## OZEDI Registration User Guide

<table>
<thead>
<tr>
<th>Version Number</th>
<th>Release Date</th>
<th>Who</th>
<th>Sections Affected</th>
<th>Changes</th>
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<td>12/03/18</td>
<td>AW</td>
<td>All</td>
<td>First version of the document</td>
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<td>1.1</td>
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<td>AW</td>
<td>Buy Data</td>
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<td>13/06/18</td>
<td>AW</td>
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<td>1.6</td>
<td>28/08/19</td>
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<td>all</td>
<td>UI changes plus addition of WPNs and portal upload access from registration</td>
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Overview

OZEDI registers all clients depending on their relationship and their chosen business model. The components include:

- **BRAND**
  - Whitelisted Product ID
  - BMiS Details

- **ACCOUNT**
  - The Account buys the data

- **CLIENT**
  - The Client uses the data

- **USERS**
  - Sign in

OZEDI recognises the variety of business models for payroll providers, their resellers and clients and the Registration system has the flexibility to accommodate these variations. This guide is for a payroll providers’ clients to register their own account at OZEDI.

Brands

OZEDI sets up a Brand after the payroll provider has been approved and basic details received. A payroll provider may have multiple Brands for different payroll products. Registration of Accounts are always linked to a Brand because the ATO requires the payroll provider’s whitelisted Product ID as part of the messaging details.

Payroll providers will supply their clients with a brand-specific link to be used to self-register at OZEDI. This link ensures the clients are registered under the payroll provider’s brand.

Getting started

The steps you need to take now are:

1. Register yourself as a User and add your Account - select the User Register link (see details below).
2. After your Account is set up, you can use the Sign In link to access the system in future.
Registering a User

The screen below displays when you access the User Registration link provided by OZEDI – it is specific to the payroll system you are using and your provider’s logo will display. Complete the form and hit the Register button. An email will be sent to you to validate that you own the email address you have entered (security check). You must activate your User by clicking on the activation link in the email – you have 24 hours to complete this process after which time you will need to contact support@ozedi.com.au. Activating the User will lead to Signing In and adding a new Account.
When successfully completed, the following screen displays, asking you to go to your email address and confirm your registration as a User.

The email sent to you to confirm your registration will be similar to the one below. You must receive this email (to prove that you own the email address) and you must click on the activation link – this completes the User registration.

```
hub account activation

inbox
noreply@ozedi.com.au

Dear amw7788@gmail.com

Your hub account has been created, please click on the URL below to activate it:


Regards,
Ozedi```
The Activation screen below will display to acknowledge that your User is now active. Click on the Sign In link.
Accessing the Registration system

Internet address
When you have been registered, you can access the OZEDI Registration in the production environment using the address below:

https://dashboard-stp.ozedi.com.au

Accessing this URL will bring up the screen below. Enter your User email address and password to sign in. Once you have signed in, other functions will be available.

Account Sign In
Sign in using the details you recorded at the Registration first step or the credentials of any of the users you have added since.

You can change your password using the Forgot your password? option.

When completed, the Account management screen displays – see below.
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Navigation
The dashboard displays several features down the left side of the screen; these include:

- Accounts – to manage your accounts
- Help – displays Registration User Guide
- Logout – ends your session

Managing Your Accounts
You have the following options:

- Select one of the accounts linked to your User and listed below
- Create a new Account

The first time you will need to select to Create Accounts – see instructions below.

If you have registered an Account, it will be displayed as one of the Accounts you have access to as shown below. A User may have access to multiple Accounts – these will be listed for selection.

NB an Account can have multiple services; for example:

- Single Touch Payroll
- Standard Business Reporting (includes TFND)

Clicking on the Account Service (see Single Touch Payroll service above) displays the Account dashboard for that service – see below.
Create a New Account
This screen is used to register a new Account under your payroll provider’s Brand. Enter your account details and hit the Register button.

NB make sure you tick the Single Touch Payroll box

You are now registered with an Account and a User and ready to access the system through the usual sign in link.
Accounts
Account Holders
The account level identifies the party purchasing data for the Clients registered under the Account. You must have at least one Client registered as this is the level that records data usage.

Manage your Account
The dashboard provides the following facilities for each Account created:

- Edit Account details
- Data usage – including Buy Data and Data Alerts
- Client usage report
- Manage Clients
- Manage Users
- Messaging
- Invoices

Edit Account details
In the Account Information box is the link to edit account details – see Create a New Account screen for details. The following data items have additional actions:

- Services - Tick Single Touch Payroll
- Contact types: - Tick Notification to receive “low data” and “no data” alerts by email
Clients

Client Facilities

Clients send data and receive responses and are linked to an Account which pays for the services. Each Client is given a unique 8-digit Client ID which is used in the following places:

- API upload
- Portal upload

The Client ID identifies the Account which allows OZEDI to check data availability prior to uploading new submissions. All usage statistics are recorded by Client, ABN and type of transaction; eg STP.

Clients can be added, edited and deleted using the Manage Clients tab on the dashboard.

NB you can’t delete a Client once you have processed submissions against that Client ID.

New Clients can be added using the + Add Clients icon/link.
Create a New Client

At least one Client is required for every Account. Use the green Create Clients icon/link to add a new Client; the screen below displays for entry of client details which include the following:

- **Client name** (company name)
- **Can send** (on/off – can be used by the Account holder to prevent clients from sending if required – this must be ticked to be able to send data)
- **Client active** and **Account active** are set by the system according to the account data balance and “can send” settings
- **ABNs/WPNs** – enter at least one ABN or WPN for a new Client. It is not necessary to enter all ABNs or WPNs here in order to upload submissions from multiple ABNs and WPNs to the Client ID. The system will automatically record multiple ABNs and WPNs if used. NB the following fields may be entered if applicable; ie
  - **Role** – blank or RAN (Registered Agent) or TAN (Tax Agent)
  - **Agent number** – must enter if Role is not blank – else leave blank
- **Client contacts** – multiple client contact details can be recorded. When the Client record has been added an email is sent to the address of one of the contacts notifying them of their Client ID. Important features include:
  - **Contact Type** – must tick **NOTIFICATION** if you want to receive ATO responses by email
Once a Client has been successfully added, the unique 8-digit Client ID is generated by the system and displayed against the Client record and an email is sent to the address of one of the contacts notifying them of their Client ID.

**Edit Client details**
Client details can be edited to add additional Contacts if required.

**Delete Clients**
Clients can be deleted if there have not been any submissions uploaded to the Client ID. Otherwise the Client can be made inactive by removing the tick from the “Send data” option.
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**Account Users**

Accounts can be accessed by multiple Users for the following functions:

- Sign into the Account dashboard and its facilities including:
  - purchasing data
  - displaying traffic and history
  - access tax invoices to verify purchase of blocks of data

Account Users can be added, edited and deleted if required – they are listed when the “Manage Users” tab is selected – see below.

Use the **+ Add Users** link to add additional users to your Account – see below.
Messaging

The Messaging tab on the Account dashboard displays the messaging submissions and responses from the ATO. The status is displayed; ie

- QUEUED – the message has been received at OZEDI
- PUSHED – OZEDI has successfully pushed the message to the ATO
- RESPONDED – OZEDI has successfully retrieved a response from the ATO
- NO RESPONSE AVAILABLE – the ATO has not generated a response within the maximum 30 day limit. You may contact the ATO and request an update on this message after 72 hours have elapsed.

Submissions that have a status of RESPONDED have the option to re-send the ATO’s response by email to all the Client Contacts flagged for NOTIFICATION – just click on the envelope on the right hand side.

Messaging statistics including message size, date/time etc may be exported to Excel using the Reports option on the dashboard for a nominated date range. This allows you to reconcile your Account data balance at any time by comparing your usage to your data purchased.

What to do if the message status is stuck at PUSHED?

Your submission status will change from PUSHED to RESPONDED when OZEDI retrieves a response from the ATO. If your status is stuck at PUSHED it will change to NO RESPONSE AVAILABLE if there is no response within 30 days. If you haven’t received a response after 72 hours, please follow the instructions below to query the status of your submission.

** Be aware that big files (over 1,000 employees) take longer to process at the ATO and don’t resend your file again – this will cause problems at the ATO with duplicate files.
What to do if you don’t get a response from the ATO

The ATO expects the following actions to be taken if a submission does not achieve a response after 72 hours or the maximum of 30 days from submission:

- Contact your payroll provider as they have access to the ATO online support facilities for DSPs to report your problem for you
- Alternatively you can contact the ATO Business Hotline yourself and follow the prompts for STP lodgement enquiries. NB Do not contact the ATO Digital Partnership Office (DPO) or SBR Service Desk at the ATO directly as they are the main contact point for digital service providers only.
- Give them your submission’s Message ID – this is available from the Messaging details tab on the OZEDI Dashboard – each submission has a Message ID – please use copy and paste for accuracy as it is quite long. If uploading via the portal it is also available via the successful upload email sent to the authorising contact.
- Copy support@ozedi.com.au on your email to the ATO
- The ATO will investigate the lost transmission and respond with the action you are to take.

ATO Advice

The ATO advises the following:

- **don’t resend** the same submission unless requested to do so by the ATO – otherwise you will probably cause errors
- **you can continue to send new payruns** – even if you don’t get a response. By sending your payruns you have met your compliance requirements

The ATO may request the “message header” or the “ebMS header”. If so, please contact support@ozedi.com.au and we will forward the message header to you so that you can respond to the ATO’s request. The message header is like the details on the outside of the envelope that we send to the ATO with your payload inside – it does not contain any private data.
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Where to get your Message ID

Portal Upload
If uploaded using the OZEDI portal, use the email that is sent (sample below with Message ID highlighted):

![Email Sample](https://example.com/email-sample.png)

Notification STP - Response Message

You have received a response from the ATO for messageuuid:

7084a13-871a-496c-b2de-e07ef39692ae@Ozedi

Response received for client GHI Industries Pty Ltd - [00469175]

Your response is in the attachment.

For the original File you uploaded: CONF-ATO-OZEDI-BULK-008.xml

Regards,
Ozedi.

From Server: https://dashboard-stp.sandpit.ozedi.com.au

REST API Upload
If you have uploaded your file using your payroll systems seamless interface, go to your Account at OZEDI, select the Messaging tab and get the Message UUID shown for every message displayed – see display below.
Portal Upload of STP files

The option to upload an STP file under your OZEDI account is provided with the **Upload** icon on the Messaging tab – see below. Access to the upload portal here skips identification by API user name and password as the user has already been validated when signing into the Registration system.

The screen below displays to identify the Client ID – a drop down box provides access to registered Clients, their names and Client IDs.

Press **Check Credentials** button and screen below displays for entry of relevant details for upload.
Once this section is entered, the declaration screen below displays for acknowledgement. Then press the **Upload** button.

If the upload is successful, the screen below displays. Otherwise errors are reported.

Refer to **Portal Upload User Guide** for more details on uploading a file using this facility.
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Buy Data
This online purchase facility lets you buy a block of data to use for your submissions. Unused data never expires! If you buy a lot, it just lasts longer.

Select quantity to purchase
The screen below displays requiring entry of the number of megabytes being purchased. Valid quantities are:

- 0.5MB
- 1MB
- 2MB
- 5Mb
- 10MB
- 20MB
- 50MB
- More than 50MB, please contact support@ozedi.com.au

![Buy Data](image-url)

You can purchase additional data if you are running low at anytime by selecting from the available purchase options below which calculates the Price $90.00 per MB + GST.

If you need to purchase more data than is available to choose then contact us.

Purchase

<table>
<thead>
<tr>
<th>Amount ($)</th>
<th>90.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>GST ($)</td>
<td>9.00</td>
</tr>
</tbody>
</table>

Total Amount $99.00

Please accept the terms and conditions
Accept terms and Conditions
Then the screen displays the terms and conditions link and the accept tick box. You can read the T&Cs at this point. To continue, tick the box.

Proceed to PayPal
Accepting the terms and conditions activates the PayPal Checkout button which will take you to the PayPal website for payment. You can pay by:

- One off credit card purchase – no Paypal account is necessary
- Paypal account payment options

Once your payment has been successfully completed, the Account dashboard will redisplay and show the recalculated data balance that is available for processing.

Invoices
Tax invoices for data purchases can be accessed using the Invoice tab on the dashboard – see below. All your purchases are listed and the option to Download or email a PDF of your tax invoice is provided on the right hand side.
**Data Alert Settings**

The option to be alerted by email when data is running low or when you use up all your purchased data is provided using the Data Alert Settings option on the Data Usage area of the dashboard. When activated the screen below displays – your options for the data level at which you want to be notified are: zero, 0.25, 0.5, 1, 5 or 10MB.

Under “Edit Account Details” you can add multiple Contacts. These **Account Contacts** must be flagged **NOTIFICATION** to receive emails alerting for low data.

**NB there are contacts under Clients as well as under Accounts – alerts do NOT go to Client Contacts**
Client Usage Report
Messaging statistics including message size, date/time etc may be exported to Excel using the Reports option on the dashboard for a nominated date range. This allows you to reconcile your Account data balance at any time by comparing your total usage to your data purchased.

Sample summary format in Excel:

<table>
<thead>
<tr>
<th>Client Name</th>
<th>Client ID</th>
<th>ABN</th>
<th>MB</th>
</tr>
</thead>
<tbody>
<tr>
<td>GHI Industries Pty Ltd</td>
<td>00469175</td>
<td>51824753556</td>
<td>.0306</td>
</tr>
<tr>
<td>GHI Industries Pty Ltd</td>
<td>00469175</td>
<td>67094544519</td>
<td>.0400</td>
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</table>

Sample detailed format in Excel:

<table>
<thead>
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<th>Client Name</th>
<th>Client ID</th>
<th>ABN</th>
<th>MB</th>
<th>Date</th>
<th>Time</th>
<th>Transaction Type</th>
</tr>
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<td>00469175</td>
<td>67094544519</td>
<td>.0201</td>
<td>25-07-2019</td>
<td>18:20:34</td>
<td>SEND</td>
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<td>00469175</td>
<td>51824753556</td>
<td>.0189</td>
<td>25-07-2019</td>
<td>18:21:38</td>
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<tr>
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<td>00469175</td>
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<td>25-07-2019</td>
<td>18:34:03</td>
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<td>18:35:06</td>
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