do you want to nominate the employer’s default Superannuation Fund?

A: Yes - The Super nomination page displays, and all fields populate for Aware Super Future Saver. Click the declaration to Yes and click Save.

For Aware Super a member ID is not required. Aware Super will generate a member ID and provide this to

the Department along with a 'Welcome pack' to your recorded address.

Your super is automatically recorded from your Hire/Rehire date or from the next available fortnight.

Employees with the Department's default fund – Aware Super Future Saver

Do you have a current Superannuation Fund?

A: Yes – if you already have a fund you wish to nominate

Is this fund Aware Super Future Saver (Department default fund)?

A: Yes

Click **Submit**

The Super nomination page displays, and all fields populate for Aware Super Future Saver. Record your membership ID, click the declaration to **Yes** and click **Save**.

Your super is automatically recorded from your Hire/Rehire date or from the next available fortnight.

Note: *If you answer **No** to both questions and submit, an error message appears advising if you are not selecting the default fund you must be an active member of an alternate fund. Click OK and start the process again (pencil icon) answering the questions as appropriate to your choice.*

If your fund is NOT with Aware Super Future Saver or it is Aware Super, and you wish to nominate a different fund (i.e.: change where your SGC is paid to)

The page opens for you to record the required details for your choice.

Do you have a current Superannuation Fund?

A: Yes

Is this fund Aware Super Future Saver (Department default fund)?

A: No

The What type of fund? Section displays. **Select** from the available options. The Information button explains these options.

Click **Submit**

The Superannuation nomination page displays.

Record the UNIQUE SUPERANNUATION IDENTIFIER for your fund. The USI does not contain spaces and can be found on most fund websites. Contact your fund if you do not know or cannot find the USI. It is important that you do not guess this if you are unsure.

Tab from the field or click the *Membership Number field*.

- Record your fund's USI (or ABN if recording a SMSF). The page requires an ABN where the fund type is 3 SMSF.

Superannuation Details ⓘ

Changes will take effect from the next available pay period.

A nomination of your superfund is required for all of your employment instance.

All fields marked with * are mandatory.

Superannuation Fund Type Nomination ⓘ

I have chosen to nominate my own choice of Superannuation Fund.

Superannuation Contribution Details

*Contribution Type

*Fund Type

*USI ⓘ

Product Name

Fund Name

*Membership Number ⓘ

Declaration

I declare that the information I have given is true and correct

Date Signed

I have nominated my own fund and have checked that all required fields have been completed.

[Return to Superannuation Details](#)

- As you enter the USI (or ABN) the system will filter and display available options. Select the correct option to complete the entry. Relevant details will populate as options are selected.
- The Lookup icon may be used; however, the search is still based on the USI. Only the first 300 results can display, if scrolling through the list, your fund may not be displayed because of this limitation. Use the search option and record the full USI.*
- Note: You CANNOT record Aware Super Future Saver through this step. Select Aware Super at the first question and all details populate automatically.**
- Record your Membership Number. This is a mandatory field for all funds.
- Click **Yes** on the Declaration slider.
- Click Save**

Your fund details will display on the resulting page.

What happens next?

- Your SGC record will be commenced from your hire/rehire date or where a previous entry exists the entry will be end dated and a new entry to your chosen fund will be created from the commencement of the next available pay period.
- When changing your fund, we it is recommended to wait to ensure at least one payment has been made correctly to the new fund before requesting a rollover of contributions and closing your old fund.

Additional Contributions

Add a new Additional Superannuation Contribution

- **DO NOT USE THIS OPTION TO CHANGE YOUR EMPLOYER CONTRIBUTION (SGC).**
- Edit the current entry for SGC instead. You may make an additional contribution to your superannuation fund.
- Where there are no Additional Superannuation Contributions already indicated, click the **Add Contribution** button. Two types of deduction are available based on your employment classification:

Additional superannuation contributions made by you



- Salary Sacrifice contributions (before tax) are limited to public service employees.
- Personal contributions (after tax) are available for all employees (Public Service, Teaching Service, VCAA Casual employees)
- On the Superannuation Details page:

- If available, select the Contribution Type from the dropdown. (Only one of each type can be selected for eligible employees)
- Select the type of fund from the dropdown –
 1. Department Default - Aware Super
 2. Other Choice of fund or;
 3. Self-managed Super fund.
- Record your USI/ABN and membership number as described previously.
- Click the declaration slider to Yes confirming the entries are correct
- Save or Cancel to return to the previous page. A message appears indicating your update has been saved successfully and when the change will take effect (next available pay period).

Your update has been successfully saved and the change will take effect from payday 04/05/2023

OK

Note: A warning appears if you attempt to pay 100% of your pay to your superannuation fund. Answer Yes/No according to your requirements. Contributing 100% of your pay to super means you will not receive any pay, as your pay will be entirely contributed to your superannuation. Obtaining refunds from superannuation funds is where a mistake has been made are not possible.

You have allocated 100% of your eligible earnings, which may result in zero net pay for all future pay periods, is this correct?

Yes No

Amend or Delete an Additional Superannuation Contribution

Where you have a current Additional Superannuation contribution occurring, you may *Edit* or *Delete* the entry.

Superannuation Details

Before making any updates, we strongly recommend reading the available [Help](#) document. Changes will take effect from the next available pay period.

Superannuation contributions made by your employer

Contribution Type	Fund Name	Unique Superannuation Identifier (USI)	Product Name	Membership Number	
Employer Contribution (SGC)	AWARE SUPER	53226460365001	Aware Super - Future Saver	97149122	

Additional superannuation contributions made by you

Contribution Type	Fund Name	Unique Superannuation Identifier (USI)	Product Name	Membership Number	
Employee After Tax Super	AWARE SUPER	53226460365001	Aware Super - Future Saver	97149122	

[Return to Select Job Title](#)

To Edit/Change the current entry:

- From the Superannuation Details Page, click the '**Pencil**' icon to edit or change your current entry.
- From the following page that opens, you may change superannuation funds, your membership number or the amount/percentage deducted each fortnight.
- Click the Declaration slider to **Yes**
- Click **Save** (or Cancel to exit without making any changes).
- The successful save message displays indicating the payday the change is effective from.



- From the Superannuation Details page, click the '**rubbish bin**' icon.
- A Cease Confirmation message appears. Click **Done** to delete the entry or **Cancel** to return to the previous page.



- The Superannuation Details page displays, and the deleted Additional contribution is removed.

Creating a New USI or ABN

Where the USI or a SMSF's ABN is not known on eduPay, you have the opportunity to create a new record. After entry of the USI or ABN if the entry is not found one of the following error messages will appear:

For a USI:

Superannuation Details USI Invalid

Your APRA or RSA fund is not found in eduPay. Please check that you have entered the USI correctly. Otherwise enter your fund details by selecting the New Superannuation Fund Details link

[OK](#)

- Or for a SMSF:

Superannuation Details ABN Invalid

Your SMSF is not found in eduPay. Please check that you have entered the ABN correctly. Otherwise, enter your fund details by selecting the New Superannuation Fund Details link

[OK](#)

- Click **OK**
- Firstly, check the USI or ABN has been correctly recorded. It is unlikely that a new USI will be required on eduPay, however a new SMSF is not uncommon.
- Click the *New Superannuation Fund Details* hyperlink that has now appeared on the page

Superannuation Contribution Details

*Contribution Type

*Fund Type

*USI

ABN

Fund Name [New Superannuation Fund Details](#)

- The new fund details page displays.

Creating a new Unique Superannuation Identifier (USI) (example)

- Record the details as provided by your APRA fund. This may be obtained from the compliance statement or another document issued by the fund.
- Record the fund's ABN
- Record the fund's name
- Record your superannuation product name (this may or may not be the same as your fund name. If you do not know this you will need to contact your superannuation fund)
- The USI previously indicated displays – double check this is correct.
- Record your Account Name
- Record your membership ID

- Attach an appropriate document that helps to verify the information entered
- Click the Declaration slider to read Yes
- Click Save and Submit (or Cancel to return to the previous page.)

Superannuation Details ⓘ

Please complete the following details for your Superannuation Contribution and Fund. All fields marked with * are mandatory.

These details are required to create a Unique Superannuation Identifier (USI)

Superannuation Contribution Details

Contribution Type: Employer Contribution (SGC)

Superannuation Fund Details

Fund Type: 2 Other Choice of Fund

*Fund ABN:

*Fund Name:

*Product Name:

USI: ⓘ

*Account Name:

*Membership Number:

Documentation ⓘ

Please click on the Add Attachment link below to attach the required documentation.

[Add Attachment](#)

Declaration

I declare that the information I have given is true and correct No

Date: _____

I have nominated my own fund and have checked that all required fields have been completed and required documentation has been attached.

Creating a new ABN for a Self-Managed Super Fund (example)

Record the details about your Self-Managed Super Fund

- The fund ABN entered previously is displayed – check to ensure it is correct – you may use the [Super Fund Lookup](#) website.
- Record the fund name as it appears on the above Super Fund Lookup website. The names must match.
- Record the address for your fund (in the City or Postcode field, enter the city/town and a list of eligible entries will show, click the correct one for your city/town).
- Record the BSB for your fund’s bank account
- Record the Account Number for your fund’s bank account
- Record the Account Name. Wherever possible avoid the use of special characters (such as: & / () * @ #) as these ultimately fail when attempting to make deposits
- Select the Electronic Service Address (ESA) from the lookup list
- The Contact Email will default to your department email address, this can be changed to another valid email address if required
- Attach relevant copies of supporting
- documentation for your SMSF – such as compliance certificate, information that indicates the fund can accept confirmations or a copy of the [Super Fund Lookup](#) website compliance results.
- Click the Declaration slider to Yes
- Click Save and Submit (or Cancel to return to the previous page)
- On completion of the above process (USI or ABN), the Superannuation Details page will display.

Superannuation Details ⓘ

Please complete the following details for your Superannuation Contribution and Fund.
All fields marked with * are mandatory.

These details are required to create a new Self-Managed Superannuation Fund (SMSF)

Superannuation Contribution Details

Contribution Type: Employer Contribution (SGC)

Superannuation Fund Details

Fund Type: 3 Self-Managed SuperFund

*Fund ABN:

*Fund Name:

*Address 1:

Address 2:

City or Postcode: ⓘ

City:

Postcode:

State:

*BSB:

*Account Number:

*Account Name:

*E-Service Address: ⓘ

Contact ID: 10272 Bradley

*Contact Email:

Documentation ⓘ

Please click on the Add Attachment link below to attach the required documentation.

[Add Attachment](#)

Declaration

I declare that the information I have given is true and correct. No

Date:

I am the trustee, or a director of the corporate trustee of the SMSF and I declare that the SMSF will accept contributions from my employer or if I am not I have attached a letter from the trustee confirming that the fund will accept contributions from your employer.

I have checked that all required fields have been completed and the required documentation has been attached.

Note: Where a new fund (USI/ABN) is to be created the results of your entry do not display on your superannuation page until the fund has been reviewed, confirmed and created by the HR Systems and Services team.

On completion of the validation process you will be enrolled into your fund. This is a manual process and may take up to 5 working days, however, every effort is taken to complete the request before pay finalisation for the next available pay period. An email advising the outcome and any further action which may be required by you will be sent to your employee education email address. Please ensure you action any emails you receive for further action promptly to avoid delays in superannuation payments being made.

Change the ESA,

Bank or contact details for your SMSF

Functionality has been introduced which provides the ability for an employee to amend certain components of their Self-Managed Superannuation Fund.

This is limited to the Electronic Service Address (ESA), the fund bank Account (BSB, Account Number and Account name) or the contact details for the fund.

The ability to amend the member number has always been available and it continues to be available.

- Access your super fund page as above
- Click the **Pencil** icon to EDIT your super entry. The Superannuation Detail page displays
- Click the *View/Edit Self-Managed Super Fund Details* hyperlink as shown

Superannuation Details ⓘ

Changes will take effect from the next available pay period.
A nomination of your superfund is required for all of your employment instance.
All fields marked with * are mandatory.

Superannuation Fund Type Nomination ✎

I have chosen to nominate my Self-Managed Super Fund.

Superannuation Contribution Details

*Contribution Type:

*Fund Type:

*ABN: [View/Edit Self-Managed Super Fund Details](#)

Fund Name: ⓘ

*Membership Number: ⓘ

Declaration

I declare that the information I have given is true and correct

Date Signed: _____

I have nominated my SMSF and declare that the SMSF will accept contributions from my employer. I have checked that all required fields have been completed.

[Return to Superannuation Details](#)

- The Superannuation Details update page opens. Fund Name and ABN cannot be changed.
- Note: The first time this process is recorded via Self-Service any previously held SMSF information does not display. As a result, all blank fields will need to be updated with the correct/current details. Once saved/submitted, these updated details will display when accessed next time.
- An attachment may be provided if necessary for your updated details.
- Click the Declaration slider to read Yes
- Click Save (or Cancel to return to the previous page).
- The previous Superannuation Details page displays

Superannuation Details ⓘ

Please complete the following details for your Superannuation Contribution and Fund.
All fields marked with * are mandatory.

Superannuation Contribution Details

Contribution Type Employer Contribution (SGC)

Superannuation Fund Details

Fund Type 3 Self-Managed SuperFund

*Fund ABN

*Fund Name

*Address 1

Address 2

City or Postcode

City

Postcode

State

*BSB

*Account Number

*Account Name

*E-Service Address

Contact ID 08288 Ralph

*Contact Email

*Membership Number ⓘ

Future update to the system will populate these fields with currently held information.

Until then, record the current and correct information for your SMSF into each field.

Fields marked * are mandatory

If your updated E-Service Address is not available from the lookup list, contact payrollservices@education.vic.gov.au with appropriate information for the ESA to be created and made available for selection

Documentation ⓘ

Please click on the Add Attachment link below to attach the required documentation.

[Add Attachment](#)

Declaration

I declare that the information I have given is true and correct No Yes

Date

I am the trustee, or a director of the corporate trustee of the SMSF and I declare that the SMSF will accept contributions from my employer or if I am not I have attached a letter from the trustee confirming that the fund will accept contributions from your employer.

I have checked that all required fields have been completed and the required documentation has been attached.

- Click the Declaration slider to read Yes
- Click Save (or Cancel to exit without making any changes)
- The confirmation message of your changes being successfully saved displays including the date the update will take effect from.

Your update has been successfully saved and the change will take effect from payday 23/09/2021.