



Compliance.Simple.



SMSF HUB INTERMEDIARY ONBOARDING GUIDE WITHOUT A TAN




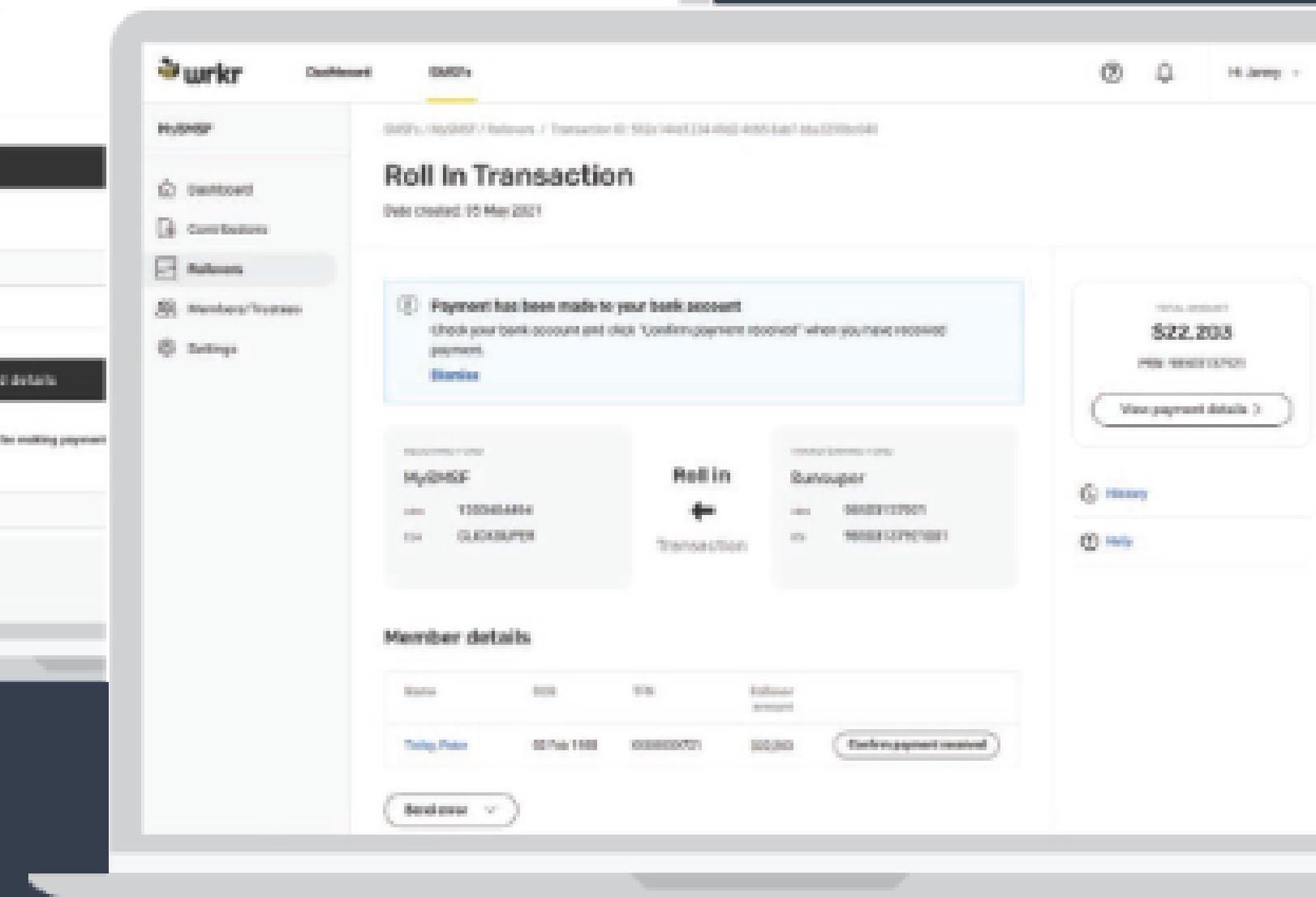
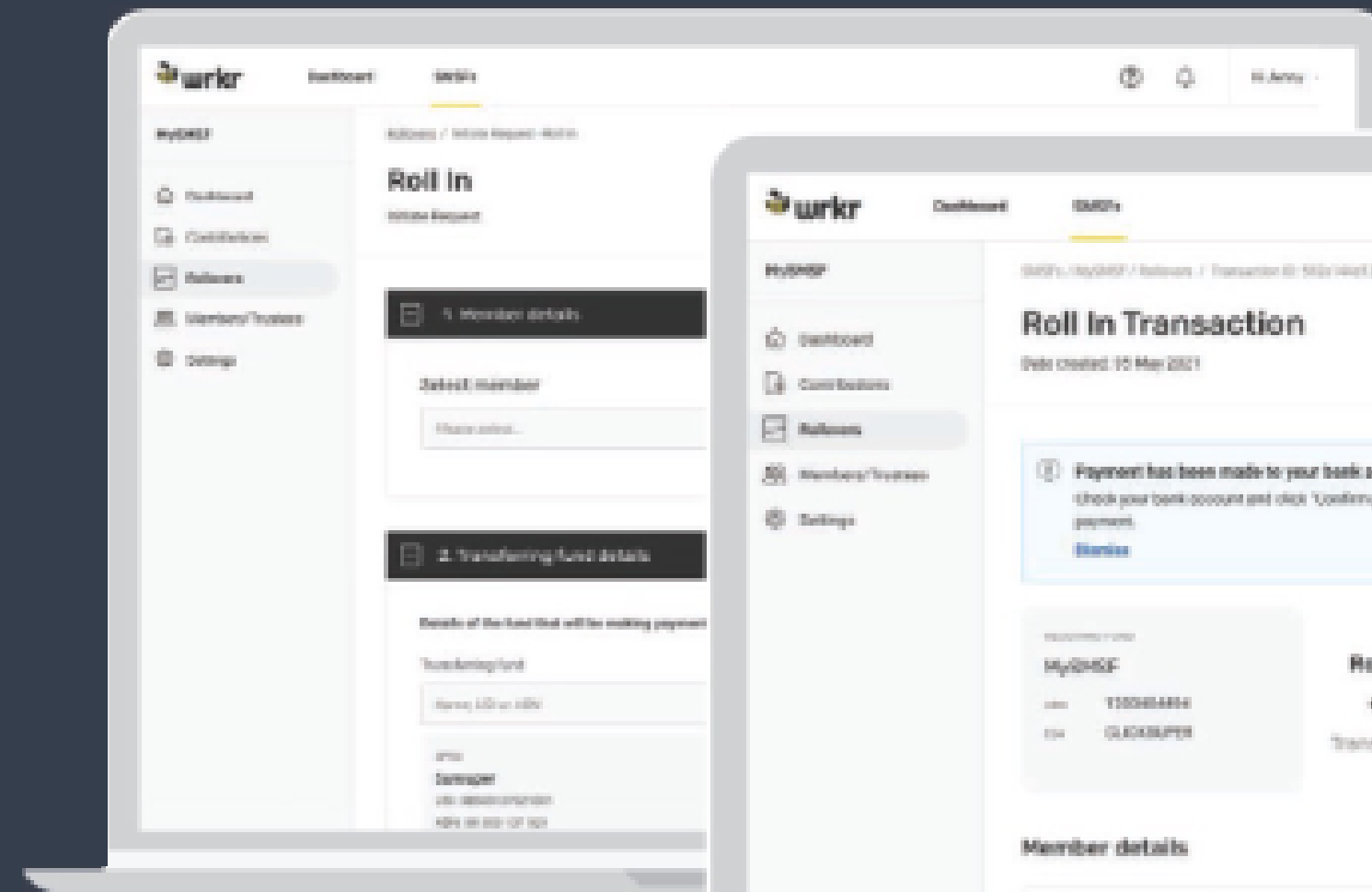
WELCOME TO WRKR SMSF HUB

New SMSF Regulations for Rollovers 3.0

 Employer Contributions made to your ESA

 Manage In/Out partial or full rollovers in a compliant solution

 Receive ATO release authorities and interact with super stream (always on)



Steps to Register for your WRKR SMFS Hub Intermediary Account

 **Revise Service Agreement sent by docuSign and complete required fields**

 **Complete requested details sent by email**


- ABN
- Organisation name
- Tax agent number (*required for rollovers if applicable)
- Email
- First name
- Last name
- Other names (optional)
- Mobile Phone Number

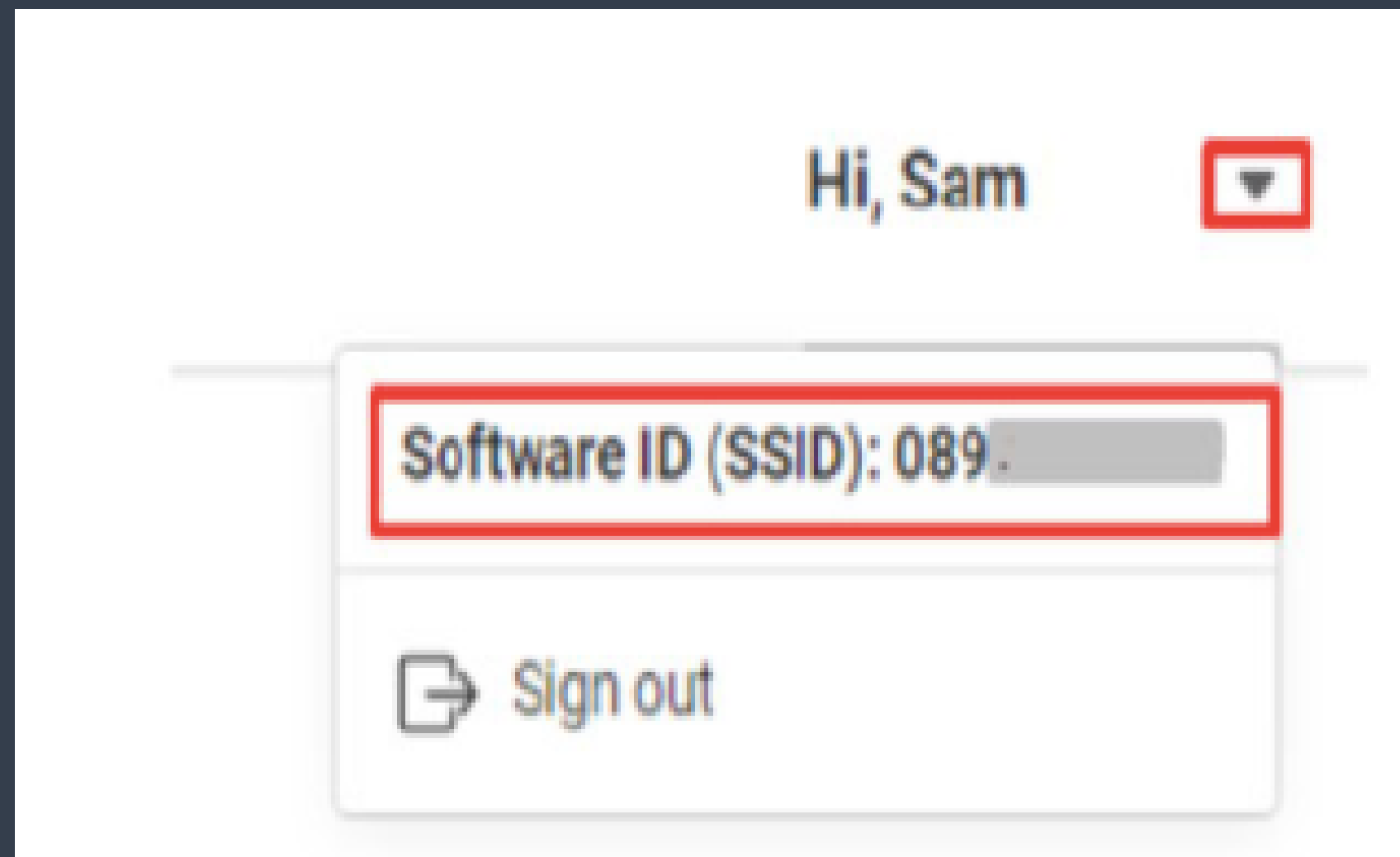
 **Account Set up and welcome email sent**



Complete Account Set Up

Step 1: Notify ATO of your SSID (Hosted SBR Software as a service)

-  You will receive your SSID in your welcome email. If you cannot locate it, log into the SMSF hub, click on the name of your login on the right hand side of the page



Notify the ATO of the hosted software service via phone



If you do not have an Access Manager account, phone the ATO on 1300 85 22 32, prepared with the following information:

- 1 Proof of record ownership (for example TFN, date of birth, address)
- 2 Your Australian business number (ABN)
- 3 The name or ABN of your software provider (which is **WRKR** and **ABN:50611202414**)
- 4 Your unique **SSID** provided to you by WRKR





You will also need your SMSF client to:

Authorise you to submit on behalf of their SMSF and update the ATO with their ESA



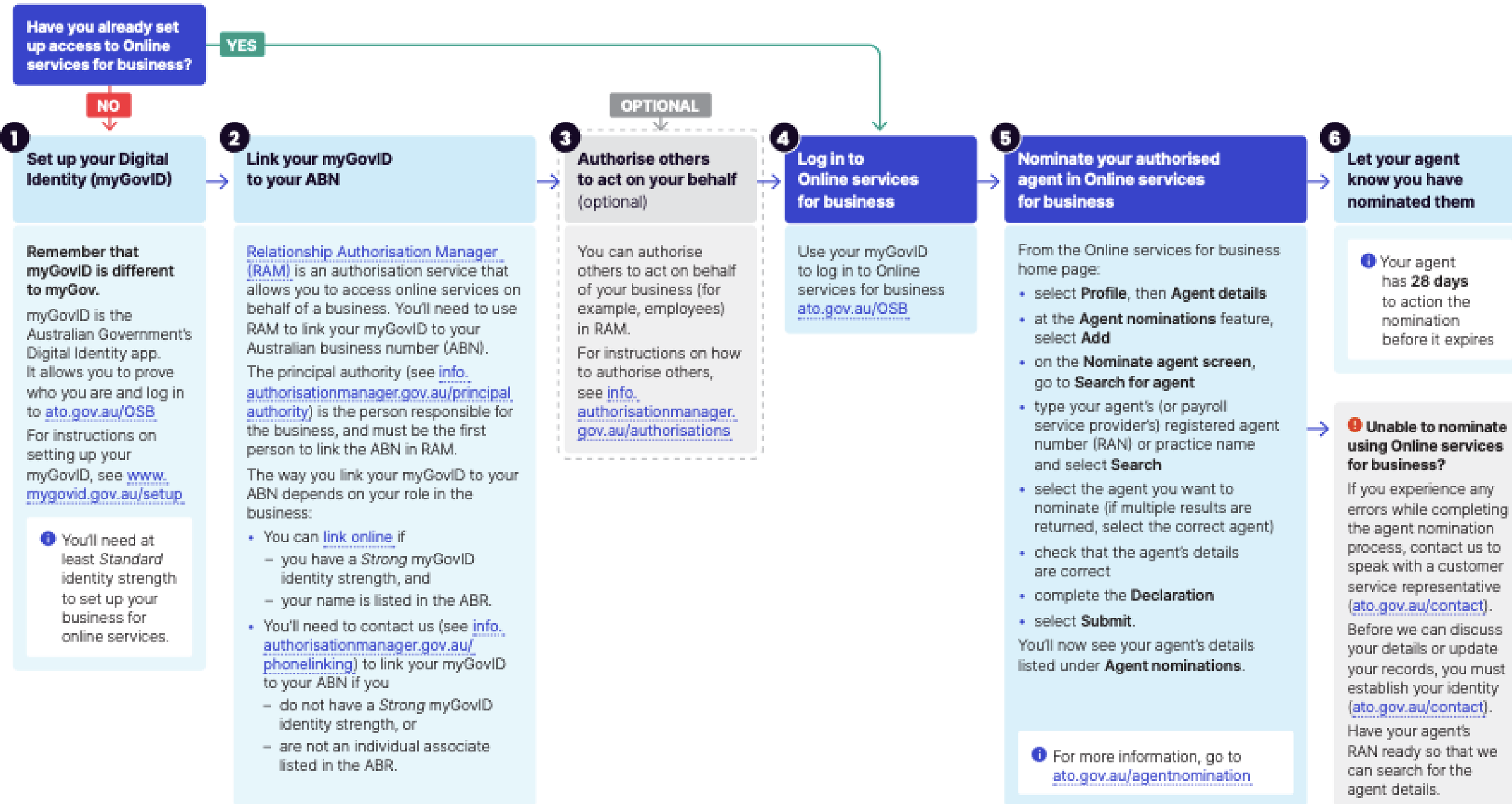
To authorise you to submit on behalf of their SMSF please follow the steps outlined by the ATO (as shown on the next page)





Online services for business Client-agent linking steps

Businesses can use our online services to nominate an agent. Your agent **cannot** do this for you.



Update the ATO with their ESA (wrkrSMSF)

1

From the Online Services for business, select your **SMSF ABN** and then select **Profile** and then **Business Details**

The screenshot shows the ATO Online Services for Business interface. At the top left is the Australian Government logo and the text 'Australian Government Australian Taxation Office'. A 'Switch ABN' button is in the top right. A navigation bar contains 'Accounts and payments', 'Lodgments', 'Employees', 'Communications', and 'Profile'. The 'Profile' menu is open, listing options: 'Business details', 'Business addresses', 'Email addresses', 'Authorised contacts', 'Agent details', 'Associates', 'Financial institution details', 'Manage card details', 'Tax registrations', and 'SMSF auditor details'. A 'View' button is next to 'Business details'. Below the navigation bar is a 'COVID-19' section with a 'View' button. A 'For action' section contains a 'Lodgments' card and a table with columns 'Account' and 'Description'. A status message at the bottom says '✓ Payments are up to date.'



2 Scroll down the page and update your **ESA**

Electronic service address alias

Provide the electronic service address alias issued by the SMSF messaging provider

Alias *

wrkrSMSF



Cancel

Save

OR

The SMFS can call the ATO on 1300 85 22 32 and update their ESA for the SMSF to
WrkrSMSF

Please ensure all members and trustees of the SMSF update their employer or payroll officer with their new ESA - wrkrSMSF

