



Sybiz Single Touch Payroll Guide

Version 1, July 2018



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Introduction

Purpose

The purpose of this document is to assist employers in understanding how they can submit STP data to the ATO using Sybiz Visipay and track the progress via the Sybiz Employer Portal.

Refer to www.sybiz.com/stp for more information on getting started with Sybiz Single Touch Payroll, including later versions of this guide.

What is STP?

Single Touch Payroll (STP) is an electronic reporting system initiated by the Australian government to assist in streamlining business reporting obligations. STP allows employers and their intermediary to report payments such as salaries and wages, pay as you go (PAYG) withholding and superannuation, directly to the Australian Taxation Office (ATO).

STP aligns your reporting obligations to your payroll processes and employers are required to report the payroll information to the ATO on or before the day of your pay cycle.

- Employers with 20 or more employees are required to report to the ATO through a Single Touch Payroll enabled software from 1 July 2018.
- Employers with less than 20 employees are required to report to the ATO through a Single Touch Payroll enabled software from 1 July 2019.

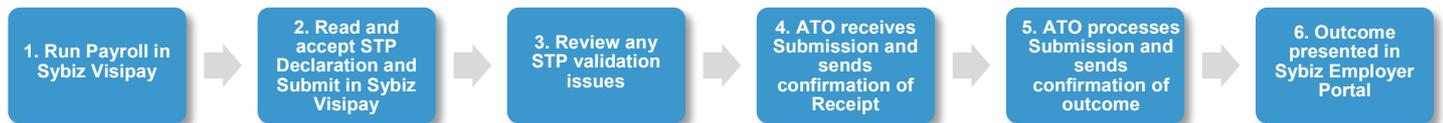
Single Touch Payroll was legislated on 16 September 2016 and additional information can be found within the [Budget Savings \(Omnibus\) Act 2016](#)

The Sybiz Employer Portal powered by SuperChoice Services Pty Ltd (as Sending Service Provider), will allow you submit your STP reporting to the ATO via Sybiz Visipay 17.20 and above.

Overview of the STP Reporting Process

High-level Overview of the STP Process

After processing and finalising your pay run you can submit your STP data from Sybiz Visipay automatically to the ATO via the Sybiz Employer Portal. You can then log into the Sybiz Employer Portal to track the progress of your submission through to the end outcome.



Detailed information can be found throughout this guide but the following is a summary of the typical process once you're up and running with Sybiz Visipay and the Sybiz Employer Portal for STP reporting:

Process pays

There are no changes to the payroll process in Sybiz Visipay, under STP. You do what you would normally do, including normal checks and corrections. However, you should understand the relationship between rolling periods and STP data transfer. That is, once a particular pay frequency's (weekly/fortnightly/monthly) employees have been reported that period should be rolled prior to processing any more pays for that frequency.

Perform the STP Transfer

The STP Transfer is conducted by clicking on **Utilities** then **ATO Transfer**. Sybiz Visipay detects which employees have been paid since you last rolled their pay period and automatically selects the relevant pay frequencies and employees. The Event Type of Pay Event is also automatically selected; however, you will need to review the Event Date, enter your credentials and tick the declaration on the **Employees** tab.

The Event Date needs to be on or before the date at which you will be paying your employees. Once you are ready you can click **Submit**.

Address any issues

Sybiz Visipay and the Sybiz Employer Portal have been designed such that any data issues are trapped prior to submitting to the ATO. After clicking **Submit** you may be immediately informed of issues (typically data entry issues) whilst still in Sybiz Visipay. You can correct those issues and submit again. If a blank error screen is presented this indicates the Sybiz Employer Portal is under peak load, please try again in a few minutes.

Check the Submission and the Outcome in the Sybiz Employer Portal

Log in to the Sybiz Employer Portal via the link provided on the STP Transfer screen to check the progress of your submission. It may take up to 72 hours for the ATO to process your STP submission to its end outcome so you may need to regularly log in to check.

Manage Exceptions

99.8% of submissions from Sybiz Visipay via the Sybiz Employer Portal have been successful during July 2018. Sybiz Visipay and the Sybiz Employer Portal have been designed such that any data issues are trapped prior to submitting to the ATO. Therefore, any errors that arise will likely only be able to be addressed between the employer and the ATO.

Activating STP in Sybiz Visipay

Turning on STP

STP reporting begins with activating Single Touch Payroll functionality within your Sybiz Visipay solution.

Single Touch Payroll functionality is not activated by default due to the possibility of deferrals or individual requirements for STP reporting.

Enabling Single Touch Payroll reporting within Sybiz Visipay is relatively easy. The relevant settings are accessible in the **File** menu. Click the **Options**, then select **Tax** Details. Click the box for **Active** under the **Single Touch Payroll** heading.

The screenshot shows the 'Edit System Information' dialog box with the 'Tax Details' tab selected. The 'Single Touch Payroll' section is expanded, and the 'Active' checkbox is checked. The following table summarizes the visible data in the form:

Field	Value
Trading Name	Demonstration Company
ABN	98999999999
Branch No	99
Signatory	Bob O'Brien
Single Touch Payroll - Active	<input checked="" type="checkbox"/>
BMS ID	4fed395c-2515-4f46-ac47-b11a743dacb6
Contact Name	Alice Reece
Email	test@sybiz.com
Address Line 1	First line Postal Address
Address Line 2	
Suburb	RICHMOND
State	South Australia
Post Code	5033

Enabling STP in Sybiz Visipay allows you to identify that you want to use Single Touch Payroll. If you need to perform payment summary reporting you can temporarily disable STP by unchecking the box.

Data validation

After activating Single Touch Payroll in Sybiz Visipay, all employee data fields required for STP reporting will display alerts when data is incomplete or required. This data must be completed to submit STP reports.

Employee Addresses

Employee addresses are required to be complete and correct for Single Touch Payroll purposes.

A few rules have been added, such as:

- Address Line 1 must be present
- Address Line 2 is optional if Address Line 1 is used
- Postcodes must be entered
- Where 'Other' state has been chosen, the relevant country needs to be selected from the drop-down menu

It is recommended to review employee on-boarding processes to ensure the collection of address details is formalised.

Categorisation of Allowances

An additional field called 'Category' has been made available for Allowance pay items. By default, all Allowances are set to the value 'Other.' You will need to categorise each as appropriate into one of the 5 specific options or leave as 'Other' in the event that a specific option does not apply. Sybiz Visipay utilises the description field for 'Other' categorised Allowances which can be customised.

Each employee is limited to 20 'Other' allowance categories in any one financial year.

Employee numbers

The employee numbers allocated against an employee record in Sybiz Visipay are now recorded by the ATO. The ATO will use these numbers as another form of unique identification against individuals.

Warnings will now appear on employee records when you attempt to change the employee number after you have made an STP submission for those employees (refer to Zero Update Event below).

Getting Started with the Sybiz Employer Portal

Creating a Sybiz Employer Portal login

Before submitting your first STP report, you must register for the [Sybiz Employer Portal](#). The Sybiz Employer Portal is used to complete your Single Touch Payroll reporting with the ATO. It offers a secure file transfer to the ATO, additional STP data validation, clear submission failure reports and an automatic retry function when ATO servers are down. You will also be able to see your STP data transfer history.

Before registering you will need to:

- know the basic details of the businesses that you are signing up for, such as the ABN and address details
- estimate the amount of data records you'll submit through STP on a monthly basis as this will determine the cost to use the service (employees x number of pays)
- be aware that once you've established your Sybiz Employer Portal account you need to wait at least 15 minutes before lodging your first submission to enable the backend systems to complete their initiation for your new account.

The entire process can be completed online and you do not need to fill out any paper forms. You should [download the brief instructions](#) to help guide you through registration.

To start the process, fill in [this form](#). You will then be transferred to the Sybiz Employer Portal to complete your registration - you will be asked for your ABN and email address again. Upon completing the registration process, record your username and password for the Sybiz Employer Portal as you will require these credentials each time you authorise an STP report.

Because of the frequency and timing of STP reporting it is highly recommended to create additional user logins for anyone who steps in to process pays when others are absent.

Reporting STP in Sybiz Visipay

STP Transfer

Under the **Utilities** menu in Sybiz Vision, the **ATO Transfer** button is used to initiate the STP reporting process.

STP Transfer

General Employees

Company Details

Company Name: The Ultimate Test Co 17.00

BMS ID: 4fed395c-2515-4f46-ac47-b11a743dadb6

ABN: 9899999999 Branch: 99

Contact Name: Alice Reece

Telephone: 8888888888

Email: test@sybiz.com

Sybiz Employer Portal Credentials

Username: SYBIZAPIUser

Password: *****

<https://www.employerpay.com.au/Sybiz>

Event Options

Event Type: Pay Event Event Date: 01/08/2018

Weekly

Fortnightly

Monthly

Submit Cancel

For security reasons your Sybiz Employer Portal Credentials will need to be entered each time.

To check submission status there is a link to the Employer Portal from this screen as well as under the main **File** menu.

Event Types

Each time you submit an STP report you must nominate which event type you are submitting and, if relevant, the pay frequencies (Weekly/Fortnightly/Monthly). Each Event Type is explained below.

Pay Event

A Pay Event is used each time you pay your employees and needs to occur on or before the scheduled pay date. The Event Date should reflect the date that employees are to be paid rather than the processing date, which may differ. Weekly, fortnightly and monthly tick box options for pay events automatically generate based on your employee pay frequencies.

Update Event

An Update Event can be used when a change has been made to an employee's details after a Pay Event has already been submitted. However, best practice is to use the next Pay Event to communicate those changes and use an Update Event only when an employee is not likely to be included in the next regular Pay Event.

Zero Update Event

A Zero Update Event can be used if you wish to reset your employees balances to zero and must be used before changing an employee's Employee Number during a financial year. Best practice is to no longer change Employee Numbers.

Employee Income Statement

The Employee Income Statement option can be used when you wish to submit a Final Event Indicator for all employees at the end of the financial year, after your last Pay Event has been submitted. The ATO will then release the employee's information into the tax return pre-filing process after 30 June.

Final Event Indicator

The 'F' column denotes the Final Event Indicator that can be attributed to an employee at any time of the year to signify to the ATO that you will be sending no more data for that employee for that financial year. For example, when an employee has been terminated and all reporting has been completed.

Prior Year Alterations

STP Transfer options and Pay Events for prior years are also available in some instances.

STP Transfer Prior Year

Under the **Utilities** menu, the **ATO Transfer Prior Year** button shows the relevant Event Options for Single Touch Payroll reporting. Prior year reporting has two options, Zero Update and Employee Income Statement. The Event Date will be automatically set to the last day of the previous financial year. The Single Touch Payroll Declaration needs to be checked on every submission.

Zero Update (for prior year)

A Zero Update Event can be used if you wish to reset your employees balances to zero for the prior year.

Employee Income Statement (for prior year)

The Employee Income Statement option is an update event that can be used when you wish to submit a Final Event Indicator for certain employees for the previous financial year.

Employees can be included or excluded from reporting by selecting or unselecting the checkboxes. The Single Touch Payroll Declaration needs to be checked on every submission.

The screenshot shows the 'STP Transfer' window with the 'Employees' tab selected. It contains a table of employees with columns for EmployeeNo, Last Name, Given Names, and two checkboxes. A 'Select All' button is visible above the table. Below the table, there is a declaration statement and a checkbox to sign the declaration with credentials.

EmployeeNo	Last Name	Given Names	<input type="checkbox"/>	<input type="checkbox"/>
Select All: <input type="checkbox"/>				
PLAY002	Murphy	Brett Mercury	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PLAY003	Benson	Christine Alice	<input type="checkbox"/>	<input checked="" type="checkbox"/>
004	DeHaviland	Olivia Lophraig	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ADMIN003	O'Hare	Betty Ann	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
007	Bond	James Arthur	<input type="checkbox"/>	<input checked="" type="checkbox"/>
1209831	Vincent	Howard Mark	<input type="checkbox"/>	<input checked="" type="checkbox"/>
13	Duncan	Simone Jessica	<input type="checkbox"/>	<input checked="" type="checkbox"/>
001	Fritsch	Jimmy Malcolm	<input type="checkbox"/>	<input checked="" type="checkbox"/>
002	Gregg	Barry Edward	<input type="checkbox"/>	<input type="checkbox"/>
9879	Mortisser	Rosie Margaret	<input type="checkbox"/>	<input type="checkbox"/>
45	Coota	Adam Trevor	<input type="checkbox"/>	<input checked="" type="checkbox"/>
65	Fields	Frank Vernon	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8901	Slomin	Anna Erin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
51	Johnson	Bailey Peter	<input type="checkbox"/>	<input checked="" type="checkbox"/>
42	Brown	John Sebastian	<input type="checkbox"/>	<input checked="" type="checkbox"/>
EMP001	Mortimer	Sarah Petrice	<input type="checkbox"/>	<input checked="" type="checkbox"/>

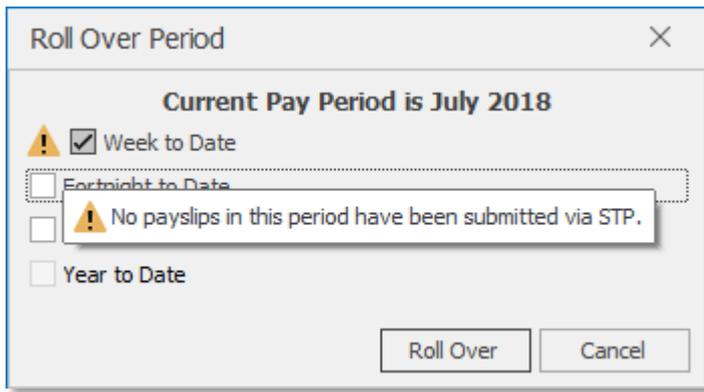
I declare that the information transmitted in this single touch payroll submission is true and correct and that I am authorised to make this declaration.

Tick this box to sign the declaration with the credentials you used to login and to authorise lodgement with your approved sending service provider's AUSKey.

Rolling periods and reporting

The STP reporting process in Sybiz Visipay is performed by going to the ATO Transfer button under the Utilities menu. This reporting must be completed prior to rolling the period in which the reportable pays have been processed.

A warning is presented when rolling a period for which no STP reporting has been performed with respect to pays that have been processed. If the period is rolled prior to reporting STP then you will need to restore the backup you performed prior to rolling.



You may process multiple pays in one pay frequency. When this occurs, the best practice is to process the required pays for that period, report STP and then roll the period prior to processing any more pays for that frequency. It is possible to do this for monthly pays if **Allow Multiple Pays** is checked under **Options... Pay Details** and care is taken when rolling the period.

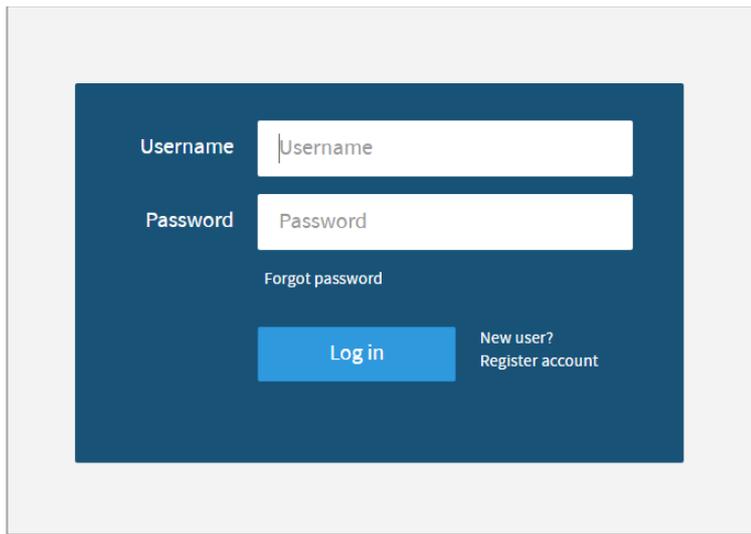
Once you have successfully submitted your STP data, you can log into the Sybiz Employer Portal (there are links from Sybiz Visipay via the Application menu and also on the STP transfer screen) and track its progress.

Sybiz Employer Portal Access

Log In

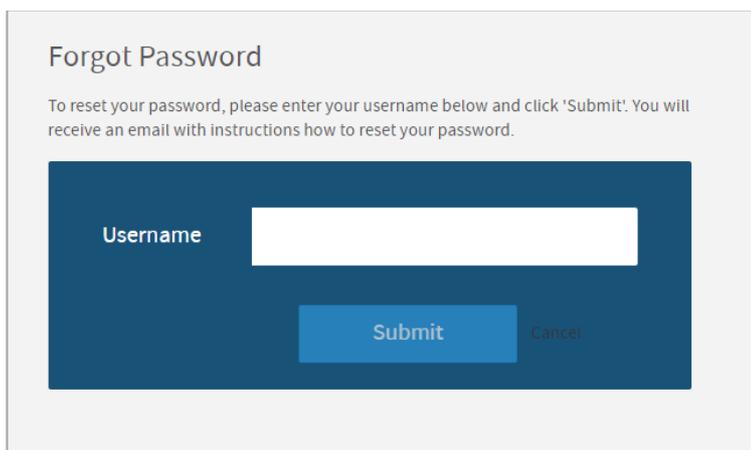
Enter your **Username** and **Password**, and then click **Log in**. Don't forget, passwords are case sensitive.

Your **User Name** will either be created by yourself during the registration process or by your administrator when they set your user up. Your **Password** will be sent to you via email when your user was created. You will be required to reset your password when you first log in.



The screenshot shows a login form with a dark blue background. It features two input fields: 'Username' and 'Password'. Below the password field is a link for 'Forgot password'. At the bottom, there is a blue 'Log in' button and a link for 'New user? Register account'.

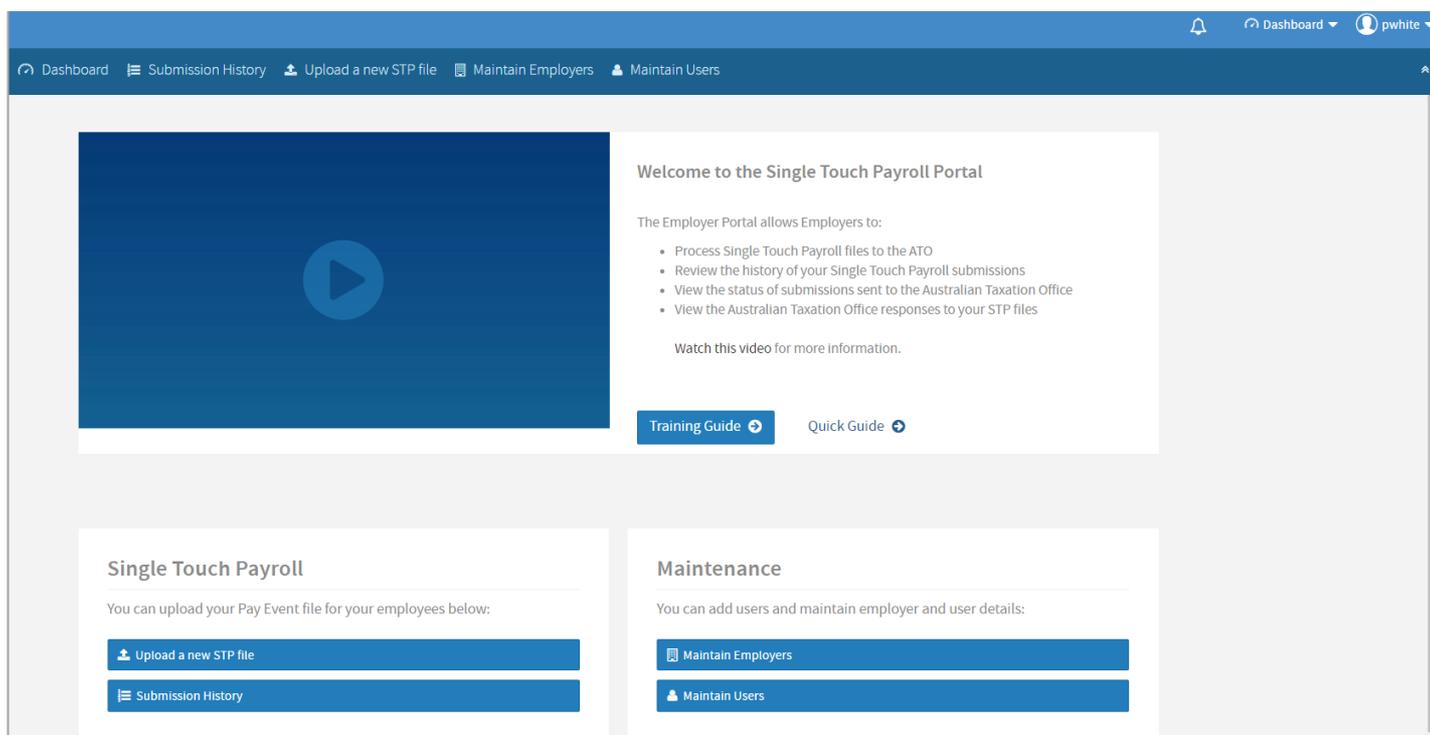
If you have forgotten your password select **Forgot password**, enter your Username and then **Submit**. You will then receive an email with a new password. On entering the new password in you will be required to reset your password.



The screenshot shows a 'Forgot Password' form with a dark blue background. It includes a title 'Forgot Password', a short instruction: 'To reset your password, please enter your username below and click 'Submit'. You will receive an email with instructions how to reset your password.', and a single 'Username' input field. Below the field are two buttons: a blue 'Submit' button and a grey 'Cancel' button.

Dashboard

On logging in you will be taken to the Dashboard.



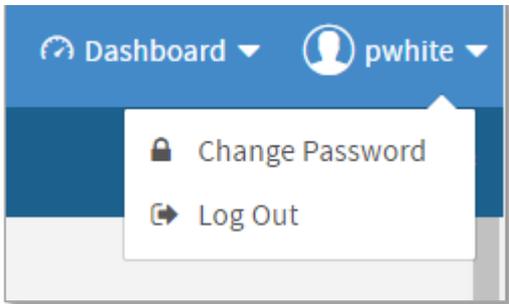
The Landing page provides you with links to various functions within the Sybiz Employer Portal:

Dashboard	Return to the Dashboard from screens within the Sybiz Employer Portal.
Submission History	View previously loaded STP files and ATO responses.
Maintain Employers	Maintain your employer details.
Maintain Users	Maintain your user details.
User Icon	Log out or change your password

If you are not able to view any of the above functions, your allocated user permission restricts you from accessing this functionality. Please contact your Sybiz Employer Portal administrator should you require access.

User Icon

On selecting the User Icon  you will be provided with the option to **Log Out** or **Change Password**. The User Icon can be accessed from all of the Sybiz Employer Portal pages.

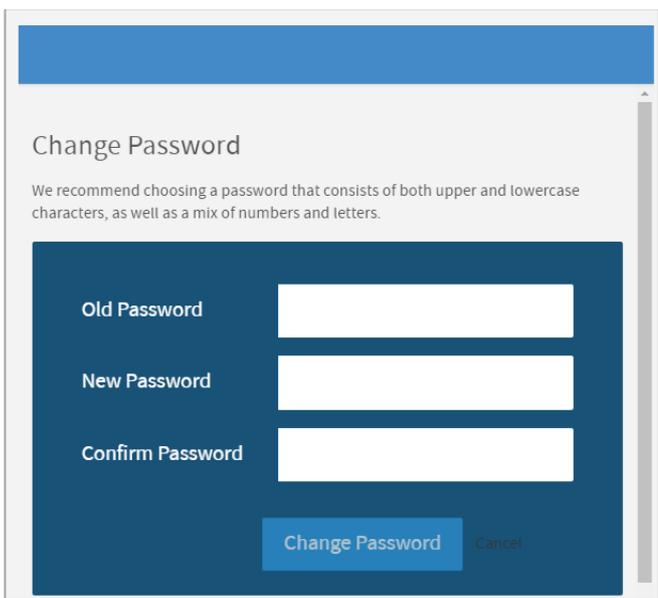


Log Out

If you select **Log Out**, you will be logged out of the Sybiz Employer Portal and taken back to the [log in](#) screen. To end the session, close your web page.

Change Password

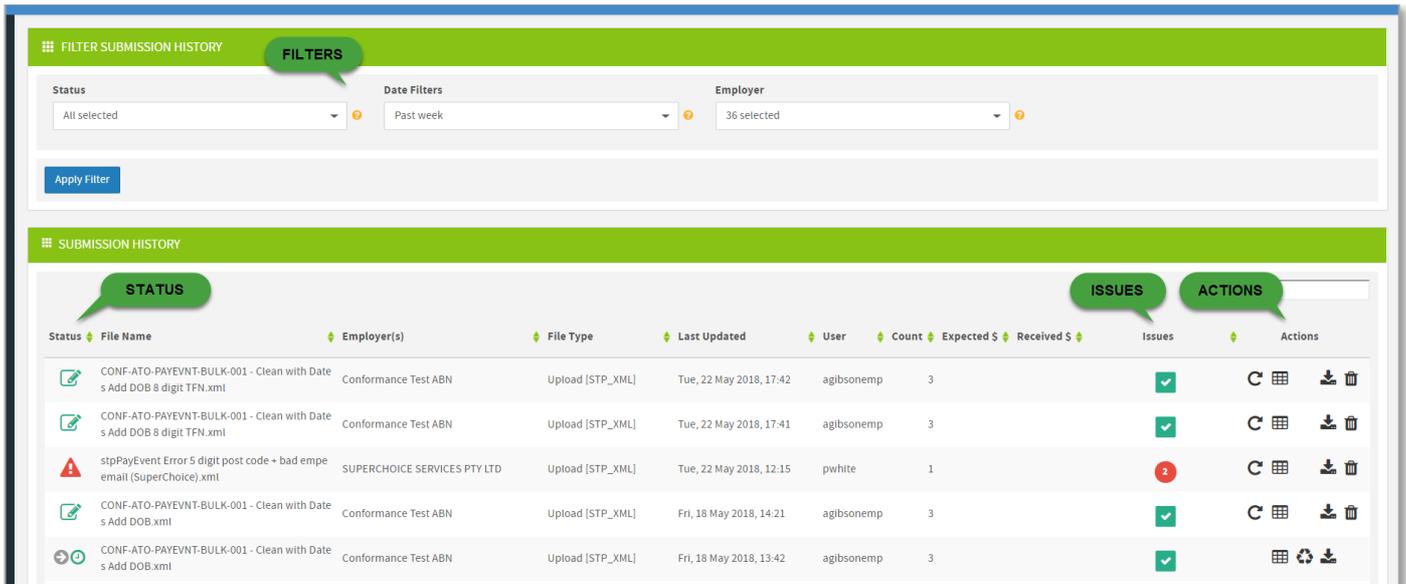
If you select **Change Password**, you will see the Change Password screen. Enter in your current password and new password details.

A screenshot of the 'Change Password' form. The form has a title 'Change Password' and a recommendation: 'We recommend choosing a password that consists of both upper and lowercase characters, as well as a mix of numbers and letters.' Below this are three input fields: 'Old Password', 'New Password', and 'Confirm Password'. At the bottom of the form are two buttons: 'Change Password' and 'Cancel'.

Submission History

The Submission History screen will let you view the STP files which have been uploaded by Sybiz Visipay for your organisation and the current status of the files. You can filter, search and sort by various different data elements. The Submission History screen can be accessed via the Dashboard.

If your submission isn't visible in the portal immediately, log out and try again in 5 minutes. If you have multiple logins for different ABNs it is best to shut your browser completely, rather than just logging out. If the submissions are still not visible please check the filter settings at the top of the screen to ensure that relevant Status and Date Filters are set.



i **The Sybiz Employer Portal only allows a user to view and access data for the Employer or Employers for which their user is authorised. Important - If your Organisation has a requirement to segregate employee data at a lower level than Employer ABN, please contact your Sybiz Employer Portal administrator to ensure your Employer and User set-up is appropriate to ensure correct data privacy.**

Filters

The top section of the Submission History screen allows you to enter in a criterion to filter the files that are displayed within the screen. You can select the filters as you need from:

- Status: The status indicates which stage the file is in. See the table below for more information.
- Date Filters: Select the date range you wish to search within.
- Employer: Select the employer that you wish to search on.

Status

The status of the file will be updated throughout the duration of the submission and response process. This icon is displayed on the left side of the screen beside each STP file.

Status Icon	Status Wording	Explanation
	Employer Matching Exception	This will occur when the ABN within the file does not match to the ABN that the user is permitted to access. Possible options to resolve include a) review the ABN within your file and confirm it is correct b) create a new employer within the Sybiz Employer Portal (provided you have the appropriate level of access) c) contact your Sybiz Employer Portal administrator.
	Member Matching Exception	These exceptions arise where the employee data provided does not match stored data. As the Payroll Number is a mandatory field within the file and the Sybiz Employer Portal matches on this it is not expected that you will experience this.
	Processing	The Sybiz Employer Portal is processing the file. This status will be shown whilst the file format is being validated. This is generally a very quick process. If this status persists, there may be an issue with the format validation. To resolve this, delete the file from submission history and load it again.
	Failed	This will occur if the format of the file is not correct; or if the user does not have permission to access the employer based on the ABN.
	Validation Exceptions	Validation errors exist within the file. Download the validations from Validation Issues , review and correct the data within your payroll system, generate a new STP file and upload into the Sybiz Employer Portal.
	Ready for Processing	There are no validation errors within the file and it is ready to be released to the ATO by the Sybiz Employer Portal. At times of peak demand on ATO servers this status may be present for some time as the portal retries. The user does not need to do anything further.
	Confirmed and Sent	The STP file has been submitted and forwarded to the ATO.
	Receipt	The ATO has acknowledged receipt of the submitted file and forwarded a Technical Receipt.
	Success Response	The ATO has provided a successful business response and accepted the data within the submitted STP file.
	Warning Response	The ATO has responded with a warning business response.

Status Icon	Status Wording	Explanation
	Error Response	The ATO has provided an error business response and the entire file has been rejected.
	Partial Success Response	The ATO has provided a successful business response for part of the submission and has rejected the remainder.

ATO Responses

- The ATO should send a Confirmation Receipt within around 5 minutes, although the duration can be longer if the ATO system is unavailable due to planned / unplanned outage.
- The ATO should fully process your submission and send the outcome within 24 hours, although the duration can be up-to 72 hours, particularly for large Employer submissions and during periods when the ATO is processing high-volumes (eg end of financial year).
- As the Sybiz Employer Portal completes validation before submission to the ATO, the vast majority of the ATO responses will be a **Success** Submission, in which case no further action is required.
- In a small number of scenarios, the ATO may return either an **Error** or **Warning** message, in which case you should review the ATO message and resubmit your STP transfer after taking the relevant corrective action in Sybiz Visipay. However, the combination of the Sybiz Employer Portal and Sybiz Visipay should result in Errors that will require you to liaise with the ATO.

Issues

The table below lists the possible issue statuses that an uploaded file may have. This icon is displayed on the right side of the Submission History screen beside each STP file.

Status Icon	Status Wording	Required Action
	No Issues	No grid validations exist within the file.
	Validation Warnings	Warning validations exist within the grid. Review the warnings, if you are happy with the data, you will be able to submit this to the ATO. Otherwise, change the data within your payroll system, generate a new STP file to upload and submit as an update or full file replacement.
	Validation Errors	Validation errors exist within the grid. Review the errors, you will not be permitted to submit this file. Change the data within your payroll system and generate a new STP file to upload and submit within the Sybiz Employer Portal.
	No Issues	The ATO has returned no validation issues.
	ATO Warnings	The ATO has responded with warnings. Review the warnings by clicking on the submission within the 'File Name' column and update within Sybiz Visipay as required.
	ATO Errors	The ATO has responded with errors. Review the errors by clicking on the submission within the 'File Name' column and update within Sybiz Visipay. You will need to perform a new STP transfer. If the error is at the ATO's end you will need to contact them for advice.
	Employer level or message level error	There is an issue with the submission at an employer or message level. An error message will be displayed when hovering over this icon. In most cases this will be an issue at that ATO's end and you will need to contact them for advice.

Actions

The below are the actions that are permitted within the Submission History screen.

Action Icon	Action Wording	Required Action
	View detailed information	Clicking on this icon will take you to the STP review grid and allow you to view the detailed information for this file.
	Download this file	Clicking on this icon will allow you to download the file.
	Delete this file	Clicking on this icon will delete the file. Files that have been submitted to the ATO cannot be deleted.

Maintain Employers

The Employer Maintenance section allows you to update details about your business and ensure that the Employer Portal is in sync with your payroll system. This can be accessed from the Dashboard by selecting [Maintain Employers](#).

i

The information populated in the Employer Maintenance screen will be shown in the grid, however it is the information that is provided within the uploaded STP file that will be sent to the ATO.

Editing an existing employer

Select [Employer Details](#) from the Maintenance section within the Dashboard.

Maintenance

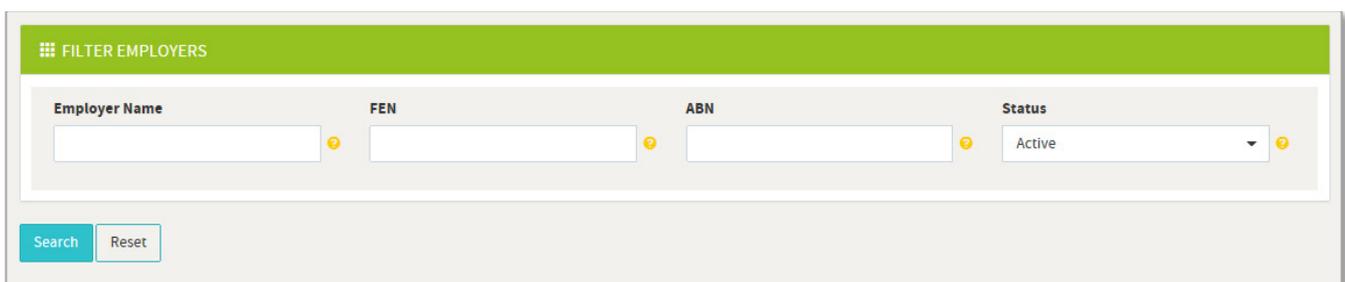
You can add users and maintain employer and user details:

 Maintain Employers

 Maintain Users

Or, from the link in the navigation bar at the top of the Dashboard.

- Enter in key employer data within the filter criteria, for example ABN. And then select **Search** to bring up a list of associated employers.



The screenshot shows a 'FILTER EMPLOYERS' form with a green header. It contains four input fields: 'Employer Name', 'FEN', 'ABN', and 'Status'. The 'Status' field is a dropdown menu currently set to 'Active'. Below the input fields are two buttons: 'Search' and 'Reset'.

- Select the employer to update from the list.

FILTER EMPLOYERS

SELECT FROM LIST OF AVAILABLE EMPLOYERS

Showing 1 to 2 of 2 entries Search:

Employer Name	FEN	ABN	Status
Food Inc.		21737851670	Active ✎
Mr Food Pty Ltd		14168509895	Active ✎

- Make your changes within the following sections. Scroll to the bottom of the screen and select **Save** if you make any changes.

Contact details

You can change any details on this screen. Given name, Family name and email address are required fields.

Contact Details

Please fill in the contact details fields. Given Name, Family Name and Email Address are required fields.

Title

Suffix

Given Name

Other Name

Family Name

Email Address

Telephone

Mobile Phone

Address details

You can change any details on this screen. Address Line 1, Suburb, Post Code, State and Country are required fields.

Address Details

Please fill in the address details fields. All fields are optional.

Address Type
Postal or correspondence address

Address Line 1
PO Box 100

Address Line 2

Address Line 3

Address Line 4

Suburb
Sydney

Post Code
2000

State
New South Wales

Country
Australia

Maintain Users

The User Details section lets you update details about your user account, as well as set up new users if you have the appropriate level of access. This can be accessed from the [Dashboard](#) by selecting *Maintain Users*.

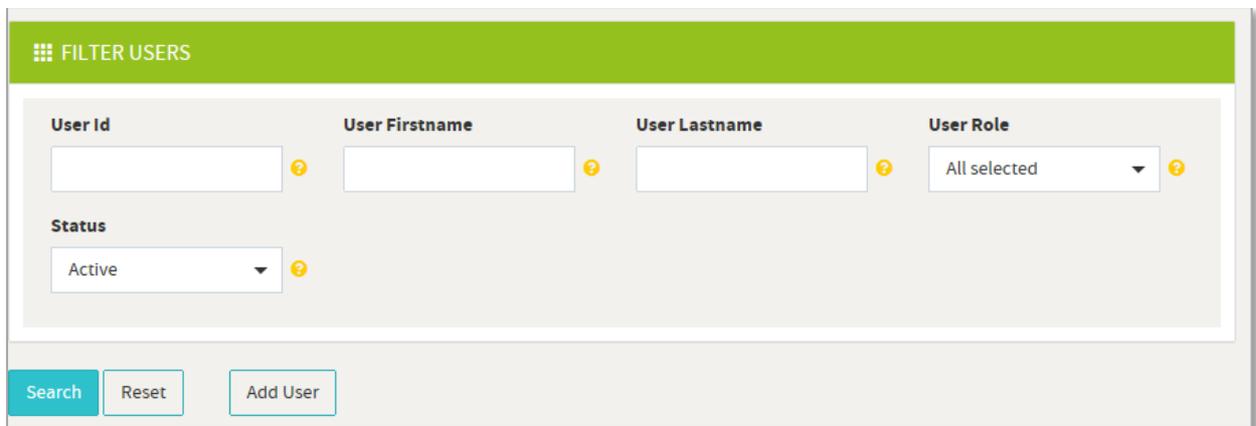
- Select **Maintain User** from the Maintenance section or from the link at the top of the [Dashboard](#) screen.

Maintenance

You can add users and maintain employer and user details:



- Enter in key user data within the filter criteria, for example Surname. And then select **Search** to bring up a list of associated users.



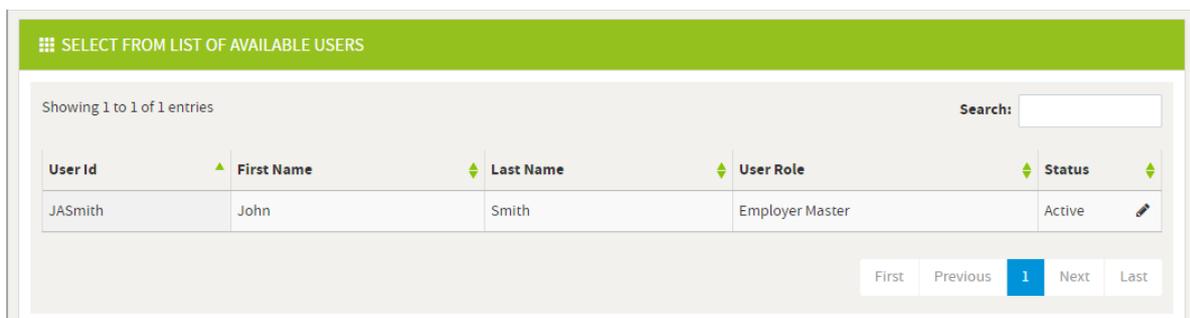
The screenshot shows a form titled 'FILTER USERS' with a green header. It contains several input fields and dropdown menus for filtering users. Below the form are three buttons: 'Search', 'Reset', and 'Add User'.

User Id	User Firstname	User Lastname	User Role
<input type="text"/>	<input type="text"/>	<input type="text"/>	All selected

Status:

Buttons: Search, Reset, Add User

- From the list, select the user ID you wish to update.



The screenshot shows a table titled 'SELECT FROM LIST OF AVAILABLE USERS' with a green header. It displays a single user entry. Below the table are pagination controls.

User Id	First Name	Last Name	User Role	Status
JASmith	John	Smith	Employer Master	Active

Showing 1 to 1 of 1 entries

Search:

Buttons: First, Previous, 1, Next, Last

- Update any required changes using the tabs at the top of the screen to navigate to each section. Select **Save** to save changes.

The screenshot shows a user management interface with the following sections:

- User Account** (selected tab):
 - User Details:** Includes fields for User Id (JASmith), User Firstname (John), and User Lastname (Smith). A note states: "Please fill in the user details. All fields in this section are required."
 - Account Details:** Shows Status (Active), Password reset required? (No), and Number of invalid login attempts (0 - (maximum of 6)). Action buttons include "Deactivate User" and "Reset Password".
 - User Roles:** Shows Available User Roles (Employer Master) and Assigned User Roles (Emp_MASTER).
- Contact Details**
- User Access**
- Employer Access**
- Preferences**

At the bottom, there are "Save" and "Cancel" buttons.

User Details

You can change all details on this screen. User First name and Last name are required fields.

This close-up view of the User Details section shows:

- User Id:** JASmith
- User Firstname:** John
- User Lastname:** Smith

A note below the fields reads: "Please fill in the user details. All fields in this section are required."

Account Details

Select [Deactivate User](#) to deactivate the user. Please note that user accounts cannot be deleted.

Select [Reset Password](#) to create a new temporary password for the user. An email will be sent containing the temporary password which they will be prompted to reset upon logging in. Also refer to the [Change Password](#) link within the [Dashboard](#).

Select [Unlock User](#) to return the number of invalid login attempts back to zero.

Account Details	Status	Deactivate User
User account information for this user.	Active	
	Password reset required?	Reset Password
	Yes	
	Number of invalid login attempts	Unlock User
	6 - (maximum of 5)	

Creating New Users

Depending on your level of access, new users can be created to access the Sybiz Employer Portal.

- Select **Add User** from the User Maintenance screen

⌵ FILTER USERS

User Id	User Firstname	User Lastname	User Role
<input type="text"/>	<input type="text"/>	<input type="text"/>	All selected ▼
Status			
<input type="text" value="Active"/>			

Search
Reset
Add User

User Account

- Enter in the following details:

- User ID:** We recommend that generic user ID's are not created. For example, if you have an Administration team that require access create a user account for each user and not a generic user such as Admin that all staff can access. Select a user role from the drop-down list.
- First Name:** Enter in the user's first name.
- Surname:** Enter in the user's surname.
- User Role:** Select the appropriate user role.

User Account **Contact Details** **User Access** **Employer Access** **Preferences**

New User

Enter a unique user id and click 'Continue'

User Id

add as self managed user (auto-create User Group).

Password **Confirm Password**

User Firstname **User Lastname**

User Roles

This section allows you to manage user roles.

Available User Roles

Select User Role

Assigned User Roles

Select at least one role.

The “add as a self-managed user” checkbox, when enabled, will allow the newly created user to self-manage any users which they create. Any users which are created by that user will by default be assigned to that user. If this option is disabled, a higher-level user will need to manage these users. This checkbox is enabled by default.

Contact Details

- Enter the user contact details.

User Account **Contact Details** **User Access** **Employer Access** **Preferences**

Contact Details

Contact details for this user. All fields in this section are optional.

Email Address

Landline

Mobile Phone

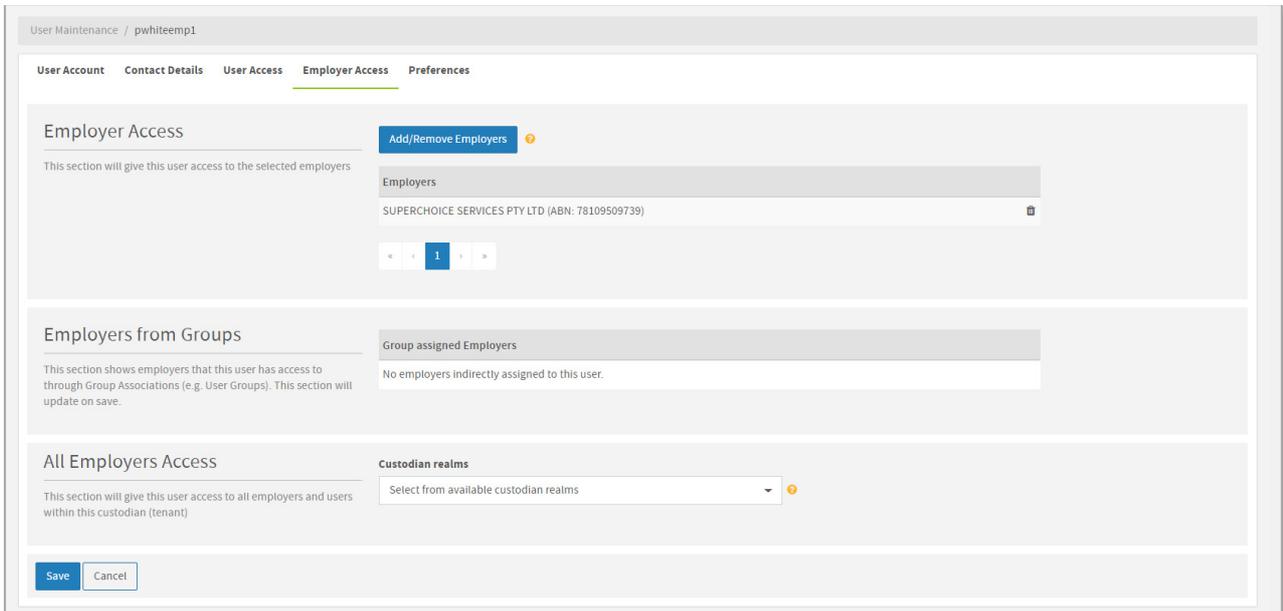
Email: Enter in the user’s email address.

i

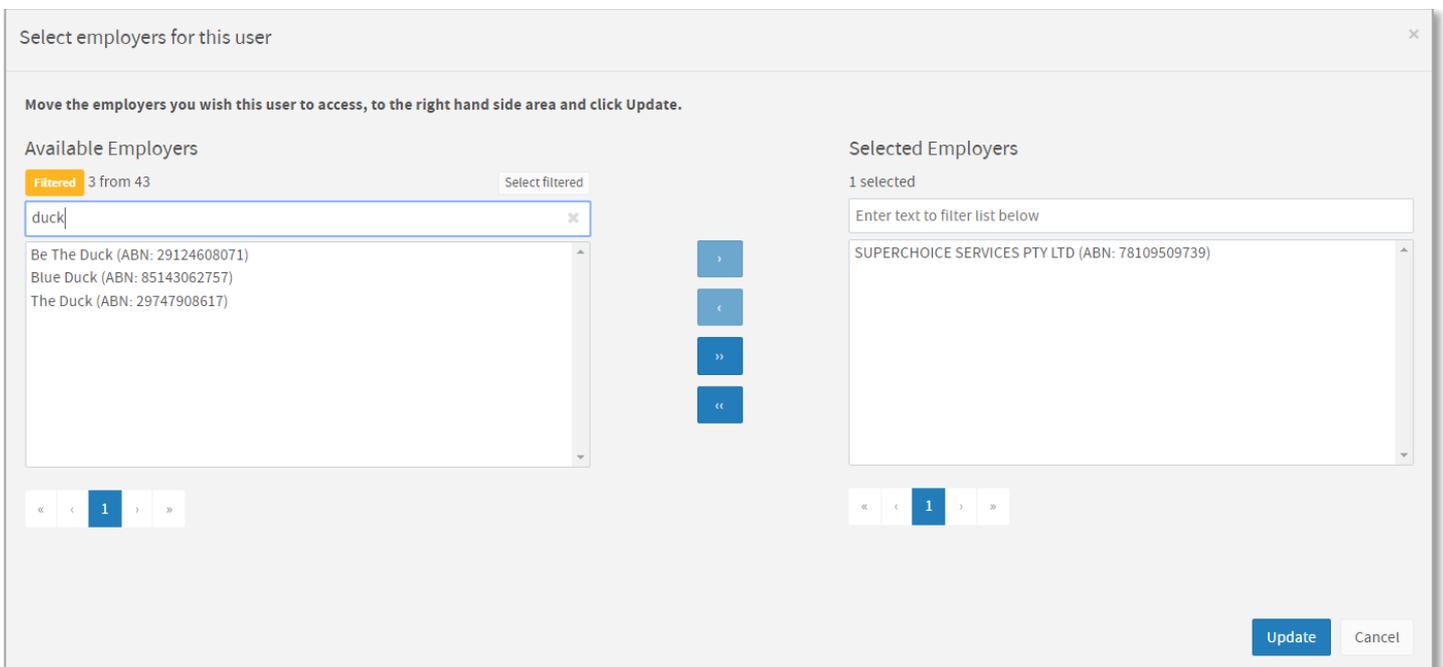
The initial login password for the user will be emailed to this email address.

Employer Access

- This screen allows you to assign the user access to employers (if you have the appropriate permissions).



- Select the **Add/Remove Employers** button to display a list of the employers that the user can be granted access to. Select the employer and click on the > button to move the employer to the Selected Employers section. Select **Update**.



- Within the Employer Access screen, scroll to the bottom of the screen and select **Save**.