Employer Portal Setup Checklist

You're almost there. Follow this checklist to complete your account setup and submit your first contribution. Step-by-step instructions and guides are available throughout the Employer Portal.*

1 User setup

- [ ] **I've received my email invitation to register for the Employer Portal.**
- [ ] **I've created my account by entering my name and email address.**
- [ ] **I've created my password and verified my email address.**

Note: You only need to verify your email once during registration.

- [ ] **I've set up Multi-factor Authentication (MFA) using Google Authenticator or SMS to my mobile device, and verified my mobile number.**

Note: While SMS is offered as an MFA option, legalsuper recommends using the authenticator app option as a preferred method for MFA (over SMS) to ensure higher levels of security.

2 Organisation setup

Where possible, we've pre-populated your organisation's details using your existing information, including your Employer Number.

- [ ] **I've reviewed the organisation's pre-filled details and updated anything that needs correcting.**
- [ ] **I've read and accepted the declarations.**

Once your organisation's user account is created, follow the Quickstart checklist on your dashboard to complete your organisation setup.

3 Quickstart checklist

The Quickstart checklist on your dashboard walks you through all required steps before you can submit your first contribution. Each completed step will display a green tick.

- [ ] **I've opened the Quickstart checklist from the top of my dashboard.**

4 Contribution payment method

- [ ] **I've added my organisation's contribution payment details and selected my preferred payment method: EFT, BPAY or Direct Debit.**

If using Direct Debit:

- [ ] **I've verified my identity, entered the bank account details and completed bank account verification.**

Note: You have 7 days to complete bank account verification from the time you initiate Direct Debit setup. Identity verification is required for Direct Debit payments — you'll need to upload a photo of your driver's licence or passport and record a short selfie video.

5 Refund account setup

- [ ] **I've entered and verified the refund bank account details and completed identity verification.**

Note: This must be completed within 7 days of initiating refund account setup. To verify the bank account, a small deposit will be sent to the nominated account — this can take up to 3 business days. Once received, enter the Payment Reference Number to complete verification. If you've already verified your identity for Direct Debit, you don't need to repeat this step.

6 Add employees

- [ ] **I've clicked the button to auto-populate my organisation's employee data.**

Note: Depending on the number of employees, this may take some time. You'll receive an email confirmation once it's complete.

7 Invite additional users

- [ ] **I've invited any additional users to the platform and set their access permissions.**

Note: This is an important step, particularly if your organisation requires authorisation for contributions. Each user must have their own individual email address — shared mailboxes are not supported.

8 Submit your first contribution

You can submit contributions by uploading a file or entering details manually — choose whichever method suits your business.

- [ ] **I've uploaded the contribution file (SAFF file).**

OR

- [ ] **I've manually created the contribution in the Employer Portal.**

Managing multiple organisations

If your business includes subsidiaries or connected entities, follow these steps for each additional organisation:

1. **Use the Organisation switcher in the top navigation bar to move between entities or view all organisations.**
2. **To add a subsidiary, navigate to View Hierarchy within the parent organisation and select New Affiliate.**
   - **Select Type:** Choose "Branch" or "Subsidiary" (note: subsidiaries inherit payment and refund details).
   - **Enter Details:** Follow the prompts to provide the ABN/WPN, address, and organisation information.
   - **Confirm:** Review the information and submit to create the new entity.

To keep your account secure

- Always click Log out when you're done
- Never leave your session open on a shared or public device
- Avoid staying signed in on browsers you don't control
- Avoid using multiple browsers simultaneously for the same session.

Need help?

Our Employer Team is available to support you throughout setup and beyond.

Call **1800 060 312** — available 8am–8pm AEST/AEDT weekdays.

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