



The  
Salary Packaging  
People

# Employer Portal

## Self Service Guide

Good for you – Good for your community.

## **This Employer Portal is for payroll and administrative staff to have access to:**

- Download the Deduction CSV File
- Upload the Deduction CSV File for processing
- Terminate and suspend Salary packaging accounts
- Authorise certain product deductions (if applicable)
- Update employee Payroll ID
- Manage portal permissions
- Organisation information
- CBB contacts.

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## Logging on

Requested users receive an email to their registered work email address with an invitation link and instructions to follow.

The email comes from **S-D365CE-PROD@cbb.com.au** (please ensure junk and spam folders are checked).

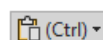
### Sample email:

Dear John

Welcome to CBB Salary Packaging Client portal.

You can now access administrative modules of the Client portal for Example PTY LTD

To get started, please find below details to access the Client portal.



Client Portal Invitation link	<a href="#">Portal URL</a>
Client	Example PTY LTD

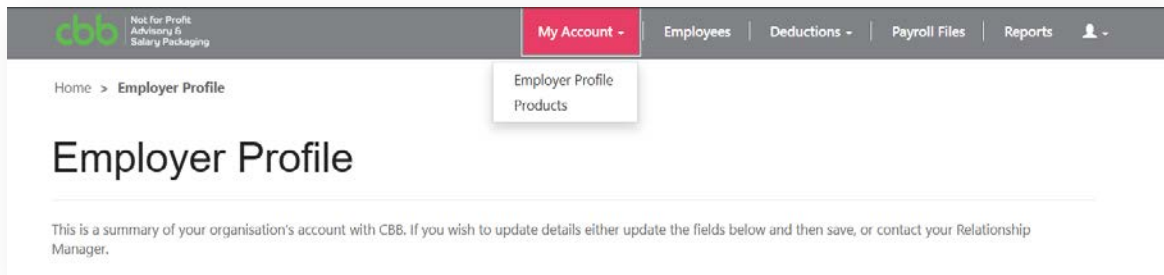
#### Steps to Sign up:

1. Click the invitation link to navigate to the registration page or copy the link and paste it into a browser window to access the registration page.
2. On the registration page, click the Register button.
3. On the login screen, please click the Sign up now link.
4. Provide a valid work email address to complete the email verification step and proceed to complete the registration by providing a password.

If you have any questions, please refer to our portal FAQs on our website, call the Customer Care team on 1300 763 505 (option 2) or email [customercare@cbb.com.au](mailto:customercare@cbb.com.au).

## My Account

Once logged in, you will be directed to the Employer Profile page under the **"My Account"** tab.



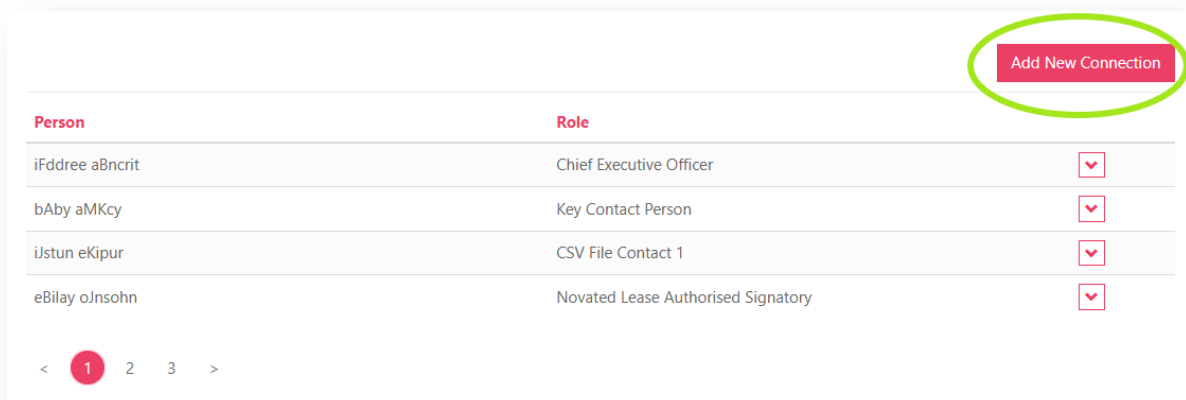
Here you will be able to see a summary of the details we have set up for your organisation, including:

- Key contact people
- Locations
- Number of staff
- Number of active products taken up by employees
- Pay and csv file dates
- Bank details
- Your CBB Relationship Manager and their contact details
- The products section will show you what Benefits are available to staff.

### Updating the Key Contacts

The Employer Profile page is where you can add key contacts for your organisation including a main point of contact, CEO, Finance/payroll teams and CSV file recipients.

To manage your key contacts, scroll down to the **"Add New Connection Button"**.



A pop up box will appear where you can assign a person and their role.

Click on the magnifying glass to select a person currently in CBB's system. (Please note, if the person is not existing in our system, please contact your relationship manager to make the requested change).

Please enter the details and click the save button below.

### Connection Details

---

<b>Person</b>	<input type="text"/>	<input type="button" value="Q"/>	<b>As this role</b>	<input type="text" value="Select"/>
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**Connected From \***  
nCilm nBi(rvnosrg dgeymcBieC S) iSutc

After selecting the person, you can then select the role from the drop down menu. (Please note CSV File Contact is the person that the payroll file will be sent to. There can be up to three people). Click save and the person will appear in your contacts list.

### Connection Details

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<b>Person</b>	<input type="text"/>	<input type="button" value="Q"/>	<b>As this role</b>	<input type="text" value="Select"/>
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**Connected From \***  
nCilm nBi(rvnosrg dgeymcBieC S) iSutc

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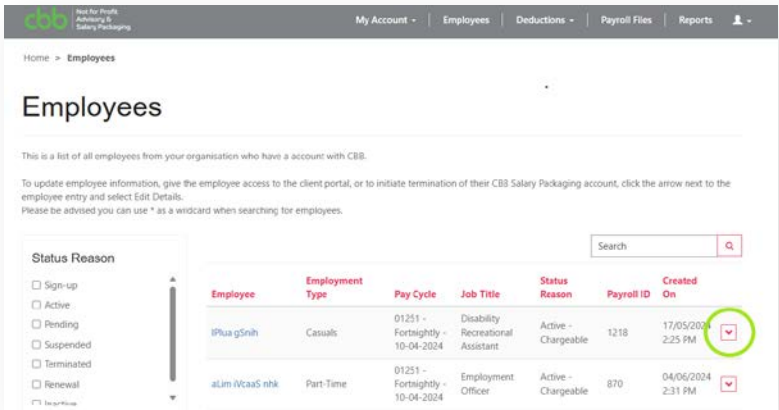
Save

# Employees



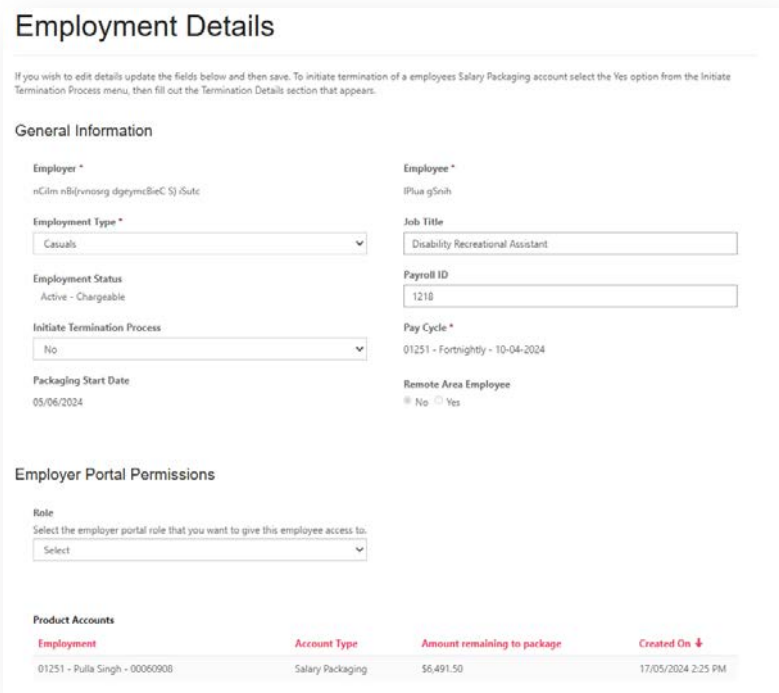
Inside the Employees menu is a list of All Employees who are currently salary packaging or have previously salary packaged.

To view or make amendments to employee details, click the pink arrow as shown. This will take you to the Employment Details page for the specific Employee.



In this Employment Details page, you can:

- Change an employee’s Employment Type (PT, FT, Casual)
- Identify if the employee is a Remote Area Benefit Employee
- Identify Pay cycle (if organisation have multiple pay cycles)
- Update Payroll ID
- View their product accounts (Salary, packaging, Meal Entertainment etc.).



## Terminate Accounts

On this page you will also be able to initiate the termination process for employees who are leaving your organisation or would like to suspend their accounts.

To do so, select **“Yes”** under **“Initiate Termination process”**.

You will then be able to enter in the termination date, last pay scheduled and the reason (eg: *Resignation, Suspension*).

Employment Details

If you wish to edit details update the fields below and then save. To initiate termination of a employees Salary Packaging account select the Yes option from the Initiate Termination Process menu, then fill out the Termination Details section that appears.

General Information

Employee \*

nClim nB(nnoarg dgeymBleC S) Gutz

Employment Type \*

Casuals

Employment Status

Active - Chargeable

Initiate Termination Process

Yes

No

Yes

Termination Information

Termination Date

Select the employees last work date.

DD/MM/YYYY

Last Pay Schedule

Select the schedule that matches their last pay date, not their last work date.

Reason For Termination \*

Select

Employee \*

IPusa g5nth

Job Title

Disability Recreational Assistant

Payroll ID

1218

Pay Cycle \*

01231 - Fortnightly - 10-04-2024

Remote Area Employee

No Yes

## Granting Portal Access

On this same page, you are able to grant portal access to the required staff members such as Finance Officers, Payroll or HR.

To do so select a role under **“Employer Portal Permissions”** as shown below.

Super User is the main role, however for limited access, please see the Portal Role table on the following page.

Employment Details

If you wish to edit details update the fields below and then save. To initiate termination of a employees Salary Packaging account select the Yes option from the Initiate Termination Process menu, then fill out the Termination Details section that appears.

General Information

Employee \*

nClim nB(nnoarg dgeymBleC S) Gutz

Employment Type \*

Casuals

Employment Status

Active - Chargeable

Initiate Termination Process

No

Packaging Start Date

05/06/2024

Employer Portal Permissions

Role

Select the employer portal role that you want to give this employee access to.

Select

Select

Finance

Finance & Operations

HR

HR & Finance

HR & Operations

Operations

Super User

Revoke Admin Access

Employee \*

IPusa g5nth

Job Title

Disability Recreational Assistant

Payroll ID

1218

Pay Cycle \*

01231 - Fortnightly - 10-04-2024

Remote Area Employee

No Yes

Amount remaining to package

\$6,491.50

Created On

17/05/2024 2:25 PM

Save

7

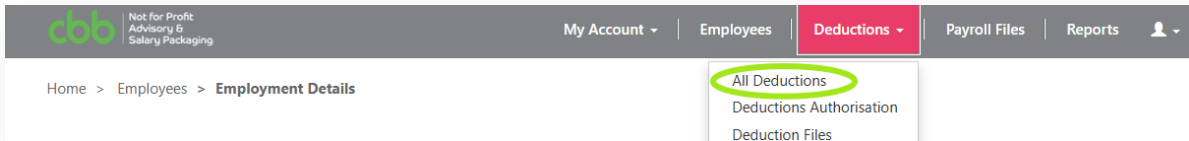
## Portal Roles

Function	Activities
<b>Finance</b>	<ul style="list-style-type: none"> <li>• Load payroll file</li> <li>• Change pay schedules</li> <li>• Change deduction values</li> <li>• Review financial reports</li> <li>• Manage vehicle details.</li> </ul>
<b>HR</b>	<ul style="list-style-type: none"> <li>• Create customers</li> <li>• Request suspension/termination (dates + reason)</li> <li>• Update total employees</li> <li>• Customer employment details ie job title, payroll id, employment type, portal permissions</li> <li>• Deduction authorisation.</li> </ul>
<b>Operations</b>	<ul style="list-style-type: none"> <li>• Update HO address/contact details</li> <li>• Location name</li> <li>• Update Key Contacts and CSV/Company statement emails.</li> </ul>
<b>Super User (SP Key Contact)</b>	<ul style="list-style-type: none"> <li>• Access to all Activities within the Employer Portal.</li> </ul>



# Deductions

## All deductions



This page consists of all approved packaging deductions currently loaded under the Organisation - whether it current or future.

Approved means the deduction is Active and will appear on the corresponding CSV file.

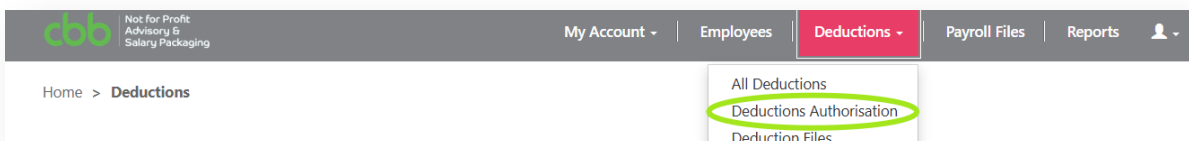
Some may show as draft. This means we are waiting on further information from the employee.

You can filter by date or click on the heading **"Employee"** and it will sort in Alphabetical order either ascending or descending.

The screenshot shows the 'Deductions' page. On the left, there are filters for 'Start on or after' and 'End on or before' with calendar icons, and an 'Apply' button. A search bar is on the right. The main table has columns: Employee, Product, Deduction Type, Total Amount, Start Date, End Date, Status Reason, and a dropdown arrow. The 'Employee' column header is highlighted with a green circle. Two rows of data are shown, both for 'aDncun gBrdabniie' and '01251-Salary Packaging', with 'Approved' status.

Employee	Product	Deduction Type	Total Amount	Start Date	End Date	Status Reason	
aDncun gBrdabniie	01251-Salary Packaging	Amount	\$206.82	24/04/2024		✓ Approved	▼
aDncun gBrdabniie	01251-Salary Packaging	Amount	\$618.35	10/04/2024	10/04/2024	✓ Approved	▼

## Deduction Authorisations



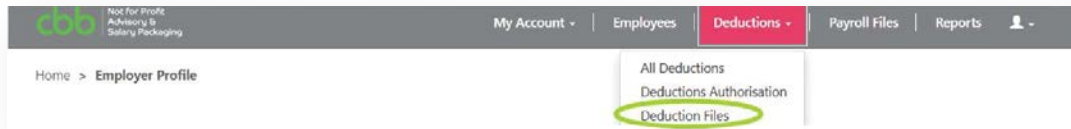
- If applicable in Organisation's Salary Packaging Policy, authorisation may be required to commence deductions within some salary packaging products.
- If authority is required, an email notification will be sent to **particular** Employer Portal users to login and Authorise the particular Deduction for the Employee.
- An example of this may be an electronic device (subject to Organisation Salary Packaging policy).

## Preparing for Payroll

This section will guide you on how to download and upload the CSV/Payroll File ready for processing on pay day.

### Step 1 - Downloading the file:

Hover over the **"Deductions"** tab and click on **"Deduction Files"**.



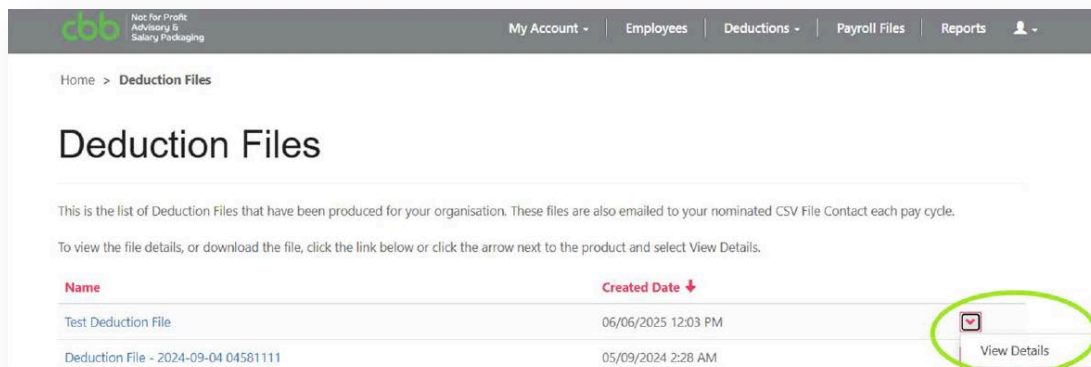
Here you will see the list of CSV files. The latest one should be at the top of the list.

You can click on the heading **"Created Date"** to change the date order if the correct one is not at the top of the list.

### Step 2:

Click on the pink arrow at the end of the row of the CSV file you are wanting to download.

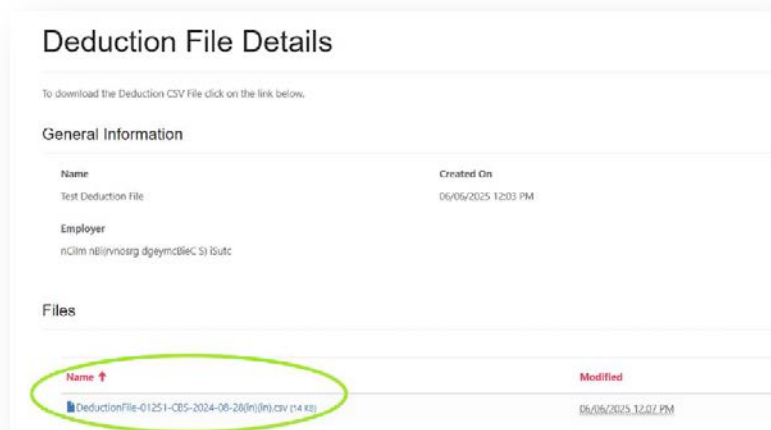
Click **"View Details"**.



### Step 3:

Click on the file link under **"Name"** at the bottom of the page. The name of the file should be the date of the pay schedule to process.

Save the file to your desktop.



## Step 4:

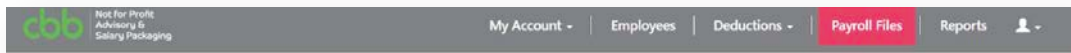
Open the file from your desktop and review the details.

Notice the status column showing any amendments from the previous pay period.

Make changes to the amounts column only if necessary (eg: leave without pay, termination) and save to your desktop.

## Step 5 - Uploading the file:

Click on the “Payroll Files” tab.



## Step 6:

Here you will see the list of pay schedules. The latest one should be at the top of the list and have a status of “Pending”.

You can click on the heading “Created On” to change the date order if the correct one is not at the top of the list.

Click the pink arrow at the end of the row and click “Details”.

Payroll Files						
This is a list of the Payroll Files that been produced for your organisation and their processing status.						
To process your next payroll, click the arrow next to the entry with the pay schedule you want processed, and select the Details item to proceed with importing the payroll file using the template provided to you (also available under the More - Import Template menu item).						
<div>Search <input type="text"/></div>						
Uploading Employer Contact	Pay Cycle	Pay Schedule	Uploaded File Name	Total Amount in Payroll File	Status	Created On ↓
	01251 - Fortnightly - 10-04-2024	01251 - Fortnightly - 06-06-2025			Pending	06/06/2025 12:07 PM
	01251 - Fortnightly - 10-04-2024	01251 - Fortnightly - 28-08-2024	01251-CBS-2024-08-28.csv	\$111,478.24	Payments Processed	28/08/2024 9:57 AM

## Step 7:

Upload the file. On this page, there are 3 key actions to ensure the file is uploaded successfully.

First, under “Attach File” click on “Select File” and select the CSV file that you downloaded to your desktop earlier.

Then, under “Ready for Processing” select “Yes”. Finally, click submit.

If the file was submitted successfully, the status will change from “Pending” to “Client Transaction Created”.

## Payroll File Details

Please ensure the correct payroll file is attached then set the 'Ready for processing' flag to Yes and click the Submit button below.

We encourage you to transfer the funds to CBB the day before your scheduled processing day. If funds are received later than 10am ACDT on your scheduled processing day, this may result in the funds being processed to staff on the following business day.

### General Information

Uploaded File Name

—

Employer

nCilm nBijnvosrg dgeymcBleC S) ISutc

Pay Cycle \*

01251 - Fortnightly - 10-04-2024

Pay Schedule \*

01251 - Fortnightly - 10-04-2024

Ready for Processing

Yes

No

Yes

Portal Status

Pending

Status

Pending

Uploading Employer Contact

K-Test Testing- nCilm nBijnvosrg dgeymcBleC S) ISutc Admin

Total Amount in Payroll File

—

Created On

06/06/2025 12:07 PM

### Attachments

There are no notes to display.

Attach a file \*

Choose File

No file chosen

Submit

## You can then track the progress as the status changes

- **Pending** – file not yet uploaded or an error has occurred
- **Client Transaction Created** – File will remain in this status until the file is Processed
- **Insufficient Funds** – Funds are yet to be deposited or there is a shortfall in funds to cover the Payroll file
- **Funds Credited to NCB Ledger** – Processing has commenced, and funds are in the Employee's CBB salary packaging accounts
- **Payments Processed** – Processing complete! Employees payments have now been distributed.

## Things to ensure packaging is successfully processed

- The CSV file uploaded in the same format as received. You can make changes to the amounts if necessary, however if you have any notes or instructions please send an email to [csvfile@cbb.com.au](mailto:csvfile@cbb.com.au)
- The CSV file must be delivered, and funds be available in CBB's bank account by 10am (SA time) on your nominated processing day in order to process on time (sending the day prior will ensure this)
- The total amount on the file must match the total amount of funds that you send through
- CBB must receive both the file and funds each pay to be able to process successfully.

# Reports



All reports are generated by the system at different frequencies. Access to current and previously generated Reports are provided in the Reports section of the Portal – located in **More** menu.

See below the Reports (if applicable) that will be posted to the Portal in Excel format.

Report Type	Frequency
Reportable Fringe Benefit Amount (RFBA) Report	Monthly
Motor Vehicles	Monthly
Client Fee Invoice	Monthly
GST	Quarterly
Employment Reportable Fringe Benefit Amount (RFBA) Report	Annual
Remote Expenses (if applicable)	Monthly

The page below is a visual guide on how to how to read and interpret the reports.

## RFBA Report and Motor Vehicle for Employer Reconciliations for the period 1/4/2024 to 31/12/2024

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19
NCB #	Employee Name	Payroll ID No.	Account Type	Remote	Carryover Card Balance (Last FBT Year)	Carryover Card Balance (This FBT Year)	Current Balance	GST Included Expenses	No GST Expenses	Non Reportable Expenses	Expenses YTD	Employee Reportable Benefits	Vehicle Employee Reportable	Payment Summary	Employer Reportable Benefits	Vehicle Employer Reportable	Expenses YTD Grossed Up	GST Collected
001-001	Employee One	524	Salary Packaging	No	\$0.00	\$0.00	\$0.00	\$0.00	\$12,230.00	\$200.00	\$12,430.00	\$23,075.56	\$0.00	\$23,075.56	\$23,075.56	\$0.00	\$23,075.56	\$18.20
001-002	Employee One	524	Meals/ Holiday Expenses	No	\$0.00	\$0.00	\$0.00	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$3,773.60	\$0.00	\$3,773.60	\$3,773.60	\$0.00	\$3,773.60	\$0.00
001-003	Employee Two	102	Salary Packaging	Yes	\$0.00	\$0.00	\$0.00	\$796.18	\$7,173.67	\$6,596.41	\$14,566.26	\$2,949.45	\$0.00	\$2,949.45	\$15,191.50	\$0.00	\$15,191.50	\$162.01
001-004	Employee Two	102	Meals/ Holiday Expenses	No	\$0.00	\$0.00	\$100.00	\$0.00	\$1,674.56	\$0.00	\$1,674.56	\$3,159.56	\$0.00	\$3,159.56	\$3,159.56	\$0.00	\$3,159.56	\$0.00
001-005	Employee Three	105	Salary Packaging	No	\$0.00	\$0.00	\$0.00	\$500.00	\$12,000.00	\$200.00	\$12,700.00	\$23,585.00	\$0.00	\$23,585.00	\$23,681.70	\$0.00	\$23,681.70	\$18.20
001-006	Employee Four	889	Salary Packaging	No	\$0.00	\$200.00	\$0.00	\$0.00	\$2,238.40	\$20.00	\$2,258.40	\$4,223.41	\$0.00	\$4,223.41	\$4,223.41	\$0.00	\$4,223.41	\$1.82
001-007	Employee Five	902	Salary Packaging	No	\$0.00	\$0.00	\$0.00	\$0.00	\$7,000.00	\$200.00	\$7,200.00	\$13,207.60	\$9,970.69	\$23,178.29	\$13,207.60	\$10,992.70	\$24,200.30	\$18.20
001-008	Employee One	524	Electronic Devices	No	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,200.00	\$1,200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$109.09

### Explanation of RFBA & Motor Vehicle report – Column Numbers and Explanation

- 1 NCB#** – Individual Employee CBB number.
- 2 Employee Name** – Name of employee.
- 3 Payroll ID No.** – Employee payroll ID number.
- 4 Account Type** – Product e.g.
  - a SP** – Salary Packaging.
  - b ME** – Meal and Accommodation.
  - c NVL** – Novated Lease.
  - d ED** – Electronic Device.
  - e WRE** – Work Related Expenses.
- 5 Remote** – Yes if claiming or No if not claiming the remote area benefit.
- 6 Carryover Balance (Last FBT Year)** – Unspent funds on Beyond bank card reduced from previous FBT year and included in this FBT year reportable expenses.
- 7 Carryover Balance (This FBT Year)** – Remaining unspent funds on Beyond Bank card reduced from Reportable total and will be carried over to next FBT year.
- 8 Current Balance** – Current total of unspent funds held in account.
- 9 GST Included Expenses** – Payment transactions that included GST (type 1).
- 10 No GST Expenses** – Payment transactions that did NOT include GST (type 2).
- 11 Non-Reportable Expenses** – Payment transactions that are not included as reportable expenses including CBB fees, exempt remote area, electronic devices, novated lease running costs, work related expenses.
- 12 Expenses YTD** – Total of funds received less Carryover Card Balance (This FBT year) (7) less Current Balance (8) and may include any rolled over funds from previous FBT year.
  - a** Total of columns GST included expenses (9) + No GST expenses (10) + Non reportable expenses (11) = Expenses YTD (12).
  - b** Complete total of funds received is Carryover Card Balance (This FBT year) (7) + Current balance (8) + Expenses YTD (12).
- 13 Employee Reportable Benefits** – Grossed up figure of total reportable expenses e.g. No GST of \$12,430 (net figure) x 1.8868 = \$23,075.56.
  - a** This column is grossed up at 1.8868 regardless of whether expenses have GST. This does NOT include the FBT for the vehicle.
- 14 Vehicle Employee Reportable** – Grossed up FBT figure for the number of days in the FBT year that an employee has a company vehicle/novated lease that attracts FBT.
  - a** Vehicle value x 20% x 1.8868.
- 15 Payment Summary** – Grossed up figure of reportable expenses to go onto the employee's payment summary at the end of the financial year.
  - a** e.g. No GST of \$12,230.00 (net figure) x 1.8868 = \$23,075.56.
  - b** This column is grossed up at 1.8868 regardless of GST included expenses. This column will include SP, ME and Vehicle Employee reportable if the employee has a vehicle that attracts FBT.
  - c** A final Payment Summary report will be issued which combines SP and ME together for end of year employee PAYG payment summary reporting.
- 16 Employer Reportable Benefits** – Grossed up figure of total reportable expenses.
  - a** No GST expenses x 1.8868 (10) +
  - b** GST included expenses x 2.0802 (9).
- 17 Vehicle Employer Reportable** – Grossed up FBT figure for the number of days in the FBT year that a company vehicle/novated lease attracts FBT. This includes GST.
  - a** Vehicle value x 20% x 2.0802.
- 18 Expenses YTD Grossed Up** – Total of reportable expenses.
  - a** No GST expenses x 1.8868 (10) +
  - b** GST included expenses x 2.0802 (9) +
  - c** Vehicle Employer Reportable expenses if they have a vehicle that attracts FBT (17).
- 19 GST Collected** – Total amount of GST included in employees' payments for the FBT year. Please refer to GST quarterly report for breakdown information and grand totals.

## FAQ's

### What if my file is uploaded late?

Depending on the time it is uploaded, CBB will endeavour to process your file still. We will advise you it is late and to let your employees know it may be delayed.

### What if my money is not deposited on time?

CBB team will contact you as CBB will be unable to process any Salary Packaging for your employees until the money has been received in full.

### How do I remove someone's access to Client Portal ?

In the 'All Employees' menu, search for the relevant Employee and open their file. Part way down the page you will see the heading 'Employer Portal Permissions' – select **Revoke Admin Access**.

### Can I add a new employee not currently on Deduction CSV File?

No, due to the fact we need to setup their accounts and payments, we recommend the new employee uses one of our onboarding channels – either online or via the phone – see here: <https://www.cbb.com.au/book-a-sign-up-appointment/>

### I can't see an employee's deduction on the file

The employee may not yet be 'Active'. This means they have not yet returned their signed documentation to CBB or left it to late. You are able to see an Employee's salary packaging status via the 'All Employees' menu.

### When will I receive my Deduction CSV File?

You will receive your Organisation's CSV file the morning of their chosen delivery date (Payroll Cut-Off date). If you are unsure of the delivery date, see the Employer Profile in the menu, a way down the page is a heading 'Deduction & Processing Details' – see Payroll Cut-Off date – it will read how many days prior to Processing Day the file will be delivered.

### When do I need to send the file and the money related to that file?

Preferably the day prior to save any last minute issues. However, CBB will be checking their accounts right up until your file is due to be processed at 10am of the morning of Processing.

### Why are our Organisation's Bank Details kept on file?

Bank details are kept on file, in the case that CBB will need to return Employee funds back to Payroll.

### A staff member has left the organisation, what do I need to do?

Please advise CBB as soon as possible that an Employee has left their role at your Organisation. You can use the Portal to initiate an Employee Termination. See 'All Employees' menu item. Find the employee and open their file. Part way down the page is 'Initiate Termination Process' – you will then need to choose their Termination Date as well as their last Pay Schedule for packaging.

### I need to run a Manual Pay outside of my normal pay schedule, how do I action this?

Please advise CBB Operations. They will assist in preparing the Manual Pay run.