Transition to the Gen 2 Portal - Employer checklist

Follow the checklist and be up and running in no time.

Need help? Contact **services@superchoice.com.au**

		Action
Step 1	**Activate and pay your super before SG quarter end** You must have activated your account in the Gen 2 Portal and paid super by 23/7 to comply with your super obligations.	**Date: 23/07/2020**
Step 2	**Watch our training videos** A series of short videos have been created to simplify the transition to the Gen 2 employer portal. Access the videos here: www.superchoiceservices.com.au/training	☐ Completed
Step 3	**Activate your account** Go to your new log-in page for the Gen 2 Portal: https://www.employerpay.com.au/EmployerPortal/register/custodian/superpay **Confirm your employer details** To simplify your transition we have pre-populated your employer data including key contact and bank details. Confirm these details are correct. Make and save any changes into the Gen2 portal so they are there for next time you log-in. **Create User ID** You will need to create a User ID and accept the Terms & Conditions and Product Disclosure Statement. Once this has occurred an email will be sent to you to complete the registration process and create a password.	☐ Completed
Step 4	**User Maintenance** Check all employer users who need access have been created and the right permissions have been set up. Follow the steps outlined in the User Guide to create a new user profile.	☐ Completed
Step 5	**Check employee information** Make sure all expected employee data has been migrated successfully to the Gen 2 portal and is visible. If required, you can add a new employee directly into the portal. Follow the steps outlined in the User Guide.	☐ Completed
Step 6	**Clean up your data** You will be required to review and correct any data where system validations have identified an error. *Action: Once you've corrected any errors and accepted the changes within the portal, we recommend you extract the updated employee data and save into your payroll.*	☐ Completed

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