Merging Superannuation Funds in MYOB Advanced

Overview

Over the last year there has been a lot of movement with Australian Superannuation funds. Funds have been merging and closing.

To assist with this MYOB have introduced the ability to merge super funds. This merge moves employees over to the new fund *(this will need to be added first)* and also moves any superannuation transactions that have not yet been submitted to your clearing house.

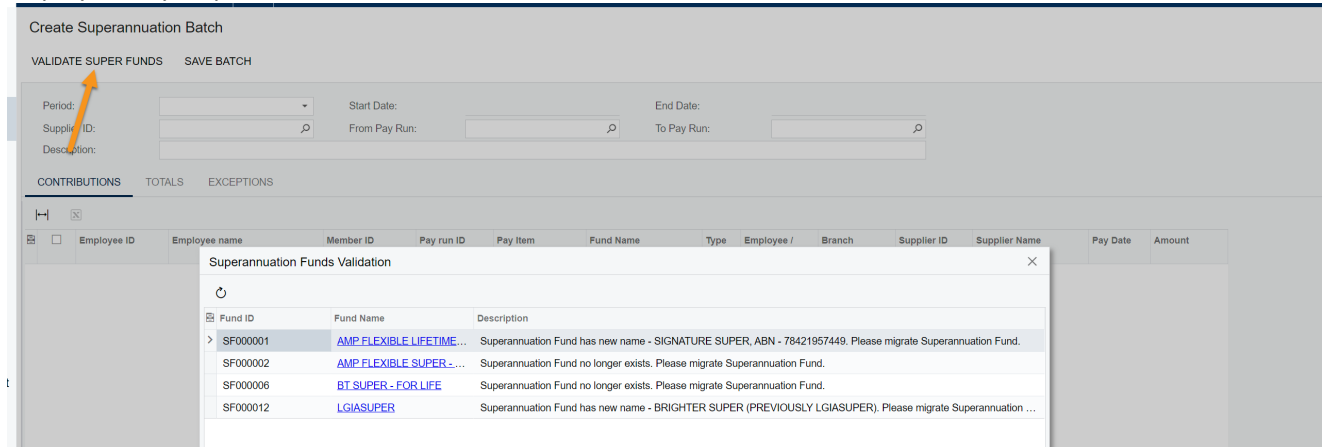Below is a list of Super funds and their USI. *(Note: this may not be a complete list)*

USI	Fund Name
SSR0100AU/98503137921001	SUNSUPER SUPERANNUATION FUND
AMP0195AU/AMP0195AU	AMP FLEXIBLE LIFETIME SUPER
AMP0735AU/AMP0735AU	AMP SIGNATURESUPER
AMP1248AU/AMP1248AU	AMP FLEXIBLE SUPER - SUPER
BTA0287AU/BTA0287AU	BT SUPER - FOR LIFE
IOF0057AU/IOF0057AU	IOOF PORTFOLIO SERVICE PERSONAL SUPERANNUATION
MTA0100AU/MTA0100AU	MTAA SUPERANNUATION FUND
TCS0106AU/TCS0106AU	SUPERWRAP - PERSONAL SUPER PLAN
WFS0112AU/WFS0112AU	BT BUSINESS SUPERANNUATION
LUC0001AU/LUC0001AU	LABOUR UNION CO-OPERATIVE RETIREMENT FUND
AMP0278AU/AMP0278AU	AMP SUPERLEADER PLAN
ASG0007AU/ASG0007AU	ASGARD EMPLOYEE SUPERANNUATION ACCOUNT
QLG0001AU/QLG0001AU	LGIASUPER
SSR0100AU/98503137921001	AUSTRALIAN RETIREMENT TRUST (PREVIOUSLY SUNSUPER)
69087651876999	BCU RETIREMENT SAVINGS ACCOUNT
BTA0136AU/BTA0136AU	BT LIFETIME SUPER EMPLOYER PLAN
FSF0217AU/FSF0217AU	CFS FIRSTCHOICE PERSONAL SUPER
CHR0001AU/CHR0001AU	CHRISTIAN SUPER
23053121564004	ENERGY SUPER
HPP0100AU/HPP0100AU	INTRUST SUPER FUND
SSP0001AU	LOCAL SUPER DIVISION OF STATEWIDE SUPER
PIN0100AU/42574421650001	MEDIA SUPER
SSP0001AU/SSP0001AU	STATEWIDE SUPERANNUATION TRUST

Process:
1. Check which funds have been impacted and so far not dealt with in your Advanced Payroll
2. Check the details of the new fund required.
3. Create new funds
4. Merge the funds

How to check your Funds

Go to Create Super Batch (no need to actually create one) and click to Validate Super Funds. A list of funds will display if they require action.

Locate the Replacement Fund

Click the ATO Super Fund Register on the Superannuation Funds screen

This will take you to the ATO Super Fund Lookup page.

Paste the fund name in full in to the search and click the All Funds tab

Select the entity that matches all the details will be there.

The information contained in this document is intended to be a guide for using your software. It is not accounting, bookkeeping or payroll advice. You should seek advice or clarification from your professional advisor in respect of these matters.

Super Fund Lookup

The Trustee for SPIRIT SUPER

ABN details		Pdf Print Email
ABN:	74 559 365 913 View record on ABN Lookup	
ABN Status:	Active from 01 Nov 1999	
Fund type:	APRA Regulated Public Offer Fund	
Contact details:	GPO BOX 1547 HOBART TAS 7001	
Status:	APRA Registered (data correct as at 31 Mar 2023 5:00 AM) Check register of superannuation institutions	

Export

Fund product details

USI	Product name	Contribution restrictions	From	To
MTA0002AU	Spirit Super Pension	Yes - contact fund	01 Jul 2014	31 Dec 9999
MTA0003AU	Spirit Super TAP	Yes - contact fund	01 Jul 2014	31 Dec 9999
MTA0100AU	Spirit Super	No	01 Dec 2014	31 Dec 9999
MTA9165AU	Spirit Super Defined Benefits	Yes - contact fund	24 Mar 2021	31 Dec 9999

If you are uncertain which one is correct, contact the new super fund for assistance, search the internet for the old fund.

Create the Super Funds in Advanced (if they don't already exist)

Click plus +

Superannuation Funds

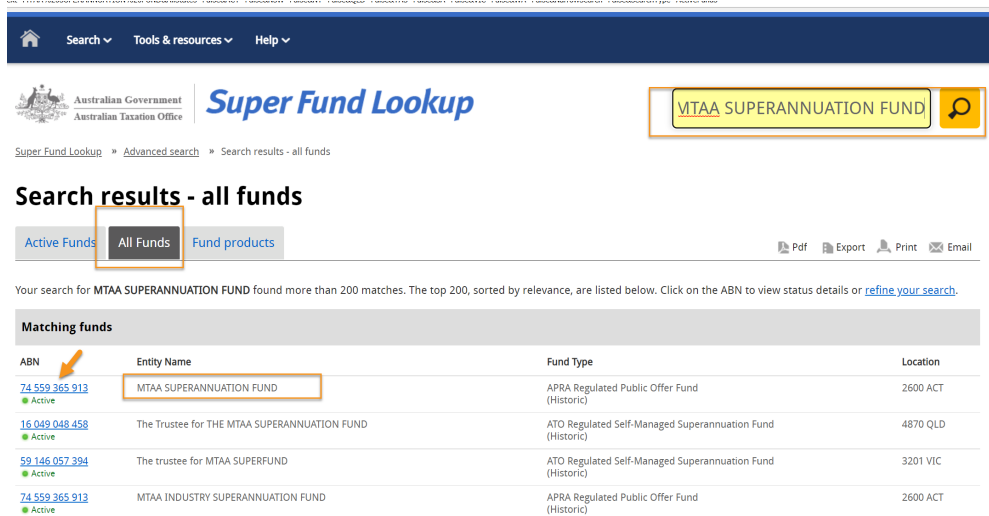| ⟳ | 💾 | ↺ | **+** | MIGRATE SUPER FUND | ⊢| | 🗷 |

Fund Type: APRA Funds ▾   Change setting on 'Pay Superannuation' tab here: Manually submitting using SAFF   ATO Super Fund Register

	🖉	▯	Fund ID	ABN	USI	Fund Name	Migration Notes	Override (must use SAFF)	Override F
>	🖉	▯	SF001584	40022701955	NUL0392A…	MLC WRAP SUPER - S…		☐	

Go straight to the spy glass for the fund name field and paste the USI into the box. The USI is unique so will be easy to select.

🖉	☐	SF001577	85502108833	TLS0100AU…	TELSTRA SUPERANN…		☐		S0009
🖉	▯	SF001575	65127917725	PSS0001A…	PSSAP FUND		☐		S0009
🖉	▯	SF001576	98503137921	SSR0100A…	AUSTRALIAN RETIRE…		☐		S0009
🖉	▯	SF001574	16457520308	COS0001A…	MINE SUPER		☐		S0009
🖉	▯	<NEW>				🔍		☐	S0009

☐ ✕

⟳	⊢|	🗷			SELECT ⟳ ⊢|	MTA9165AU 🔍			
Employee ID	Employee name	Pay Group				USI	SCFI	ABN	Name	Pay Item Description
					>	MTA9165AU	8efbfcabfa…	74559365…	SPIRIT SUPER …	

Select the fund and **save** the entry.

Merge the Funds

Click MIGRATE SUPER FUND

Superannuation Funds

			Fund ID	ABN	USI	Fund Name	Migration Notes	Override (must use SAFF)	Override F
>	🔗	📄	SF001584	40022701955	NUL0392A…	MLC WRAP SUPER - S…		☐	

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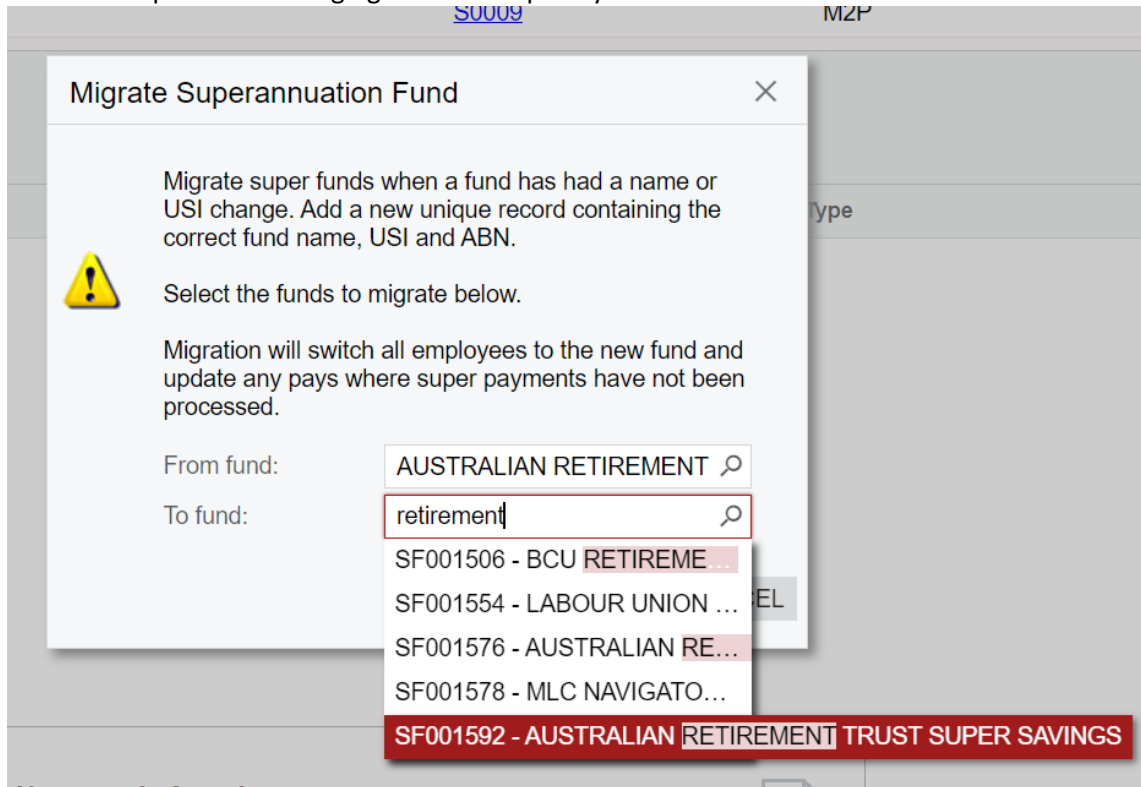
This next screen appears, select the "from fund" and the "to fund".
In this example we are merging the old temporary ART fund with the new ART fund

Migrate Superannuation Fund

⚠️ Migrate super funds when a fund has had a name or USI change. Add a new unique record containing the correct fund name, USI and ABN.

Select the funds to migrate below.

Migration will switch all employees to the new fund and update any pays where super payments have not been processed.

From fund: AUSTRALIAN RETIREMENT 🔍

To fund: retirement 🔍

SF001506 - BCU RETIREME…
SF001554 - LABOUR UNION …
SF001576 - AUSTRALIAN RE…
SF001578 - MLC NAVIGATO…
SF001592 - AUSTRALIAN RETIREMENT TRUST SUPER SAVINGS

After clicking OK the employees and transactions are moved over. The old fund is marked as migrated, and has been made inactive.

		Fund ID	ABN	USI	Fund Name		
📄		SF001568	28342064803	AMI0100AU…	AUSTRALIAN MEAT INDUSTRY SUPERANNUATION TRUST		☐
📄		SF001576	98503137921	SSR0100A…	AUSTRALIAN RETIREMENT TRUST (PREVIOUSLY SUNSUPER)	Migrated all Employees …	☐

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