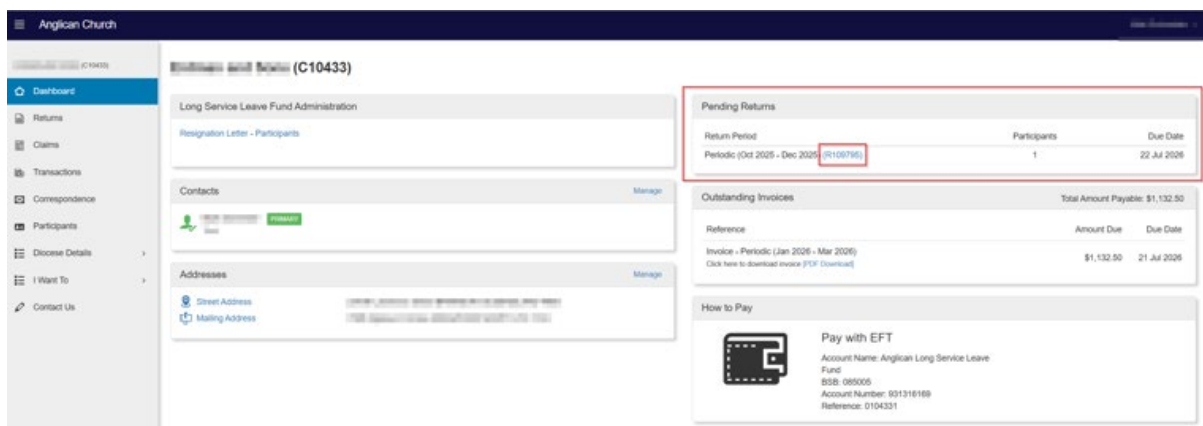


Introduction

This document explains how participating organisations submit contribution returns via the portal. It also covers adding new participants, adding existing participants, importing returns, and adjusting returns.

Submitting returns

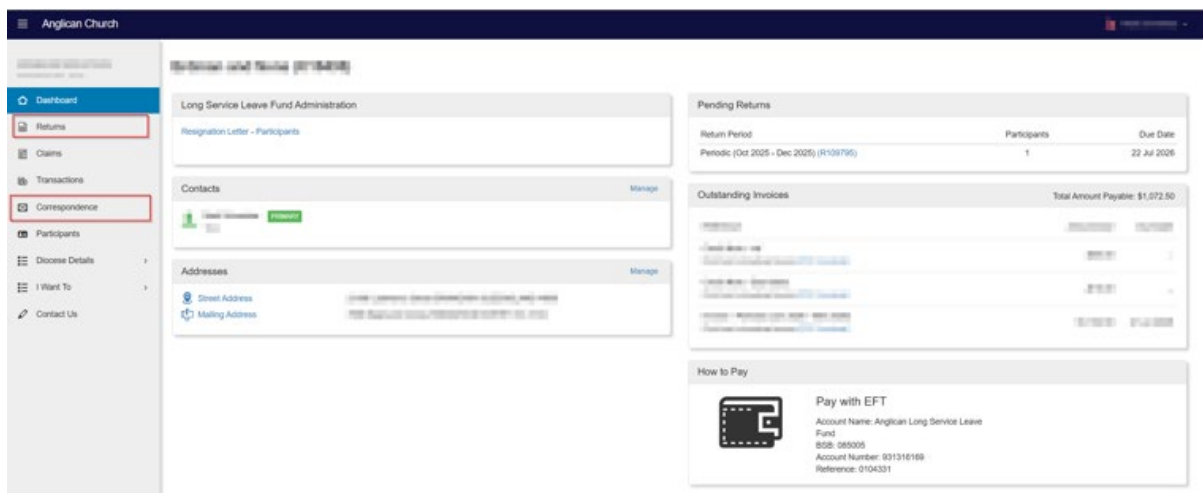
Participating organisations can view and edit pending returns on the portal and add new participants. New returns appear in the "Pending Return" section on the main dashboard. Organisations click the return ID to access and edit it for that period.



The screenshot shows the Anglican Church portal dashboard. The left sidebar contains navigation links: Dashboard, Returns, Claims, Transactions, Correspondence, Participants, Diocese Details, I Want To, and Contact Us. The main content area is titled 'Long Service Leave Fund Administration (C10433)' and includes sections for 'Resignation Letter - Participants', 'Contacts', and 'Addresses'. On the right, the 'Pending Returns' section is highlighted with a red box, showing a table with columns for Return Period, Participants, and Due Date. Below this, there are sections for 'Outstanding Invoices' and 'How to Pay' (Pay with EFT).

Return Period	Participants	Due Date
Periodic (Oct 2025 - Dec 2025) (R103795)	1	22 Jul 2026

On the return contribution screen, organisations can edit or commit the return for the period. They can view all information related to the return period, participants, and levy rates. Pending returns are accessible via the return tab on the left navigation or the correspondence tab, which holds a generated email from the scheme.



This screenshot shows the same Anglican Church portal dashboard, but with the 'Returns' and 'Correspondence' tabs in the left sidebar highlighted with red boxes. The main content area remains the same, showing the 'Long Service Leave Fund Administration' details and the 'Pending Returns' section on the right.

When the organisation opens the return, it is usually generated with pre-filled information for active participants for the current period. The organisation clicks edit return to access the Return View page, where it can adjust pre-filled information or add new and existing participants to the return period.

Returns: Periodic (Oct 2025 - Dec 2025) (R109795)

✓ To finalise this return you must click "Commit".

Export / Import Release Ownership On Hold ☐ Edit Return Commit Return

Periodic Return Information Owned by Support.

Return Status	OPEN	Participant	1
Return Period (ID)	Periodic (Oct 2025 - Dec 2025) (R109795)	Return Rate	\$1,764.00
Due Date	22/07/2026[Edit]	Contribution	\$441.00

Contributions

Participant	Dates	FTE	Contribution
                            			

Once the organisation is satisfied with the changes, they can click the close button to save and commit the return. This completes the return for this period and records the information.

Returns: Periodic (Apr 2025 - Jun 2025) (R109280)

✓ To finalise this return you must click "Commit".

[Export / Import](#)
[Release Ownership](#)
[Edit Return](#)
[Commit Return](#)

Periodic Return Information			
Return Status	OPEN	Participant	4
Return Period (ID)	Periodic (Apr 2025 - Jun 2025) (R109280)	Return Rate	\$1,764.00
Due Date	14/07/2025	Contribution	\$1,323.00

Contributions			
Participant	Dates	FTE	Contribution
(M54972)	Apr 2025 - Jun 2025	1	\$441.00
Added to this Return due to Member contribution started in earlier return R108813			
(M63198)	Apr 2025 - Jun 2025	0.5	\$220.50
Added to this Return due to Member contribution started in earlier return R108813			
(M63097)	Apr 2025 - Jun 2025	1	\$441.00
Added to this Return due to Member contribution started in earlier return R108813			
(M62728)	Apr 2025 - Jun 2025	0.5	\$220.50

Returns: Periodic (Apr 2025 - Jun 2025) (R109280)

[Export](#)

Periodic Return Information			
Return Status	COMMITTED	Participant	4
Return Period (ID)	Periodic (Apr 2025 - Jun 2025) (R109280)	Return Rate	\$1,764.00
Due Date	14/07/2025	Contribution	\$1,323.00
		Balance Payable	\$1,323.00

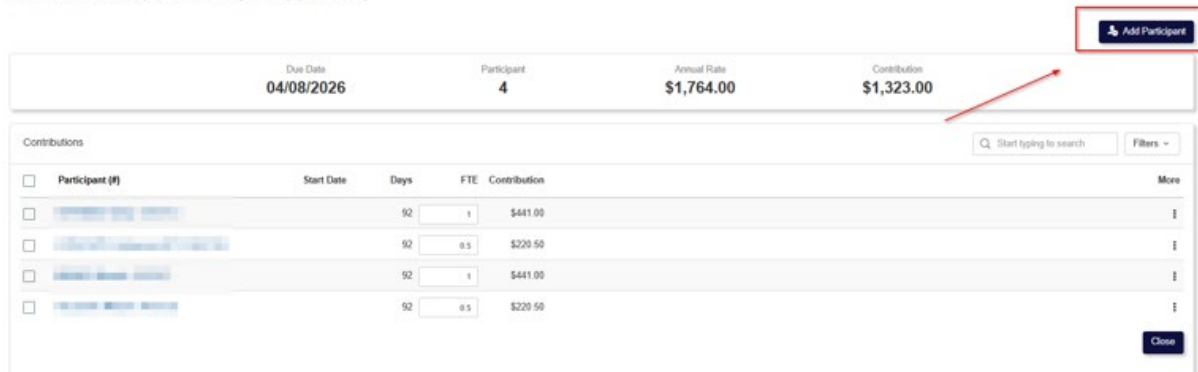
Financial Details			
Date	Description	Debit	Credit
21 Jul 26	Invoice [Print PDF]	\$1,323.00	

Contributions			
Participant	Dates	FTE	Contribution
(M54972)	Apr 2025 - Jun 2025	1	\$441.00
(M63198)	Apr 2025 - Jun 2025	0.5	\$220.50
(M63097)	Apr 2025 - Jun 2025	1	\$441.00
(M62728)	Apr 2025 - Jun 2025	0.5	\$220.50

Adding participants

The organisation can add participants via the returns using the "Add Participant" button. The organisation can add participants who are completely new to the fund and require verification by the fund, existing fund members, and returning participants who have previously been with the organisation.

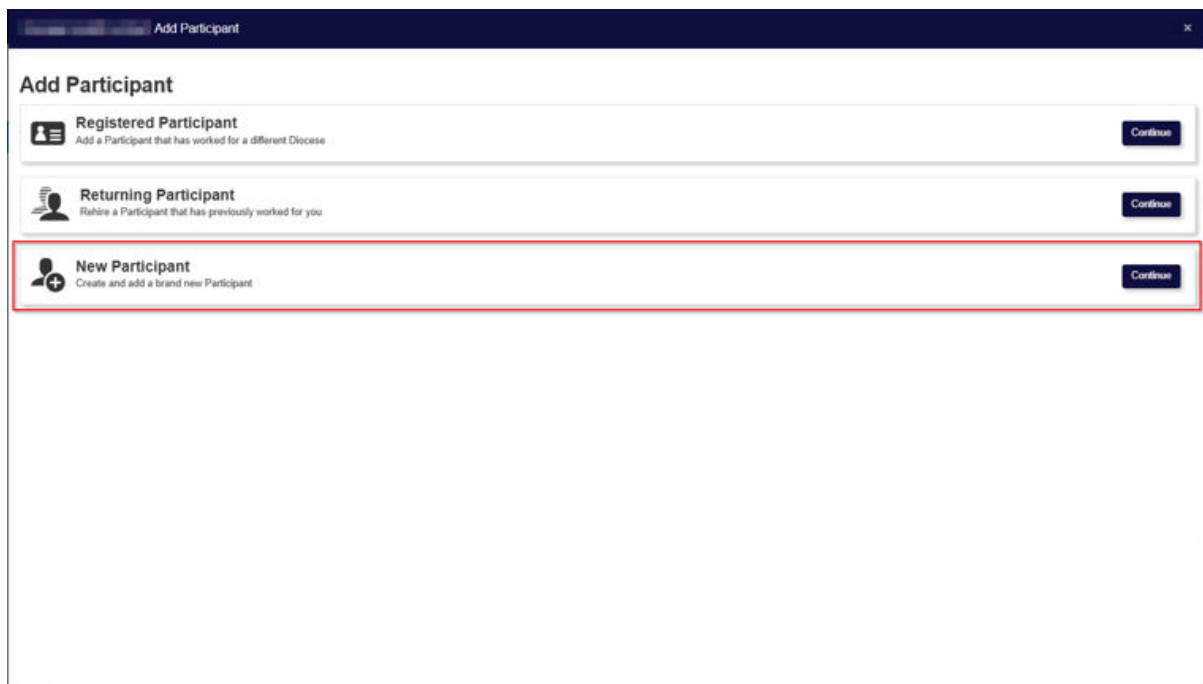
Returns: Periodic (Jul 2025 - Sep 2025) (R109804)



Due Date	Participant	Annual Rate	Contribution
04/08/2026	4	\$1,764.00	\$1,323.00

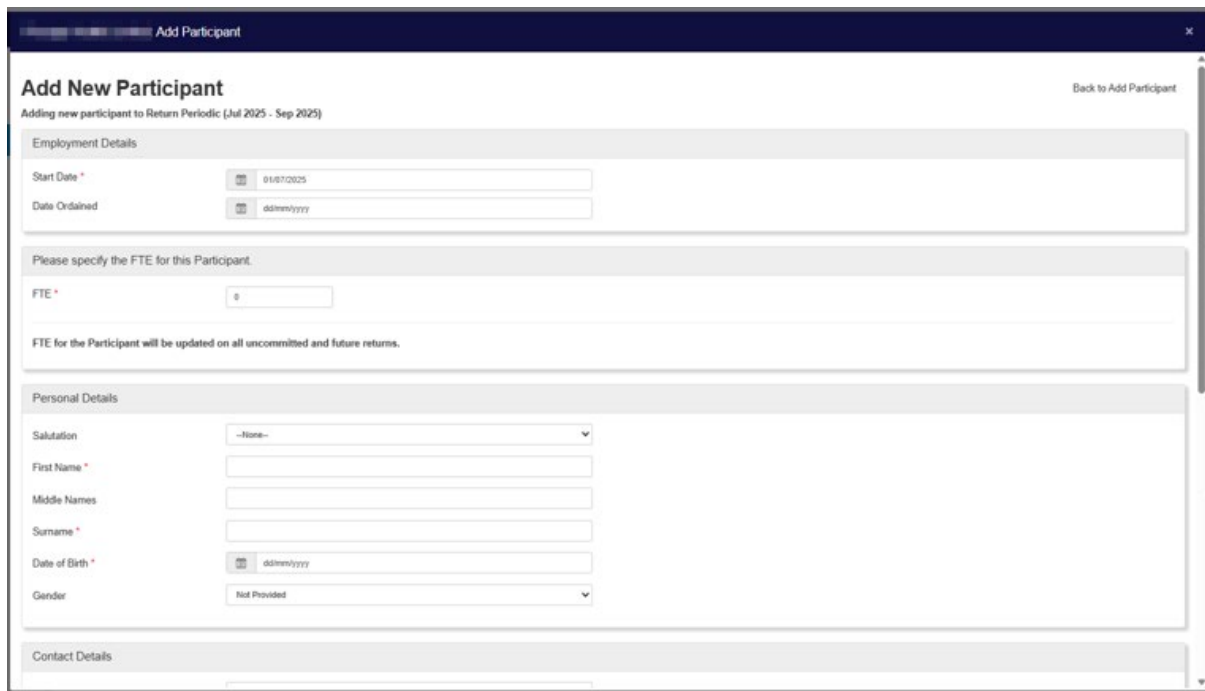
Participant (F)	Start Date	Days	FTE	Contribution	More
☐		92	1	\$441.00	
☐		92	0.5	\$220.50	
☐		92	1	\$441.00	
☐		92	0.5	\$220.50	

When adding new participants via the returns, the organisation must complete all mandatory fields marked with a red asterisk. These include start date with the organisation, date ordained, FTE, first name, surname, date of birth, mobile number, email, and contact address.

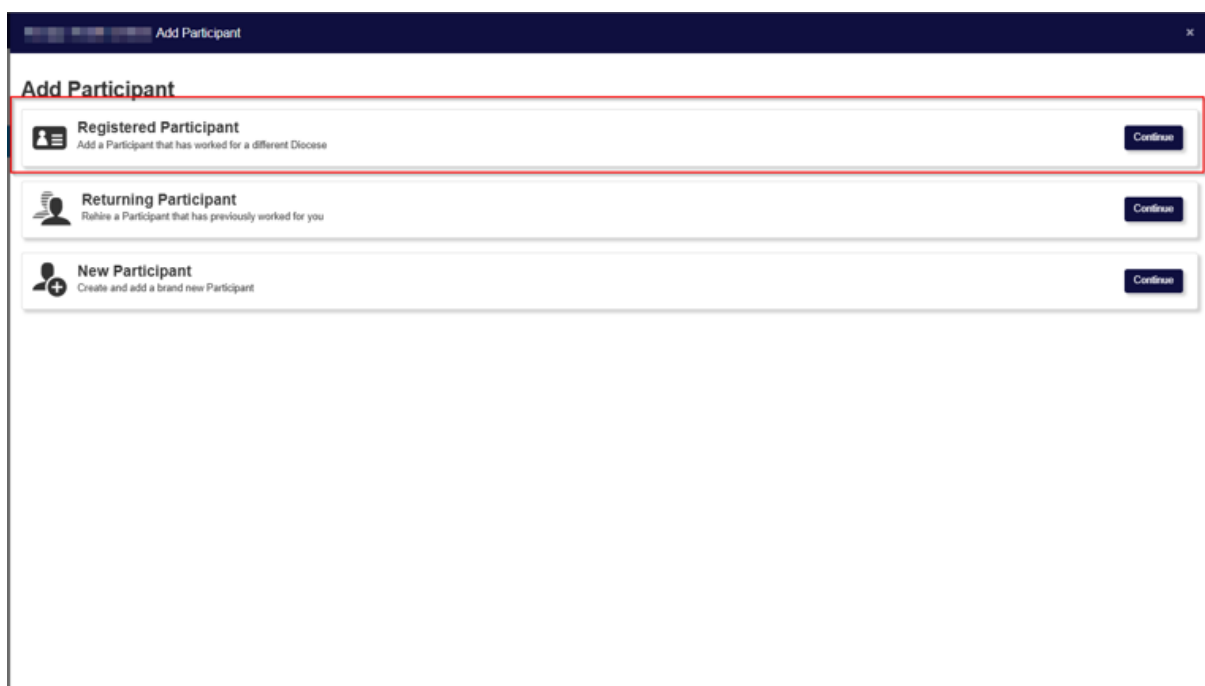


Add Participant

- Registered Participant**
 Add a Participant that has worked for a different Diocese
 Continue
- Returning Participant**
 Rehire a Participant that has previously worked for you
 Continue
- New Participant**
 Create and add a brand new Participant
 Continue



The organisation can also add participants who are registered with the fund by clicking the registered participant section and continuing with the process.



Afterwards, the organisation can look up participants using the registration number and date of birth. The matching participant details will appear, and the organisation can enter the latest participant information and add them to the return.

Add Participant

Add Registered Participant Back to Add Participant

Participant Search

Registration Number: * Date of Birth: * Clear Search

Adding to Return Periodic (Jul 2025 - Sep 2025)

Participant Details

Name

Date of Birth

Mobile *

Email *

Address

Line 1 *

Line 2

Line 3

Suburb/City * To enter an address you are required to enter a postcode or suburb, and choose from the options listed.

State/Province *

Postal/Zip Code *

Country *

Employment Details

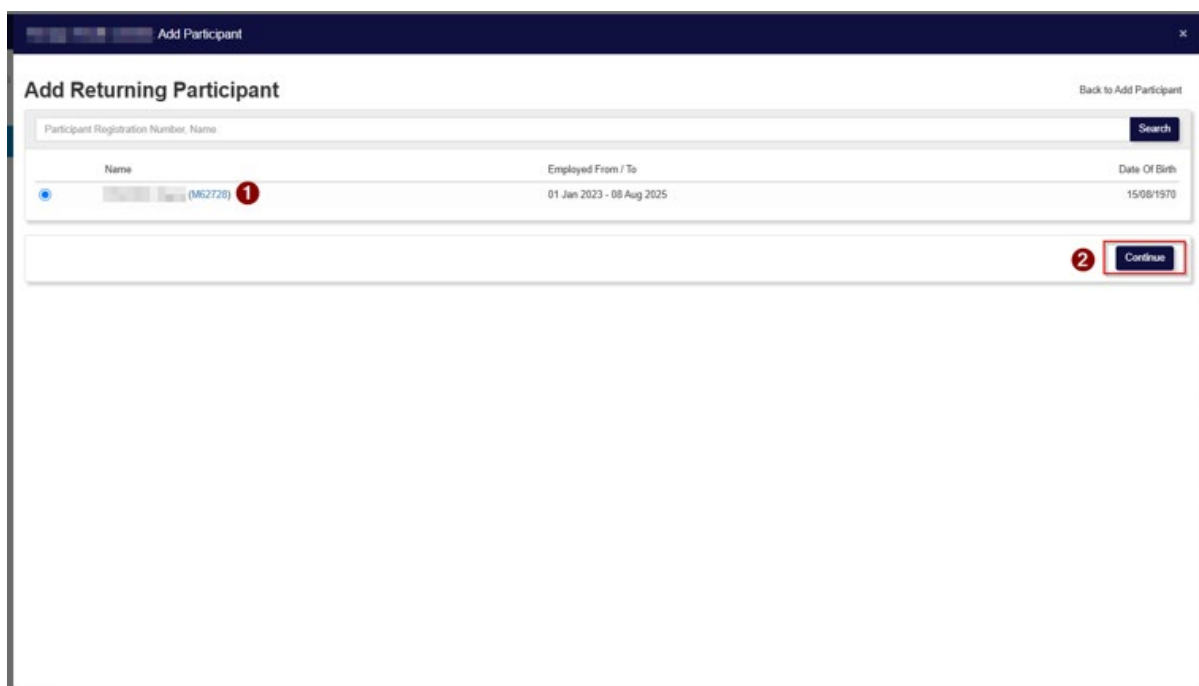
Lastly, the organisation can add returning participants. After clicking the returning participant button, the system automatically populates returning participants linked to the organisation, searchable by name or registration number.

Add Participant

Registered Participant Continue
Add a Participant that has worked for a different Diocese

Returning Participant Continue
Rehire a Participant that has previously worked for you

New Participant Continue
Create and add a brand new Participant



The organisation must update the participant's information and FTE, which will be used for future returns. After entering all data, the organisation can commit the return for the period with the new participants.

Return Export/Import

Organisations with multiple participants to update during a return period can use the return export/import feature in the return view. This feature allows the organisation to complete bulk actions for participants, such as adding new participants or terminating existing ones.

Returns: Periodic (Oct 2025 - Dec 2025) (R109805)

✓ To finalise this return you must click "Commit".

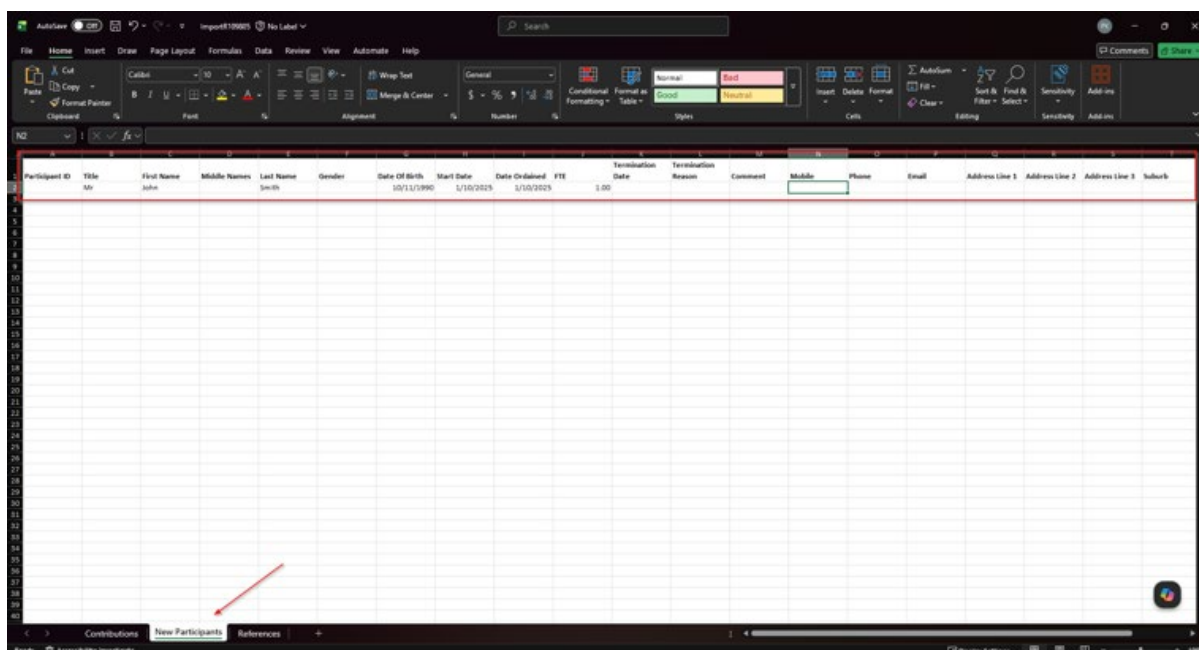
[Export / Import](#) [Release Ownership](#) [Edit Return](#) [Commit Return](#)

Periodic Return Information			
Return Status	On Hold	Participant	5
Return Period (ID)	Periodic (Oct 2025 - Dec 2025) (R109805)	Return Rate	\$1,764.00
Due Date	04/08/2025	Contribution	\$1,904.50

Contributions			
Participant	Dates	FTE	Contribution
[Participant Name]	Oct 2025 - Dec 2025	1	\$441.00
[Participant Name]	Oct 2025 - Dec 2025	1	\$441.00
[Participant Name]	Oct 2025 - Dec 2025	0.5	\$220.50
[Participant Name]	Oct 2025 - Dec 2025	1	\$441.00
[Participant Name]	Oct 2025 - Dec 2025	1	\$441.00

The export/import feature generates an Excel sheet for bulk updating participants. The organisation can re-upload the sheet to update information for multiple participants in the system. For scheme-specific information, the organisation can download step-by-step instructions from the portal by clicking the hyperlink listed on the export/import page.

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Participant ID	Title	First Name	Middle Name	Last Name	Gender	Date Of Birth	Start Date	Date Ordained	FTE	Termination Date	Termination Reason	Comment	Mobile	Phone	Email	Address Line 1	Address Line 2	Address Line 3	Suburb
		John		Smith		10/11/1995	1/10/2025	1/10/2025	1.00										

On the portal, the export/import function updates the return period based on the uploaded Excel file. The organisation can review changes and confirm that the relevant participant has been correctly terminated. After finalising changes, the organisation can commit the import file to the return.

Returns / Periodic (Oct 2025 - Dec 2025) (R109805): Export / Import

[Back to Return Summary](#)

Data Export / Import Process

Discard the current import.
Uploading another file will automatically discard the current import.

Discard Import

Step 1

Download the Return as a spreadsheet.
For instructions on completing the spreadsheet, [click here](#).

Export to Excel

Step 2

Update/save the spreadsheet.
Insert new participants on the second sheet of the spreadsheet.
Title is NOT mandatory.
Codes are displayed below for gender, and title. [Click here](#).
Insert " (apostrophe) before a mobile or phone number (or reformat column as text) to retain leading zeros.

Step 3

Upload the completed spreadsheet.
If your spreadsheet has validation errors, update it and re-upload the spreadsheet.

1

No file selected

Choose

Step 4

File uploaded. You must click [Commit Import File] to complete the data import process.
You will be taken to the return edit page where you will need to resolve any validation errors and submit your return.

2

Commit Import File

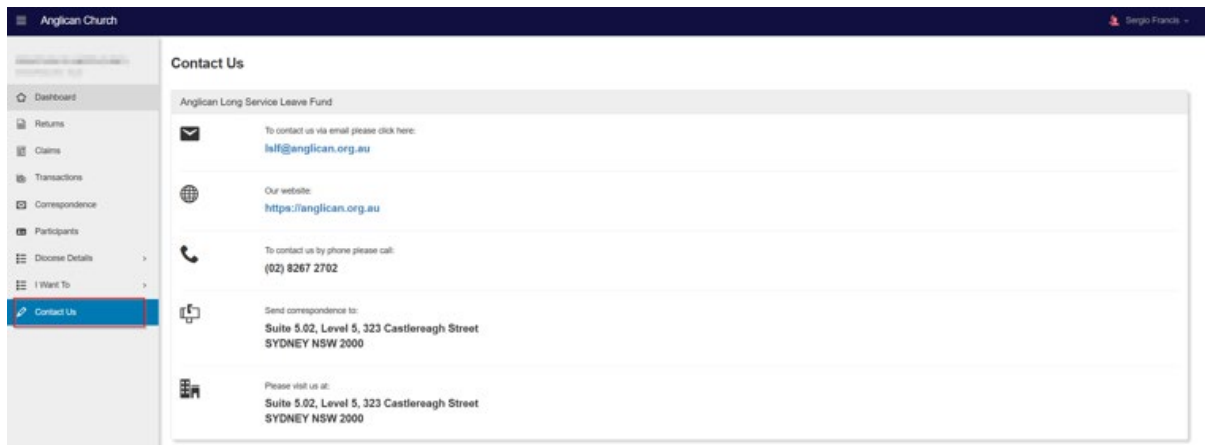
Import Results - Participants Count: 5

Participant ID	Last Name	First Name	Date Ordained	FTE	Termination Date	Comment
63417	Doe	John	01/01/2025	1	-	
54972	Huffman	Harley	-	1	-	
63198	Lopez-6713	Anderson-6713	-	0.5	-	
63897	Marks	Manuel	-	1	10/11/2025	Test
62728	Sellers	Wayne	-	1	-	

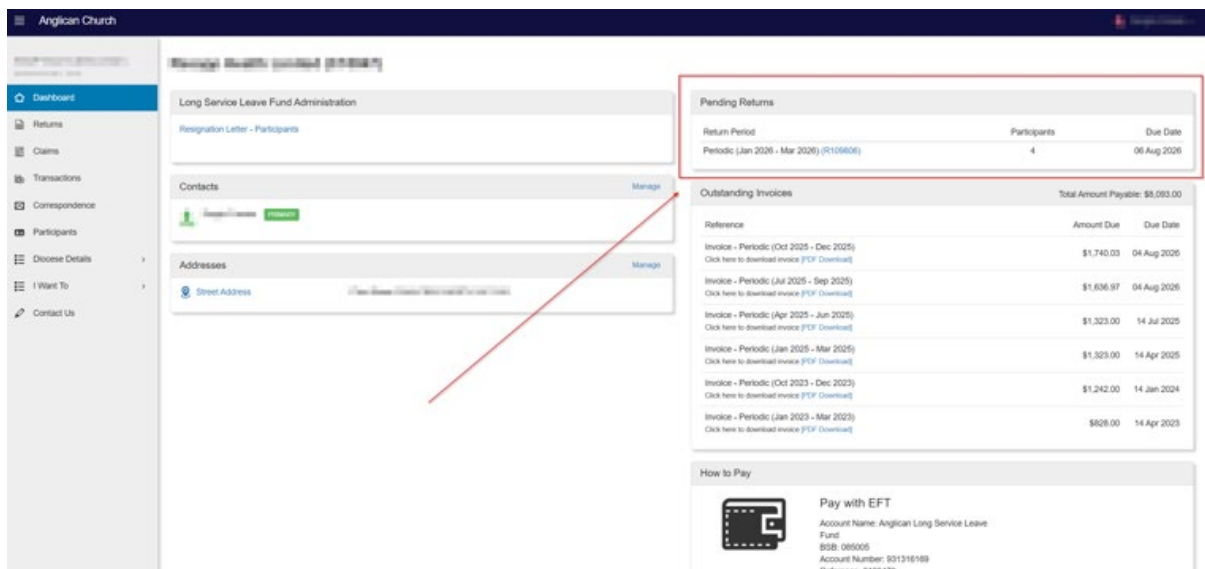
If the organisation has concerns about the changes, it can discard the import using the top right button and discard the Excel file to start over. When the file is committed to the return, the organisation can follow the same procedure to commit the return for the period.

Adjusting returns

If a participating organisation wants to change information on a committed return for a period, it must contact the scheme to request that the return be reopened for adjustment. The participating organisation can find the scheme's contact information within the portal by navigating to the contact tab in the menu.



Once the participating organisation contacts the scheme to reopen a committed return period for adjustment, the organisation can navigate to the relevant return from the dashboard and take ownership of the open return for readjustment.



Returns: Periodic (Jan 2026 - Mar 2026) (R109806)

✓ To finalise this return you must click "Commit".

Take Ownership

Periodic Return Information			
Return Status	Open	Participant	4
Return Period (ID)	Periodic (Jan 2026 - Mar 2026) (R109806)	Return Rate	\$1,812.00
Due Date	06/06/2026[Edit]	Contribution	\$1,585.50

Contributions			
Participant	Dates	FTE	Contribution
(M03417)	Jan 2026 - Mar 2026	1	\$453.00
(M04972)	Jan 2026 - Mar 2026	1	\$453.00
(M03198)	Jan 2026 - Mar 2026	0.5	\$226.50
(M02728)	Jan 2026 - Mar 2026	1	\$453.00

Once the participating organisation owns the recently opened return, it can adjust FTE, add new participants, and terminate participants. The organisation can follow the same procedures mentioned above to make the relevant adjustments.

Returns: Periodic (Jan 2026 - Mar 2026) (R109806)

✓ To finalise this return you must click "Commit".

Export / Import

Release Ownership

On Hold ☐

Edit Return

Commit Return

Periodic Return Information Owned by Support.			
Return Status	Open	Participant	4
Return Period (ID)	Periodic (Jan 2026 - Mar 2026) (R109806)	Return Rate	\$1,812.00
Due Date	06/06/2026[Edit]	Contribution	\$1,585.50

Contributions			
Participant	Dates	FTE	Contribution
(M03417)	Jan 2026 - Mar 2026	1	\$453.00
(M04972)	Jan 2026 - Mar 2026	1	\$453.00
(M03198)	Jan 2026 - Mar 2026	0.5	\$226.50
(M02728)	Jan 2026 - Mar 2026	1	\$453.00

Once the adjustment has been completed, the organisation must recommit the return by following the same procedure. Once committed, the periodic return status will change from open to committed.

Returns: Periodic (Jan 2026 - Mar 2026) (R109806)

Export Take Ownership

Periodic Return Information

Return Status	Completed	Participant	4
Return Period (ID)	Periodic (Jan 2026 - Mar 2026) (R109806)	Return Rate	\$1,812.00
Due Date	06/06/2026[Edit]	Contribution	\$1,585.50
		Balance Payable	\$1,585.50

Financial Details

Date	Description	Debit	Credit
23 Jul 26	Invoice [Print PDF]	\$1,585.50	
23 Jul 26	Credit Note [Print PDF]		\$1,585.50
23 Jul 26	Invoice [Print PDF]	\$1,585.50	

Contributions

Start typing to search Filters

Participant	Dates	FTE	Contribution
[Redacted]	Jan 2026 - Mar 2026	1	\$453.00
[Redacted]	Jan 2026 - Mar 2026	1	\$453.00
[Redacted]	Jan 2026 - Mar 2026	0.5	\$226.50
[Redacted]	Jan 2026 - Mar 2026	1	\$453.00