EMPLOYER ONLINE

HELP GUIDE

Online Contribution Processing
BERT 2 | BEWT | CIP

Disclaimer: All employer and member details used throughout this guide are fictitious and have been created for training and educational purposes. Any reference to any employer or member is entirely coincidental.

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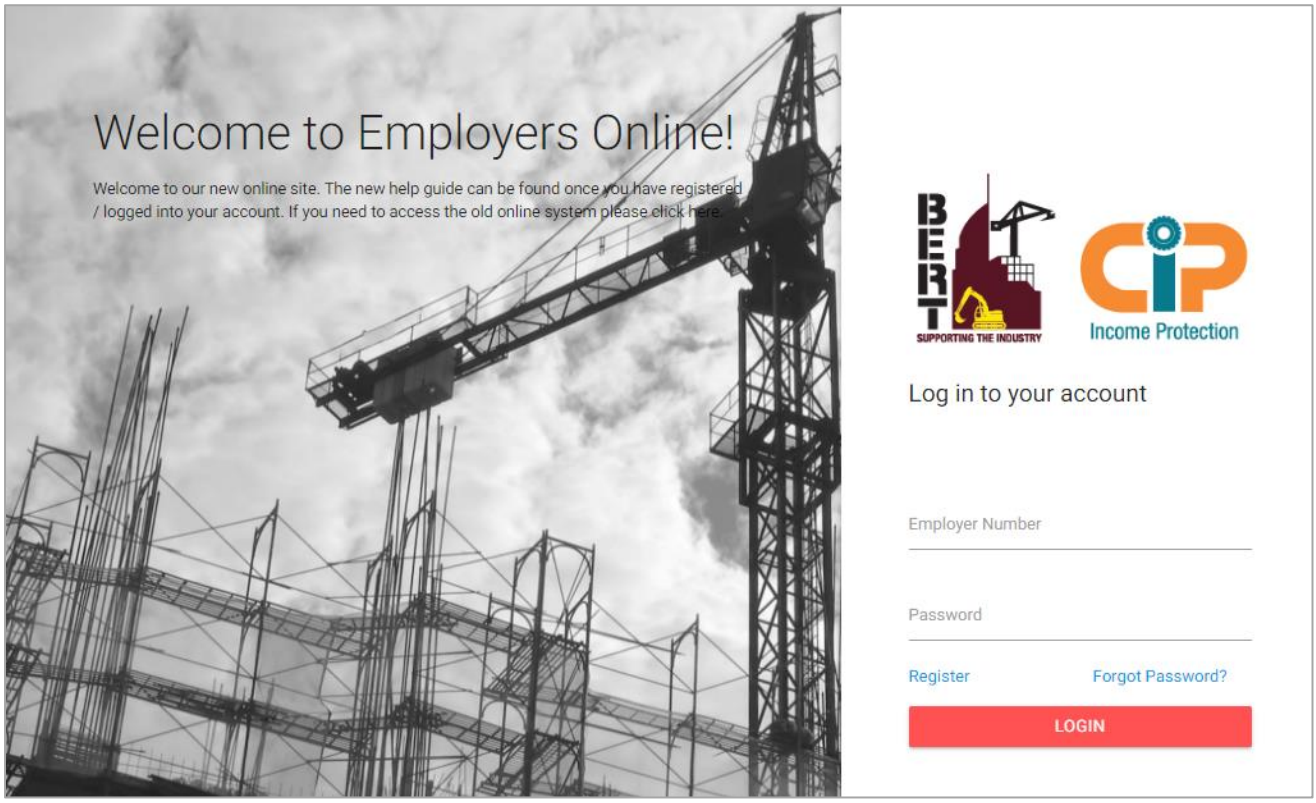
1. Accessing and Logging in

The new Employers Online can be accessed by any browser however for optimal performance BERT recommends the following browsers:

Google Chrome | Mozilla Firefox | Microsoft Edge

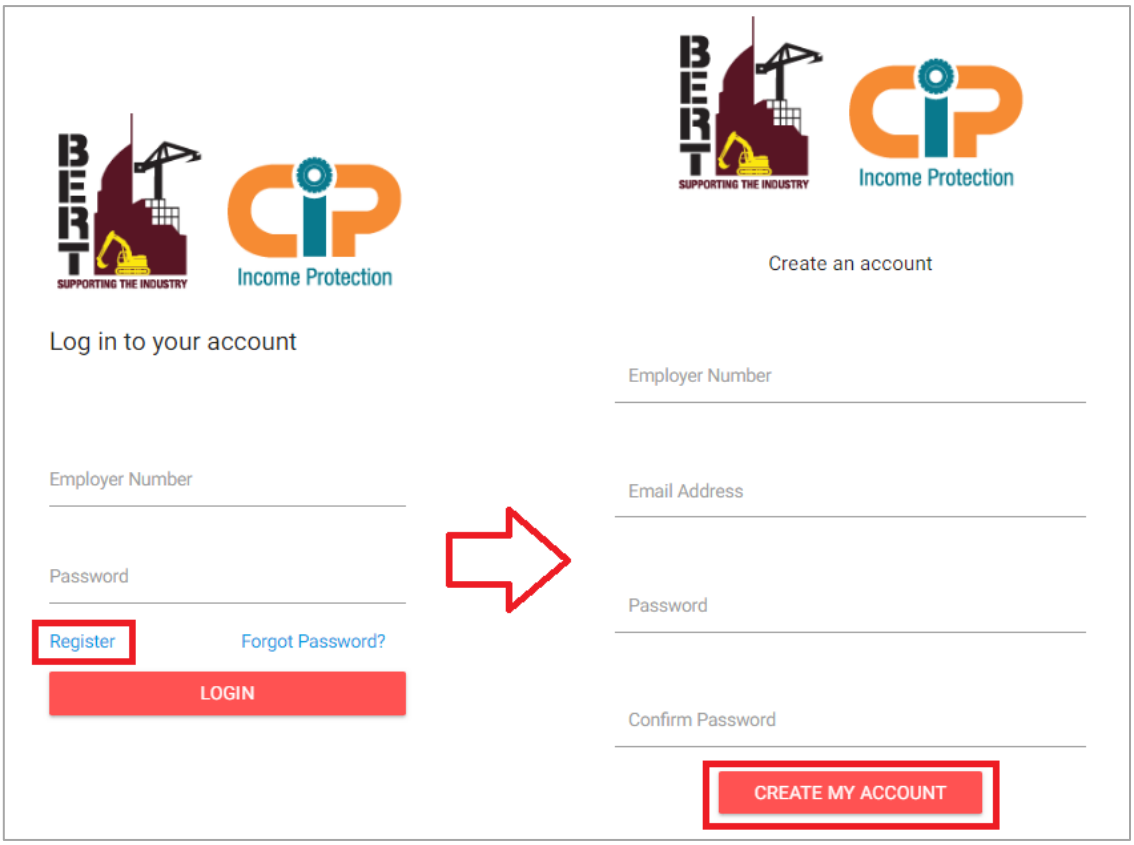
Navigate to https://ernieweb.bert.com.au/ using one of the preferred internet browsers listed above.

The Home Page / Login screen will display.

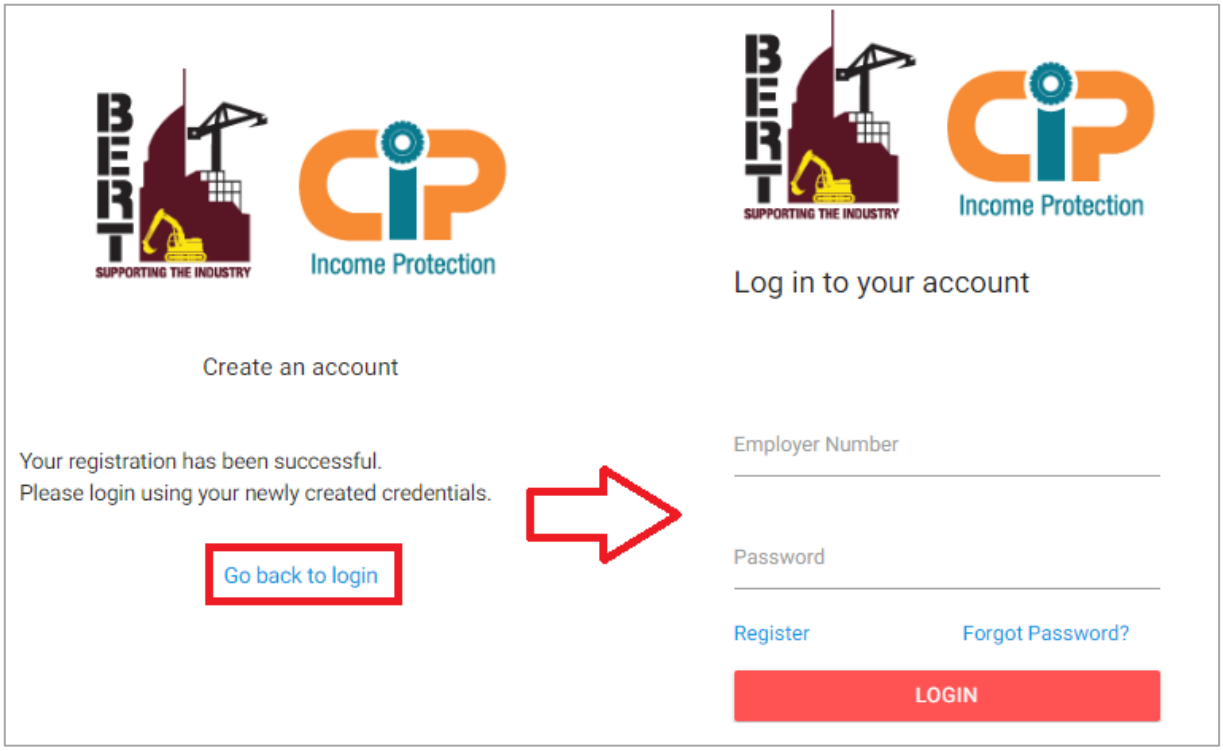


1.1 New Registrations

Select the Register link on the login page and enter in your credentials (including Employer Number| Email Address | Password | Confirm Password) and select Create My Account.

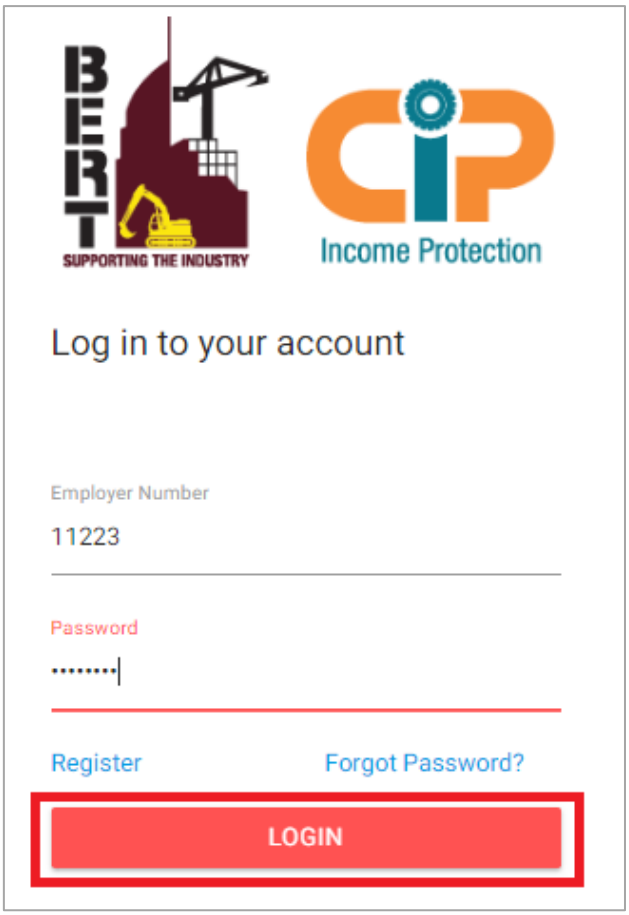


You will receive a notification on screen that your registration has been successful. You will need to login using your newly created credentials. To do this, select the Go back to login link and enter the Employer Number and Password you just registered and select Login.



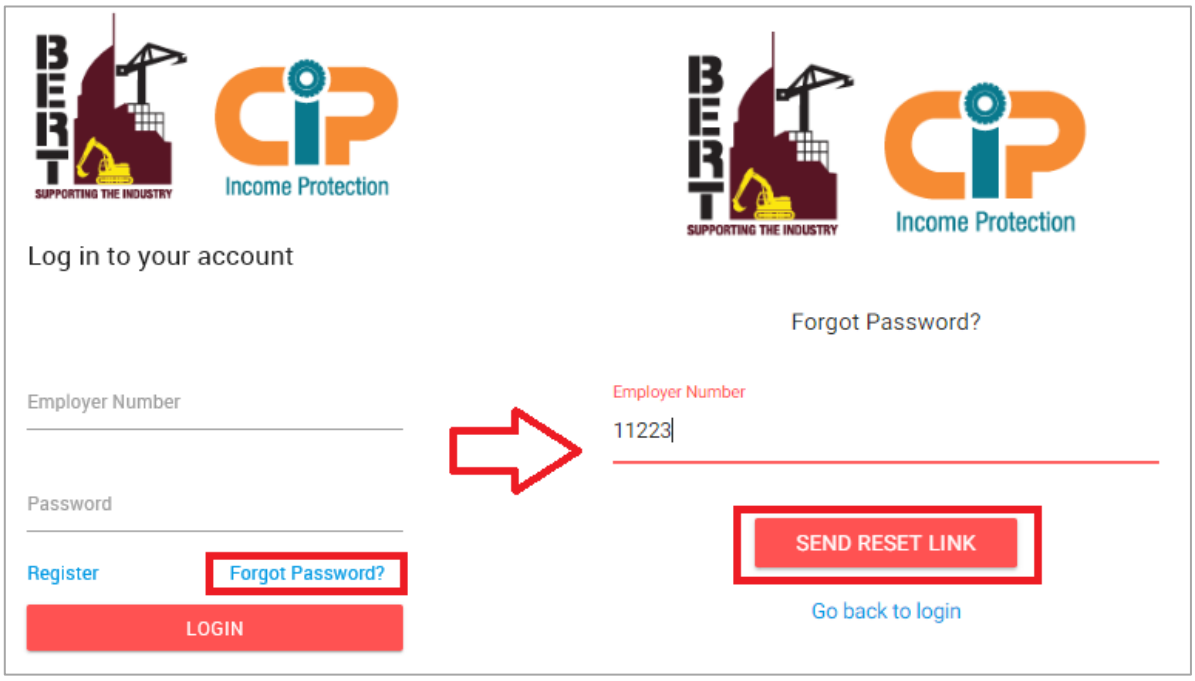
1.2 Returning Employers

If you have previously registered to submit your contribution online simply enter in your Employer Number and password and select Login.

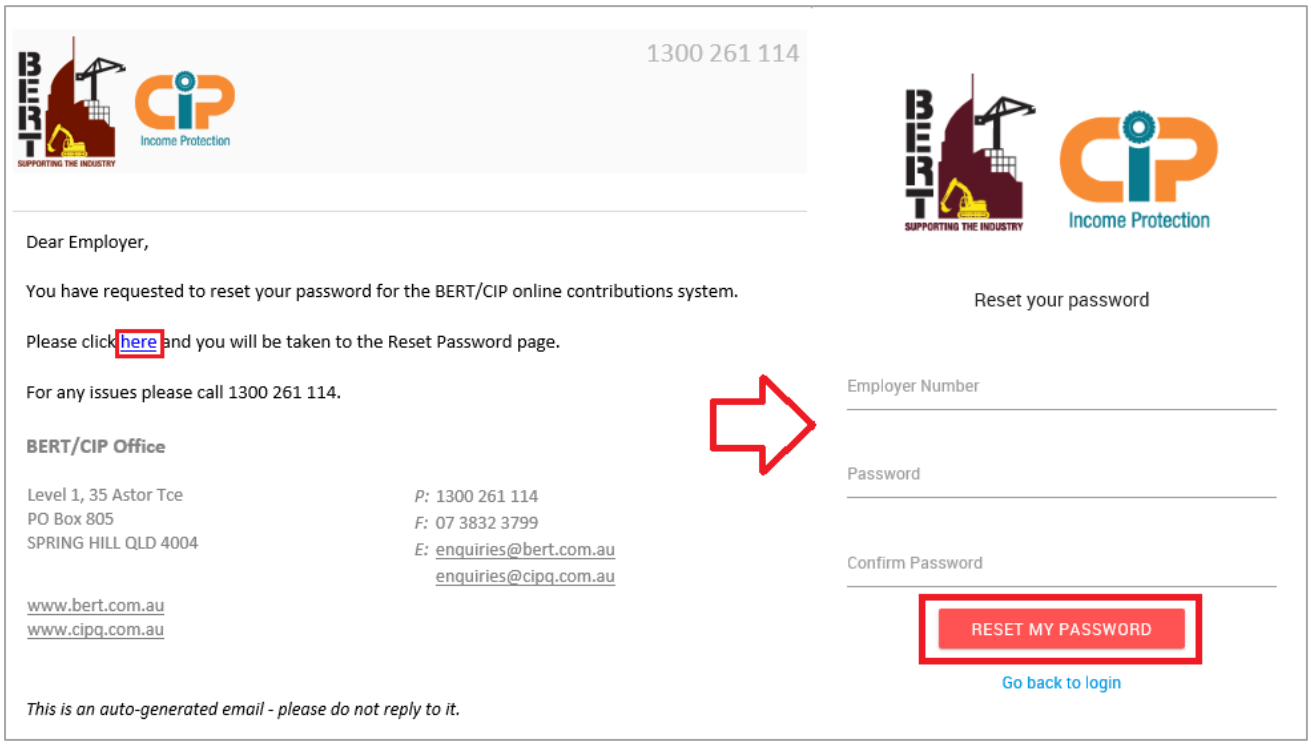


1.3 Forgot Password

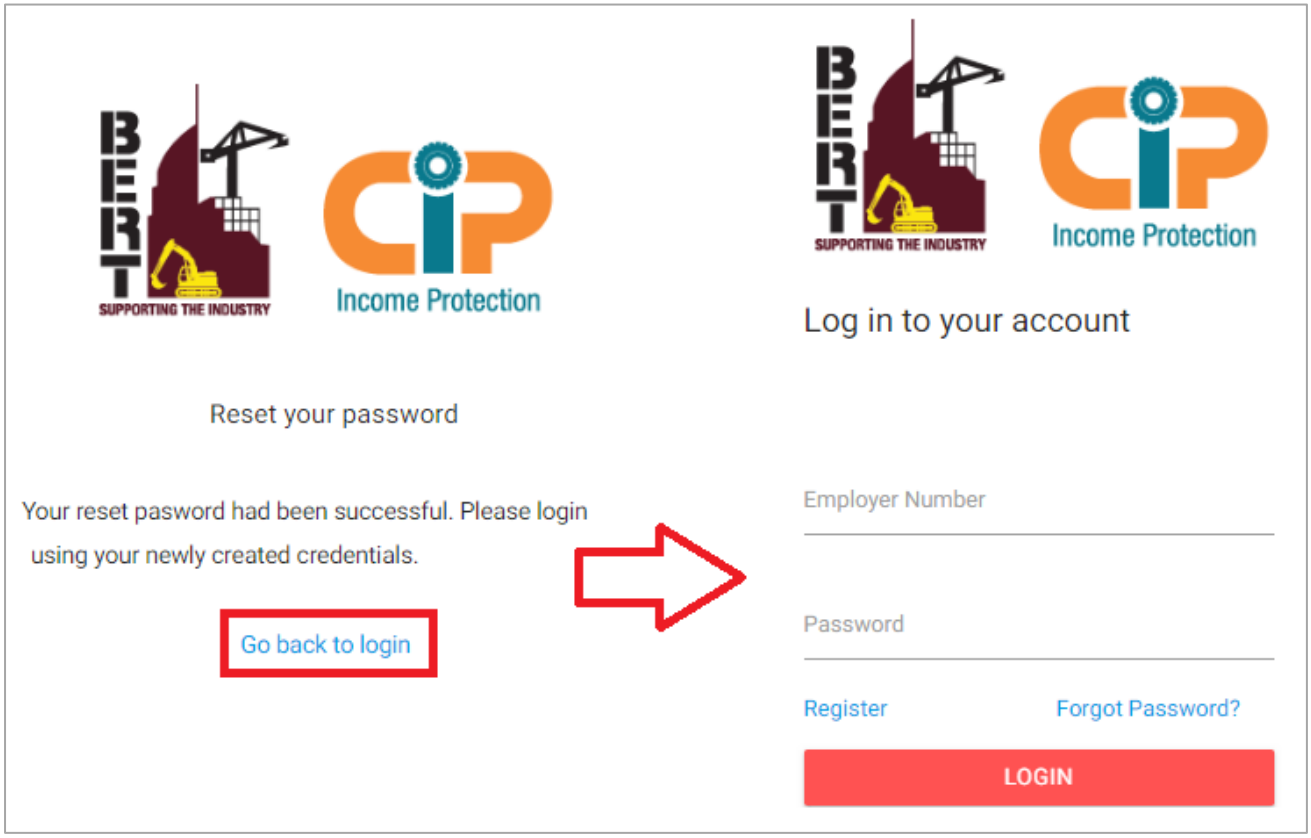
On the Login screen select the Forgot Password? Link and when prompted enter in your Employer Number and select Send Reset Link.



A Reset Password link will be emailed to the registered email for that account. Click the link in the email and when prompted reset your password.

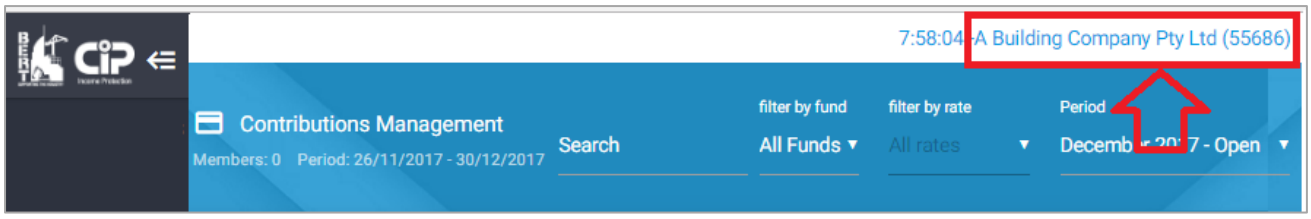


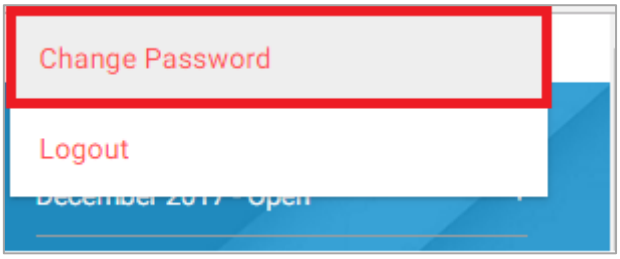
You will receive a notification on screen that your reset password has been successful. You will need to login using your newly created password credentials.



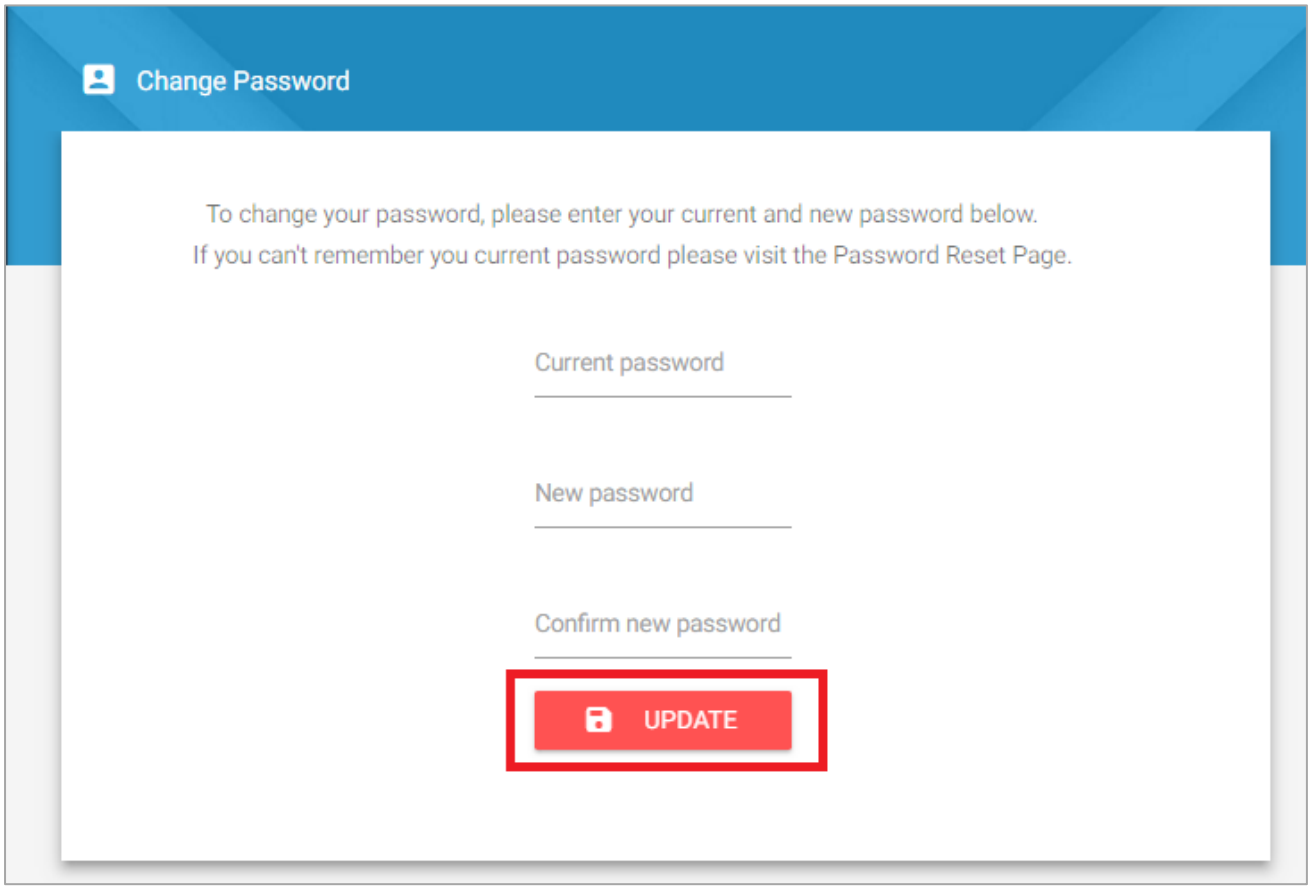
1.4 Changing your Password

Once you have logged in click your Employer Name link located in the in the top right-hand corner of the screen.





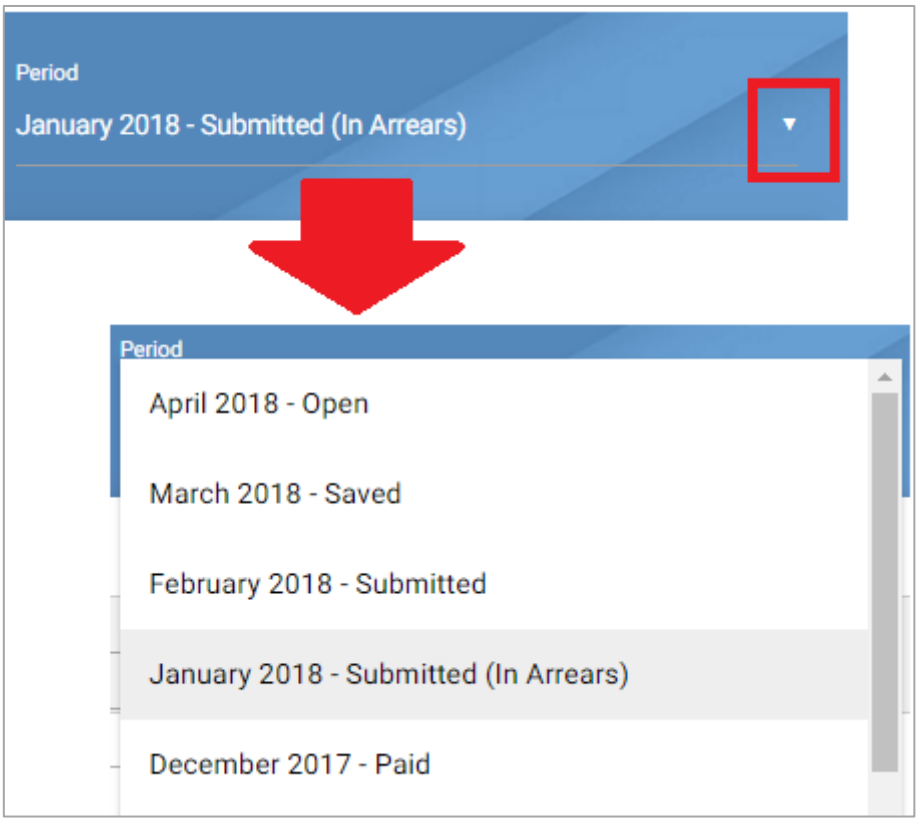
Select the Change Password option, and the below screen will display. Enter in your current password | New Password | Confirm New Password and select Update.



You will receive a notification on screen that your password has been updated successfully.

2. Understanding Your Contribution

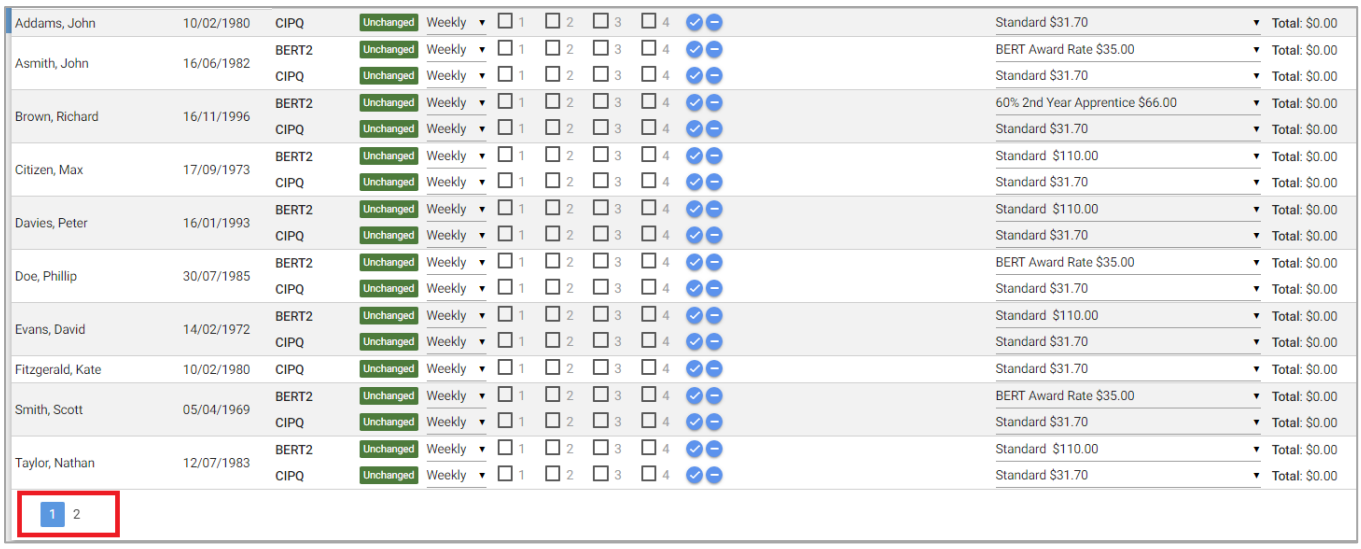
When you first access your online contributions the contribution period will automatically be selected and display the oldest contribution outstanding (i.e. Submitted (in Arrears) | Submitted | Saved | Open). You are able to select other available contribution periods using the dropdown facility.



2.1 Contribution Screen Paging

Members on your Contribution will appear in alphabetical order (unless newly added when they are displayed at the top of the contribution) and the screen will display ten (10) members per page / screen.

Along the bottom of the contribution page numbers will appear depending on the number of members on the contribution. Selecting a page number will refresh the screen and show the members listed on the contribution for that page.



Note: Paging is also applicable for members appearing on the Member Management screen.

2.2 Understanding what the different statuses mean

Open Status	An 'Open' Status means that this contribution is in an open period and has not had modifications made to it or changes saved. ***Please Note:*** *some Open Status contributions you will not be able to access. These are future contributions that can only be processed or modified if the previous month's contribution has been saved or submitted.*
Saved Status	A 'Saved' status indicates that the contribution has been saved either with or without changes being made. A contribution advice can be downloaded at this stage to assist you with your calculations for the contribution.
Submitted Status	A submitted status indicates that the contribution has been submitted for payment. Submitting a contribution closes the contribution off to further modifications and enables an invoice to be generated for the contribution. An invoice can be downloaded at this stage to assist you with your payment of the contribution. If you need to make modifications on a Submitted contribution you will need to contact the BERT Office.
Submitted (In Arrears) | Saved (In Arrears) Status	This status indicates the contribution is in Arrears and has not been paid by the due date. This can occur on both Submitted and Saved contributions.
Paid Status	Paid status refers to a contribution that has been paid. Again, you are unable to make any modifications to the contribution as it has been closed. A receipt can be downloaded at this stage for proof of payment of the contribution. If you need to make modifications on a Paid contribution you will need to contact the BERT Office.

NOTE: If you make any changes to your contribution you must save it. If you "Refresh" or navigate to another screen prior to saving you will lose any changes you have made. You can choose to "Save" your contribution multiple times and modify your contribution until you are happy that it is correct for the period.

You are only able to 'Submit' your contribution online once.

2.3 Contribution Fund Table

Each fund is summarised in the Fund table at the bottom right of the contribution screen.

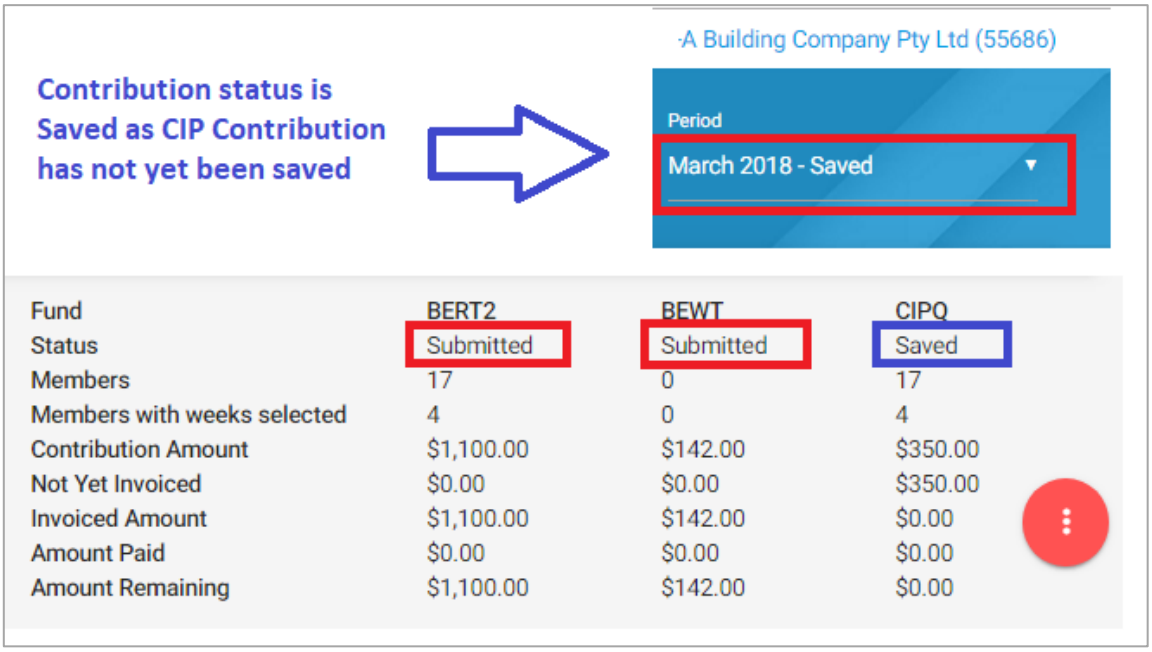
Fund	BERT2	BEWT	CIPQ
Status	Submitted	Submitted	Saved
Members	4	0	3
Members with weeks selected	1	0	1
Contribution Amount	$440.00	$56.80	$140.00
Not Yet Invoiced	$0.00	$0.00	$140.00
Invoiced Amount	$440.00	$56.80	$0.00
Amount Paid	$0.00	$0.00	$0.00
Amount Remaining	$440.00	$56.80	$0.00

Status	This is the status for the contribution for the particular fund. As you have the ability to submit the contribution for funds separately these statuses may differ across the funds.
Members	Displays the total number of members that are on the contribution for the Fund, regardless of weeks selected
Members with weeks selected	Displays the number of members for the fund that have weeks selected on the contribution
Contribution Amount	The total amount of the contribution based on members with weeks checked for the fund. It includes any amount previously saved, submitted or paid plus any new amounts added or subtracted through an amendment.
Not Yet Invoiced Amount	This will be the amount that has not yet been added to a current invoice. This normally occurs if a contribution has been saved but not yet submitted. Once the contribution for the fund has been submitted the amount will be invoiced.
Invoiced Amount	Once a contribution is submitted the amount becomes invoiced.
Amount Remaining	This is the amount left to pay for the contribution period. It will normally be the same amount as the Invoiced Amount unless a part payment for the contribution has been received.

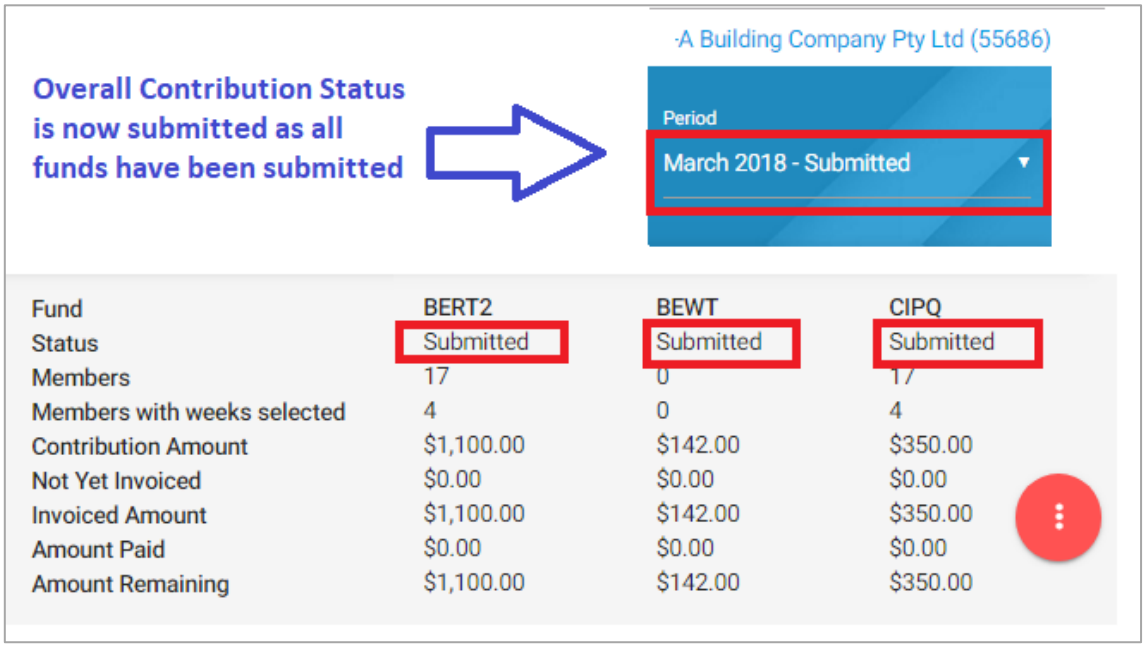
2.4 BERT2, BEWT and CIP Employers

In a contribution where you have multiple Funds (I.e BERT2, BEWT and CIP) the status for the contribution period will not update to Submitted – unpaid unless all Funds have been submitted.

For example where BERT2 and BEWT contributions have been submitted but CIP has not, the Status for that months contribution will still be Saved.



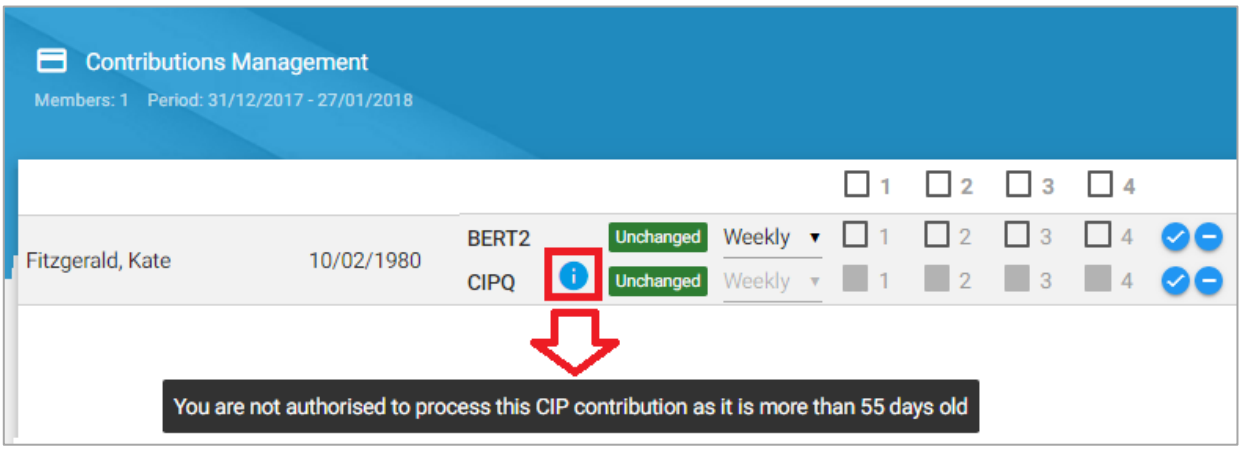
Once CIP has been submitted the period will update to 'Submitted'



2.5 CIP Contributions Passed Their Due Date

Where a CIP contribution is passed its due date, it cannot be submitted online. You will still be able to view the contribution and if applicable make changes to the BERT contribution, but will not be able to submit or make any changes to the contribution for CIP. This includes not being able to add members to; or terminate members from the CIP fund.

Upon opening a contribution where the CIP component is past its due date you will see an information icon located next to the CIP heading. Hovering over this information icon will display the following message.

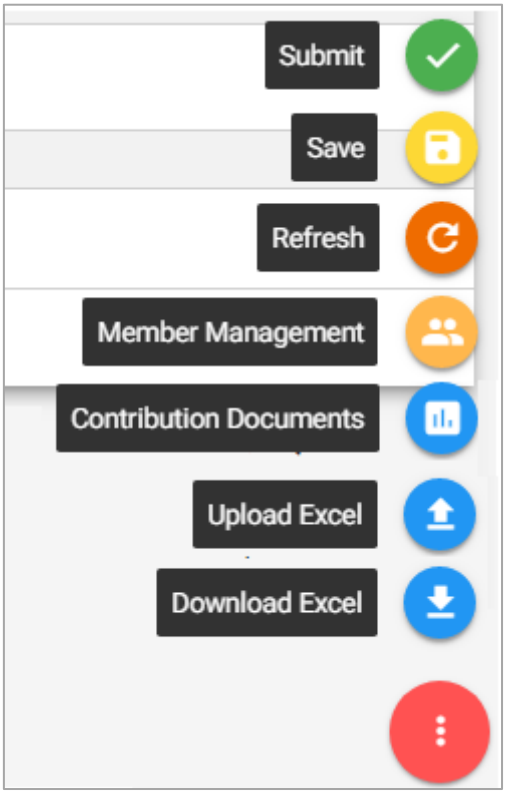


3. Navigating the System

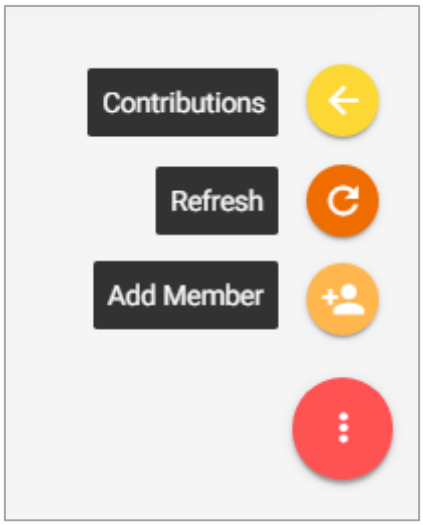
To perform different functions on your contribution, such as Submitting and Saving your contribution, and adding or terminating a member use the action icon (3 dots in a red circle) located in the bottom right hand corner of the contribution screen.

Clicking the action icon will display the list of actions available to you to perform on that contribution. Note depending on your contribution status you will see different options.

To select an action simply click on it.



The action icon will also appear on the Member Management screen with different functions to perform.



4. Adding an Employee to a Contribution

You can add new and existing employees to your contribution using the member management function of the system.

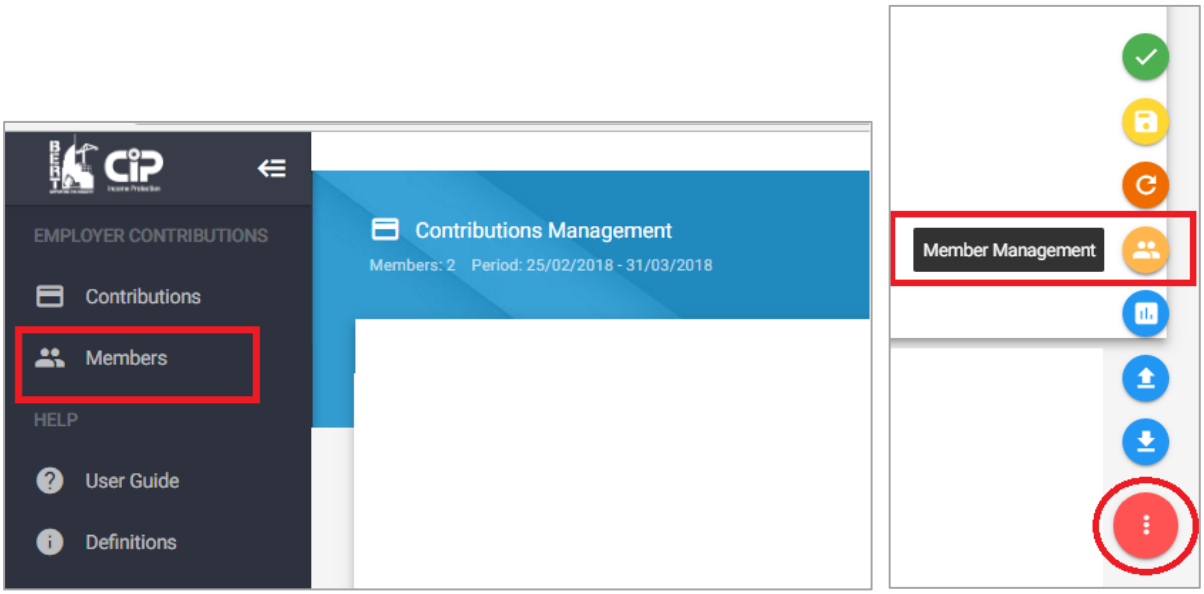
If your new employee already has a known BERT/CIP member number you can use that to easily add that existing member. Your employee may know that they have had a BERT/CIP membership but cannot provide their Member number. These members can be searched for using their personal details and again easily added.

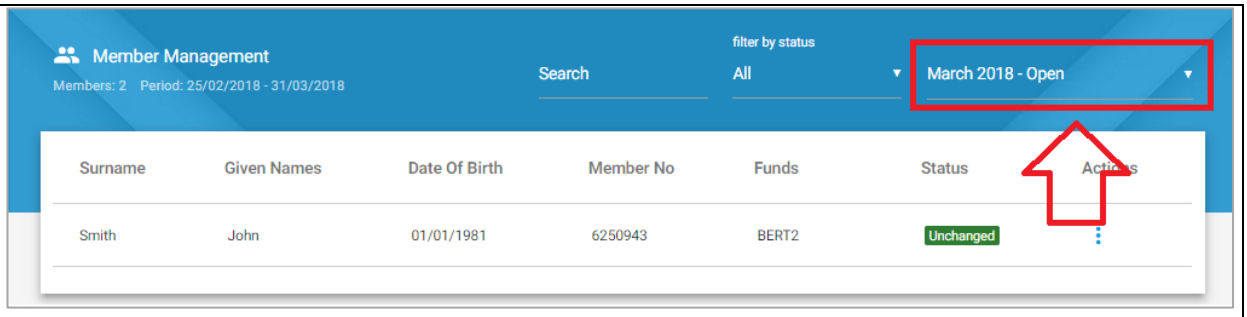
If you employee is new to the Queensland / NT Building Industry you can add them to your contribution and create a unique member number for them.

If you add a new or existing member, to an Open contribution – they will be added to that contribution and all future contribution once the record is saved. However, if you add a member to a contribution that has already been saved you will need to add them manually to future contributions that are also 'Saved' and the next Open contribution.

If you choose to refresh a contribution prior to saving any updates that have been made to that contribution, including the addition of new members, your changes will be lost.

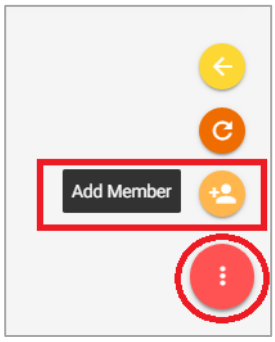
4.1 Adding an existing BERT/CIP Member using Member Number/Personal Details

Step No	Step Description
1.	Navigate to the Member Management page, either by selecting the Members option from the left hand side menu or selecting the Member Management icon from the actions list on your contribution.  The Member Management screen will display listing all members on the contribution.



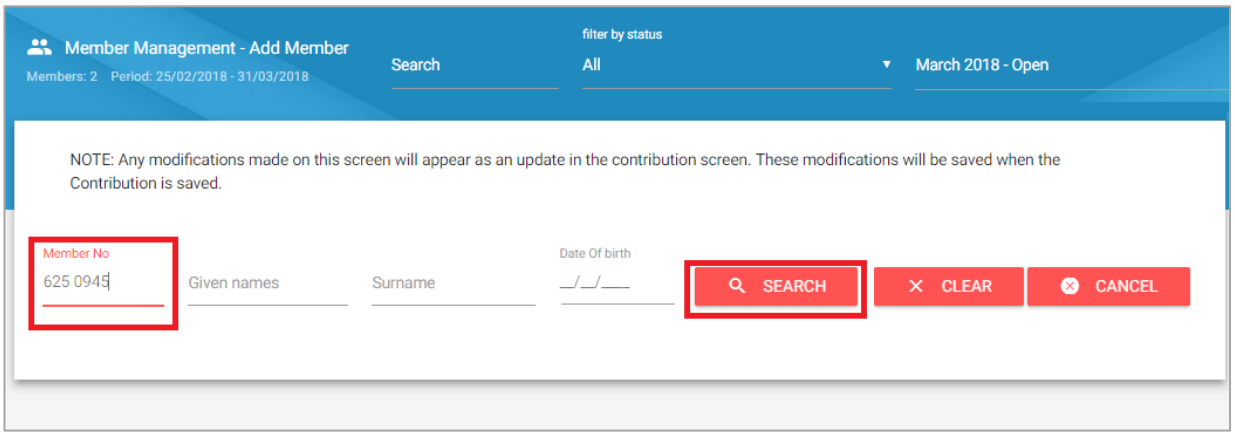
If required you can change the contribution period from this page using the Period drop down located in the top right hand corner.

2. Using the action icon located in the bottom right hand corner of the screen select to Add Member.



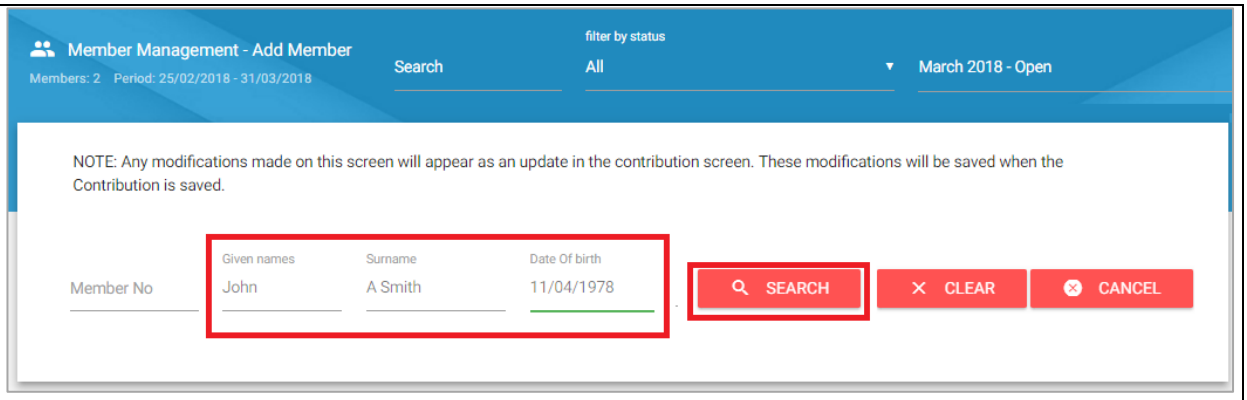
The Add Member Screen will display.

3. **If you know the employees BERT / CIP Member Number**: Enter the Member Number and select Search

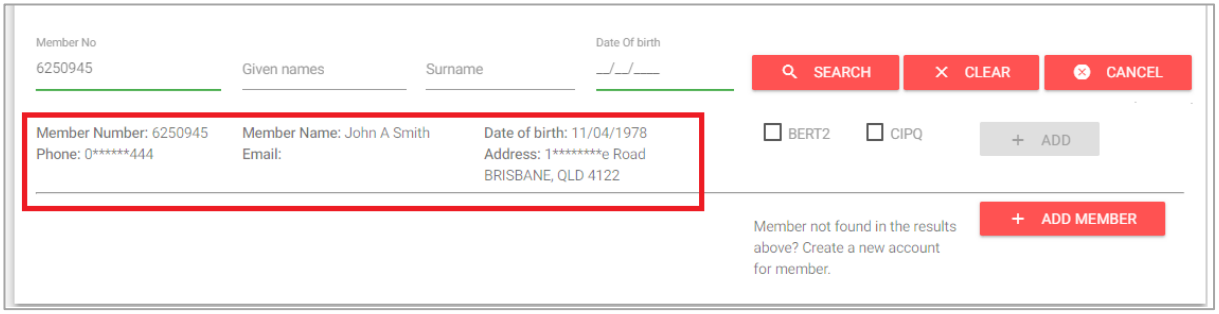


Or;

If you know the employee is a BERT/CIP Member but don't know their member number: Enter their Given name; Surname and Date of Birth details and select Search.

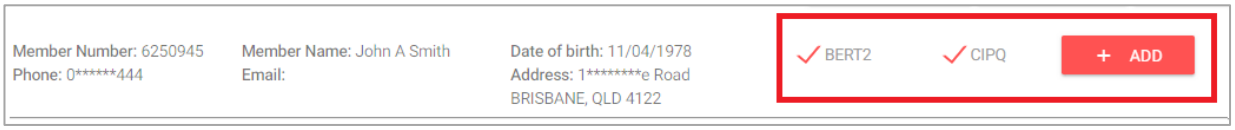


If the member is located in the system their details will display for you to check over.



NOTE: if the member details do not match you can select to create a new account for you member using the + Add Member button (refer to *Section 4.2 Adding A Brand New Member to your Contribution* for further steps).

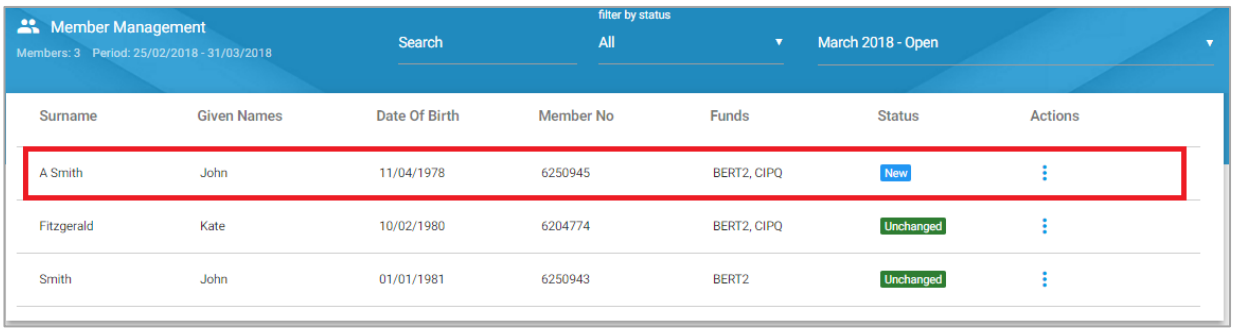
4. Select the relevant Fund(s) for the Employee by clicking the checkbox that appears next to each Fund Name. A tick will appear, and the + Add Button will become available selection.



Select + Add button.

***Please Note**: You will also be required to select the rate for the employee for each Fund, but this will be done on the contribution screen (refer to Section 4.3 Adding a Rate and saving Newly Added Members to your Contribution).*

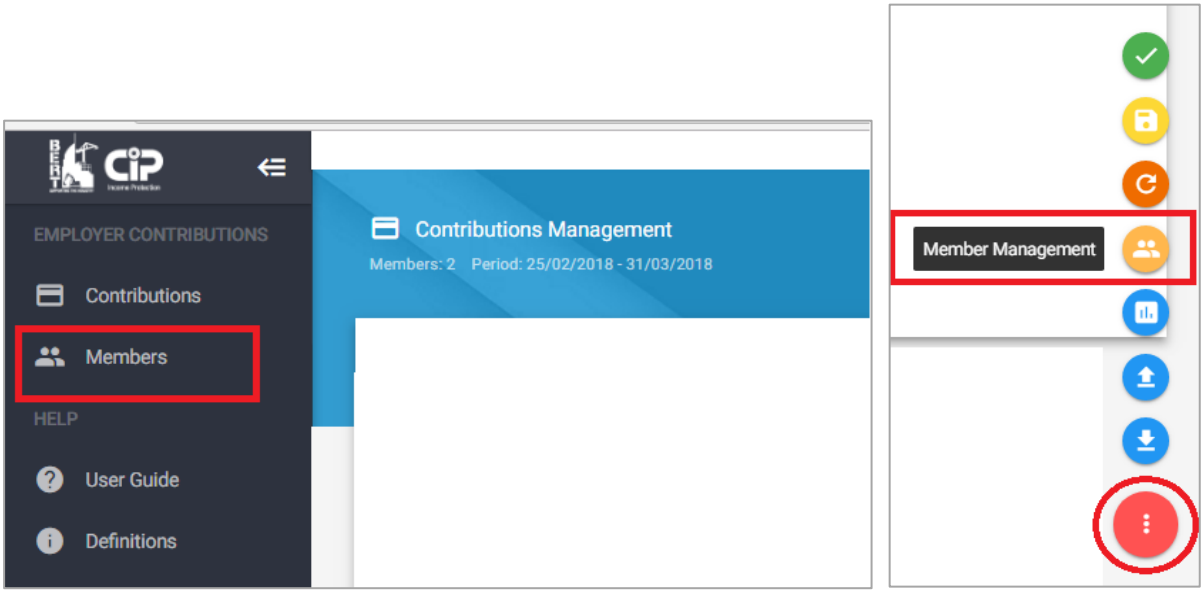
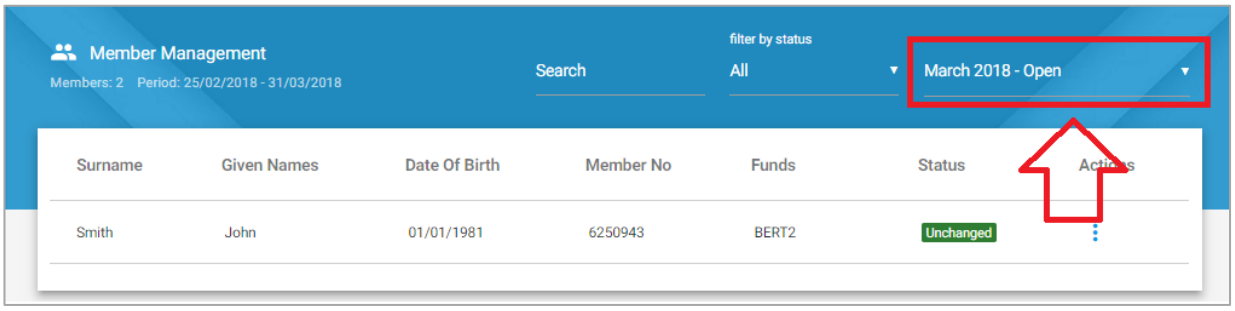
5. Upon selecting the + Add button you will be navigated back the Member Management screen. The new employee will show at the top of the list with a status of New.



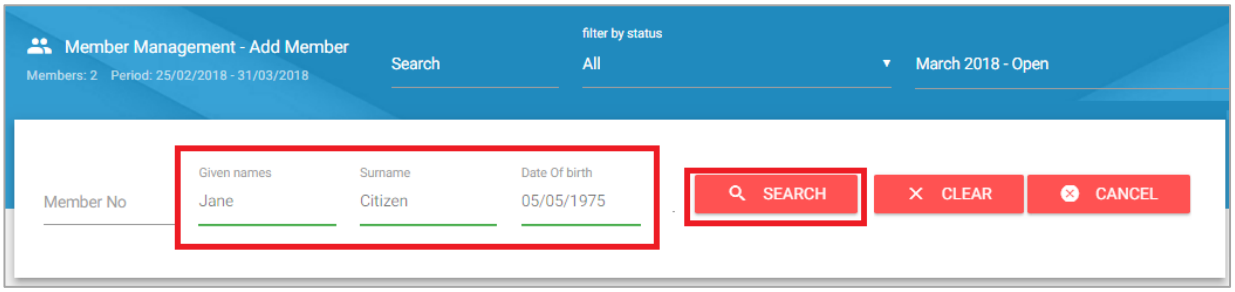
	Please Note: *the member will now appear on the contribution however will not be saved on the contribution. You will need to return to the contribution and save it to ensure members are added to the contribution correctly.* Continue to add any further new members to your contribution. Once you have added all the new members for the contribution, you will be required to add the rates for each member and save the contribution. These steps are done on the contribution screen. Refer to Section 4.3 Adding a Rate and saving Newly Added Members to your Contribution.

4.2 Adding a Brand New Member to your Contribution

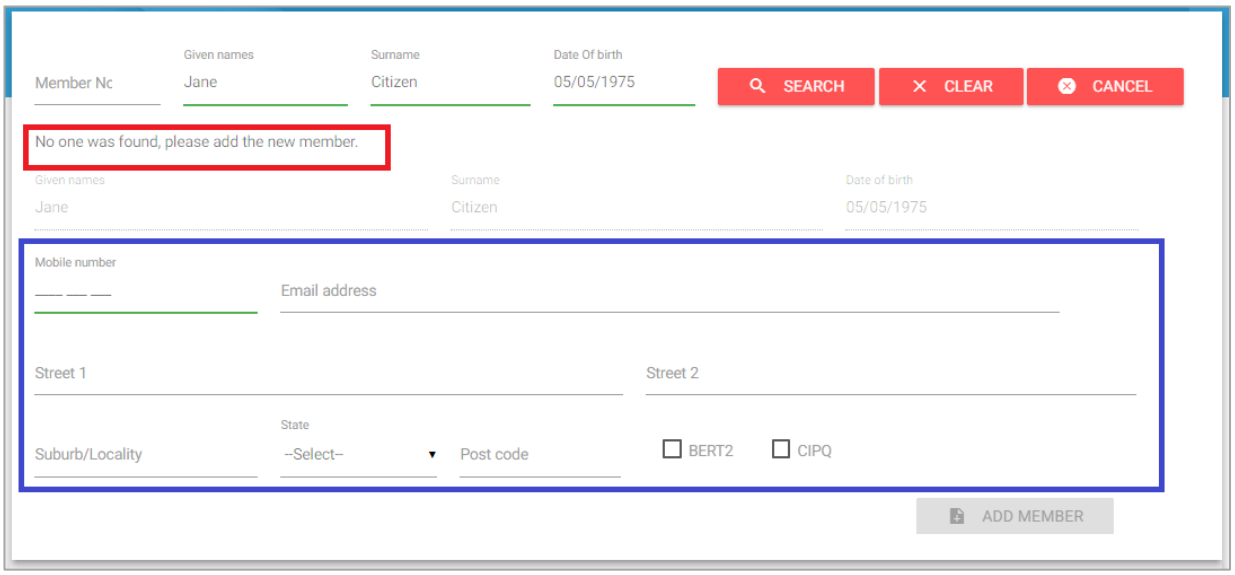
Prior to adding a new employee/member to the BERT/CIP Funds you still must perform a search to ensure they do not exist in the system. Once the search has been performed and no matches can be found, you can add the new employee.

Step No	Step Description
1.	Navigate to the Member Management page, either by selecting the Members option from the left hand side menu or selecting the Member Management icon from the actions list on your contribution.  The Member Management screen will display listing all members on the contribution.  If required you can change the contribution period from this page using the Period drop down located in the top right hand corner.

2. Enter the Employees Given name; Surname and Date of Birth details and select Search.



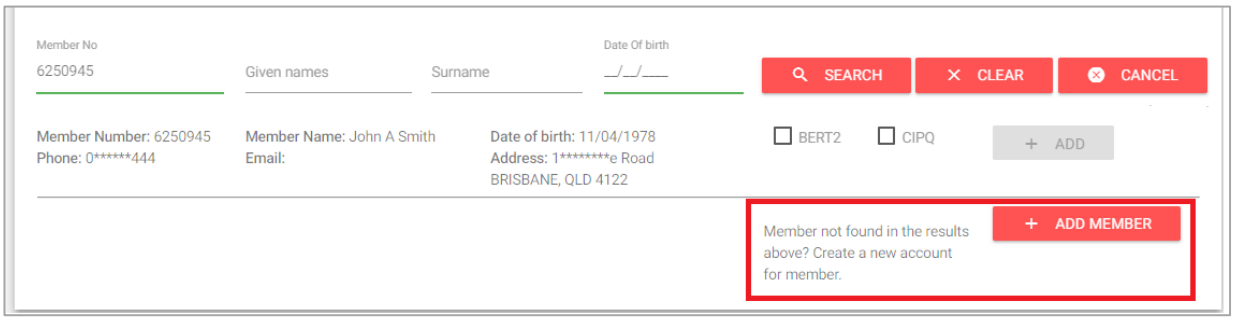
A message will display indicating a member was not found. Enter in the contact details for the employee including a Mobile Number, Email address and Postal address.

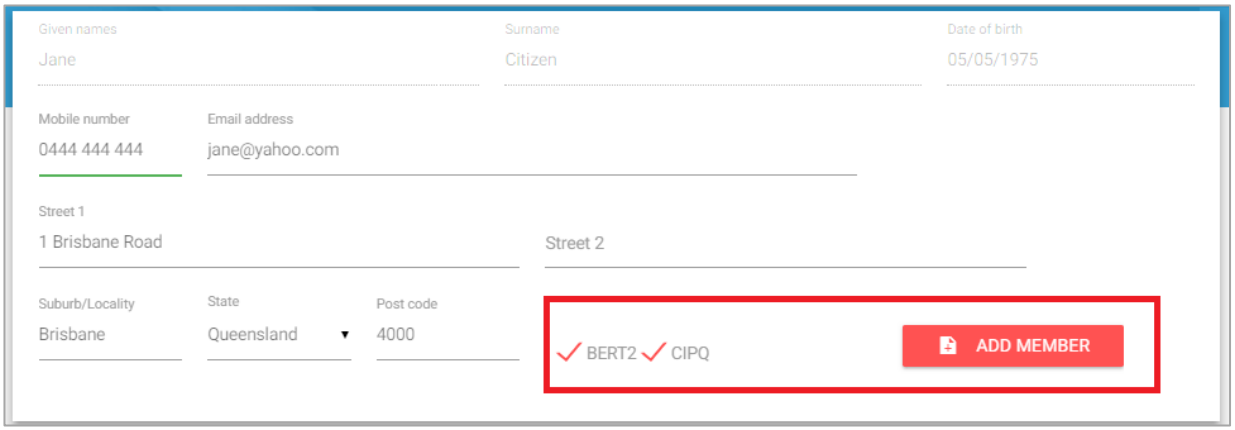
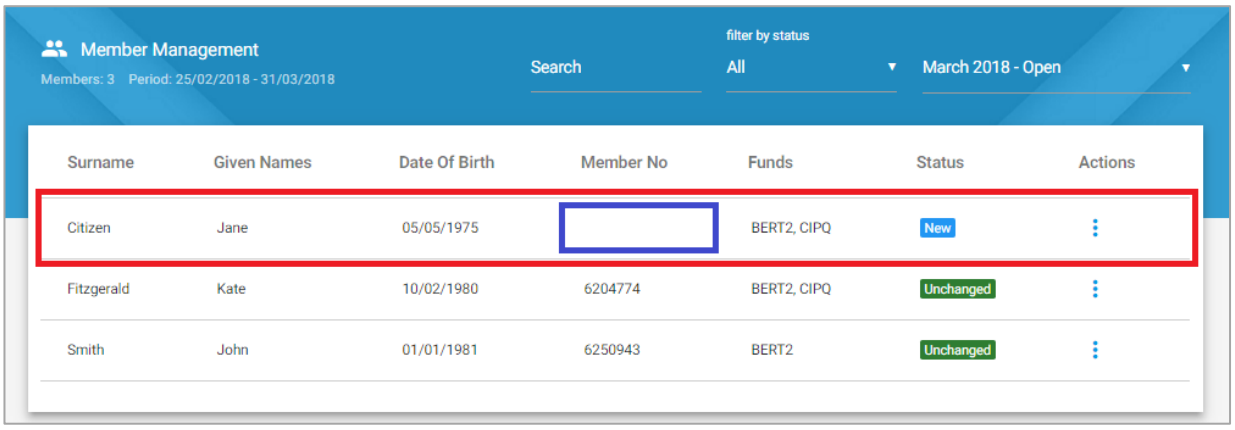


Please Note: *It is now compulsory to enter an address for all new members added to the Contribution. You will not be able to add new members without the members address.*

Please Note: *The Given Name; Surname and Date of Birth is pre-populated from the search. If these details are incorrect you will need to select the Clear Button; re-enter the details and Search for the employee/member again.*

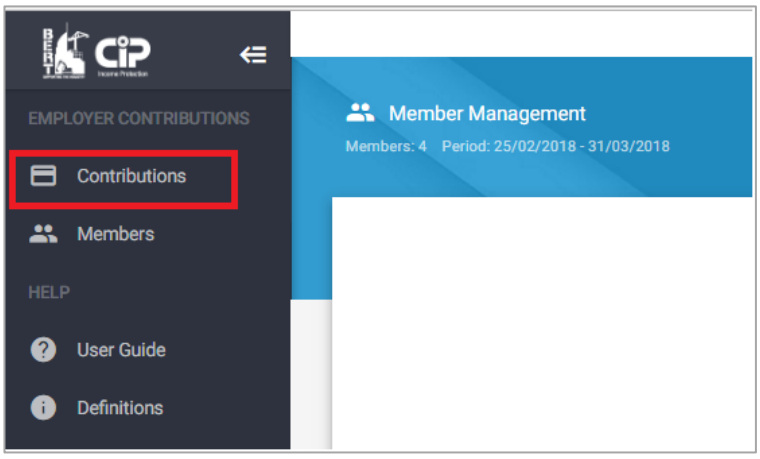
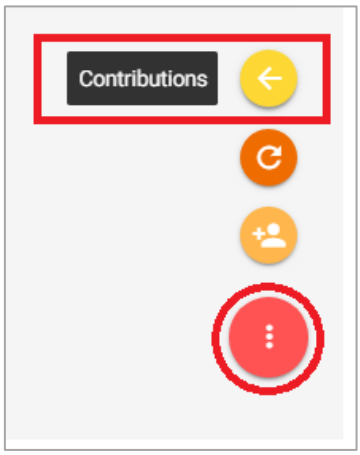
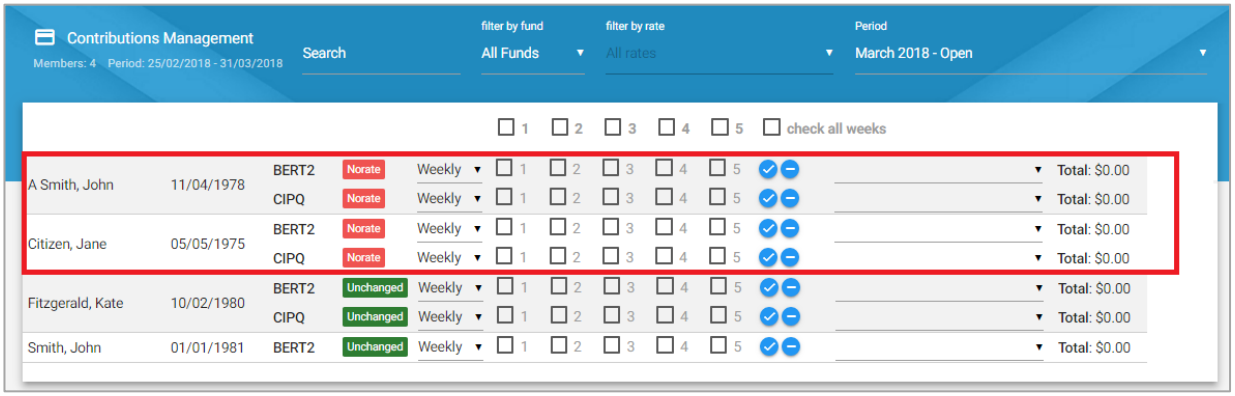
Please Note: *if a member is located in the system matching the details you entered they will display on screen. If it is the same member you can select to add that account (by selecting the Funds and selecting the + Add button) or you can select to create a new account for the member selecting the + Add Member button.*

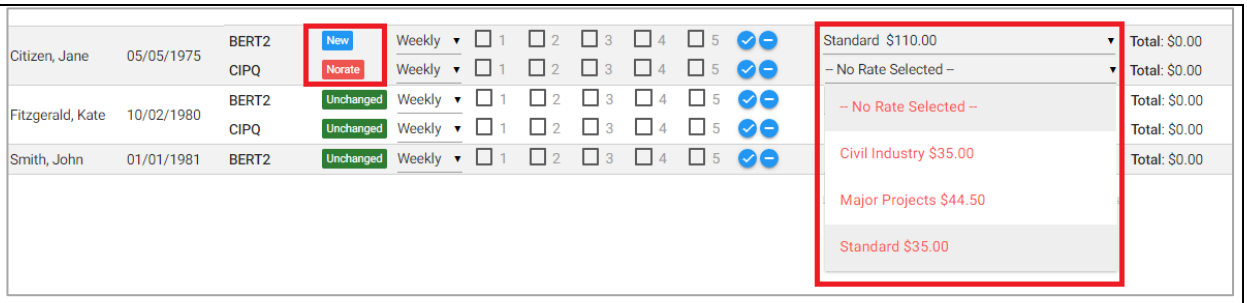


3.	Select the relevant Fund(s) for the Employee by clicking the checkbox that appears next to each Fund Name. A tick will appear, and the Add Member Button will become available selection.  Select Add Member button. ***Please Note**: You will also be required to select the rate for the employee for each Fund but this will be done on the contribution screen (refer to Section 4.3 Adding a Rate and saving Newly Added Members to your Contribution).*
4.	Upon selecting the Add Member button you will be navigated back the Member Management screen. The new employee will show at the top of the list with a status of new.  ***Please Note:** The member number for the new employee will not be created until you have saved the newly added member on the contribution.* ***Please Note:** the member will appear on the contribution screen however will not be saved on the contribution. You will need to return to the contribution and save it to ensure your members are added to the contribution correctly.* Continue to add any further new members to your contribution. Once you have added all the new members for the contribution, you will be required to add the rates for each member and save the contribution. These steps are done on the contribution screen. Refer to Section 4.3 Adding a Rate and saving Newly Added Members to your Contribution.

4.3 Adding a Rate and saving Newly Added Members to your Contribution

Once you have added all the new members for the contribution in the member management screen, you will be required to add the rates for each member and save the contribution. These steps are done on the contribution screen.

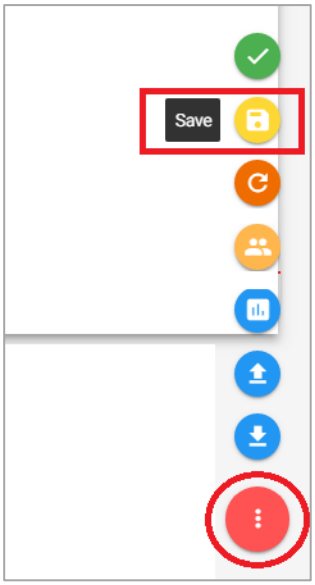
Step No	Step Description
1.	Navigate back to the Contribution screen by either by selecting the Contributions option from the left hand side menu or selecting the Contributions icon from the actions list when you are on the member management screen.   The Contribution screen will display listing all members on the contribution. The newly added member(s) will appear at the top of the contribution with a status of No Rate.  ***Please Note:*** *You will be able to save the contribution at this stage without entering the rates for the new Members however you will not be able to submit your contribution until you have selected the Rate(s) for the newly added Members.*
2.	Select the rate for your new member(s) by selecting the applicable rate from the drop down. Once the rate has been selected the rate will populate and the members status will update to New.



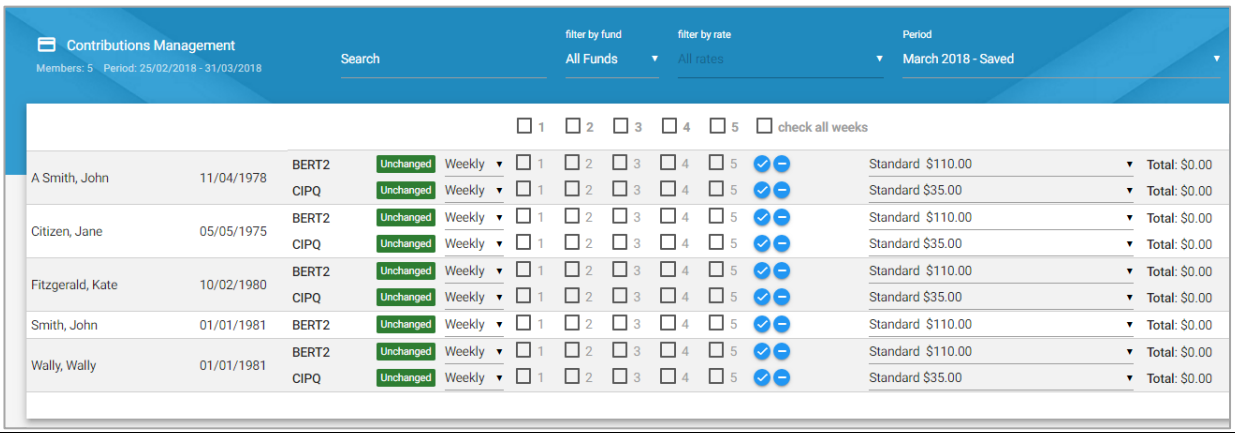
Handy Tip: *Once you have click on the Rate Drop down you can select the first letter of the rate you are looking for (I.e. 's' for standard) rather than scrolling through the drop down - and that rate will be highlighted automatically for you. Either hit enter or click the rate to select it.*

Once all the rates for your newly added members have been selected the contribution can be saved.

3. Using the action icon located in the bottom right hand corner of the screen select to Save the Contribution.

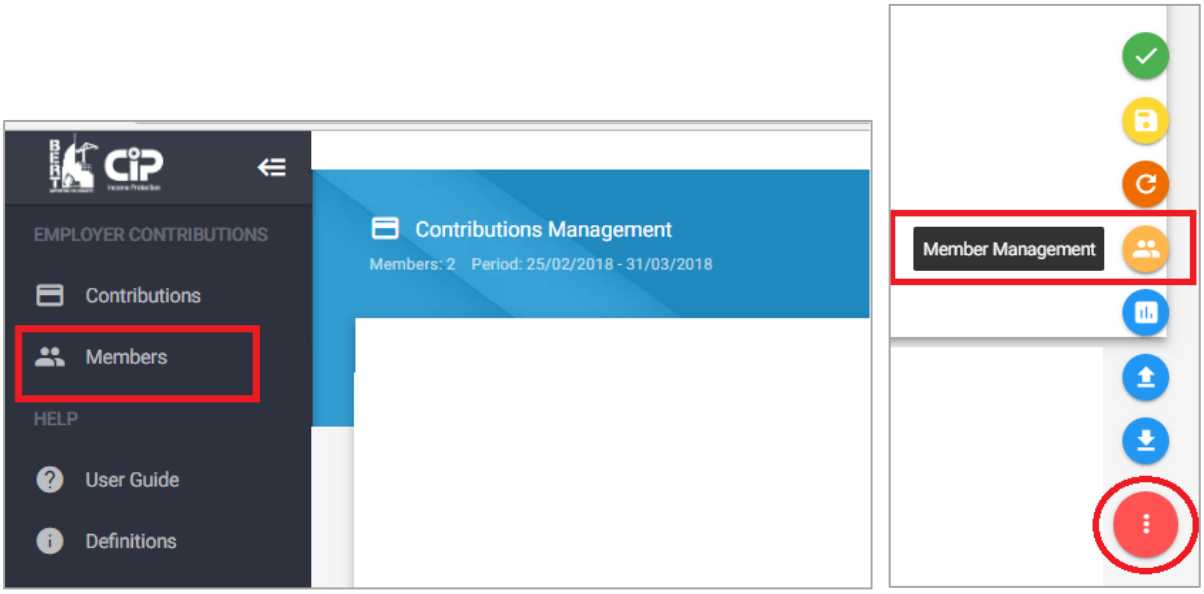
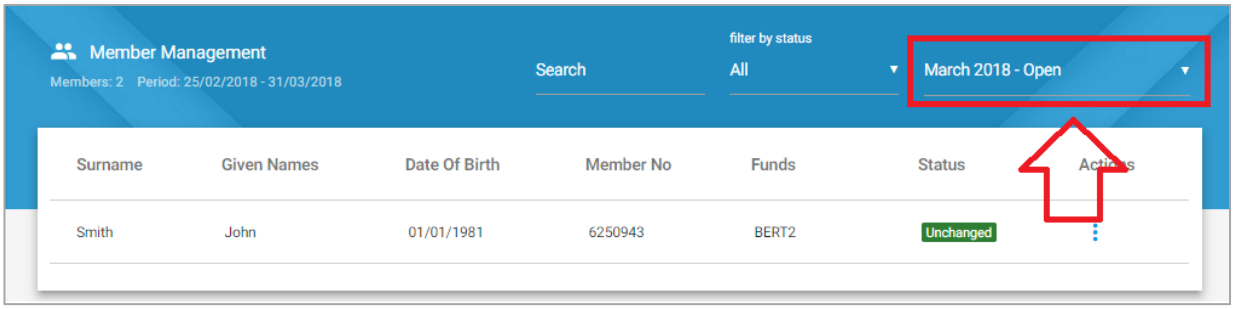


Once the contribution has been saved, the new member(s) will move into alphabetical order (both on the contribution and member management screens) and their status will update from New to Unchanged.

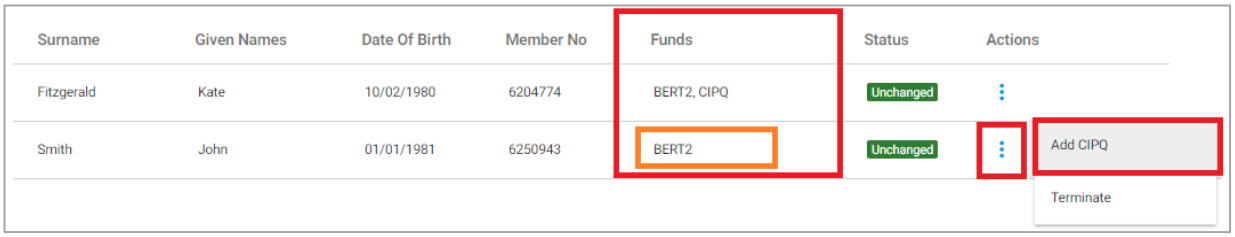


5. Adding a Fund for an existing Member

Where an employee is already on your contribution for one fund (i.e. BERT) you can easily add them to another fund (i.e. CIP) via the Member Action function.

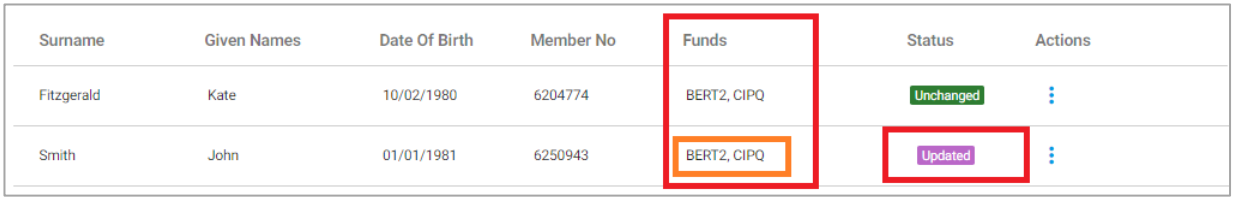
Step No	Step Description
1.	Navigate to the Member Management page, either by selecting the Members option from the left hand side menu or selecting the Member Management icon from the actions list on your contribution.  The Member Management screen will display listing all members on the contribution.  If required you can change the contribution period from this page using the Period drop down located in the top right hand corner.
2.	Locate the existing Employee you need to add a fund too. This will either be a member only in the BERT or CIP Fund. If your member does not appear on screen you may need to navigate to another page to locate them using the page numbers that appear along the bottom of the member list - remembering members are sorted in alphabetical order.

Select the 3 dots that appear under the Actions column located at the end of the employees row and select the Add {Fund} option.



Surname	Given Names	Date Of Birth	Member No	Funds	Status	Actions
Fitzgerald	Kate	10/02/1980	6204774	BERT2, CIPQ	Unchanged	
Smith	John	01/01/1981	6250943	BERT2	Unchanged	Add CIPQ Terminate

The Fund will be added and the Members status will now be updated.



Surname	Given Names	Date Of Birth	Member No	Funds	Status	Actions
Fitzgerald	Kate	10/02/1980	6204774	BERT2, CIPQ	Unchanged	
Smith	John	01/01/1981	6250943	BERT2, CIPQ	Updated	

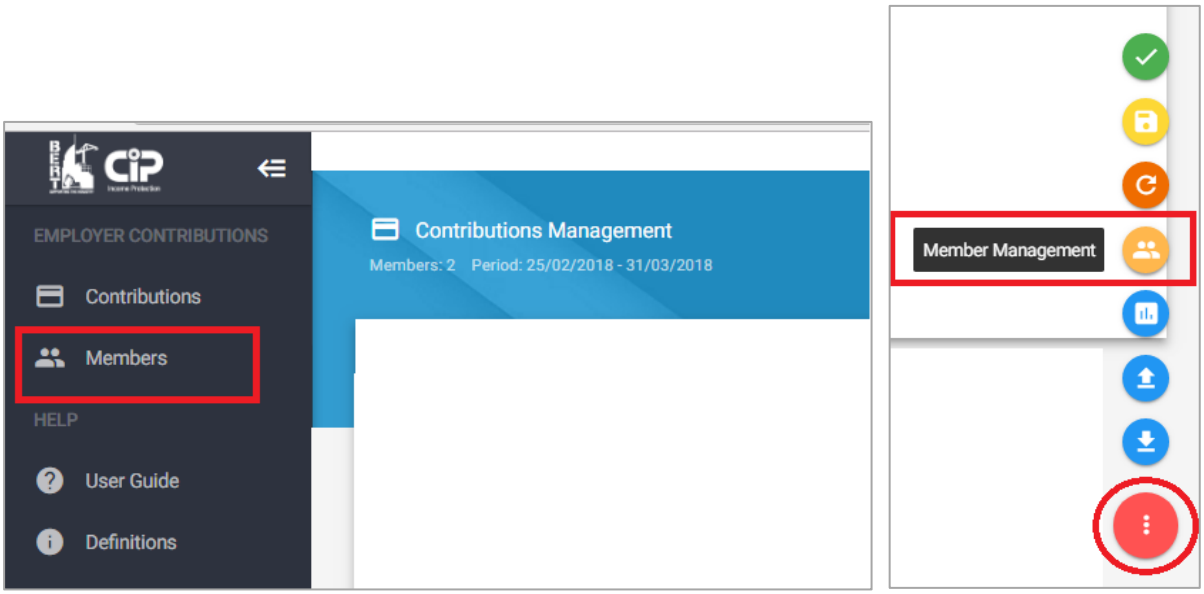
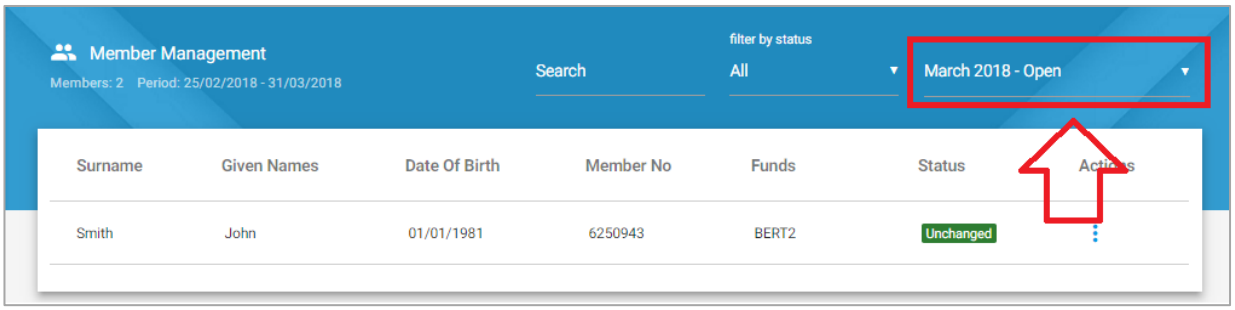
***Please Note**: the new fund will appear on the contribution for the member however will not be saved on the contribution. You will need to return to the contribution and save it to ensure the members new Fund is added to the contribution correctly. You will also be required to add the rate for the new fund. Refer to Section 4.3 Adding a Rate and saving Newly Added Members to your Contribution.*

6. Terminating an Employee from a Contribution

The easiest way to terminate an employee from your contribution is via the Member Management - Terminate function on an Open or Saved contribution.

If you need to terminate an employee form a contribution that has been submitted or paid you will need to contact the BERT / CIP Office on 1300 261 114 or send an email to enquiries@bert.com.au.

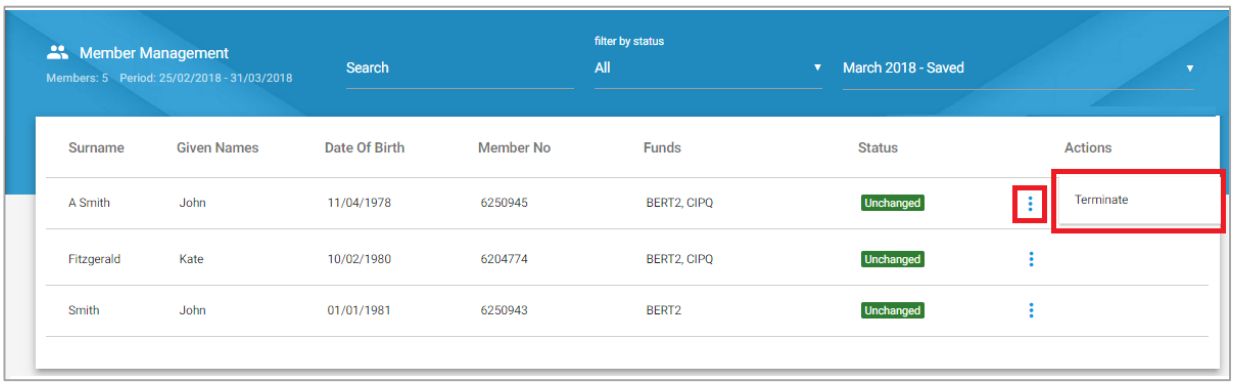
6.1 Terminating an Employee from a Contribution

Step No	Step Description
1.	Navigate to the Member Management page, either by selecting the Members option from the left hand side menu or selecting the Member Management icon from the actions list on your contribution.  The Member Management screen will display listing all members on the contribution.  Select the relevant Open or Saved contribution period from this page using the Period drop down located in the top right hand corner. *(**Please Note**: this selection can be done either on the Contribution screen prior to navigating across or from Member Management Screen).*

2. Locate the existing Employee you want to terminate.

If your member does not appear on screen you may need to navigate to another page to locate them using the page numbers that appear along the bottom of the member list - remembering members are sorted in alphabetical order.

Select the 3 dots that appear under the Actions column located at the end of the employees row and select the terminate option.

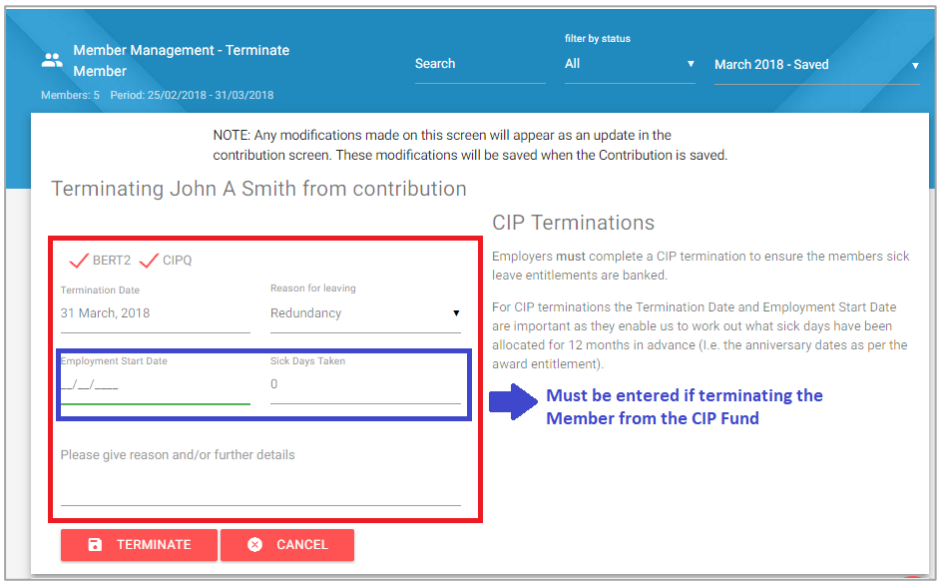


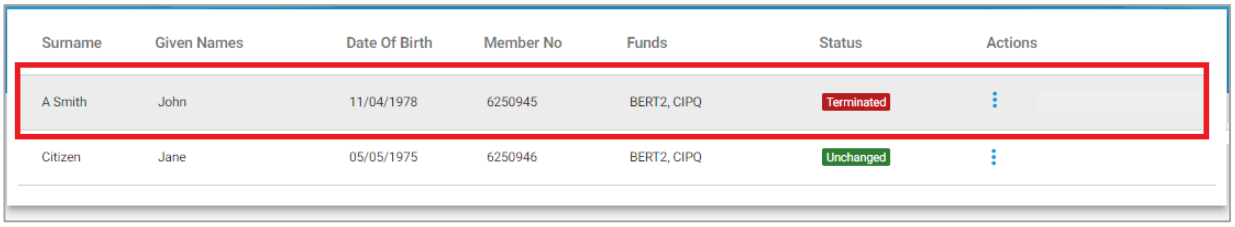
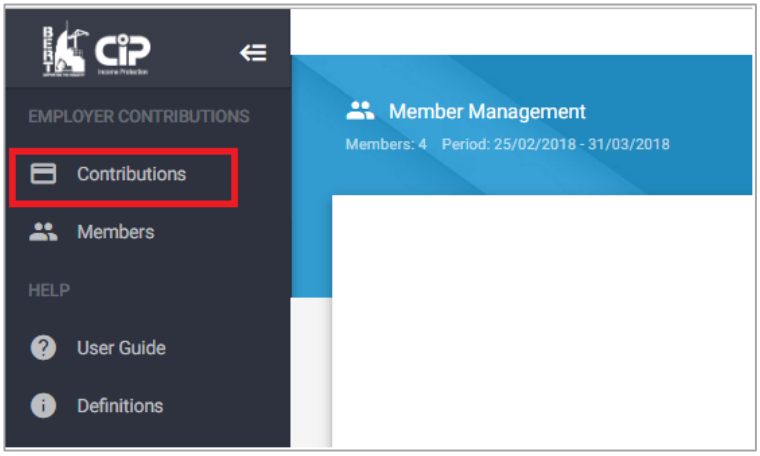
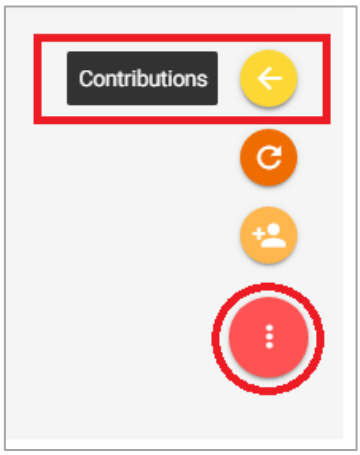
The Terminate Member screen will display.

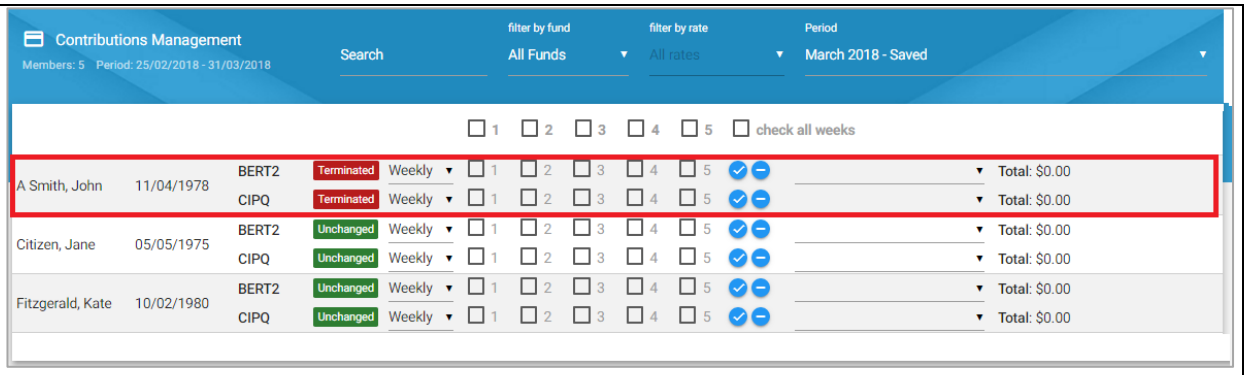
3. Select the relevant Fund(s) to terminate the member from by checking the checkbox that appears in front of each Fund Name. A tick will appear and the Terminate Button will become available for selection.

The Termination Date will default to be today's date. If required you can select a different date by clicking in the field and using the calendar picker to re-enter the correct termination date.

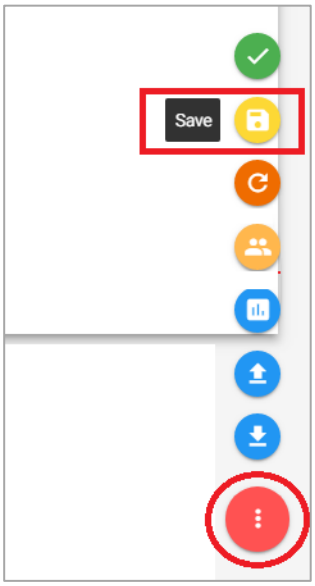
You will also be required to select the reason for leaving using the drop down before you can process the termination. Once the reason has been selected it will populate in the field.



	Please Note: *If you have elected to terminate the member from the CIP Fund you will be required to enter the members employment start date of fulltime employment and the number of sick days taken during employment. This information is used to calculate the employee's portable sick days that they have accrued during fulltime employment with you company.* Select Terminate button.
4.	Upon selecting the Terminate button you will be navigated back to the Member Management screen. The terminated member will show with a status of Terminated.  ***Please Note:*** *the member will appear on the contribution screen as terminated however the termination will not yet be saved. You will need to return to the contribution and save it to ensure your terminations are recorded on the contribution correctly.* Continue to terminate any further members from the contribution. Once you have completed your terminations for the contribution period, you will be required to enter any weeks the employee(s) were entitled to in the contribution period if there were any. This is done on the contribution screen. Refer to Section 7. Processing a Contribution.
5.	Navigate back to the Contribution screen by either by selecting the Contributions option from the left hand side menu or selecting the Contributions icon from the actions list when you are on the member management screen.   The Contribution screen will display listing all members on the contribution. The newly terminated member(s) will appear with a status of Terminated.



Using the action icon located in the bottom right hand corner of the screen select to Save the Contribution.



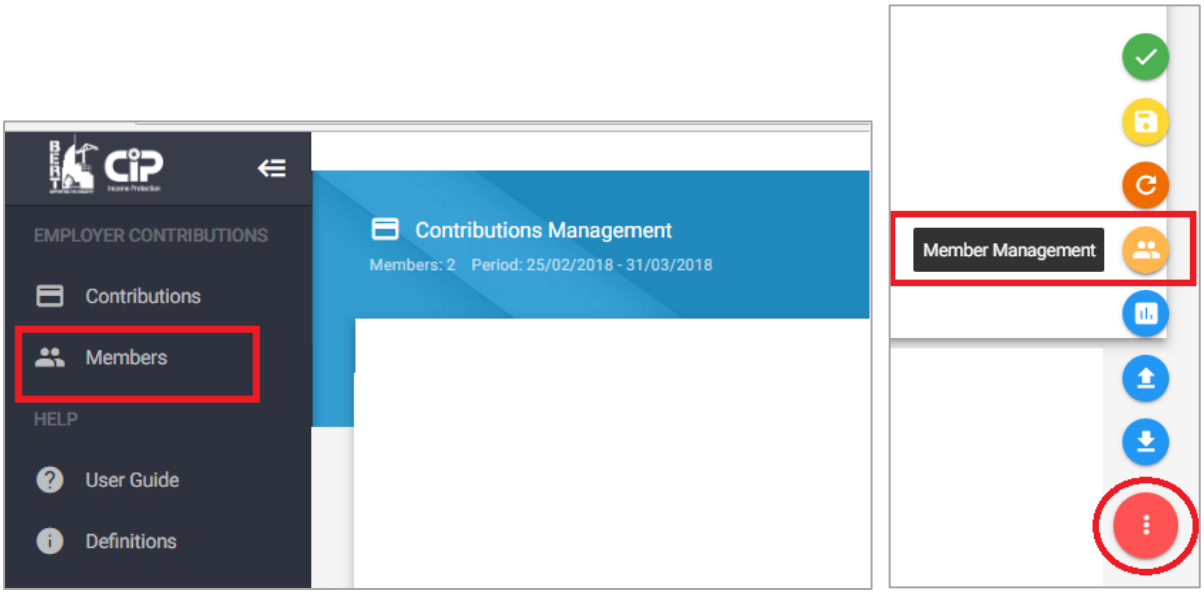
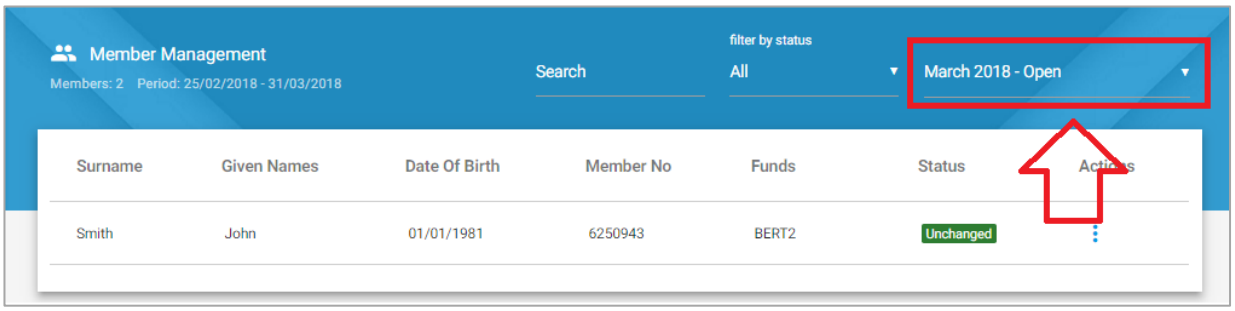
Navigate to the next month's contribution. If it is in an open status the member will automatically be removed from that contribution.

NOTE:

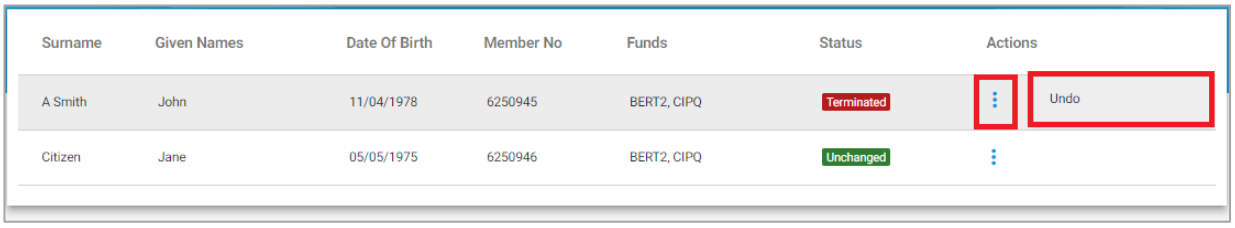
- It is possible to terminate your employee from one Fund only (i.e. BERT2) and keep them on your contribution for another fund (i.e. CIP)
- You should terminate a member from a CIP contribution where the member is over 70 years of age.
- If you have a saved contribution and you want to terminate an employee, all periods after the saved contribution must be open. Where subsequent period are also saved, you will only be able to terminate the member from the latest saved contribution.

6.2 Undo a Termination

Where you have terminated an employee off your contribution in error you can easily undo the termination via the Member Management action functions.

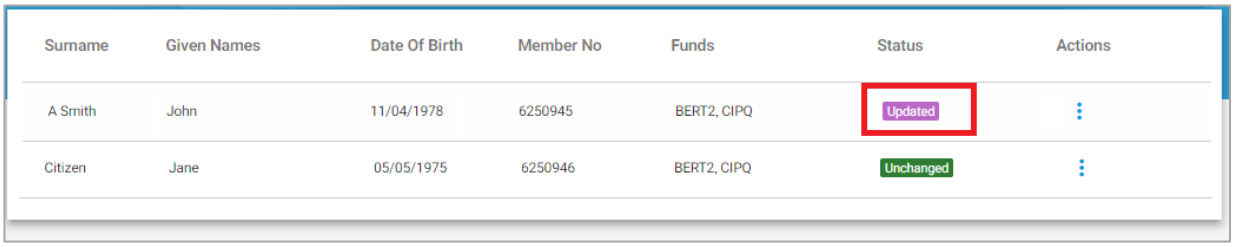
Step No	Step Description
1.	Navigate to the Member Management page, either by selecting the Members option from the left hand side menu or selecting the Member Management icon from the actions list on your contribution.  The Member Management screen will display listing all members on the contribution.  If required you can change the contribution period from this page using the Period drop down located in the top right hand corner.
2.	Locate the existing Employee you need to undo the termination for. The member will have a status of Terminated. If your member does not appear on screen you may need to navigate to another page to locate them using the page numbers that appear along the bottom of the member list - remembering members are sorted in alphabetical order.

Select the 3 dots that appear under the Actions column located at the end of the employees row and select the Undo option.



Surname	Given Names	Date Of Birth	Member No	Funds	Status	Actions
A Smith	John	11/04/1978	6250945	BERT2, CIPQ	Terminated	Undo
Citizen	Jane	05/05/1975	6250946	BERT2, CIPQ	Unchanged	

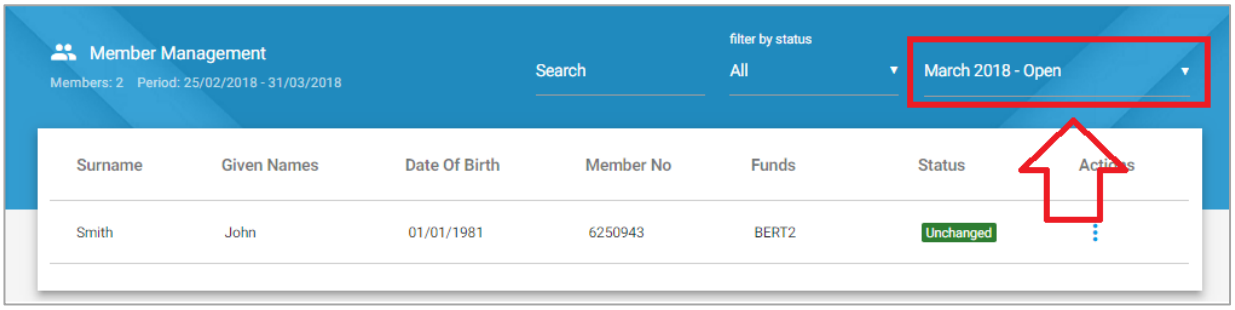
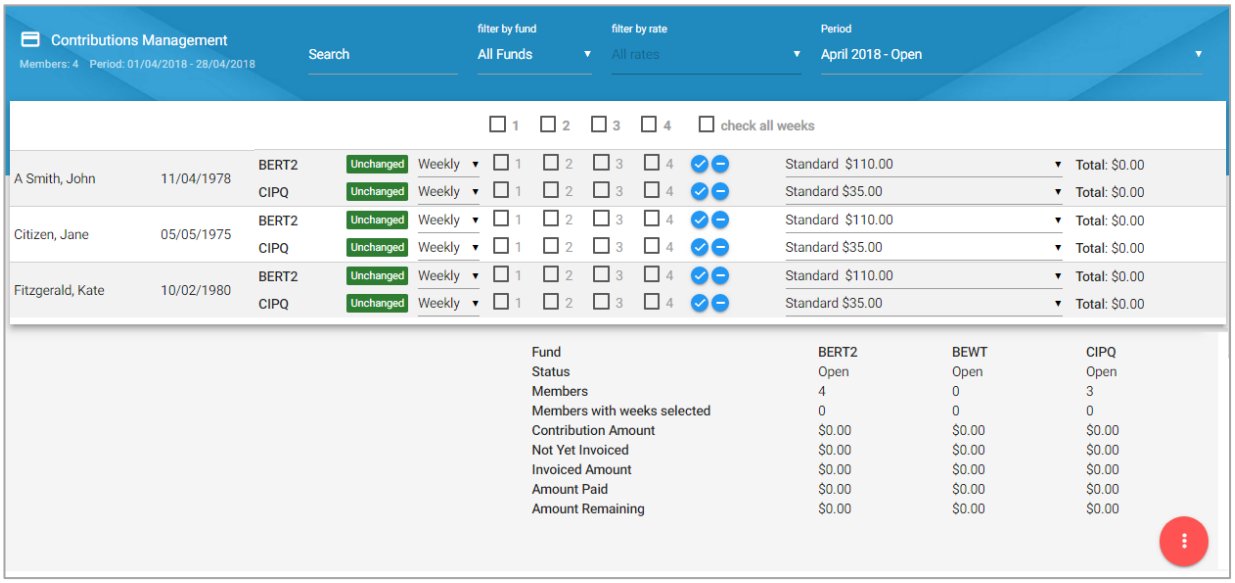
The Termination will be undone and the Members status will now be updated.



Surname	Given Names	Date Of Birth	Member No	Funds	Status	Actions
A Smith	John	11/04/1978	6250945	BERT2, CIPQ	Updated	
Citizen	Jane	05/05/1975	6250946	BERT2, CIPQ	Unchanged	

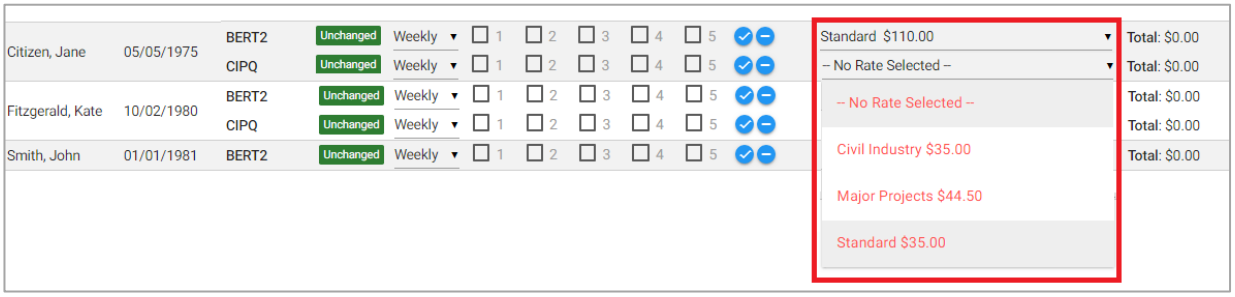
***Please Note**: the undo of the members termination will appear on the contribution however will not be saved on the contribution. You will need to return to the contribution and save it to ensure the member is not terminated from the contribution.*

7. Processing a Contribution – Standard Weeks

Step No	Step Description
1.	Navigate to an Open or Saved Contribution period. ***Please Note:*** *The contribution period will automatically be selected and display the oldest contribution outstanding. If required change the contribution period using the Period drop down located in the top right hand corner.*  The contribution will display for the period selected listing all members to be paid.  For each member a row will appear displaying the following information: • Members Details (including their full Name; DOB) ***Please Note:*** *To view the Member Number hover your mouse over the members name* • The Funds the member belongs to (i.e. BERT2; CIP) • The Members current status • Weeks worked checkboxes • The Members Rate At the bottom right hand of the screen is the Fund Status table which gives an overview of the contribution period for each fund including: • Status • Number of Members / Number of Members with weeks selected • Amounts for the Contribution

2. Confirm the rates for each member listed on the contribution; or if required select a new rate from the drop down selection. The rate that appears by default is based on the rate selected for the member from the previous contribution period.

To change a rate use the drop down and select the applicable rate by clicking it. Once the rate has selected the rate will populate and the members status will update to Updated.



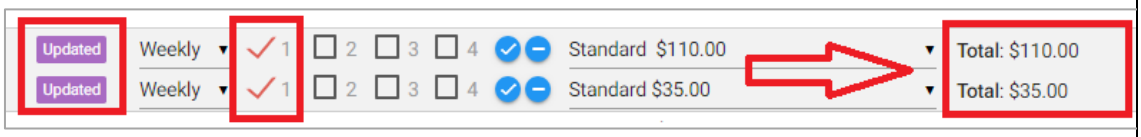
Handy Tip: *Once you have click on the Rate Drop down you can select the first letter of the rate you are looking for (I.e. 's' for standard) rather than scrolling through the drop down - and that rate will be highlighted automatically for you. Either hit enter or click the rate to select it.*

3. Add weeks to members for the period selected.

There are multiple ways to select how many weeks a member has worked for the period.

1. **Check individual week checkboxes for a member**

For each member manually select each individual week checkbox for the weeks worked for the Fund(s) in the period.



As each week is selected a tick will appear in the checkbox; the individual member's total amount for the period will tally to the right of the checkboxes for each Fund; and the members status will change to Updated.

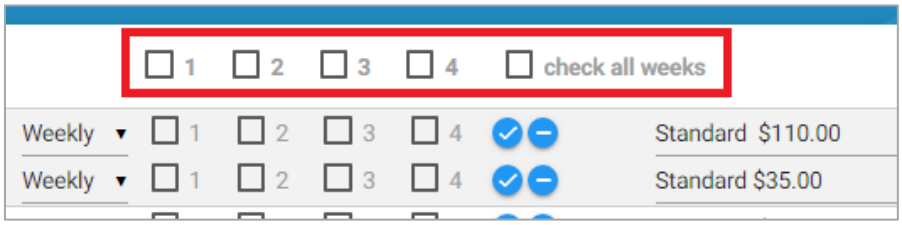
At the bottom of the screen, the Fund information will also automatically update.

Fund	BERT2	BEWT	CIPQ
Status	Open	Open	Open
Members	3	0	3
Members with weeks selected	1	0	1
Contribution Amount	$110.00	$14.20	$35.00
Not Yet Invoiced	$110.00	$14.20	$35.00
Invoiced Amount	$0.00	$0.00	$0.00
Amount Paid	$0.00	$0.00	$0.00
Amount Remaining	$0.00	$0.00	$0.00

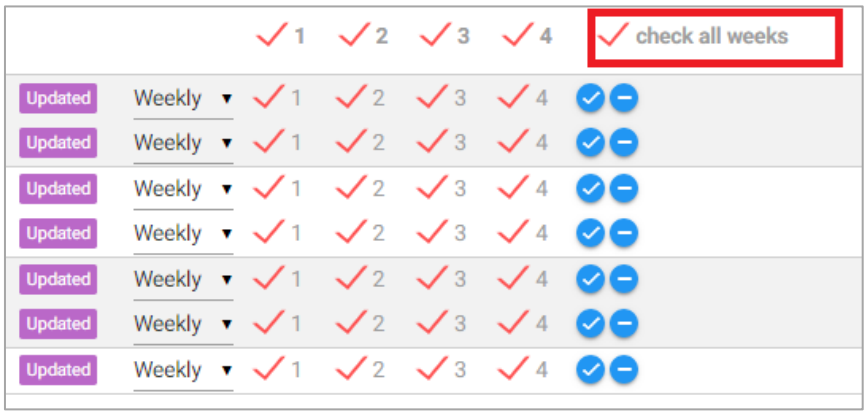
Please Note: *For employers* contributing *to the BEWT Fund, this amount will automatically be calculated based on the BERT2 member's weeks worked and BEWT rate*.

2. Using the Weeks 1 - 4 or Check All Weeks checkboxes – All Members

Across the top of the contribution you will see the 1 - 4 and check all weeks checkboxes.



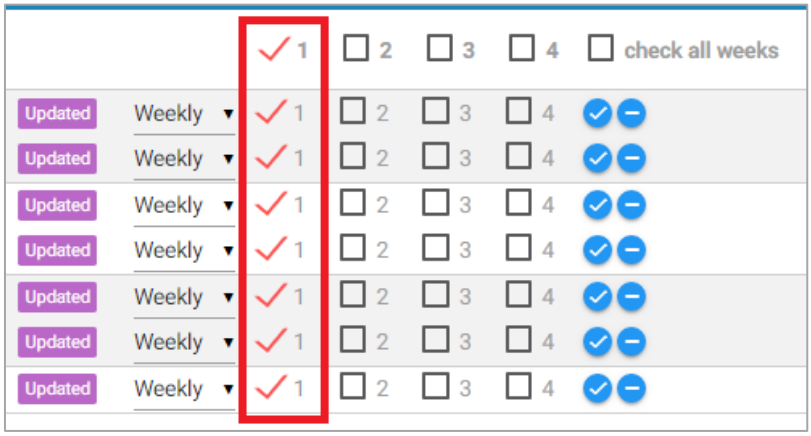
To select **all weeks** for all members on the contribution use the check all weeks checkbox.



Ticks will automatically appear for all weeks for all members. Each member's total amount for the period will tally; and all members will have an updated Status. The fund information at the bottom of the screen will also update.

Uncheck the box to remove all weeks for all members

To select a **specific week (i.e. Week 1)** or for all members check the relevant week checkbox.



Ticks will automatically appear for the week selected for all members. Each member's total amount for the period will tally; and all members will have an updated Status. The fund information at the bottom of the screen will also update.

Uncheck the Week box to remove that week for all members.

3. Using the Member check /remove all weeks

Located to the right of the week checkboxes you will see a tick and a dash

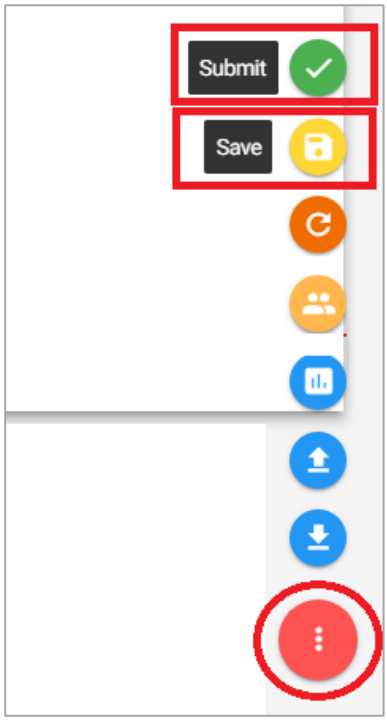
To select all weeks for a member check the blue tick.

Ticks will appear in all the weeks for that member; the individual member's total amount for the period will tally to the right of the checkboxes for each Fund; and the members status will change to Updated. At the bottom of the screen, the Fund information will also automatically update.

Click the dash to remove the ticks for all weeks for that member.

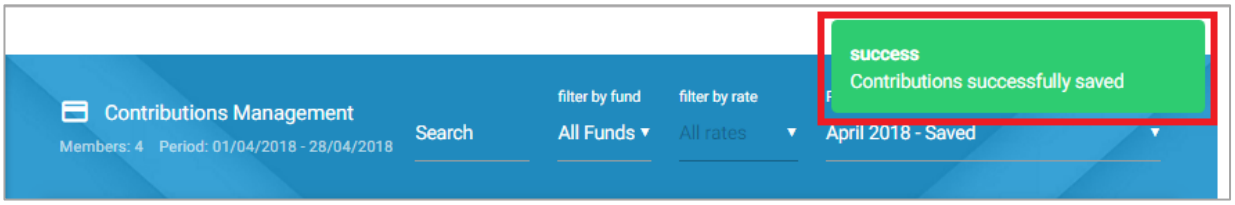
4. Once all rates and weeks have been indicated on the contribution, and the totals for members and overall amounts checked the contribution is ready to be saved or submitted.

Using the action icon located in the bottom right hand corner of the screen select to Save or Submit the Contribution.



Saving Your Contribution

If you choose to Save the contribution an information message will display briefly in the top right hand corner of the screen indicating that the contribution has saved successfully.

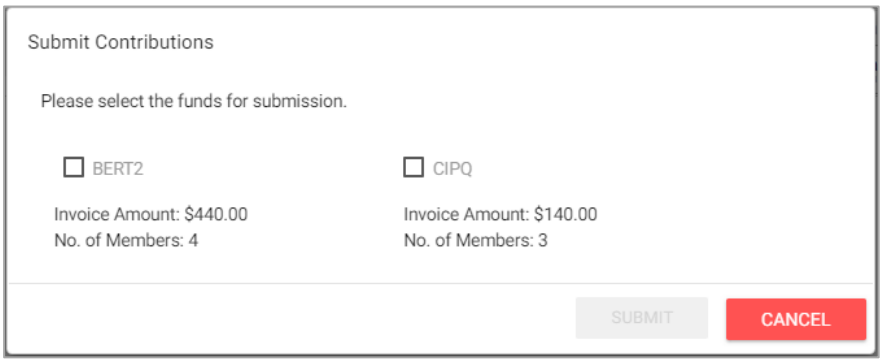


This means your contribution has essentially been saved as a draft and no information has been sent across to the internal financial system.

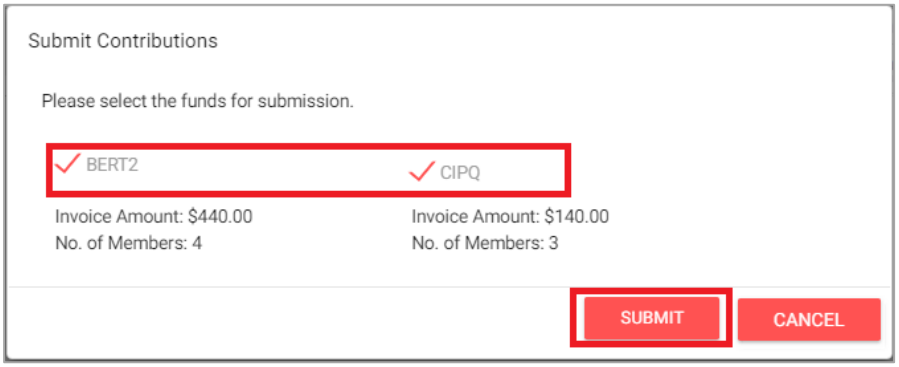
If the contribution was in an Open status it will be updated to Saved. All the Member status' will update to Unchanged.

Submit Your Contribution

When selecting to Submit a popup will display on screen for you to select the funds for submission. You will be able to review the number of members and the invoice amount for the contribution.

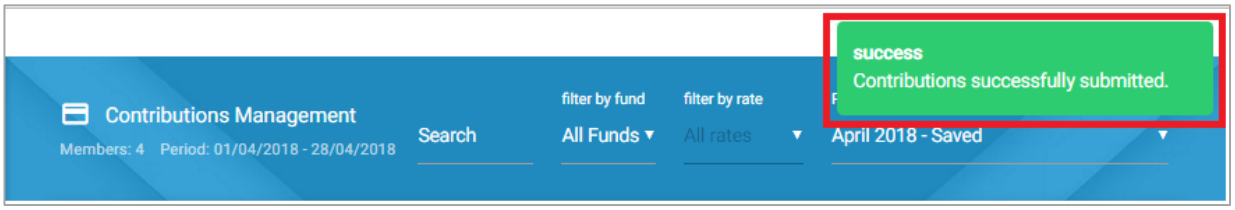


Select the relevant Fund(s) to submit by clicking the checkbox that appears next to each Fund Name. A tick will appear, and the Submit button will become available for selection.



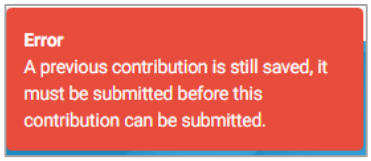
Please Note: *If you are in more than once fund, (i.e. BERT and CIP) you can elect to submit all funds at once or individual funds if required.*

Please Note: *If a fund has previously been submitted; or if the CIP contribution is passed 55 days the Fund checkbox will not be available for selection.*

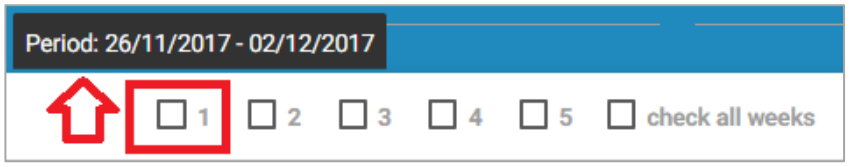
	Select Submit button An information message will display briefly in the top right hand corner of the screen indicating that the contribution has successfully submitted.  Once Fund(s) have been submitted the status will update to Submitted. The overall contribution status will only update to Submitted when all Funds have been submitted for that period. An invoice will be generated for payment.

NOTE:

- You will not be able to submit a Contribution until all previous contributions have been submitted. An error message will display on screen if there are previous open/saved contributions to be submitted



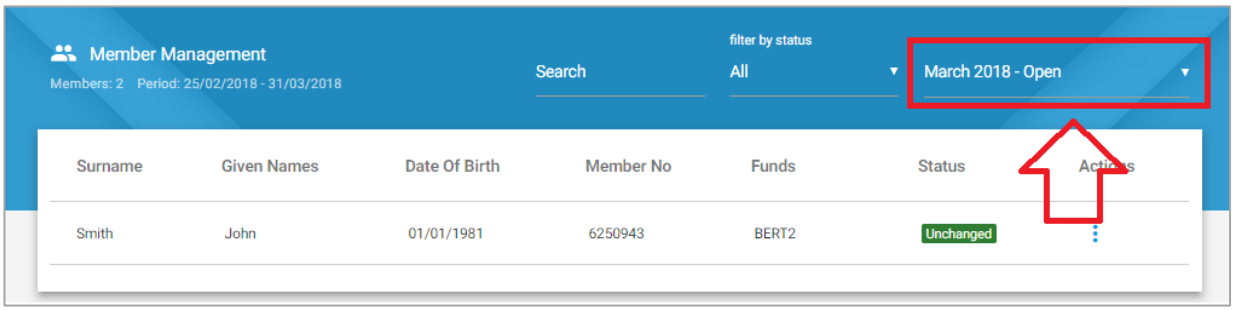
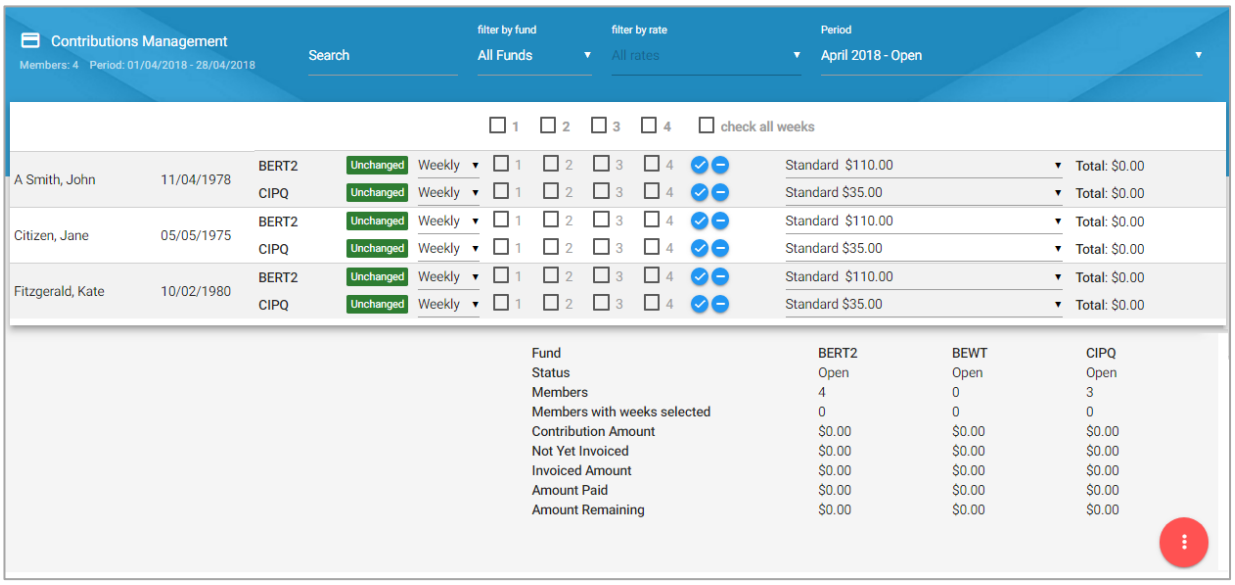
- To see the dates for each week mouse over the weeks checkbox. The period start and end date for that week will display on screen to the right of the checkbox

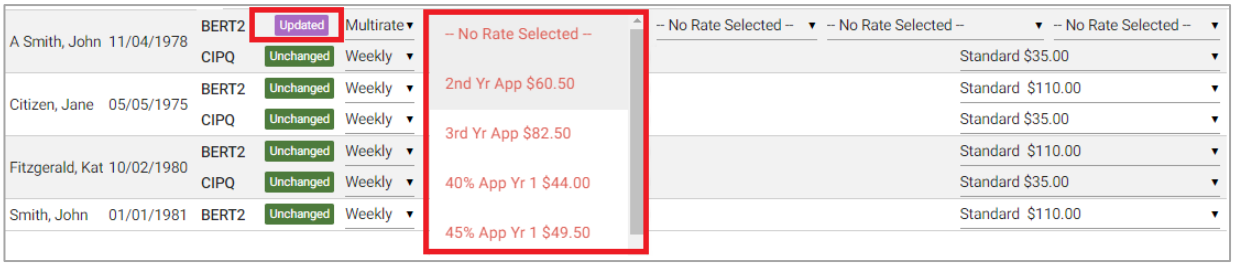


- The BERT2 and CIP accounts are linked, and therefore if a member is part of both Funds a tick in 1 fund will automatically populate a tick in the other fund.

8. Processing a Contribution – Multi-Rate Weeks

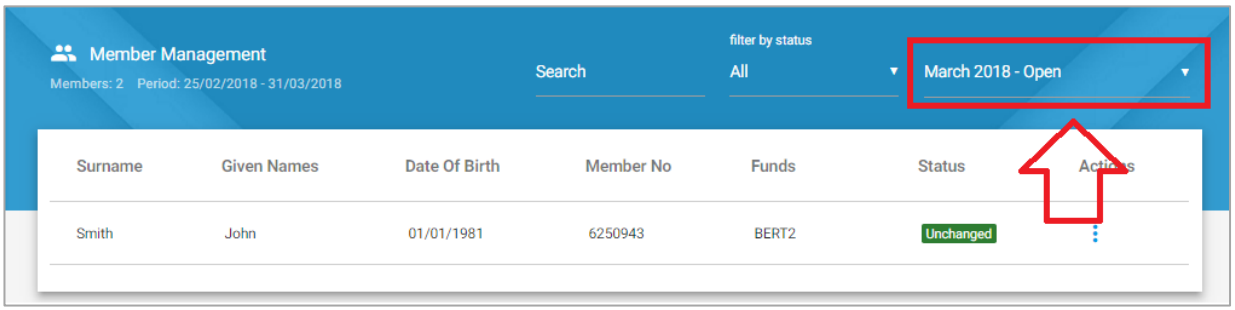
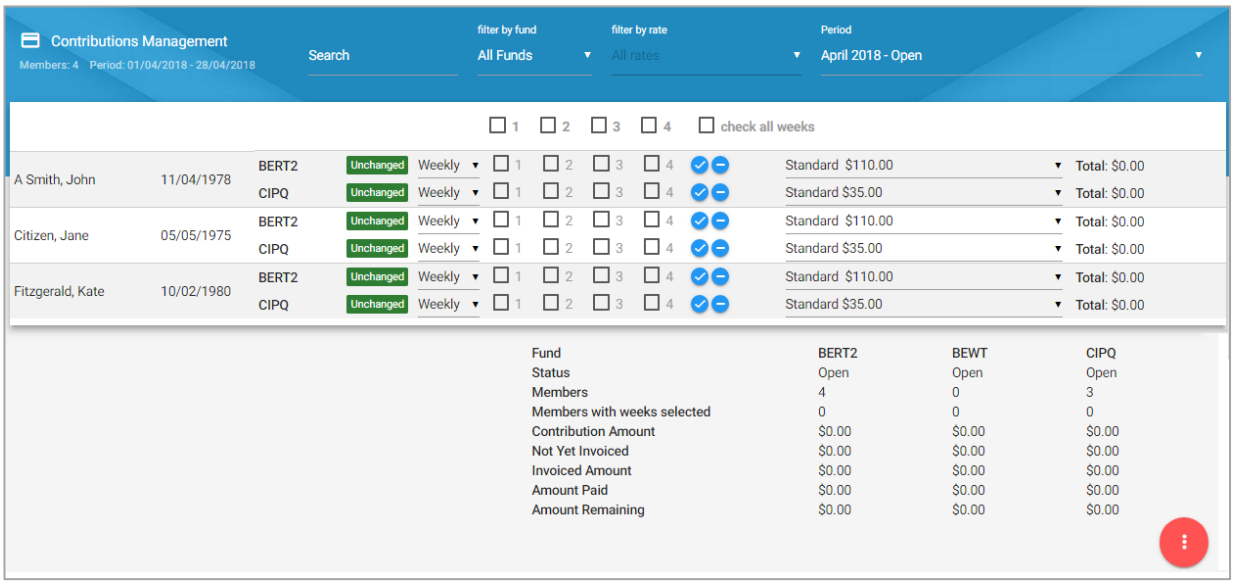
On occasion, you may need to enter a change of rate part way through a contribution period. This can be done by selecting the Multi-rate checkbox on a fund for a member on the contribution screen.

Step No	Step Description
1.	Navigate to an Open or Saved Contribution period. ***Please Note:*** *The contribution period will automatically be selected and display the oldest contribution outstanding. If required change the contribution period using the Period drop down located in the top right hand corner.*  The contribution will display for the period selected listing all members to be paid. 
2.	Locate the member you need to set a multi-rate for. If your member does not appear on screen you may need to navigate to another page to locate them using the page numbers that appear along the bottom of the member list - remembering members are sorted in alphabetical order.

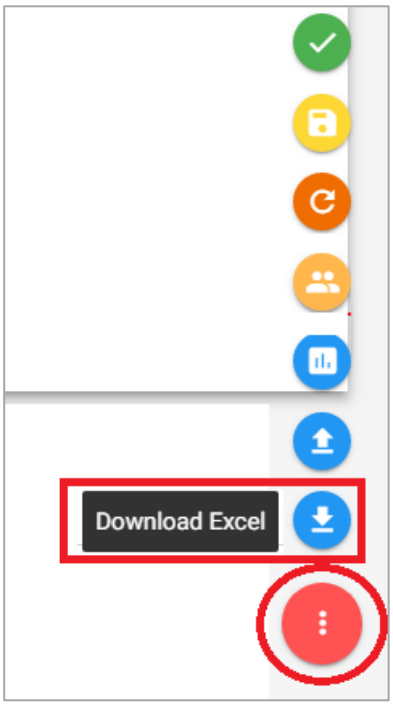
3.	Select the Contribution Frequency drop down (located in between the Status and week checkboxes) and select Multi-rate option. Once select the week's checkboxes will be updated to dropdowns for you to select the required rate for each week on the contribution.
4.	Select the rate for each week by selecting the applicable rate from the drop down. Once the rate has been selected the rate will populate and the members status will update to Updated.  ***Handy Tip:*** *Once you have click on the Rate Drop down you can select the first letter of the rate you are looking for (I.e. 's' for standard) rather than scrolling through the drop down - and that rate will be highlighted automatically for you. Either hit enter or click the rate to select it.* Both BERT2 and CIP Funds can have multi-rates applied. Once the multi-rates have been selected for the member for the period weeks the contribution can be processed as per usual. Refer to Section 7. Processing a Contribution.

9. Contribution File Download and Upload

You have the option to download and complete your contribution in an excel template which then can be uploaded upon completion.

Step No	Step Description
1.	Navigate to an Open or Saved Contribution period. ***Please Note:*** *The contribution period will automatically be selected and display the oldest contribution outstanding. If required change the contribution period using the Period drop down located in the top right hand corner.*  The contribution will display for the period selected listing all members to be paid. 

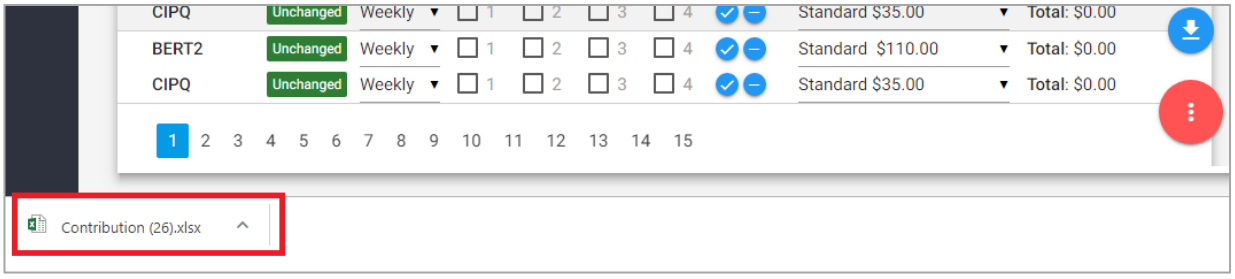
2. Using the action icon located in the bottom right hand corner of the screen select to Download Excel.



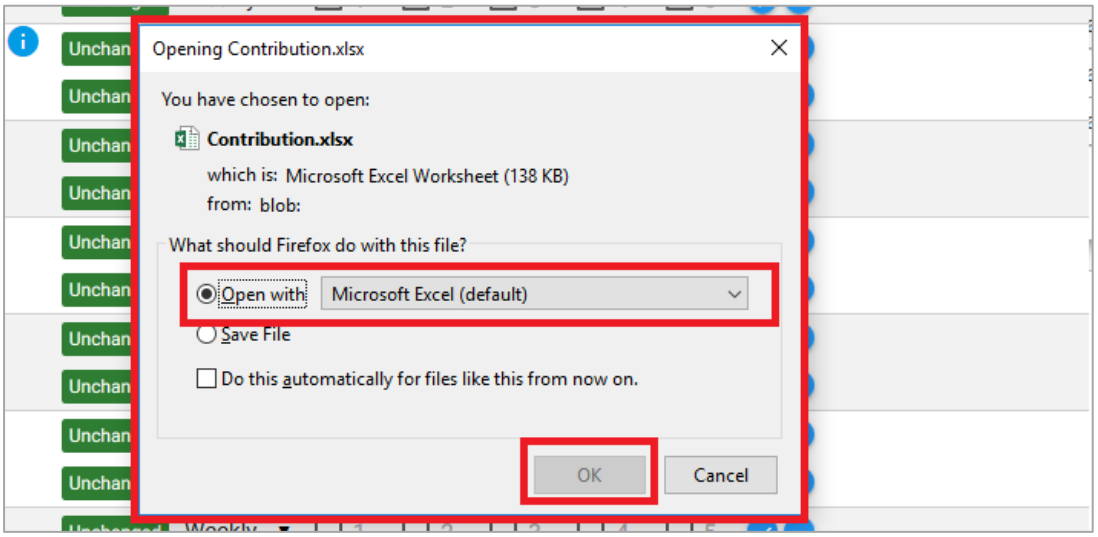
The contribution will download as an excel document.

***Please Note**: The document will download depending on the browser you are using.*

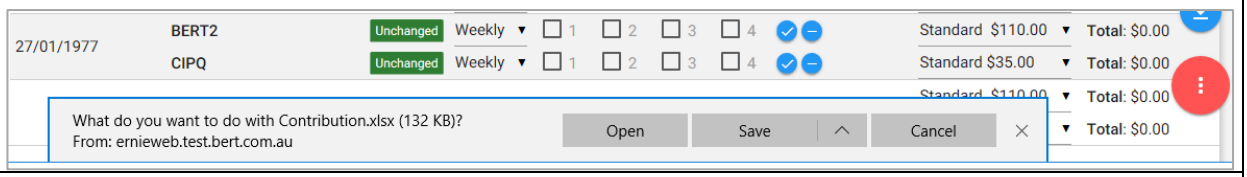
In **Google Chrome** the document(s) selected to be downloaded will appear in the bottom left hand corner of your screen. To open click the document



In **Firefox** a download dialogue box will appear on screen to download Select to Open – click Ok to open the document.

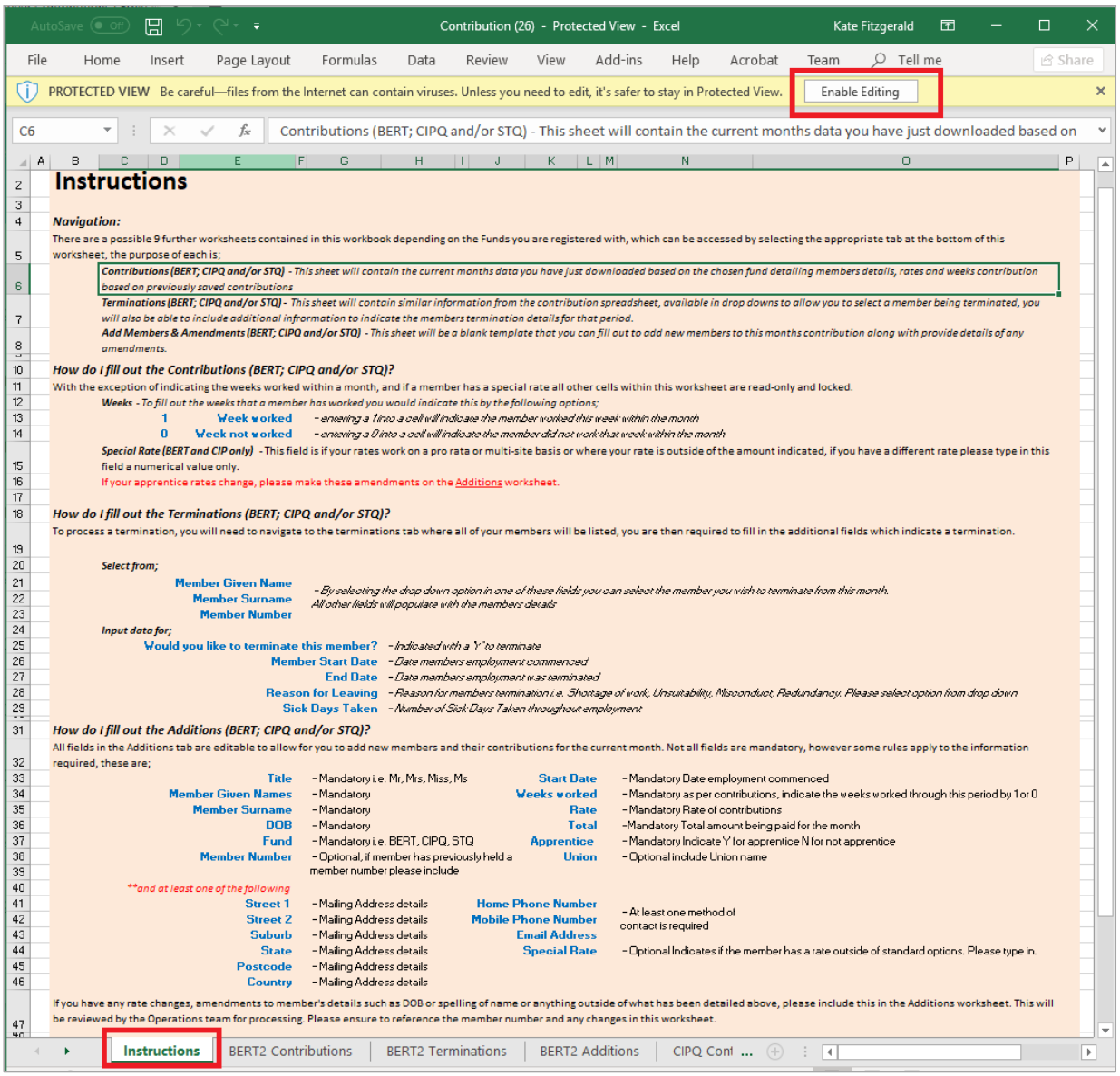


In **Edge** you will be asked to Open or Save the downloaded document. This appears at the bottom of your screen.

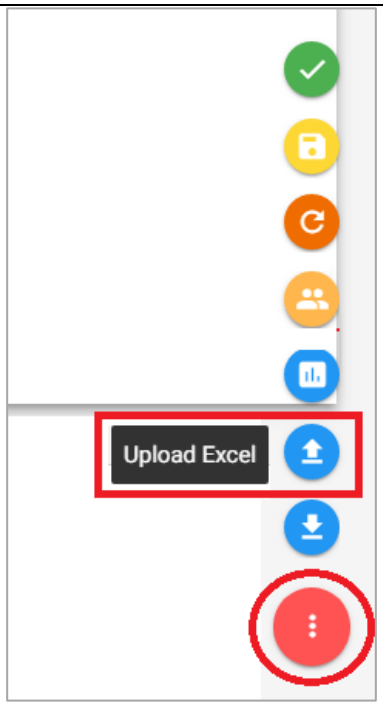


3. Once the Excel document has opened select to Enable Editing.

You will locate Instruction on how to use the template on the First tab.



4. Once you have completed, saved and closed the excel Contribution template, navigate back to contribution and using the action icon located in the bottom right hand corner of the screen select to upload Excel.



You will be asked to select the file to upload. Once uploaded the amendments made on via the excel template will display on screen and the Contribution will be in a Saved Status.

NOTE: If you have only made changes on BERT Contributions tab and not the CIP Contributions tab on the excel template these changes will not show on the Contribution. Only weeks checked in both Funds (BERT and CIP) will show on the Contribution screen.

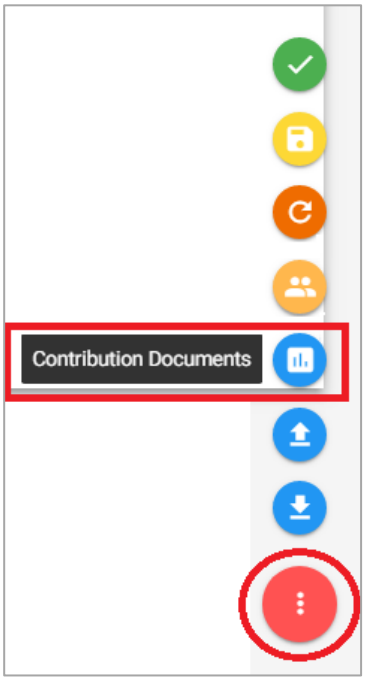
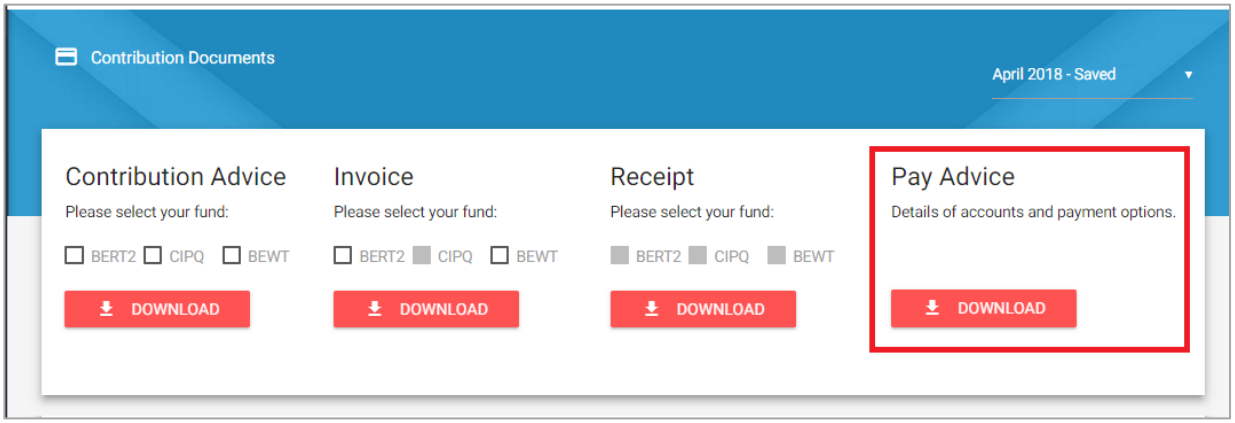
NOTE: Any additions or terminations made on the template will not display on the Contribution screen. These will be managed internally by the BERT Operations Team.

10.Paying Your Contribution

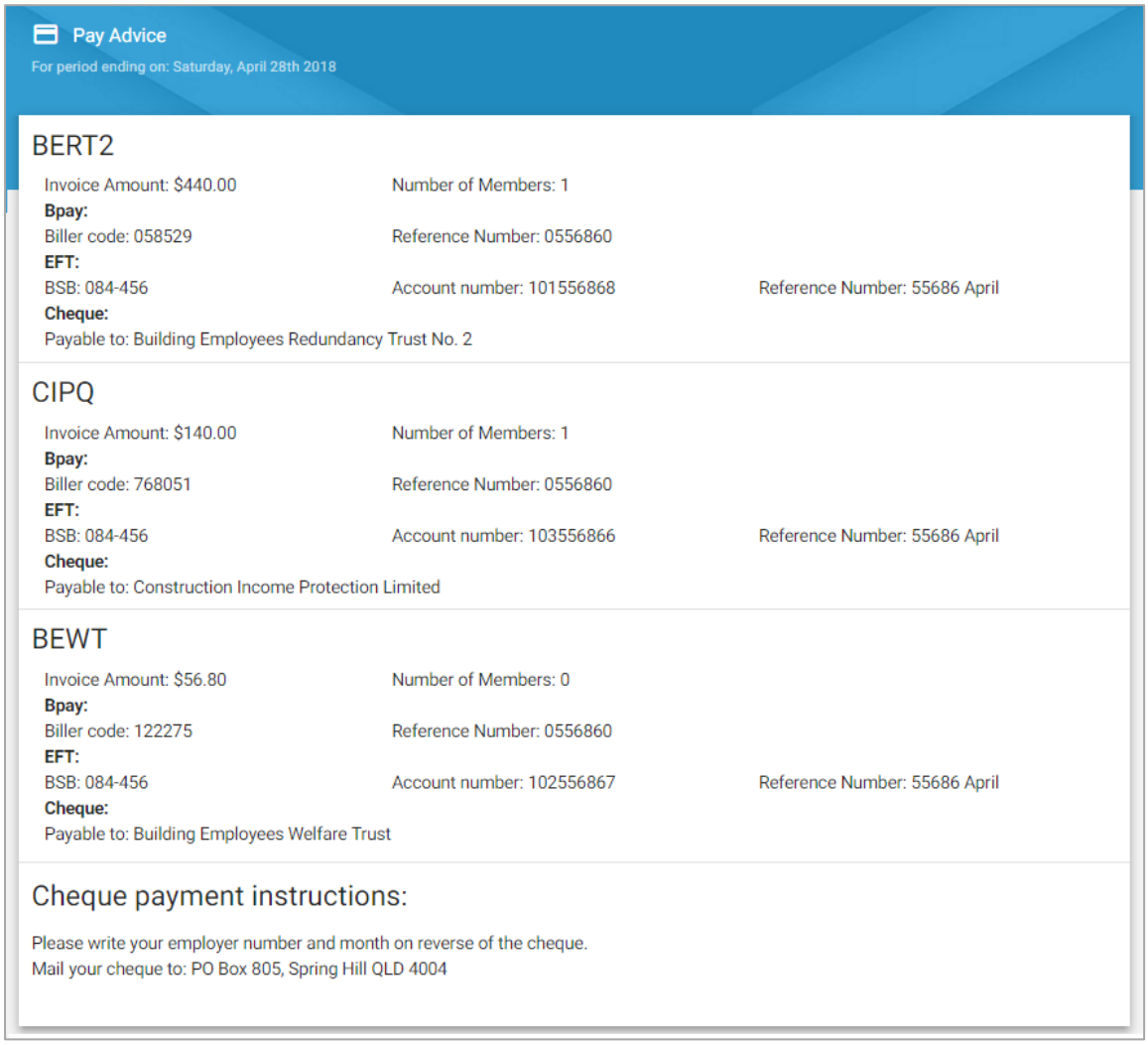
We offer three ways to pay your contribution, by EFT, BPAY or Cheque. You should submit your contribution online prior to sending your payment through.

10.1 Locating your Payment Options

Payment Options such as the EFT and Bank Account details are displayed on page 2 of a contribution invoice, however you can also access your payment options via the Pay Advice Document no matter what status your contribution is in.

Step No	Step Description
1.	Navigate to the Contribution screen. Using the action icon located in the bottom right hand corner of the screen select the Contirbution Documents option.  The Contribution Documents screen will display.
2.	Select the Download button that appears under the Pay Advice section 

3. The Pay Advice Screen will display. For each Fund the BPAY; EFT and Cheque account details will display.



PAYING BY EFT

To pay your invoice by EFT login to your internet banking and for each fund you are paying enter:

- BSB Number
- EFT Account Number
- EFT Reference Number
- Invoice Amount

NOTE: There are **different account numbers** for each Fund, however the BSB and EFT Reference are the same

PAYING BY BPAY

To pay your invoice by BPAY login to your internet banking and for each fund you are paying enter:

- Biller Code
- BPAY Reference Number
- Invoice Amount

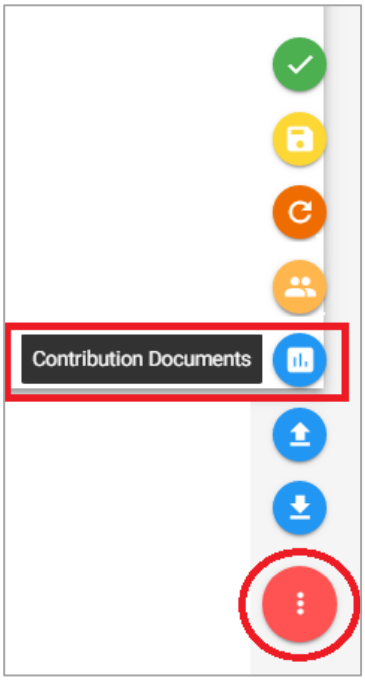
NOTE: There are **different account numbers** for each Fund, however the BSB and EFT Reference are the same

PAYING BY CHEQUE

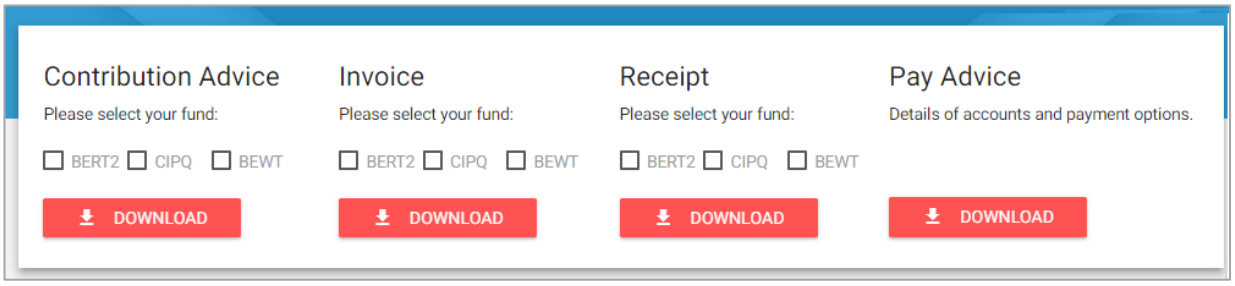
To pay your invoice by cheque a separate cheque should be made out for each fund you are paying. On the back of each cheque please write your employer number.

10.2 Locating Your Contribution Documents (Contribution Advice | Invoice | Receipt)

Step No	Step Description
1.	Navigate to the Contribution Documents by using the action icon located in the bottom right hand corner of the Contribution screen and selecting the Contribution Documents option.



The Contribution Documents screen will display.



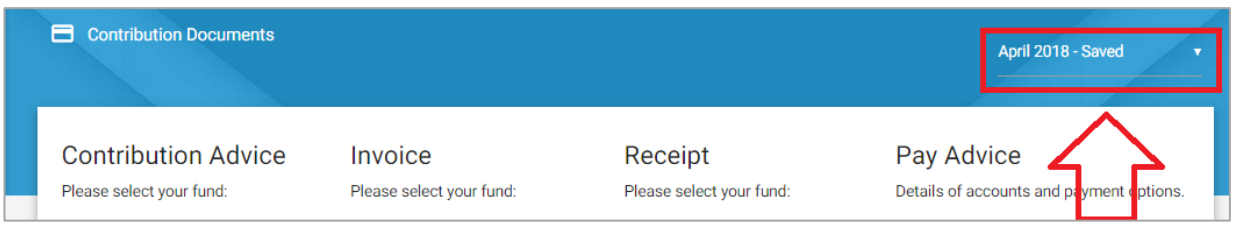
Depending on the Status of the Contribution you will be able to download your contribution documents.

Open or Saved Status – Contribution Advice is available for download

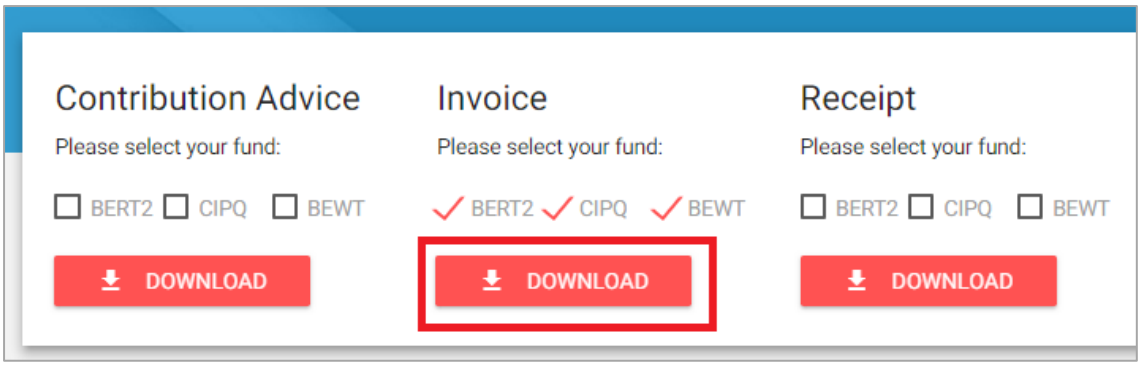
Submitted Status – Contribution Advice and Invoices are available for download

Paid Status – Contribution Advice; Invoices and Receipts are available for download

Please Note: *The contribution period will automatically be selected and display the period selected from the contribution screen. If required change the contribution period using the Period drop down located in the top right hand corner.*



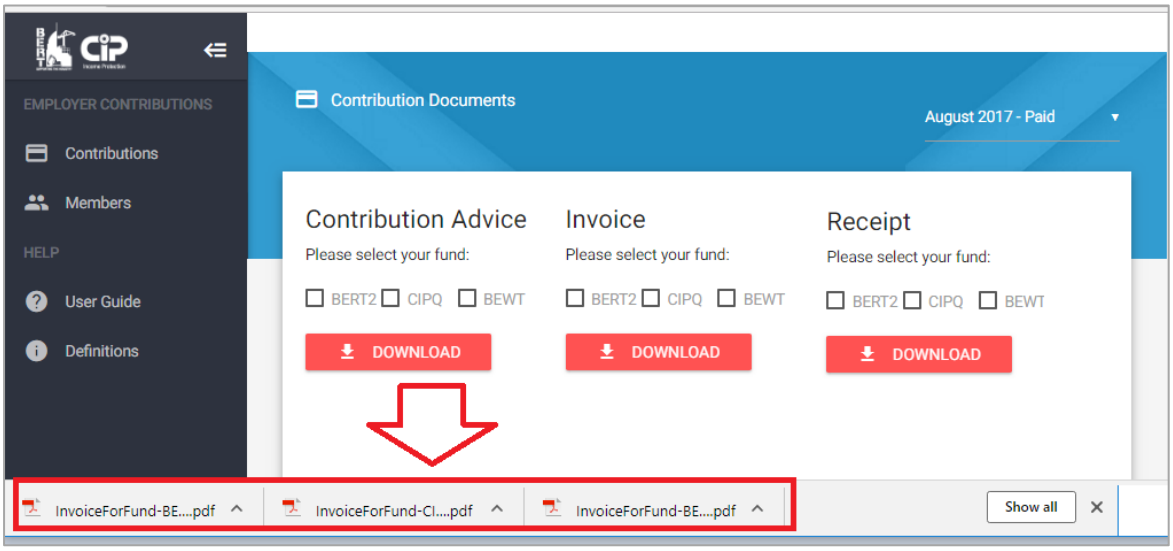
2. Select the relevant Fund or Funds for the Document you wish to download by clicking the checkbox that appears next to each Fund Name. A tick will appear.



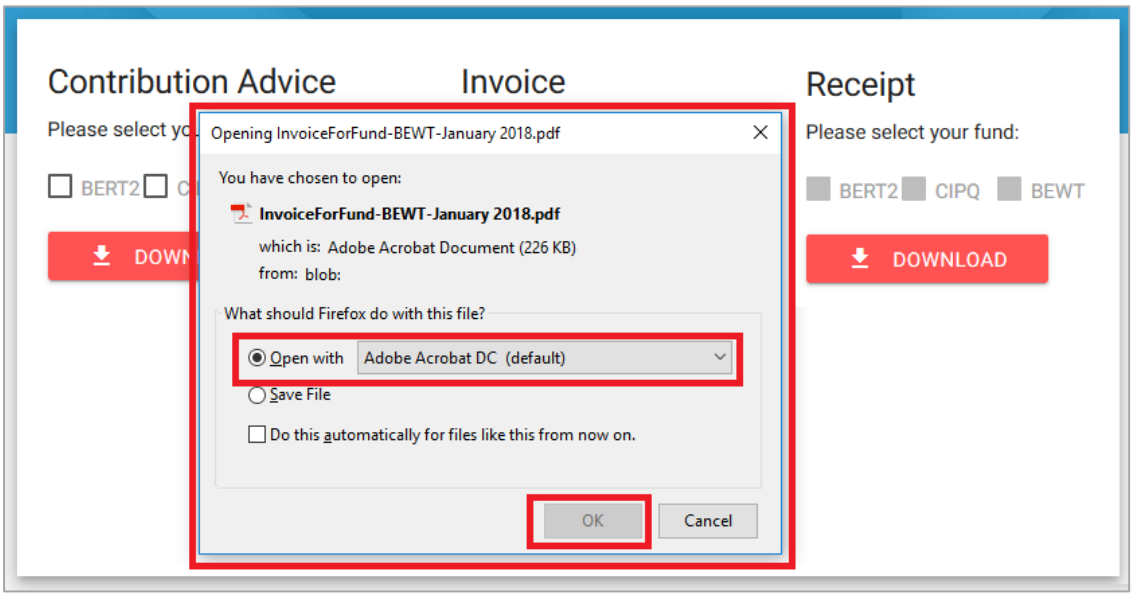
Select Download and follow the prompts to open the document.

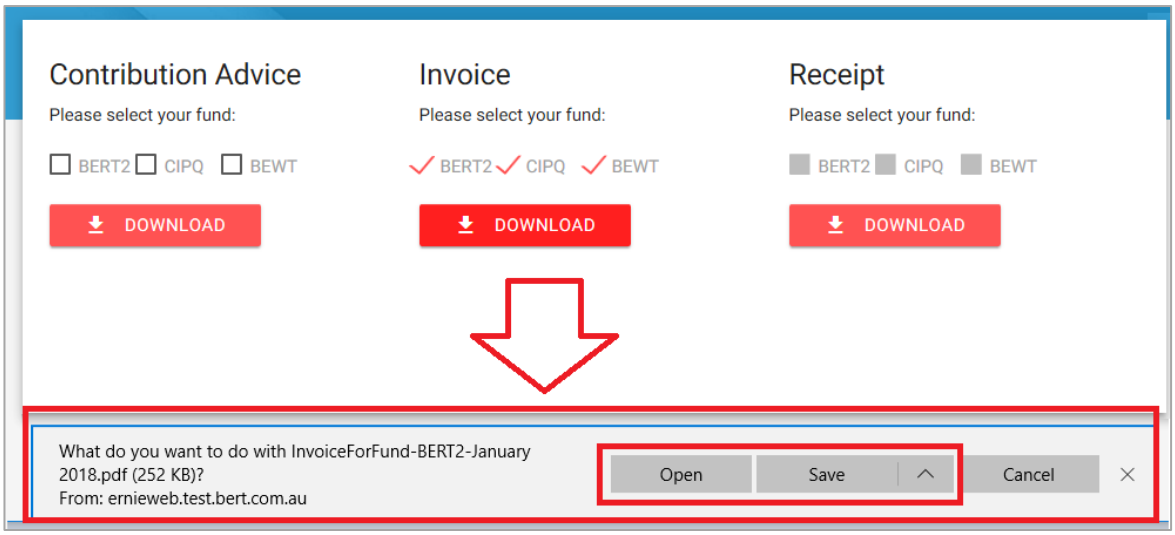
***Please Note**: The document will download depending on the browser you are using.*

In **Google Chrome** the document(s) selected to be downloaded will appear in the bottom left hand corner of your screen. To open click the document



In **Firefox** a download dialogue box will appear on screen to download Select to Open – click Ok to open the document.

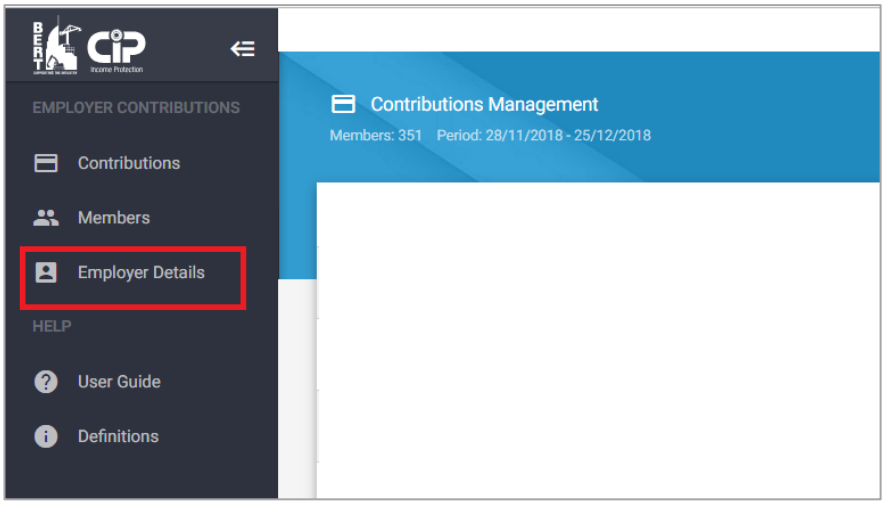


	In **Edge** you will be asked to Open or Save the downloaded document. This appears at the bottom of your screen. 

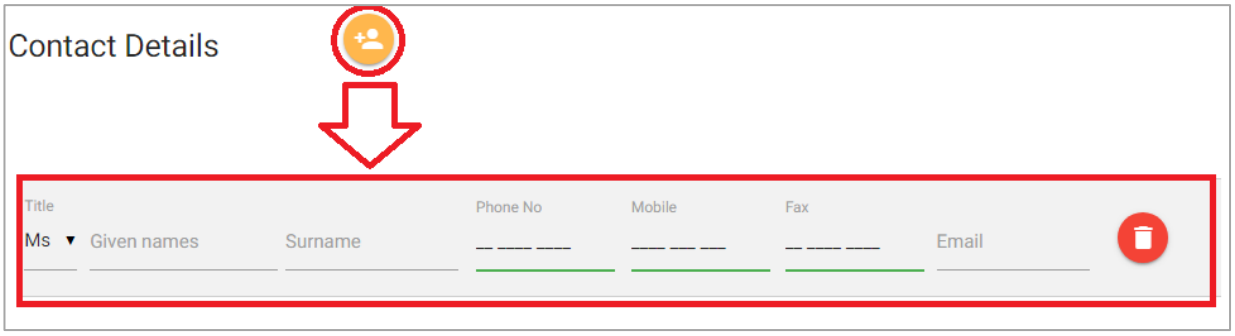
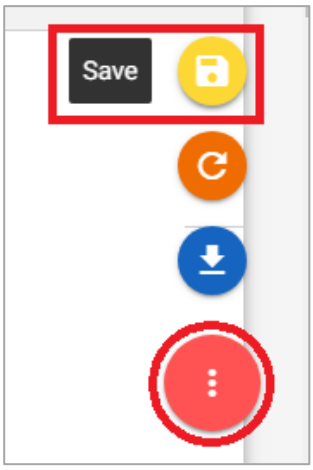
11. Viewing and Updating Employer Details

You can add view and update your Employer details using the Employer details function of the system.

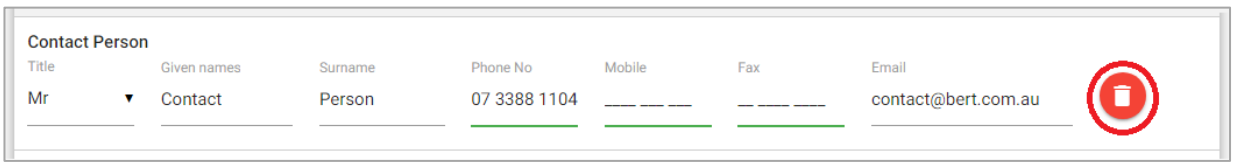
You can add, edit or delete contacts, update the general and registered addresses as well as view important information such as the Funds you are joined with and the payroll end date for your Company.

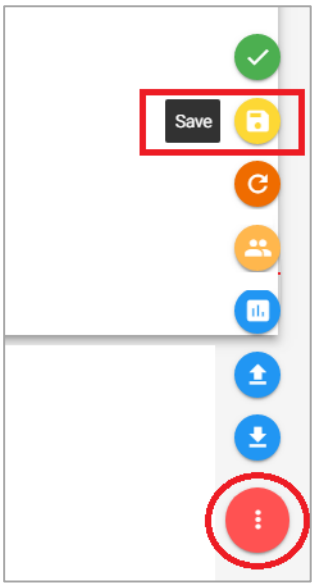
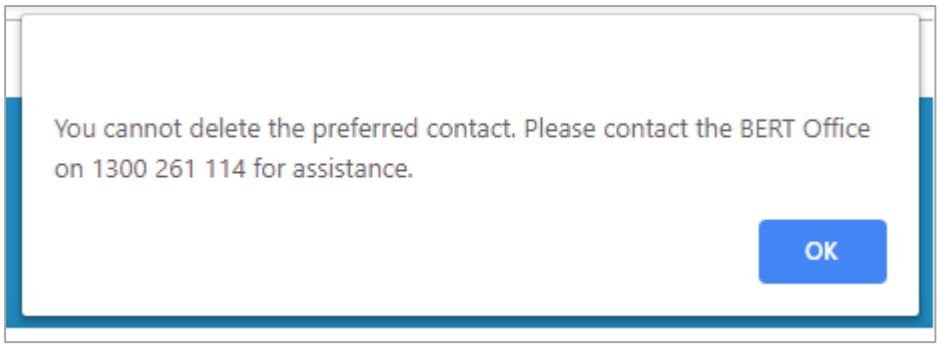
Step No	Step Description
1.	Navigate to the Employer Details page, by selecting the Employer Details option from the left hand side menu.  The Employer Details screen will displaying important information for the Employer.

11.1 Add a Contact

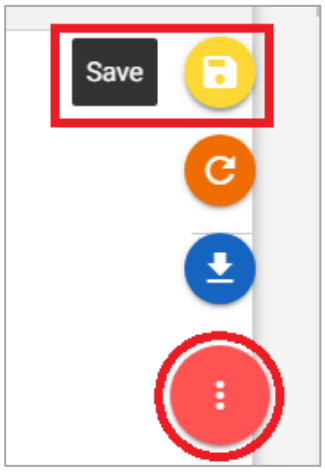
Step No	Step Description
1.	To add a new Employer Contact select the Add person icon located next to the Contact Details heading. The screen will refresh and new fields will appear for you to enter the details for the new Employer contact.  Ensure you enter the Contact Given Name, Surname, a contact Number (either Phone; Mobile or Fax) and the email address for the contact.
2.	Using the action icon located in the bottom right hand corner of the screen select to Save. 

11.2 Delete a Contact

Step No	Step Description
1.	To delete an existing Employer Contact select the bin icon located to the left hand side of the Contact row.  The details will be removed from the screen. NOTE: You have to save the Employer details screen for the deletion to be final. Selecting to refresh the screen will undo the deletion

2.	Using the action icon located in the bottom right hand corner of the screen select to Save.  NOTE: You will not be able to delete the contact if they are the Primary Contact on the account. A message will display on screen indicating this. Click ok to close the message and contact the BERT Office for further assistance. 

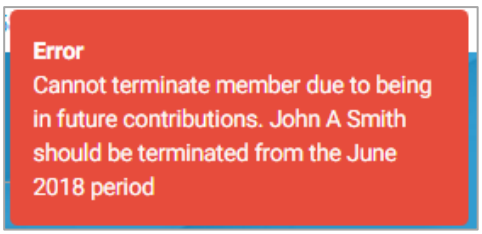
11.3 Edit Address Details

Step No	Step Description
1.	To edit either the General or Registered address details simply enter in the updated information and select to save using the action icon located in the bottom right hand corner of the screen. 

12. Handy Tips

10.1 TERMINATION ERROR:

- If you attempt to terminate a member from a saved contribution (e.g May) and you have already saved the next Month's contribution (i.e June), an error message will display on screen (top right hand corner) indicating you must terminate the member from the most recent contribution (In this case June).



10.2 RATE CHANGE THROUGH a CONTRIBUTION PERIOD:

- To change a rate for a fund for a member part way through the contribution period, select the Multi rate option and manual select the rate for each week including the new rate.
- If the rate change takes place partway through a week, select the new rate to commence from the beginning of the following week.

10.3 PAYROLL END DATE:

- The weeks on your contribution are calculated based on the nominated payroll end date. Depending on the day selected (i.e. Friday) you will see either a four or five week contribution depending on how many of days (I.e. Fridays) there are in the contribution period. Hover over the week checkboxes at the top of the contribution to see the start and end date of each week in the contribution.

10.4 REDIRECTION TO SUPERANNUATION:

- If you have a member who has elected to redirect his BERT2 contribution payments to superannuation, that member will appear on the contribution screen with a Super Redirect rate pre-selected. You will see an information icon located next to the BERT heading. Hovering over this information icon will display a message indicating the Redirection to Superannuation. It is important you can still check the BERT weeks for the member to calculate the BEWT contribution for the period.

10.5 SPECIAL RATES:

- If you have a special rate that is part of your EBA you can either ring the BERT Office on 1300 261 114, or email your details and required rate to enquiries@bert.com.au for the Operations Team to assist you with your enquiry.

10.6 PAYMENTS and RECIEPTS:

- Payments by EFT and BPAY take 3 working days to be received from the bank and a further 2 days to be processed into our bank accounts. Receipts can be downloaded from the online system 5 working days after you have made the payment. You can print off a receipt by going to the Contribution Documents Screen on a Paid Contribution.

  NOTE: the contribution must be in a status of 'Paid' for the receipts button to be available.

10.7 ADDING MEMBERS:

- If you add a new or existing member to an 'Open' contribution they will automatically be added to that contribution and all future contributions once you have saved the contribution.
- If you add a member to a contribution that is Saved' you will need to manually add them to all future contributions that are also 'Saved'.