



## SMSF HUB INTERMEDIARY ONBOARDING GUIDE WITHOUT A TAN



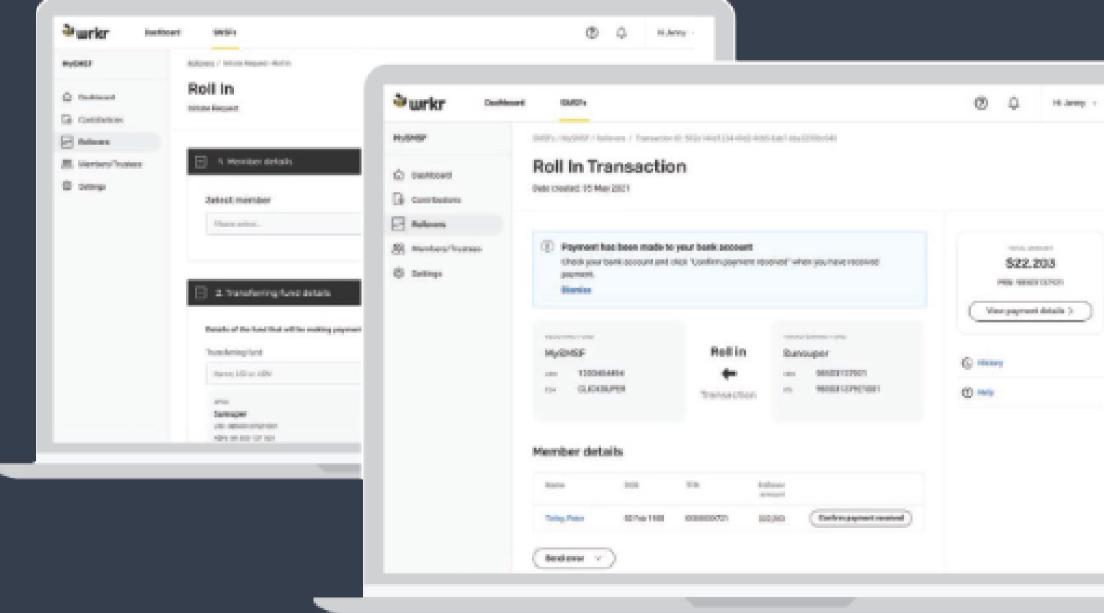


# WELCOME TO WRKR SMSF HUB

## New SMSF Regulations for Rollovers 3.0



- 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

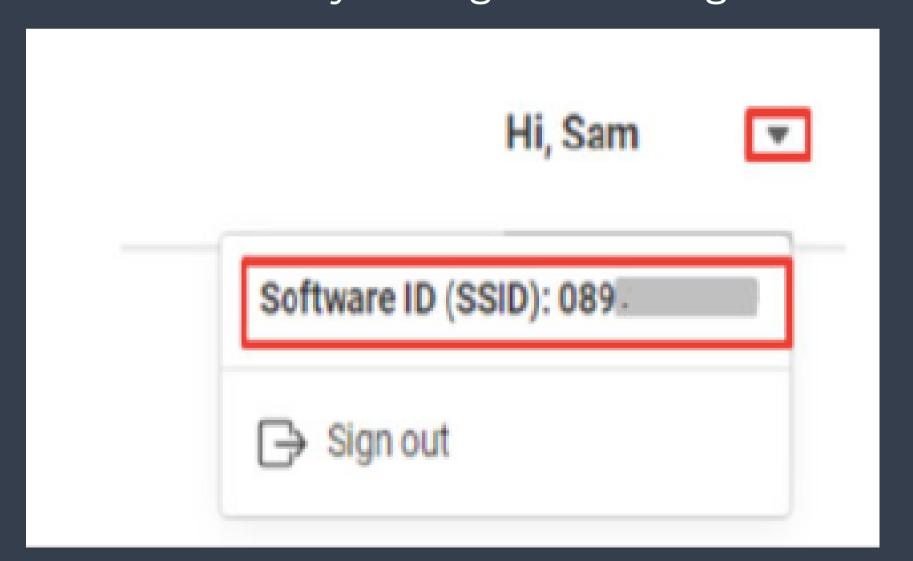


## Complete Account Set Up

### 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:

- Proof of record ownership (for example TFN, date of birth, address
- Your Australian business number (ABN)
- The name or ABN of your software provider (which is WRKR and ABN:50611202414)
- 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

YES

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

Have you already set up access to Online services for business?

NO

Set up your Digital Identity (myGovID)

Remember that myGovID is different to myGov.

myGovID is the Australian Government's Digital Identity app. It allows you to prove who you are and log in to ato.gov.au/OSB

For instructions on setting up your myGovID, see www. mygovid.gov.au/setup

 You'll need at least Standard identity strength to set up your business for online services. Link your myGovID

to your ABN

Relationship Authorisation Manager (RAM) is an authorisation service that allows you to access online services on behalf of a business. You'll need to use RAM to link your myGovID to your Australian business number (ABN).

The principal authority (see info. authorisationmanager.gov.au/principal authority) is the person responsible for the business, and must be the first person to link the ABN in RAM.

The way you link your myGovID to your ABN depends on your role in the business:

- · You can link online if
- you have a Strong myGovID identity strength, and
- your name is listed in the ABR.
- You'll need to contact us (see info. authorisationmanager.gov.au/ phonelinking) to link your myGovID to your ABN if you
- do not have a Strong myGovID identity strength, or
- are not an individual associate listed in the ABR.

Authorise others to act on your behalf (optional)

OPTIONAL

You can authorise others to act on behalf of your business (for example, employees) in RAM.

For instructions on how to authorise others, see info. authorisationmanager.

gov.au/authorisations

Log in to Online services for business

Use your myGovID to log in to Online services for business ato.gov.au/OSB Nominate your authorised agent in Online services for business

From the Online services for business home page:

- select Profile, then Agent details
- at the Agent nominations feature, select Add
- on the Nominate agent screen, go to Search for agent
- type your agent's (or payroll service provider's) registered agent number (RAN) or practice name and select Search
- select the agent you want to nominate (if multiple results are returned, select the correct agent)
- check that the agent's details are correct
- complete the Declaration
- select Submit.

You'll now see your agent's details listed under **Agent nominations**.

 For more information, go to ato.gov.au/agentnomination Let your agent know you have nominated them

> Your agent has 28 days to action the nomination before it expires

Unable to nominate using Online services for business?

If you experience any errors while completing the agent nomination process, contact us to speak with a customer service representative (ato.gov.au/contact).

Before we can discuss your details or update your records, you must establish your identity (ato.gov.au/contact). Have your agent's RAN ready so that we

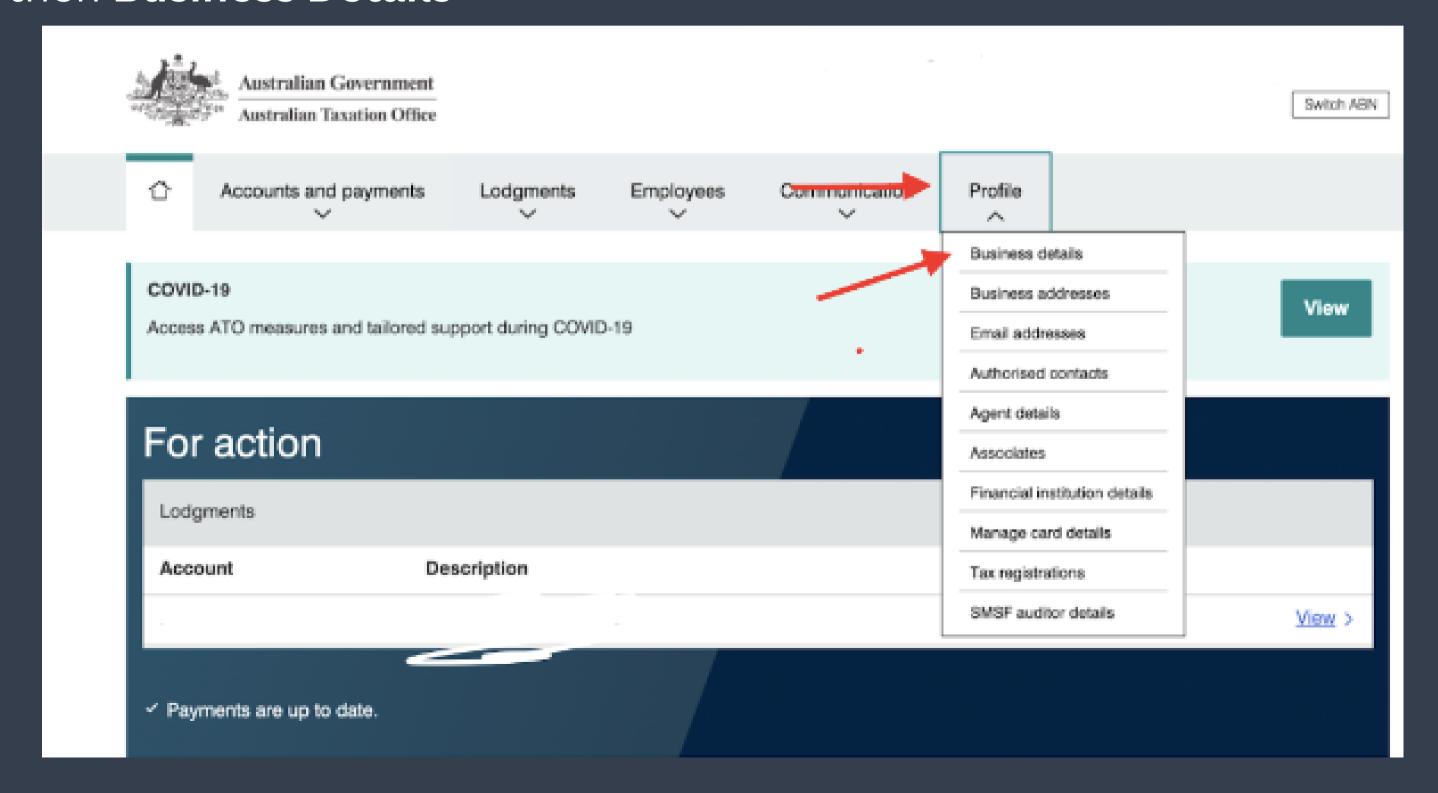
RAN ready so that we can search for the agent details.





## Update the ATO with their ESA (wrkrSMSF)

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









## 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	ave

#### 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\*

