



# Your guide to salary packaging with Smartsalary

# Salary packaging with Smartsalary

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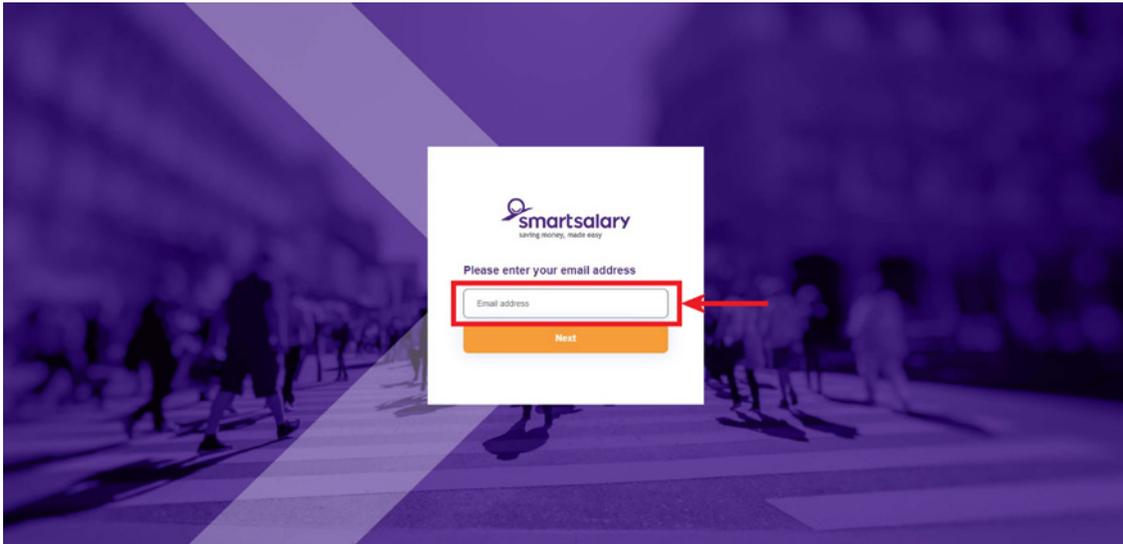
# > Accessing your account



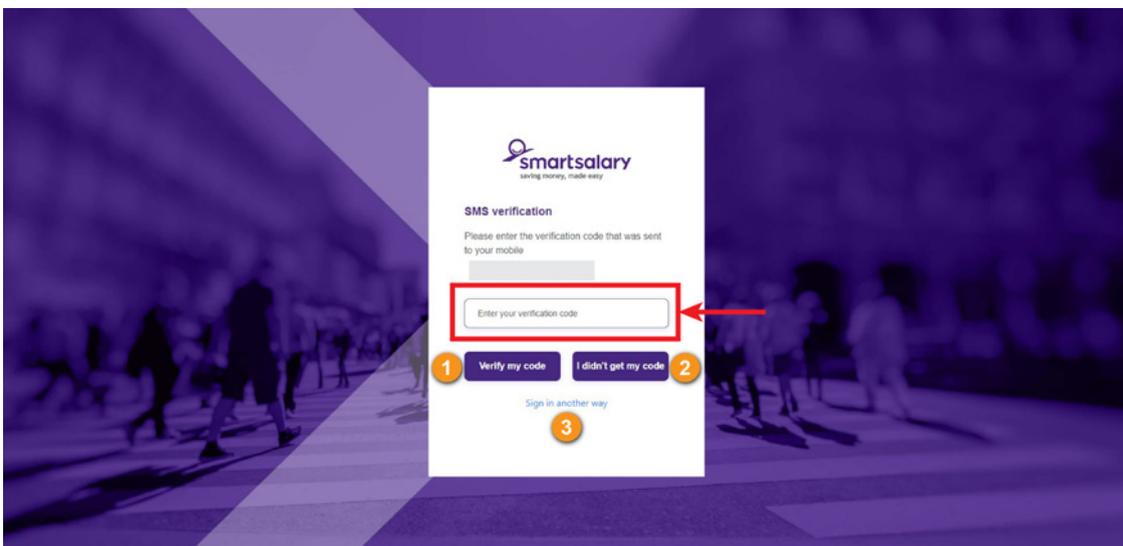
For your security, we use two-factor authentication as part of the login process. This means you need the code we send to your phone and your email address.

## To see how it works, follow the steps below

- Enter the email address registered with Smartsalary (usually the one we use to communicate with you).



- A verification code will be sent to your registered mobile number.
  - 1 Enter the code received from Microsoft (usually sent in under a minute).
  - 2 If you didn't receive a code, select I didn't get my code to have it resent.
- To have the code emailed, select **3** 'Sign in another way'. Once you confirm your mobile number, date of birth and postcode, the code will be sent.



# > Work for more than one employer?



If you salary package at more than one employer, on your account dashboard, click the 'cog'  icon to select the account you need.

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# > View your benefits



Click the benefit for more details and to access quick links to reports and online claims (if applicable).

**My tax-free cap**

Left to claim  
**\$0.00**

Last pay cycle deduction (21/12/2022)  
\$0.00

Next pay cycle deduction (21/12/2022)  
\$0.00

My tax-free cap	Current FBT year	Next FBT year
<b>View schedules</b>	Total amount of tax-free cap left to claim: \$0.00	
<b>View transactions</b>	\$0	
<b>Change your deductions</b>	Total of claims paid to date	
<b>New regular payment</b>	Claims scheduled for payment	
<b>Make an online claim</b>	Left to claim	
<b>Change your benefit</b>	Tax-free cap breakdown	
	Claimed	Scheduled
Rest payments		

**Recent claims (past 90 days)**

Pending claims: 0

Partially approved claims: 0

Fully approved claims: 0

**Contact Us**

Use the SmartFAQ

1300 476 278



# > Add a benefit



- Click 'Add benefit' for details on the benefits you can include in your salary packaging.
- Click 'Find out more' for further details and the supporting documents required. If you're ready to start, click 'Apply now'

The screenshot shows the Smartsalary website interface. At the top, there's a navigation bar with the Smartsalary logo and account information. Below that, a dark navigation bar contains links for 'My benefits', 'eClaims', 'My personal details', 'FAQs', 'Forms', and 'Rewards'. The main content area is titled 'Benefit catalogue' and features several benefit cards. The 'Everyday Purchases' card is highlighted with a red box and a red arrow pointing to its 'Add benefit' button. Other cards include 'Vehicle Leasing', 'Tax-free Expenses', 'Meal Entertainment', and 'Superannuation'. On the right side, there's a sidebar with a 'View my salary packaging calculator', 'Recent claims' status, and 'Contact Us' information.



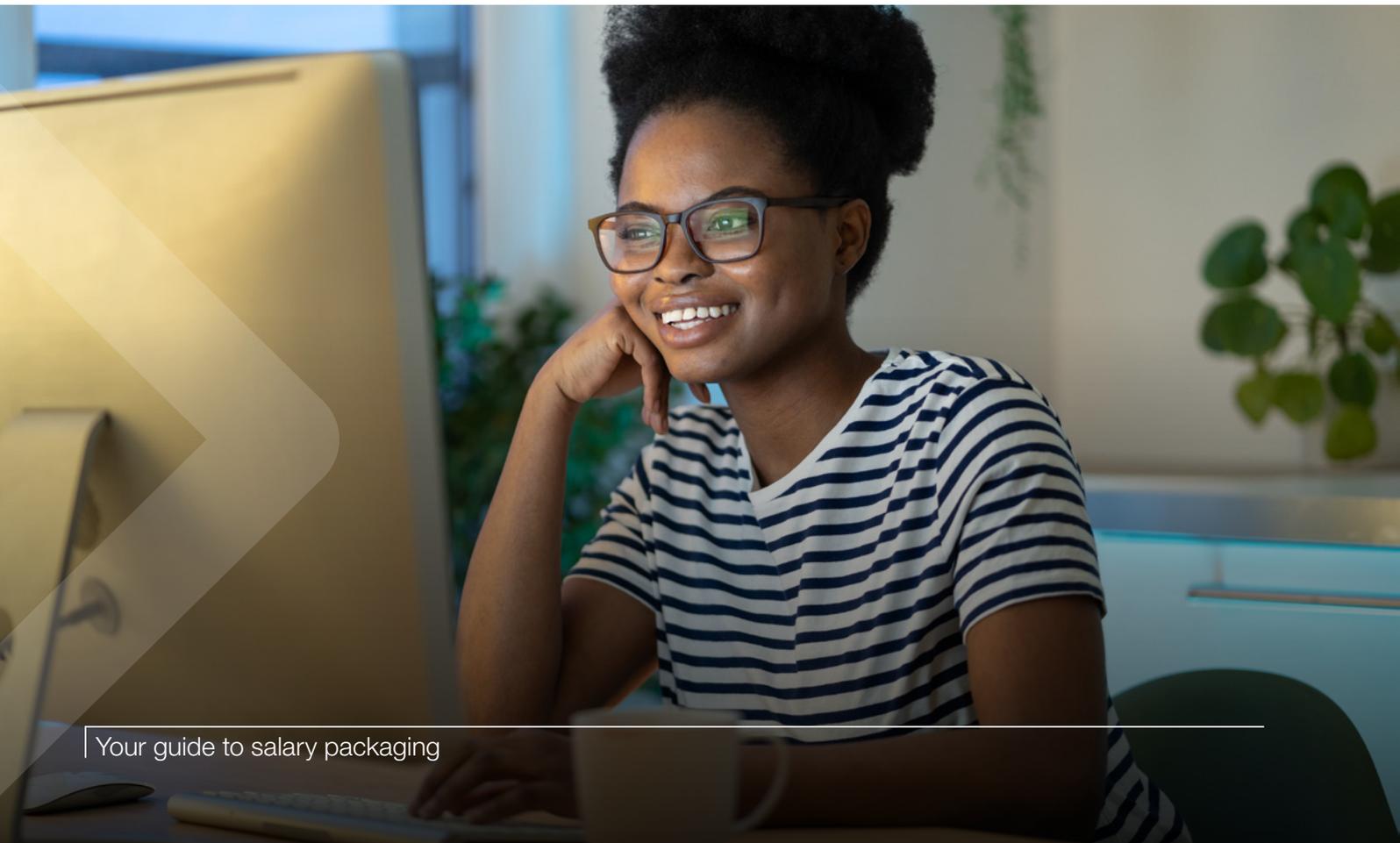
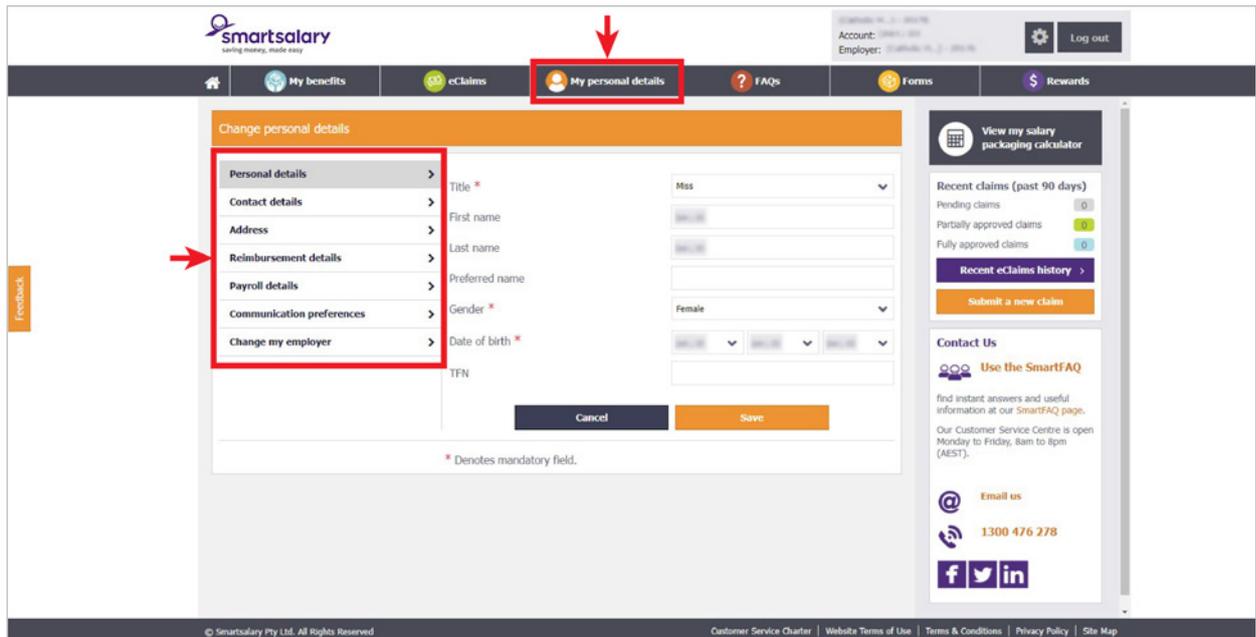
# > Updating your details



If any of your salary packaging details have changed, it is important to update this information on your account.

View your current details by choosing one of the menu options on the left-hand side.

For example, to update your bank account details, select 'Reimbursement details'.

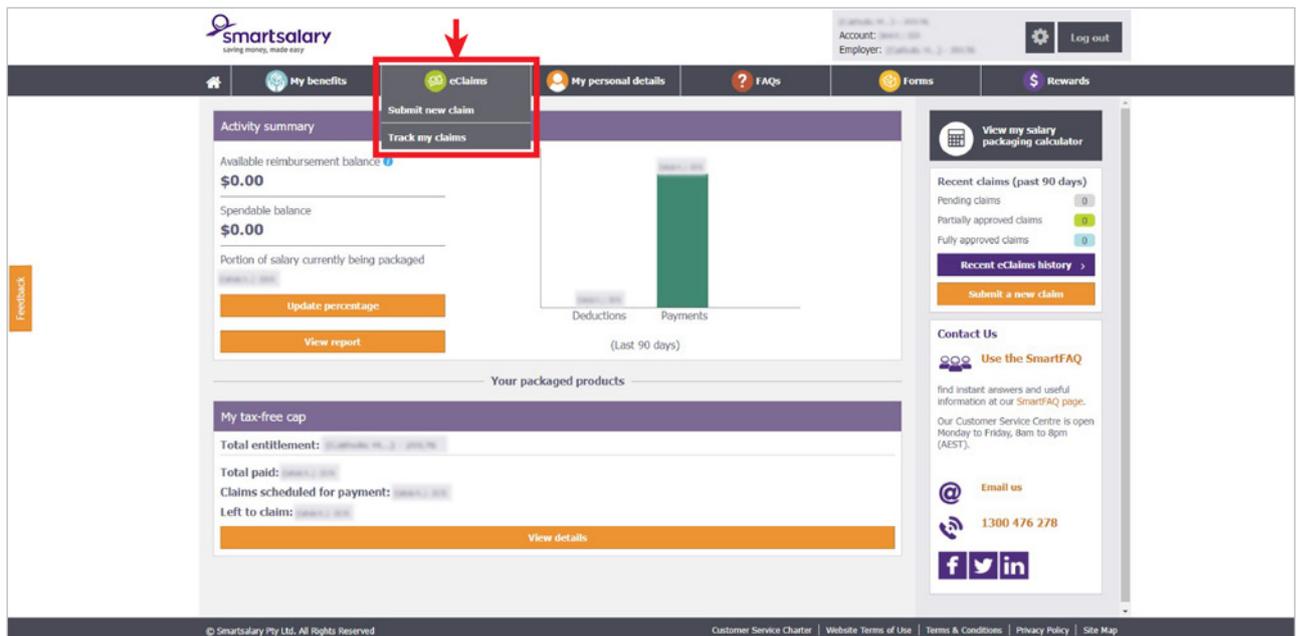


# > Submitting a claim



The quickest way to submit a claim or provide documents or receipts so a balance for an existing benefit can be paid out to you is via E-claims. Here you can also track and view previously submitted claims.

- In the E-claims menu, select either 'Submit new claim' or 'Track my claim'.



- To submit a new claim or provide updated documents for an existing benefit, select the benefit and the expense type. Enter the dates and amounts of all transactions you are including (you can submit multiple receipts/files in the same claim), then upload your receipts. (You can upload up to 10 megabytes (MB) and the following formats are accepted: PDF, JPEG/JPG, BMP, TIF/TIFF, PNG or GIF).
- Check that your bank account details are correct as this is where the payment(s) will be made.
- Accept the declaration and submit your claim.



## Uploading supporting documents

Providing supporting documents and keeping them up to date is important to keep your salary packaging payments going. For some of the most popular salary packaging benefits such as mortgage and rent, you only need to provide the documents once. For other that are claimable under the tax-free cap or entertainment expenses, you'll need to submit a claim, along with receipts, for reimbursement.

Follow the instructions on "Submitting a claim" to do this.

# > Changing your deductions



To change your deductions, follow the steps below

- Choose the benefit you want to change from your account dashboard and click 'View details'.
- Click 'Change your deductions' from the left-hand menu to change the per pay amount, the total amount, or the number of pays you'd like to package over, then click 'Submit'.

**Current FBT year**

You have \$8259.14 left to claim on your tax-free cap for the current FBT year.

When would you like to start salary packaging this benefit? Number of deductions to pay your benefit?

Enter how much you would like to package either as a 'per pay amount' or a 'total amount' this FBT year.

Per pay amount or Total amount

\$750.82 will be deducted each pay from 19/12/2019 to 26/03/2020

# > Changing your superannuation contributions



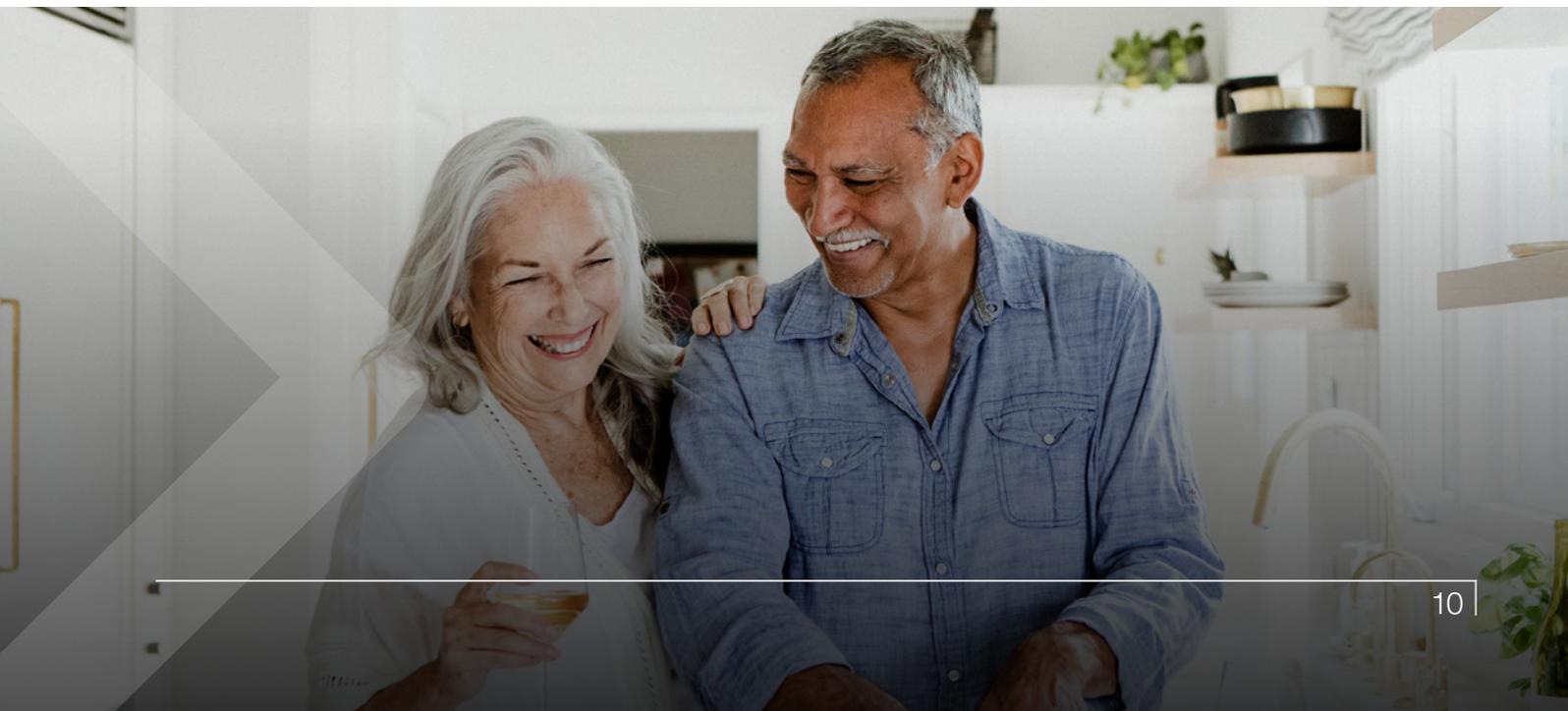
To change your super contributions, follow the steps below

- Select 'View details' under the superannuation banner on your account dashboard or from the 'My Benefits' menu.

The screenshot shows the Smartsalary website dashboard. The top navigation bar includes 'My benefits', 'eClaims', 'My personal details', 'FAQs', 'Forms', and 'Rewards'. The main content area is divided into several sections:

- Activity summary:** Shows 'Available reimbursement balance' at \$0.00, 'Spensible balance' at \$0.00, and 'Portion of salary currently being packaged' at 100%. It includes buttons for 'Update percentage' and 'View report', and a bar chart for 'Deductions' and 'Payments' (Last 90 days).
- Your packaged products:** Contains a section for 'My tax-free cap' with fields for 'Total entitlement', 'Total paid', 'Claims scheduled for payment', and 'Left to claim'. A red arrow points to a 'View details' button at the bottom of this section.
- Recent claims (past 90 days):** Lists 'Pending claims', 'Partially approved claims', and 'Fully approved claims' with corresponding counts.
- Contact Us:** Provides information on using the SmartFAQ, email address, phone number (1300 476 278), and social media links.

- Then make the changes you need (cancel your contributions or change the per-pay amount).
- Confirm the changes by clicking 'Submit'.



# > Changing or managing your vehicle budgets



Just follow the below steps to manage and increase your vehicles budgets directly via the Smartsalary website.

- Select 'View vehicle details' under the Novated leasing overview banner on your account dashboard or from the 'My benefits' menu.

Novated leasing overview (for vehicle )

Vehicle:  Last odometer reading: 34,958km 1 View vehicle details

- Select 'Manage my budgets' on the vehicle expense you wish to increase. You'll also see options to view other details and products for your vehicle.

Manage my budgets

Vehicle:  Filter by: Last 12 months

- Manage my budgets >
- My leasing details >
- View full transactions >
- Fuel cards >
- Days unavailable >
- My products >
- Add new products >
- My odometer reading >

**Fuel** Manage budget 2 >

\$2,958.21 of \$2,499.00 ✗ Over Budget

View Transactions

**Maintenance** Manage budget >

\$0.00 of \$340.44 ✓ Within Budget

View Transactions

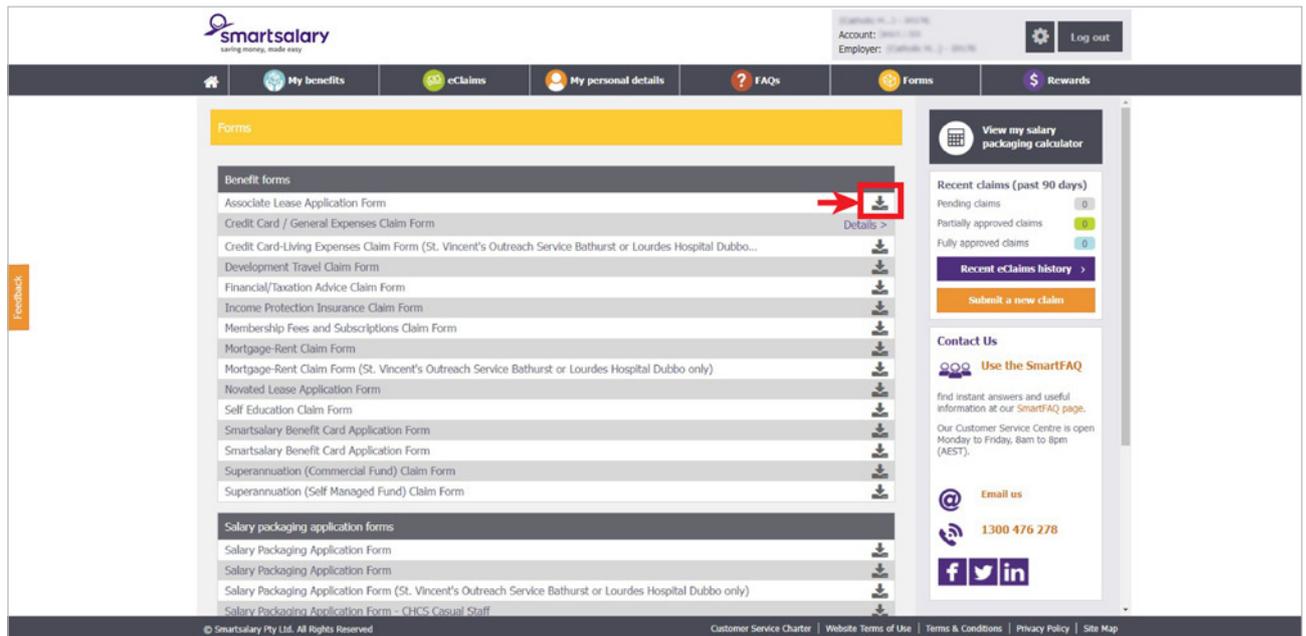
- Enter the new annual budget amount (the reduction of vehicle budgets cannot be done online).
- Confirm the changes by clicking 'Submit'.

# > Downloading forms



Some benefits and account changes require a form to be manually completed such as nominating a Third-Party authorisation.

- Select 'Forms' from the top menu and click the download icon  to save the form to your device.



- Print and complete your form and send it back to us.



# > Salary packaging reports



Salary packaging reports are available from the account dashboard under 'Activity summary'.

- Simply select 'View report'.

The screenshot shows the Smartsalary account dashboard. The 'Activity summary' section is highlighted, showing the available reimbursement balance (\$0.00) and spendable balance (\$0.00). A bar chart displays 'Deductions' and 'Payments' for the last 90 days. The 'View report' button is highlighted with a red box and a red arrow pointing to it. Other sections include 'My tax-free cap', 'Recent claims (past 90 days)', and 'Contact Us'.

- You can filter your deductions by date and/or benefit. You can also download and print your salary packaging transactions or Confirmation Report.

The screenshot shows the Smartsalary account dashboard with the 'My transactions' section highlighted. The 'Transaction filter' dropdown is highlighted with a red box, showing options for 'Transactions type' and 'Benefits'. Below the filter, there is a table of transactions with columns for date, deduction, payment, and balance. The 'Export report to CSV', 'Export report to PDF', and 'View confirmation report' buttons are highlighted with a red box and a red arrow pointing to them. Other sections include 'Activity summary (21/09/2022 - 21/12/2022)', 'Recent claims (past 90 days)', and 'Contact Us'.

# Need help?



To learn more about salary packaging  
visit us online or call:

**[smartsalary.com.au](https://smartsalary.com.au)**

**1300 476 278**