

How to Start Salary Packaging - New Member – Join Now

Description

To start salary packaging is **easy**. We suggest you have your bank account and household expense details handy. Below is a step-by-step outline. As you progress with your set-up, you can also view short instructional videos at every stage. Otherwise, contact the friendly staff at GO Salary for help.

Step 1 – Find us on your device

You can find GO Salary at gosalary.com.au.

Step 2 – New Member – Join

Click on **New Member – Join**.

Complete all your details, including your preferred email and create a password (8 characters).

Step 3 – Confirm Membership via Email

We will send you an email confirming your Membership to GO Salary. (The email is a security measure to provide you access). View this email immediately and **CONFIRM** your membership by clicking on the link provided. You are now ready to log in. (If the link does not work due to your browser restrictions, we will send you an address to use). Once confirmed, we will also send you a 'Welcome' email. It's now time to GO !

Step 4 – Member Log In (and Let's GO !)

Username (email)	Enter the same email address used to JOIN.
Password	Use the same password when joining. Must be a minimum of 8 characters. You can change your password once logged in.

Step 5 – Complete My Profile (All information is CONFIDENTIAL)

Please provide the following information :

My Personal Details	Enter your name, email, mobile and D.O.B.
HELP (HECS), CSA	Let us know if you have a HELP (HECS) debt and if you pay / receive child support. This information is important.
Address	Enter your home address and postal address (if different).
Work Details	Tell us your job title, payroll ID, employment status, work contact details.
Salary	This is important. Tell us your annual salary (or a 'best estimate') as many of our calculations are based on this figure.
Email	We will communicate via email to work or home (or both).
Authorised Person	You can authorise another person (eg. partner, accountant) to discuss your salary package.

Step 6 – My Salary Package

You are now ready to set up your salary package. Therefore, you will need:

Expenses	Tell us the expenses you wish to salary package (eg. mortgage, rent etc.).
Bank Account	Provide your bank account details for payment.
Documentation	It's an ATO requirement that for each expense you salary package you must provide documentation (substantiation) for the expense. We call it Proof of Expenses (POE). The exception are our Salary Packaging Card(s).

Once you have this information and you are logged in, go to the **My Salary Package** page. See over for details. Other fact sheets you should access include '**Household Expenses**' and Meal Entertainment / Holiday Accommodation.

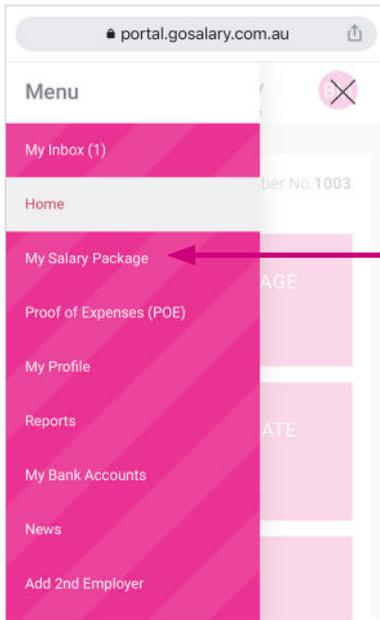
Any Questions ?

Ask Amy at gosalary.com.au.

Please turn over

The Go Salary home page has **links** to all your salary packaging functions. To add or change a household expense (such as mortgage, rent, credit card), go to:

- Menu (top LHS), and click on 'My Salary Package'; or
- 'Add Household Expense' under 'Manage My Salary Package' (bottom).

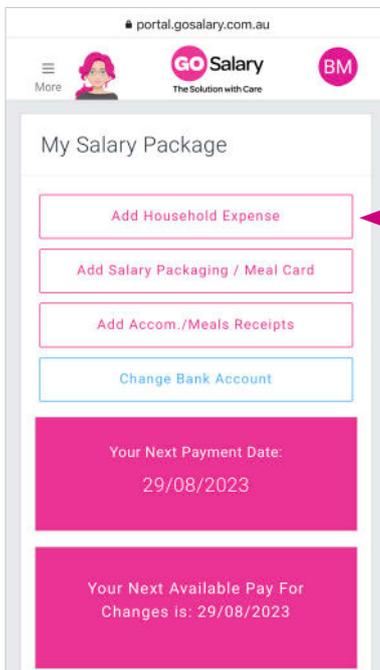


At the **My Salary Package** page, you can manage your salary package. Features include:

- **Add Household Expense** - Click here to add an expense to your salary package. You will be asked to provide **POE**
- **Add Salary Packaging / Meal Card** - Click here to add the paperless salary packaging or meal entertainment **card**
- **Add Accom. / Meals (Receipts)** - Click here to add accommodation and/or meal entertainment **receipts / invoices**. Your employer may allow a set annual value (Max \$2,650) or a claim (reimbursement) per pay. You will be asked to provide/upload **POE (receipts)**. Have a **scanned** document handy.

Important

- **Next Payment Date** - this is the date Go Salary will next process your salary package **payment**
- **Your Next Available Pay for Changes is** - Go Salary sends changes every pay to your employer. The date shown is the next *available* pay run for salary package changes. Payroll typically 'close off' our changes a week prior to the actual pay run. Therefore, the date shown may **not be** your next pay day. Your update will be effective the **next available pay**.



You now need to select the Expense type and the Amount per year:

- **Expense type.** Click on the 'select' list and choose from the expenses shown (e.g. mortgage, rent, etc).
- **Enter Total Expense Value.** This is the annual value of the expense. The amount should be the **lesser** of the 'Amount Available to Limit' (LHS) or the actual expenses value (e.g. rent \$400/week = \$10,400).
- **Maximise This Year.** New to salary packaging? Tick this box to maximise your salary package (tax savings) in your first year.
- **Bank Account.** Click on the '**select**' tab and choose the bank account for your payment.
- **Save & Next.** Click here to 'save' and move to the next page. You will be invited to add '**POE**'.

Your update will be effective the next available pay. (This may not be your 'next' pay, as changes to this pay run may have already been 'closed' by Payroll).

