September 2019

eReturns

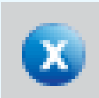
Associated Entity Quick Reference Guide

Australian Electoral Commission

Contents

The basics

Common icons

Icon	What it does?
	This is the help icon in eReturns. If you click on this icon, further information will be displayed to explain what is on screen. Clicking the icon again, or the close icon in the help text area will close the help text.
	This is the close icon in eReturns. Clicking on this icon will close the help text that it is related to.
	This is the annotation icon in eReturns. Anywhere that this icon appears, you have an opportunity to record further information, be it against an individual transaction, or total. Any information you record in an annotation will be presented on the final return as a footnote. Annotations not related to a specific transaction or field are also available within the wizard. This is covered in some detail later on in this guide.

Useful information

Saving

eReturns automatically saves what you are doing while you are working. You do not need to remember to click save while working in eReturns.

Getting Started

Logging in to eReturns

Getting Credentials

Associated entities must be registered with the AEC within 90 days of becoming required to register and must maintain up to date records.

Entities are required to make any changes to the register via the Change to Transparency Register form within 90 days of the change occurring.

New financial controllers of associated entities will have a user name and password issued to them by the Australian Electoral Commission (AEC) with their obligation letter.

Obligation letters to associated entities are sent after 30 June of that financial year. Where a person has become the financial controller of an associated entity and wants to gain access to eReturns, please contact the Funding and Disclosure section (FAD) on 02 6271 4552 or email fad@aec.gov.au.

Logging in

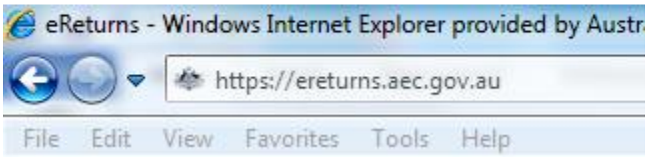
eReturns credentials will appear like this in the obligation letter:

User name: AdminTestAssociatedEntity
Password: PW488XRT

eReturns credentials are made up of a user name and one-time password. On the first log-in to eReturns you will be prompted to change the password. There is also an option to change the user name. It is important that eReturns credentials are kept secure and not shared with anyone else. Financial controllers will be held responsible for returns lodged via eReturns using those credentials.

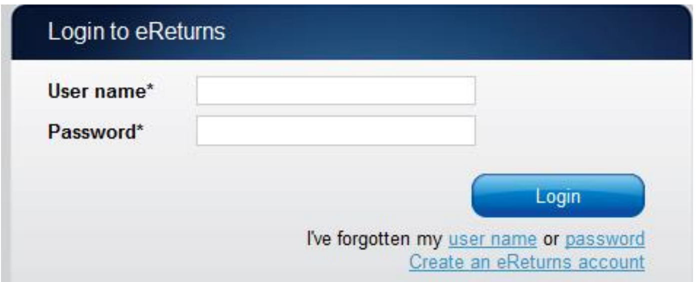
Getting Started

Once eReturns credentials have been received, the eReturns website can be accessed via your web browser.



Be careful! – eReturns is a secure website which means you must type 'https://' at the beginning of the URL.

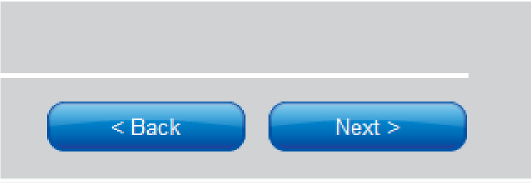
At the eReturns webpage the following login screen will appear.



Enter the user name and password provided in the obligation letter and click 'Login'.

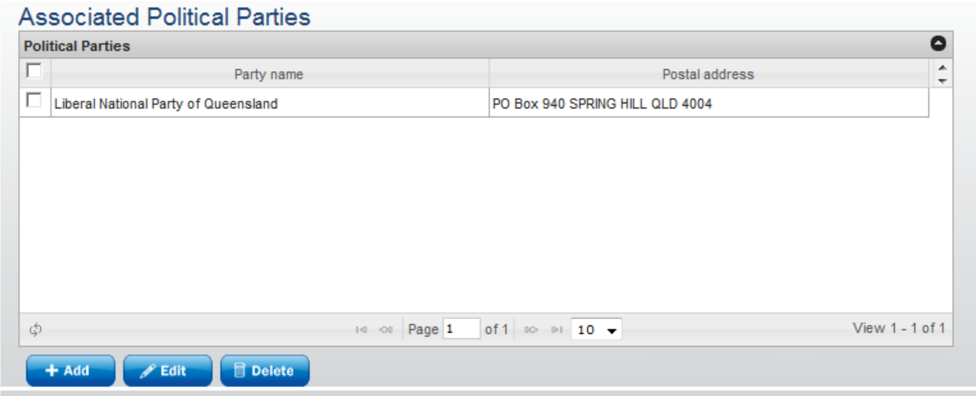
On first login

The first time you log in to eReturns you will be prompted to verify your details. To navigate through the eReturns wizard use the ‘Back’ and ‘Next' buttons at the bottom right of the screen.



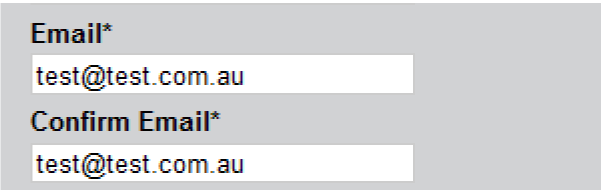
Step 1: Organisation Details

First you will be asked to confirm which party or parties you are associated with.



Step 2: Contact Details

Please ensure you enter your email address as eReturns uses email for validation and to send you copies of any returns you lodge.



Step 3: Account Details

On this screen you will be able to change your user name if you wish. You will also be required to enter a new password and provide a secret question and answer and a PIN. This secret information will be used by AEC staff to verify your identity over the phone if you need to contact the Help Desk.

Account details

Enter a username you will remember*

AdminTestAssociatedEntity

New Password

●●●●●●●●●

Confirm password

●●●●●●●●●

Secret question*

Name of dog

Secret answer*

Rover

Pin*

9876

Once you have completed the Account details screen, click ‘Finish’.

Step 4: Confirmation

Account successfully updated

As your email address has changed, an email verification request has been sent to your new email address.
Please click on the link in the email when it arrives and your account will be activated.
You can continue to use eReturns now, however you must activate your account to lodge a disclosure return or re-login to eReturns.
You can now use eReturns.

eReturns will automatically generate a verification email and send it to your email address. Before your eReturns account can be activated you will be required to verify your email address. This is done by clicking on the link in the email.

The email account linked to your eReturns account has changed. Please activate your eReturns account by clicking this link https://ereturnstest.dev.aec.local/RegistrationWizard/ActivateAccount?activationCode=EE8C054585CD0B3C0762107FFD128271. Alternatively copy the link into your browsers address bar.

If you have any queries, please contact the Funding and Disclosure section by phone on 02 6271 4552 or by email at fad@aec.gov.au

Disclosure Unit
Funding and Disclosure | National Office
Australian Electoral Commission
T: (02) 6271 4552 | F: (02) 6271 4555

Clicking this link verifies that you have access to the email account.

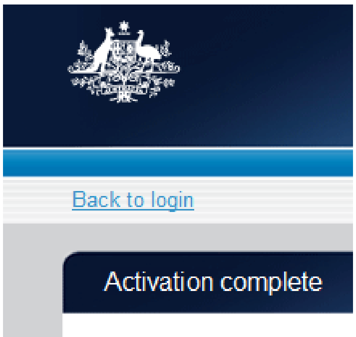
Activation complete

You have successfully activated your account. You can login to the eReturns site using the user name and password you provided during registration.

Once you have verified your email address you are able to start using your eReturns account.

Login

Click the ‘Back to login’ button to return to the eReturns login page.

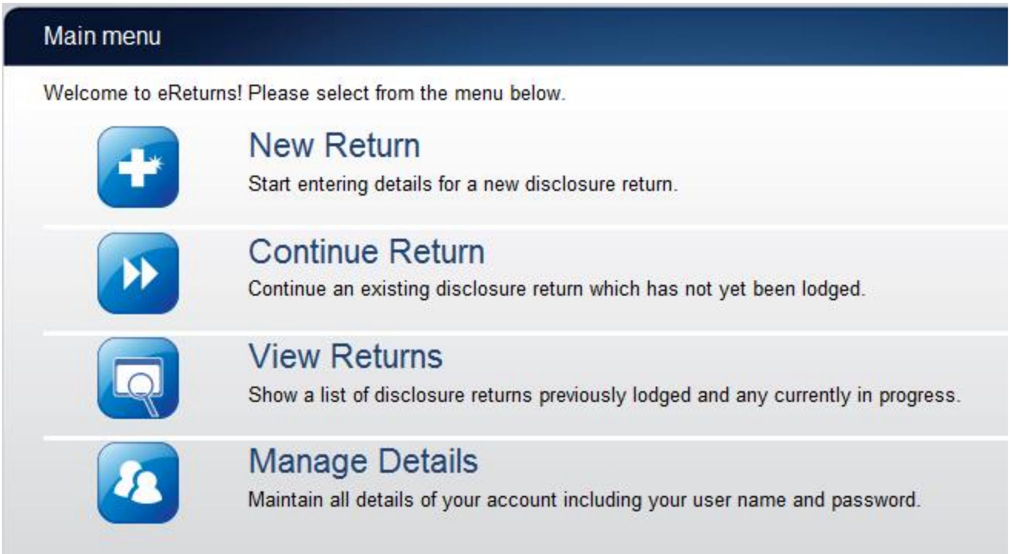


From here, enter your user name and password to login – remember you will have changed your password and may have changed your user name.

Using eReturns

Main Menu

Once you have logged in you will see the eReturns main menu.



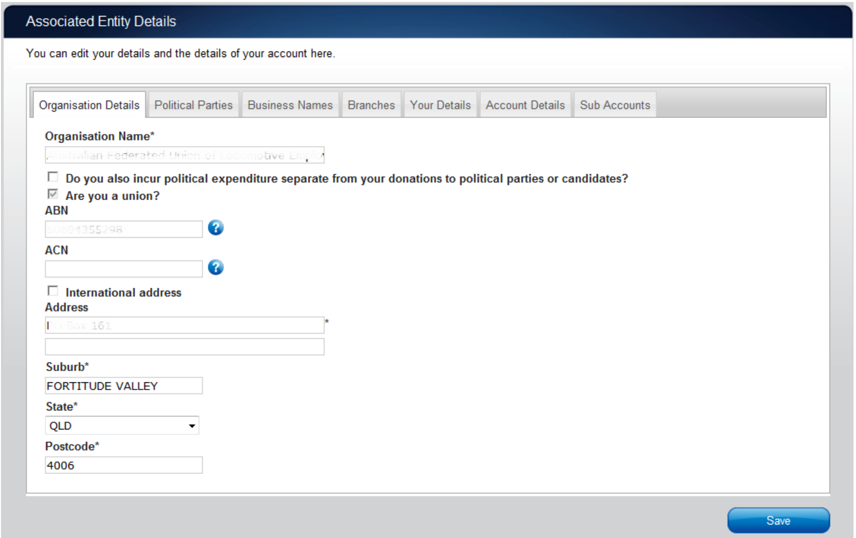
From the main menu you can start a new return, continue a return which is partially complete, view historical returns and manage your account details.

Your account details are the details which you reviewed and updated when you logged in for the first time.

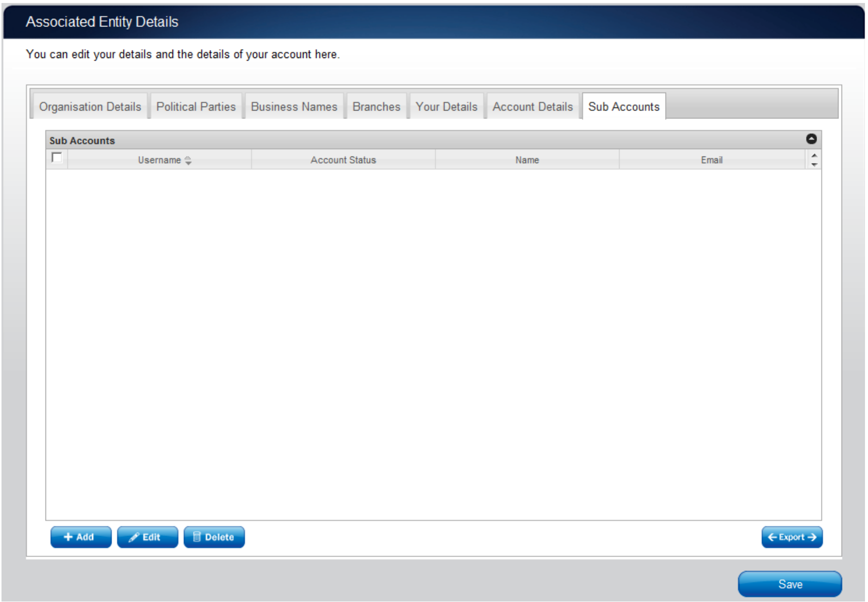
Creating a sub-account

eReturns will allow a financial controller to create a sub-account for another person (such as an admin person) to log in to eReturns and enter data in to the return. The sub-account holder will be able to add, remove and edit data in the return but they will **not** be able to lodge the return.

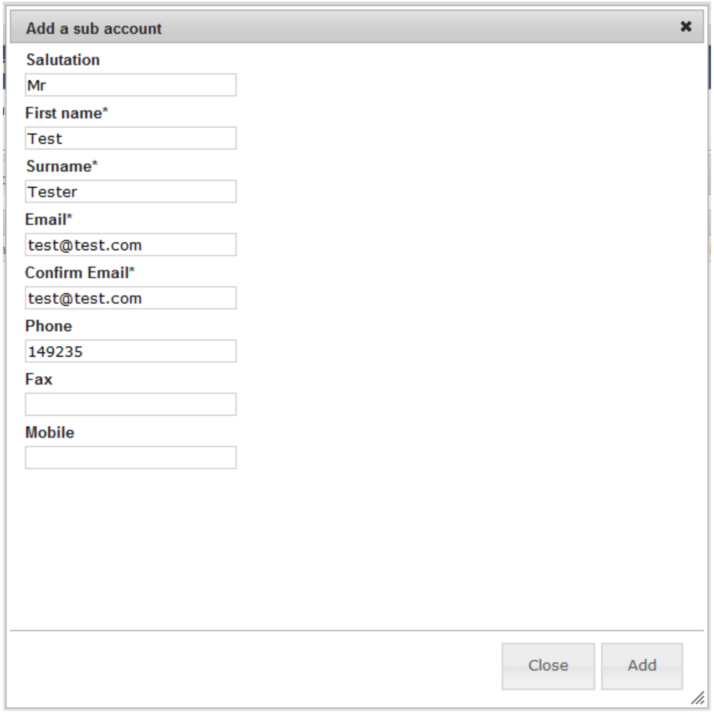
To create a sub-account, you will first need to contact Funding and Disclosure on 02 6271 4552 or email fad@aec.gov.au and ask for your account to be changed to allow the creation of a sub-account. Once this is done you will need to log in using your credentials. On the main menu click ‘Manage Details’. This will bring up the manage details screen.



On this screen click the ‘Sub Accounts’ tab.

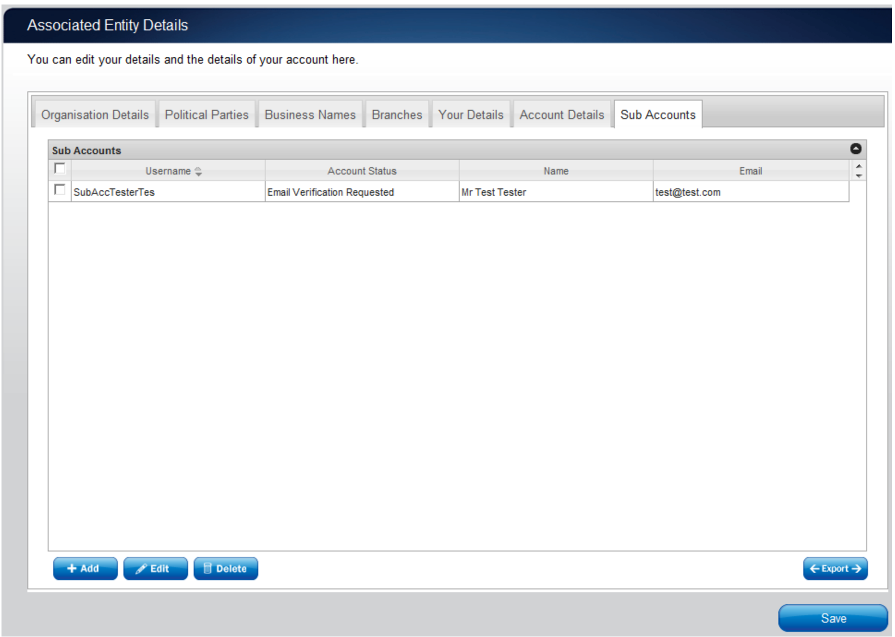


To add a sub-account click the '+ Add' button. This will launch the 'Add a sub account' window.

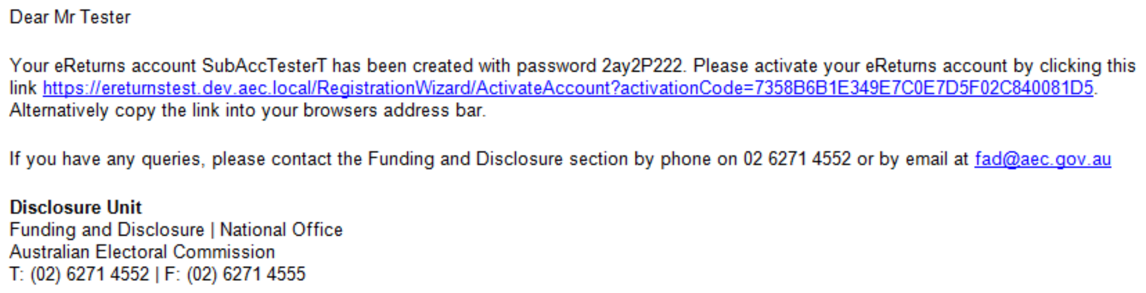


In the 'Add a sub-account' window you can record the details of the sub-account holder. It is important that the email address is recorded correctly as it will be used to send the sub-account holder their credentials.

Once you have finished recording the details of the sub-account holder click 'Add' to create the sub-account. Then click 'Close' and the sub-accounts screen will display and you will be able to see the new sub-account in the list like the example below.



Once a sub-account has been added, eReturns will automatically send an email to the sub-account holder's email address like the one below.


Dear Mr Tester

Your eReturns account SubAccTesterT has been created with password 2ay2P222. Please activate your eReturns account by clicking this link https://ereturnstest.dev.aec.local/RegistrationWizard/ActivateAccount?activationCode=7358B6B1E349E7C0E7D5F02C840081D5. Alternatively copy the link into your browsers address bar.

If you have any queries, please contact the Funding and Disclosure section by phone on 02 6271 4552 or by email at fad@aec.gov.au

Disclosure Unit
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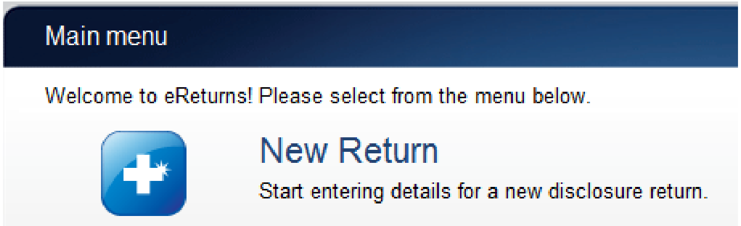
This email contains the user name and password for the sub-account holder. It also contains an activation link which the sub-account holder will need to click before they can log in. Once they have activated their account, they will be able to use their user name and password to log in to eReturns.

Completing a return

New Return

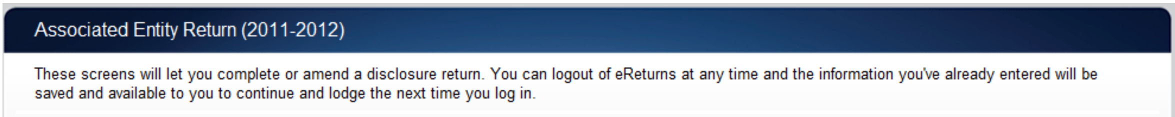
Click the 'New Return' button to start completing a new return.



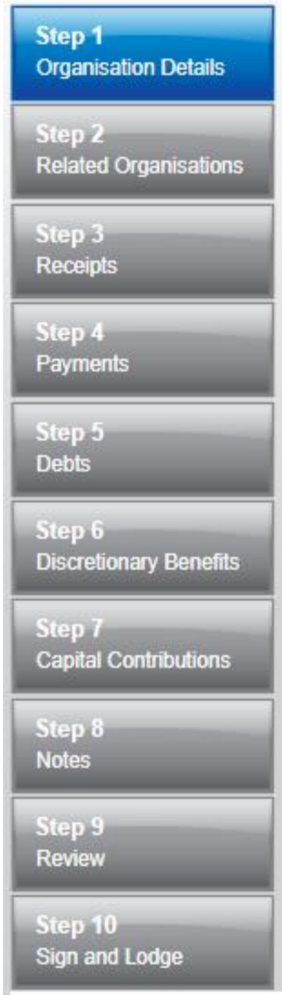
Then choose the return which you would like to complete.

Click 'Continue' to launch the return wizard. Similar to when you review your account details you can use the 'Back' and 'Next' buttons to navigate through the screens.

Instructions on how to complete the return will appear at the top of each page.



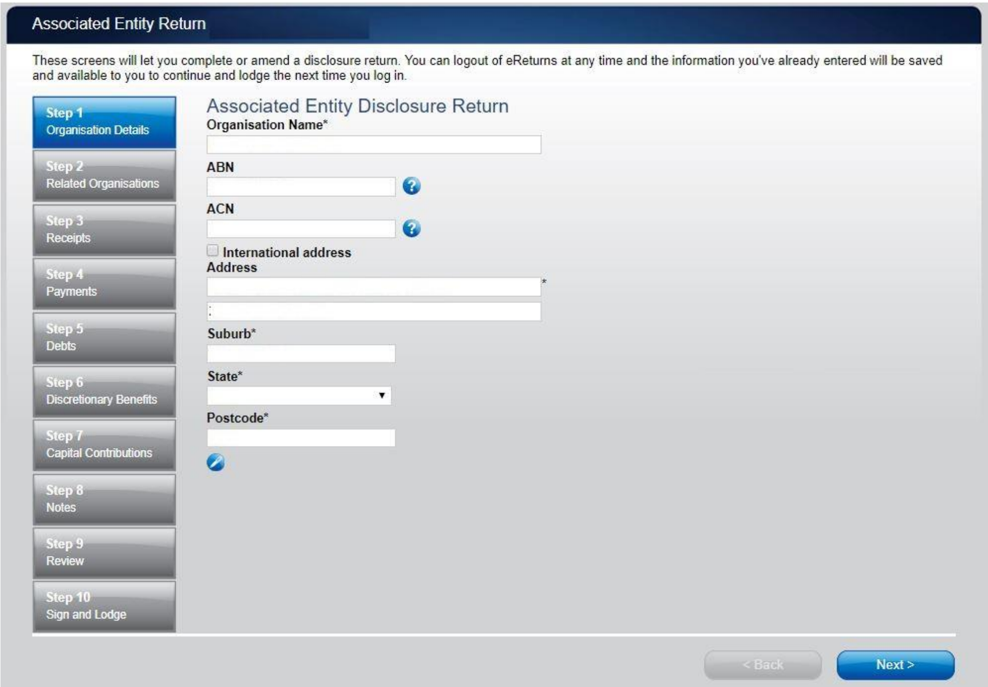
Progress through the return is tracked down the left-hand side of the screen.



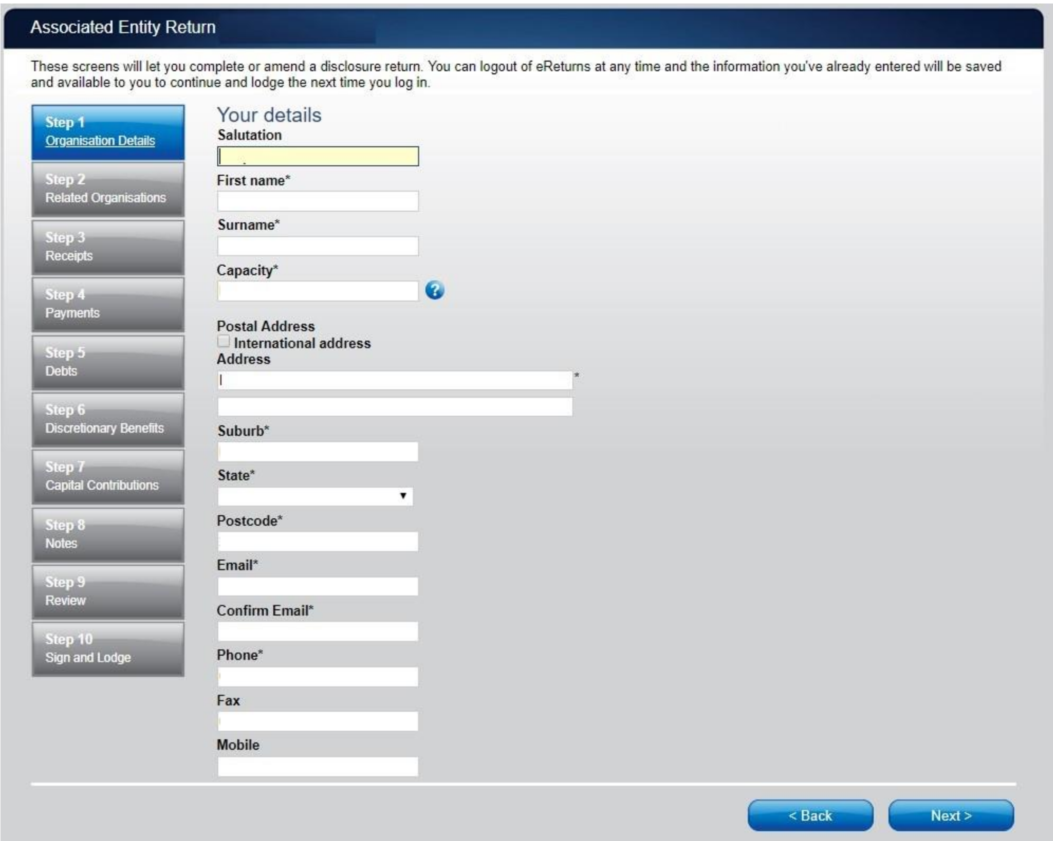
As you navigate through the return, you will be prompted to enter the information which will make up the return.

Step 1 - Organisation Details

On this screen you can update your organisation details. These details have been automatically pre-filled from your account.



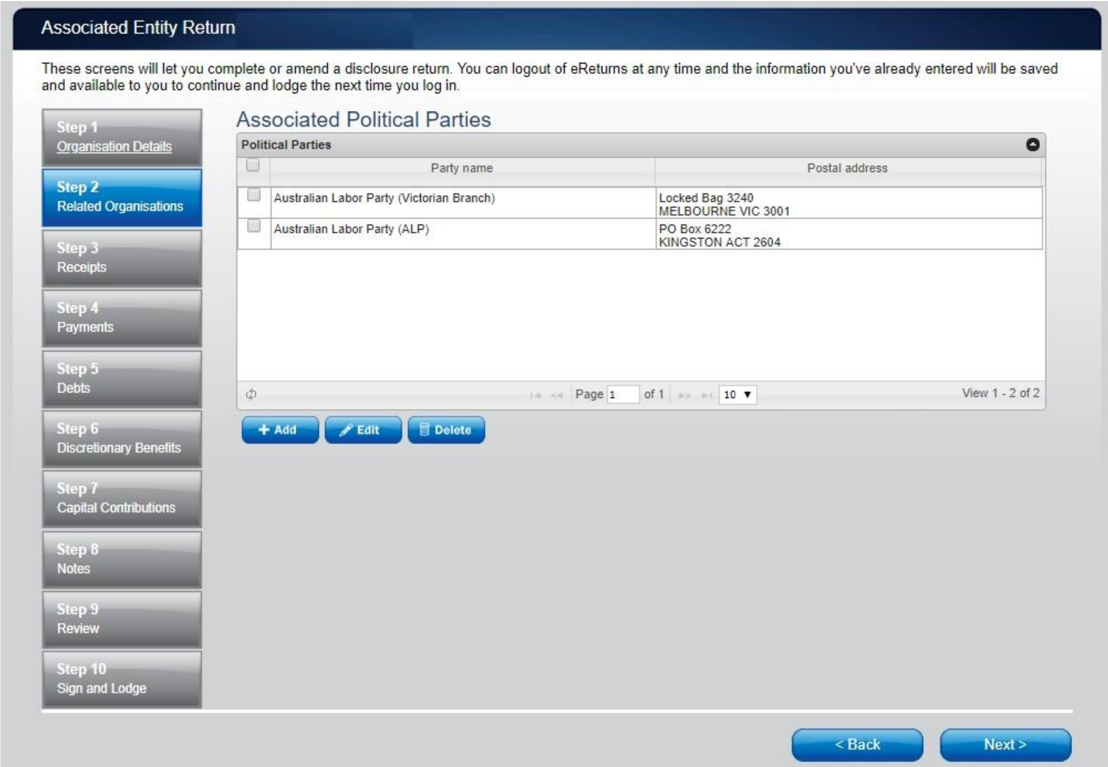
Once you have updated your organisation details click ‘Next’ to move to the ‘Your details’ screen.



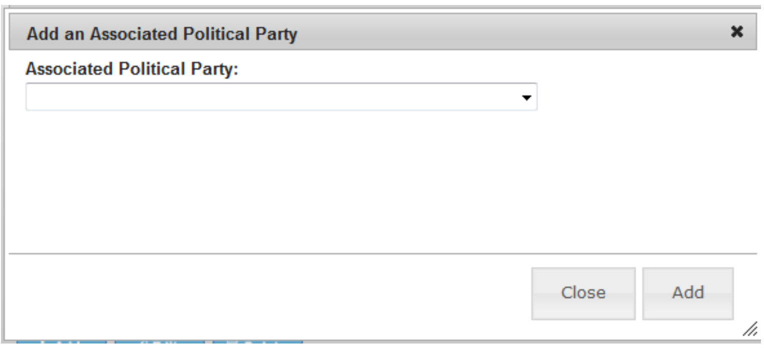
On this screen you can review and update your details. Once you have completed your details click ‘Next’ to move to the Related Organisations screen.

Step 2 – Related Organisations

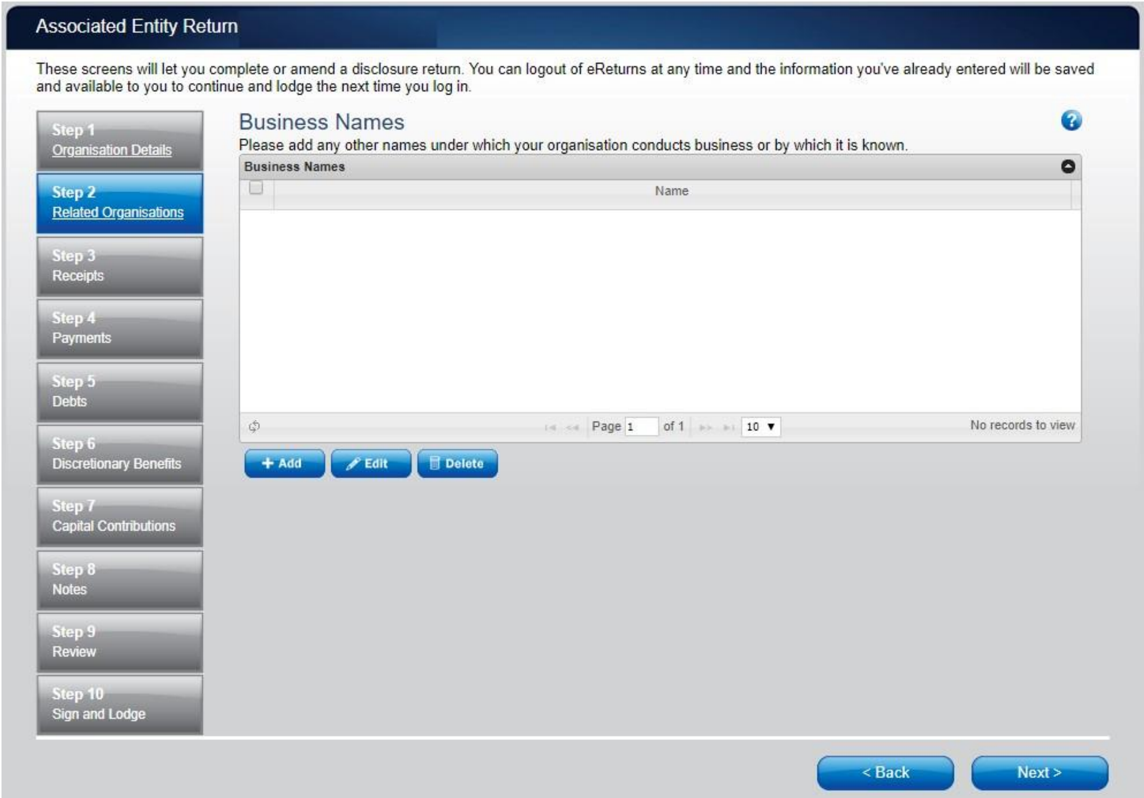
This screen will allow you to record the party or parties which your associated entity is associated with.



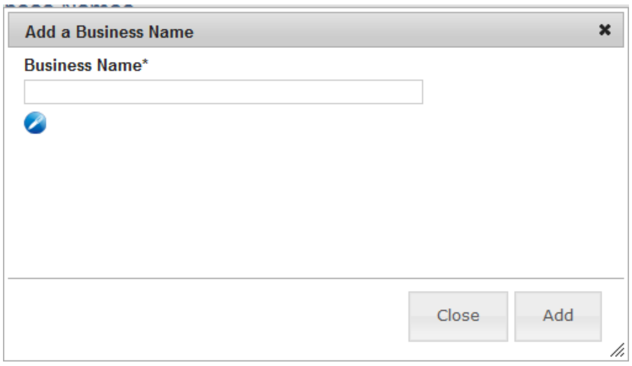
To add a party to the list, click the ‘+ Add’ button below the table to launch the ‘Add an Associated Political Party’ window. In this window you can select the political party you are associated with from the drop down menu.



Once you have selected the party, click ‘Add’ to add the political party to the list of associated political parties. Once you have finished adding associated political parties click ‘Close’ and you will return to the Associated Political Parties screen. Once you have finished on this screen, click ‘Next’ to move to the Business Names screen.



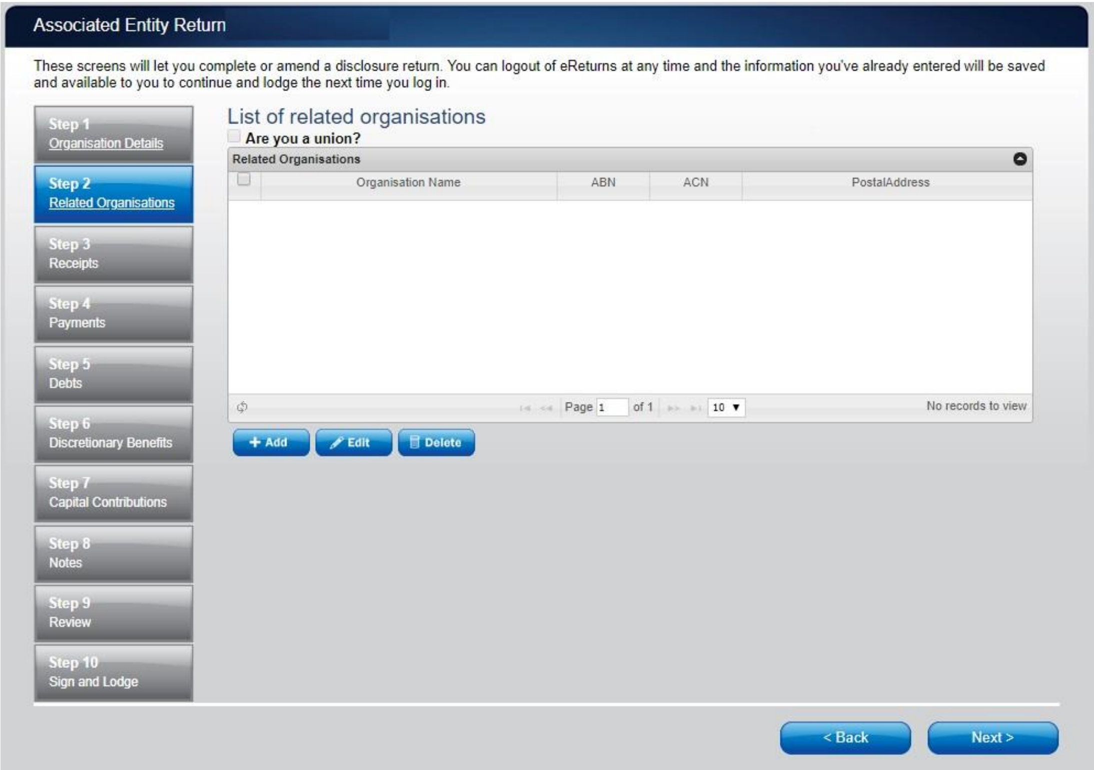
On the Business Names screen you can enter any other names under which your organisation conducts business or by which it is known. If your organisation is a union you should list other names that the union is known, for example, registered name, other trading name. To add another business/union name click '+ Add' to launch the 'Add a Business Name' window.



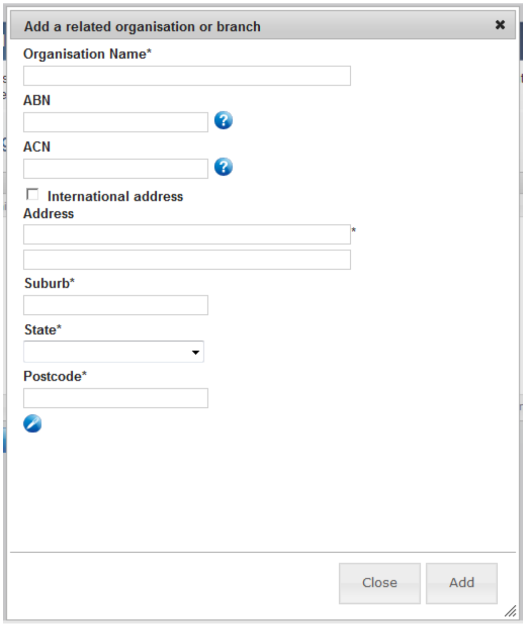
Once you have entered another business name for your organisation, click 'Add' to add it to the list of other business names. When you have finished entering all other business names click 'Close' to return to the other business names screen. Once you have finished on this screen click 'Next' to move to the List of related organisations or branches screen.

If your organisation is:

- **not a union**, you will need to enter details of related organisations who you are lodging on behalf of; or
- **a union**, you will need to enter details of branches you are lodging on behalf of.



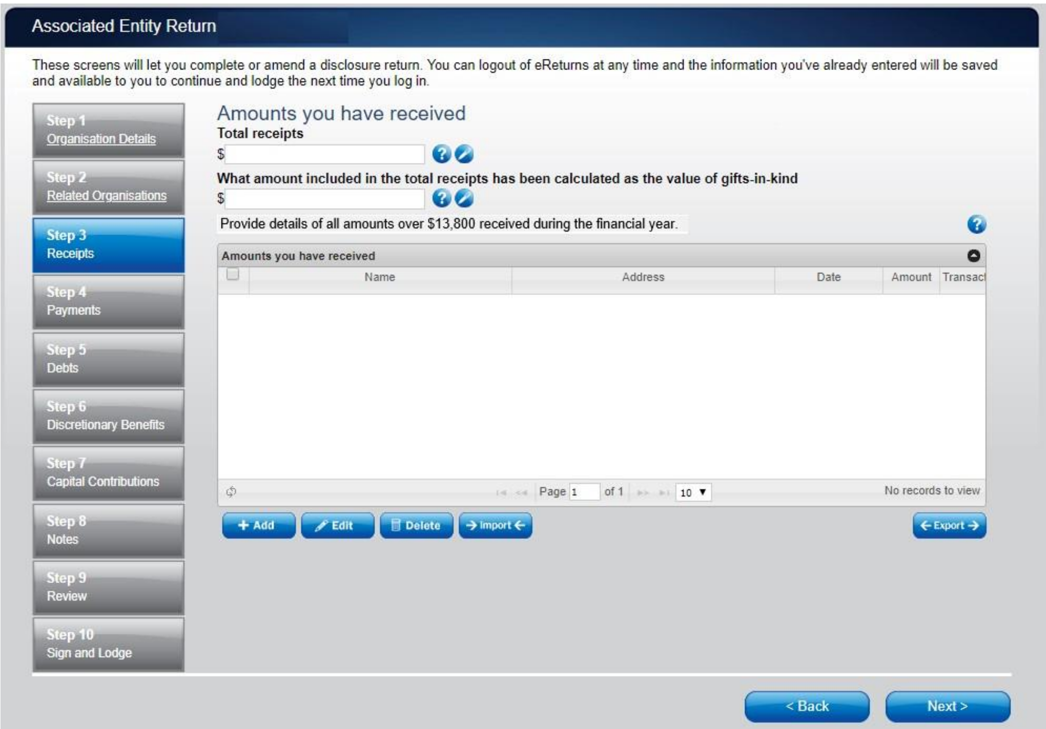
On this screen you will be able to record details of either your related organisations or any branches (if you are a union) that you are lodging on behalf of. To add a related organisation or branch to the list click the '+ Add' button below the table on the screen. This will launch the 'Add a Related Organisation/Branch Name' window.



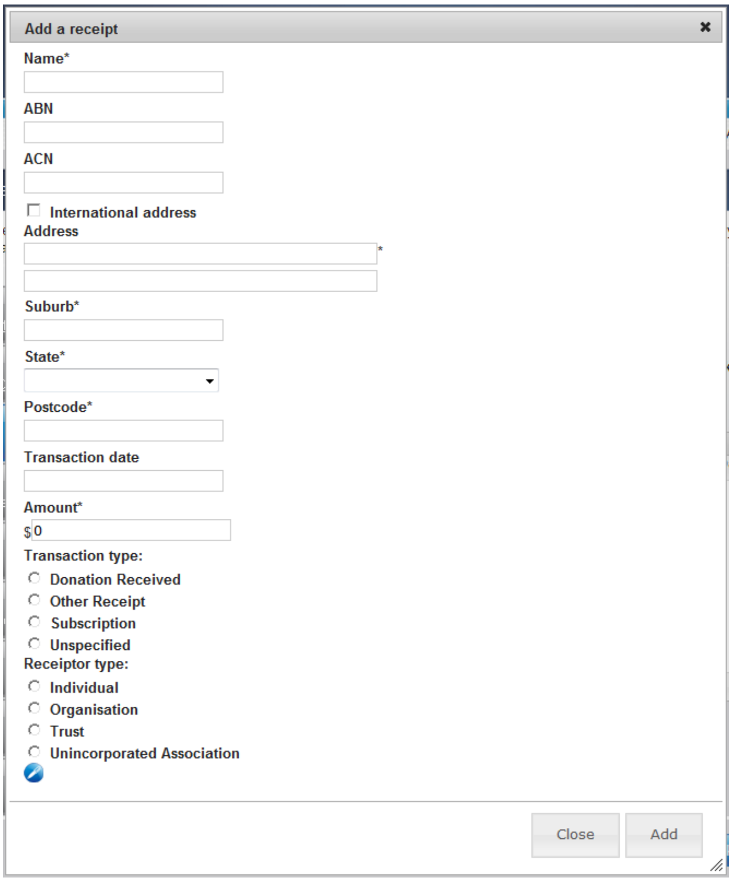
In this window you can record the details of the related organisation or branch. Once you have entered all the details, click ‘Add’ to add the related organisation or branch to the list. Once you have finished recording related organisations or branches, click ‘Close’ to return to the Add related organisations or branches screen. Once you have finished on this screen click ‘Next’ to move to the receipts screen.

Step 3 - Receipts

Total receipts and gifts-in-kind can be recorded directly into this screen.



To record detailed receipts click the ‘Add’ button at the bottom of the table on the screen. This will launch the ‘Add a receipt’ window.

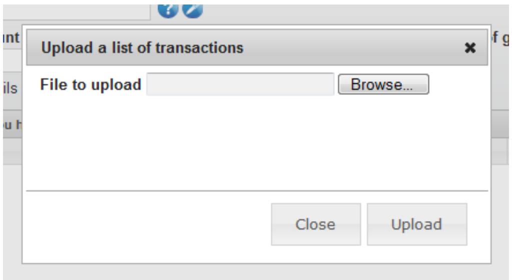


In the ‘Add a receipt’ window you can fill in the details of each detailed receipt. All required fields must be completed. Once all the information has been entered click the ‘Add’ button to add the receipt to the list. The ‘Add a receipt’ window will remain open to allow you to enter more receipts. Once you have finished entering all receipts click the ‘Close’ button to return to the receipts screen.

Import receipts

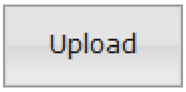
The import function allows you to upload a spread sheet of transactions into eReturns, eliminating the need to manually enter each transaction. In order to import receipts you will need a spread sheet (either in MSExcel, CSV or XML format) of receipts which contains all of the required information for each receipt. To start importing receipts click the ‘Import’ button.

This will launch the import screen

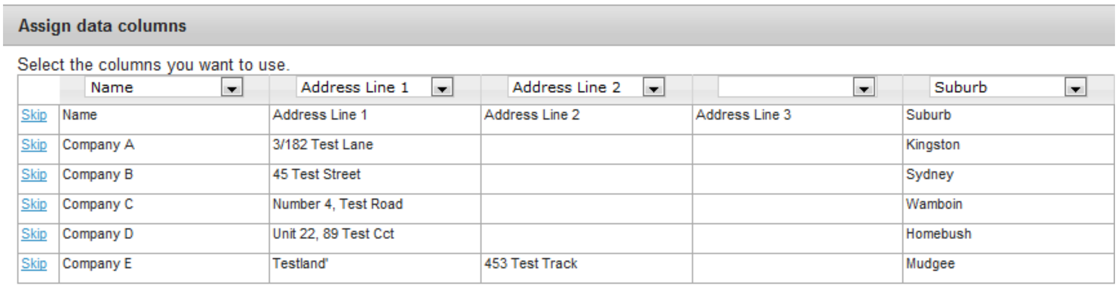


From here you can use the browse button to select the spread sheet you wish to upload from your computer.

Once you have selected the spread sheet, click ‘Upload’.



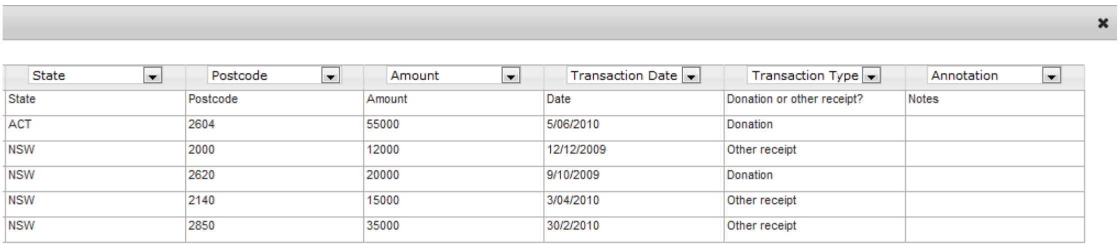
Once the system has uploaded your spread sheet it will ask you to match the columns in your spread sheet to the columns in eReturns.



Assign data columns

Select the columns you want to use.

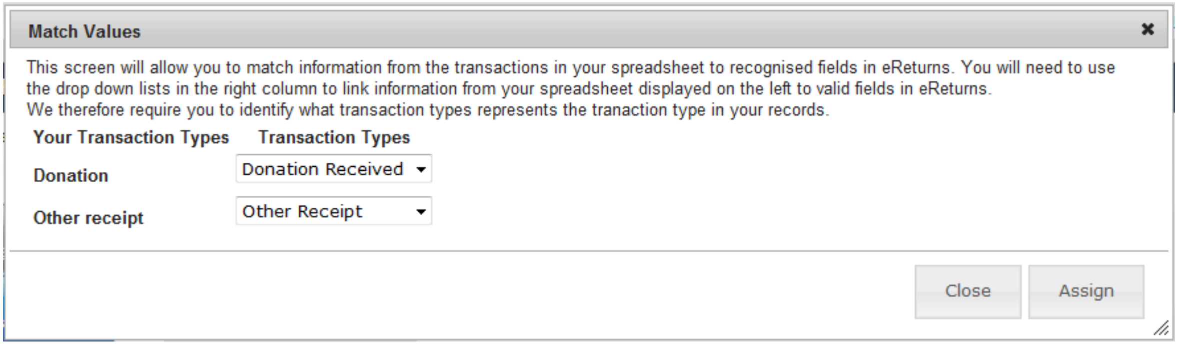
	Name	Address Line 1	Address Line 2		Suburb
Skip	Name	Address Line 1	Address Line 2	Address Line 3	Suburb
Skip	Company A	3/182 Test Lane			Kingston
Skip	Company B	45 Test Street			Sydney
Skip	Company C	Number 4, Test Road			Wamboin
Skip	Company D	Unit 22, 89 Test Cct			Homebush
Skip	Company E	Testland'	453 Test Track		Mudgee



State	Postcode	Amount	Transaction Date	Transaction Type	Annotation
State	Postcode	Amount	Date	Donation or other receipt?	Notes
ACT	2604	55000	5/06/2010	Donation	
NSW	2000	12000	12/12/2009	Other receipt	
NSW	2620	20000	9/10/2009	Donation	
NSW	2140	15000	3/04/2010	Other receipt	
NSW	2850	35000	30/2/2010	Other receipt	

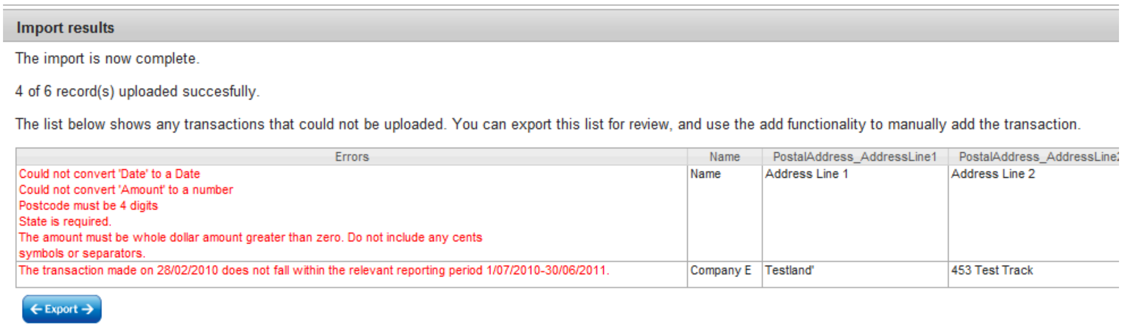
Once you have assigned all the columns, click ‘Import Data’.

Now the system will ask you to designate some of the values in some of the columns. You will need to assign values that eReturns recognises to some of the data in your spread sheet. See the example below:



Once you have matched the values from your spread sheet to values that eReturns will recognise you can click ‘Assign’. eReturns will tell you how many records were successfully imported, and list those which were not successful.

You can also export the list of transactions which were not successfully imported from here. To close this window, click ‘Close’.



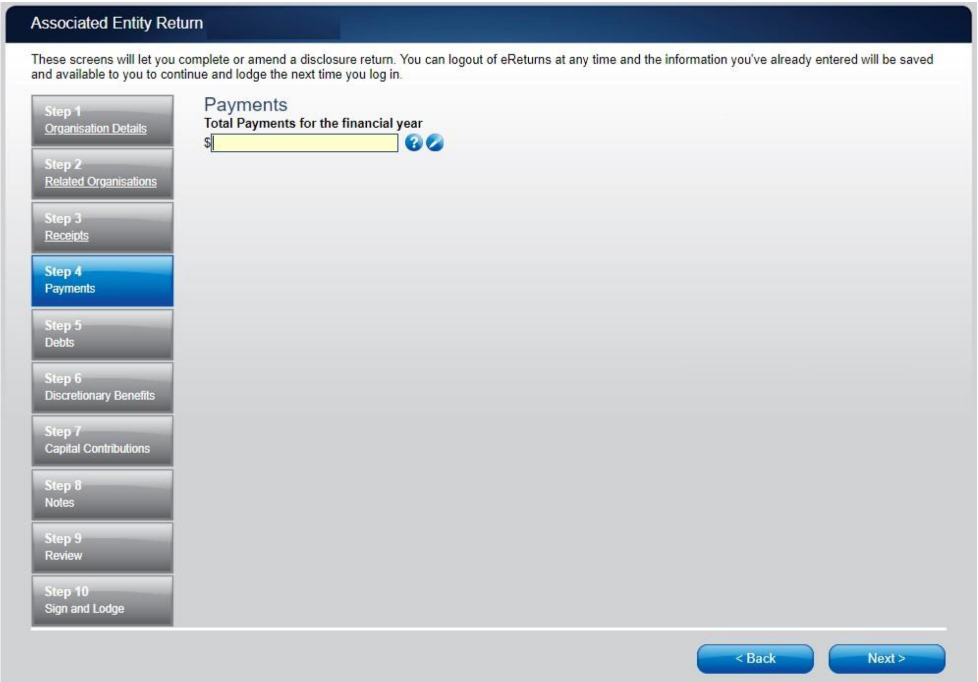
If you choose to export the list of transactions which were not successfully imported you can fix the problems in the data which eReturns has identified and re-import that list. Alternatively, you can use the ‘+ Add’ button to add those transactions manually.

eReturns will now upload the transactions from the spread sheet into the return wizard. Once it is complete you will be able to see the transactions in the list on the screen. Once you have finished on the receipts screen click ‘Next’ to move to the payments screen.

Step 4 - Payments

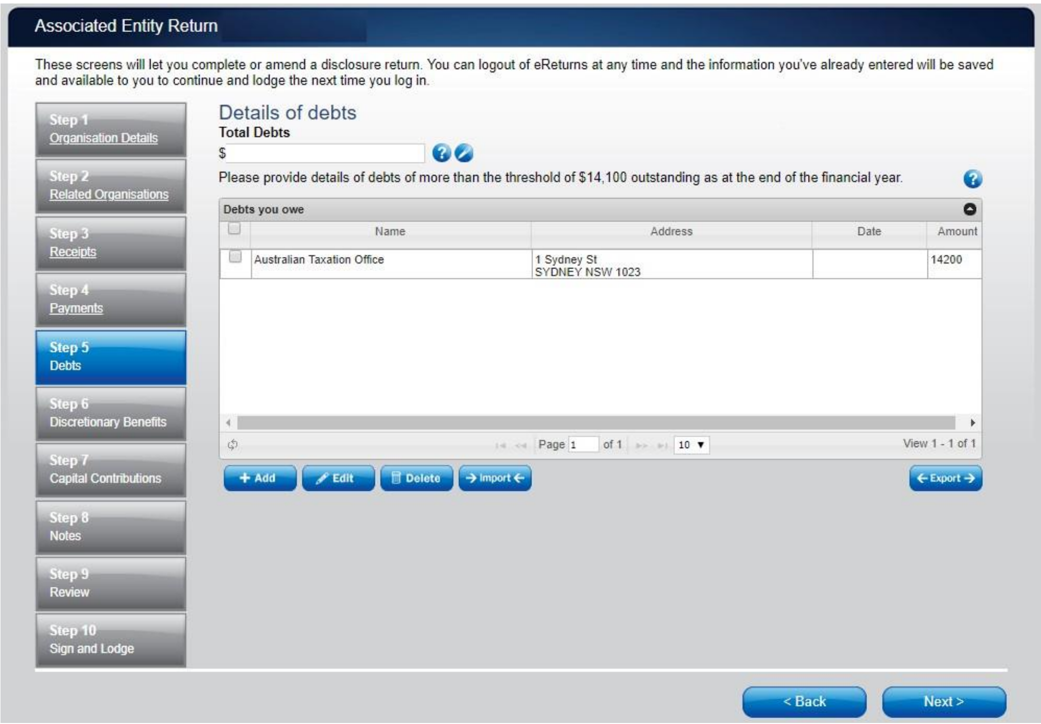
Enter the 'total payments' amount here.

Note: Associated entities are only required to provide the total payments 'amount', no further details are required in relation to payments.

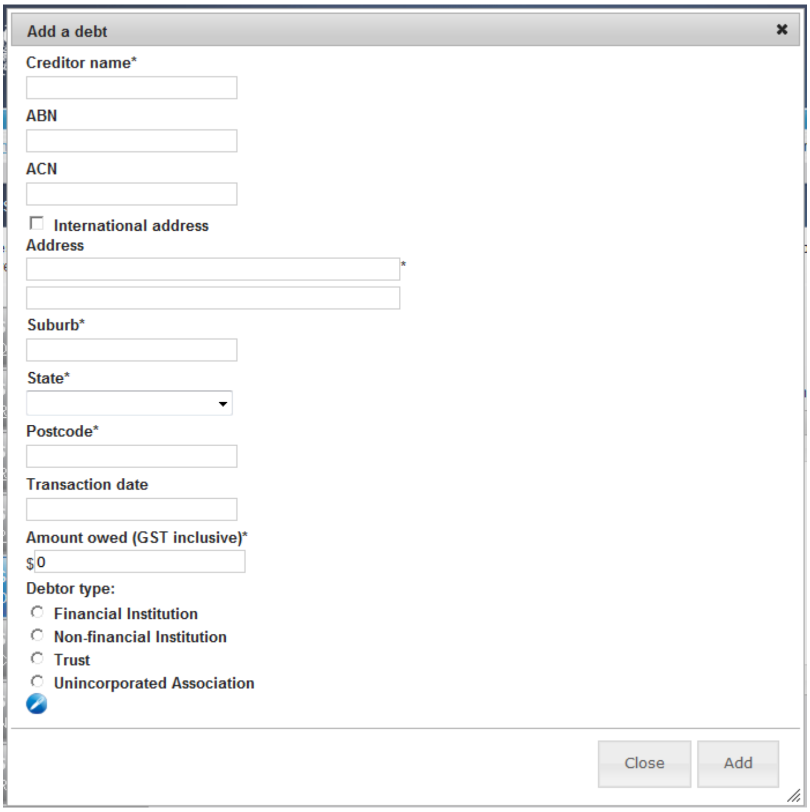


Step 5 – Debts

Total debts and details of individual debts greater than the disclosure threshold are recorded here.



To record individual debts that are more than the disclosure threshold use the ‘+ Add’ button. This will launch the ‘Add a debt’ window.



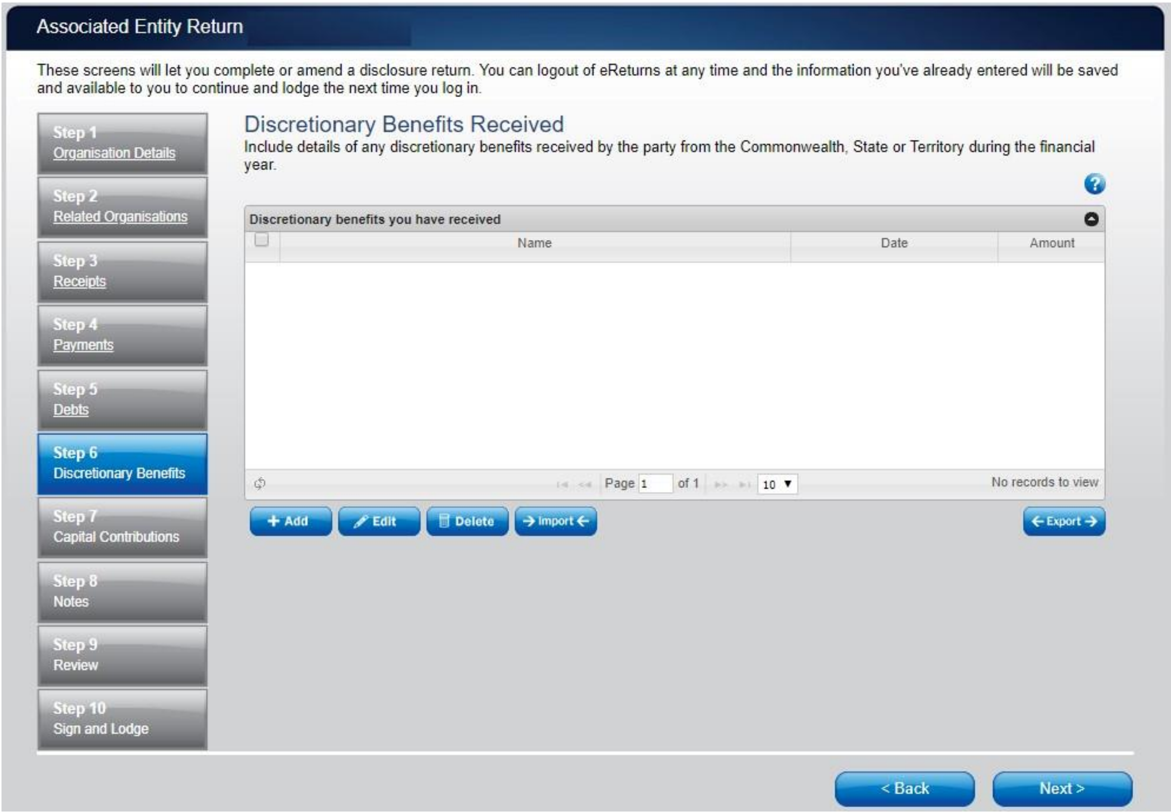
In the ‘Add a debt’ window you can fill in the details of individual debts. All required fields must be completed. Once all the information has been entered click the ‘Add’ button to add the debt to the list. The ‘Add a debt’ window will remain open to allow you to enter more debts. Once you have finished entering all debts click the ‘Close’ button to return to the debts screen.

If you have a large number of debts to record you may wish to import a spread sheet. For step by step instructions on importing debts, refer to the ‘import receipts’ section of this guide. Once you have recorded your total debts and all detailed debts click ‘Next’.

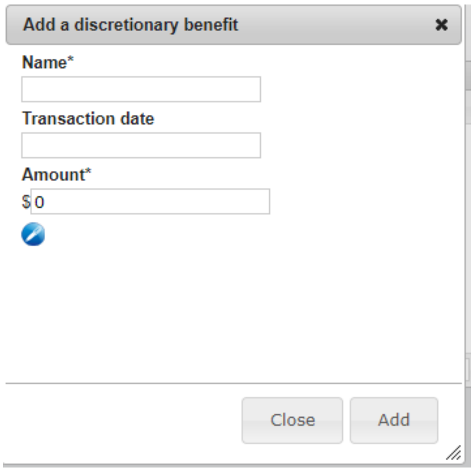
Step 6 – Discretionary Benefits

NOTE: The discretionary benefits field applies from the 2018-19 financial year. Although the tab will be visible for prior years, you will not be able to enter data.

Discretionary benefits received from the Commonwealth, a State or a Territory during the financial year is recorded here.



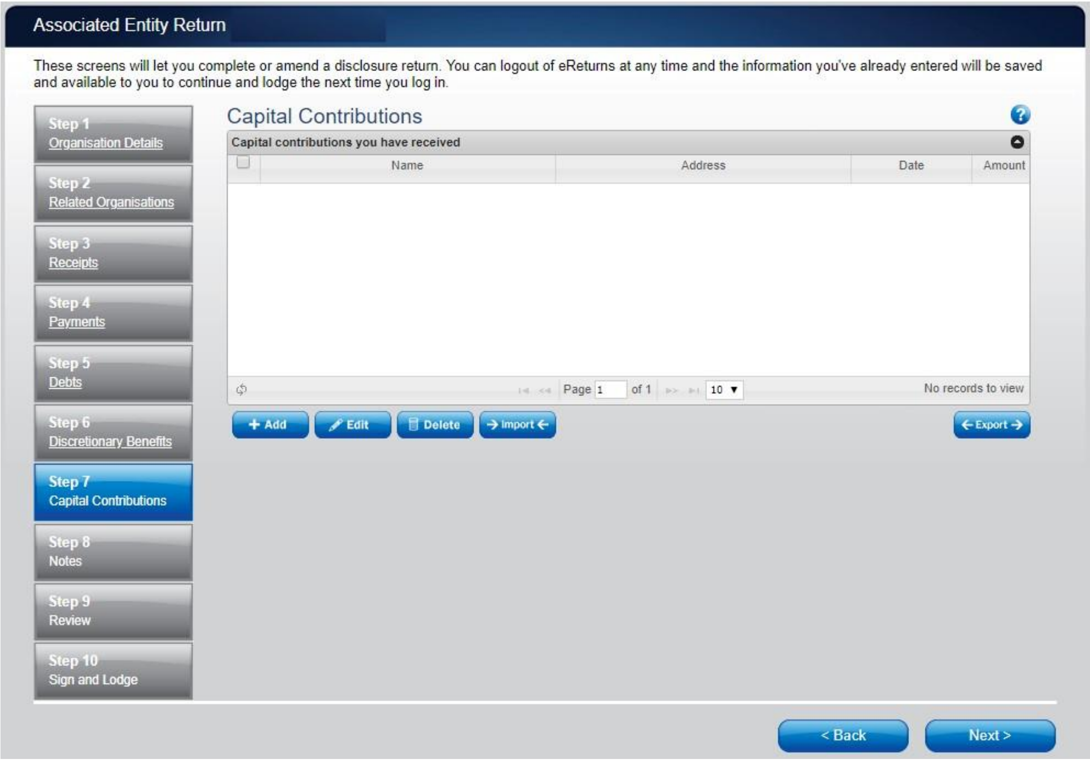
To record discretionary benefits received use the ‘+ Add’ button and the ‘Add a discretionary benefit’ window will appear.



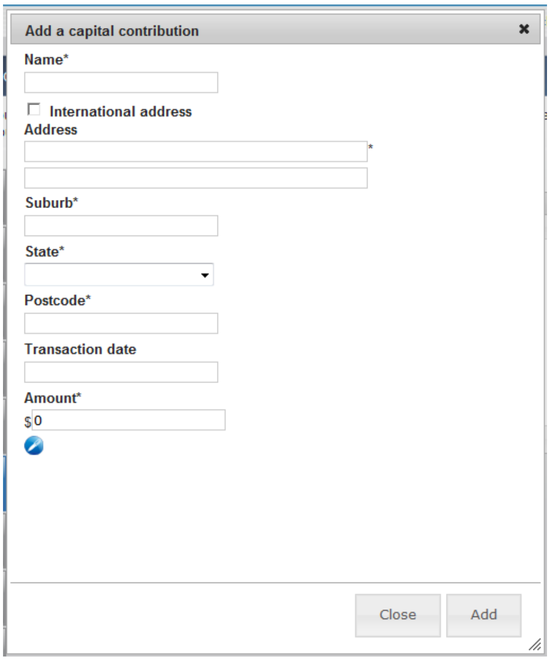
Once you have recorded your discretionary benefits, click ‘Next’ to move to the Annotations screen.

Step 7 - Capital Contributions

On this screen you can record details of capital contributions made to your associated entity.



To add a capital contribution, click the 'Add' button. This will launch the 'Add a capital contribution' window.

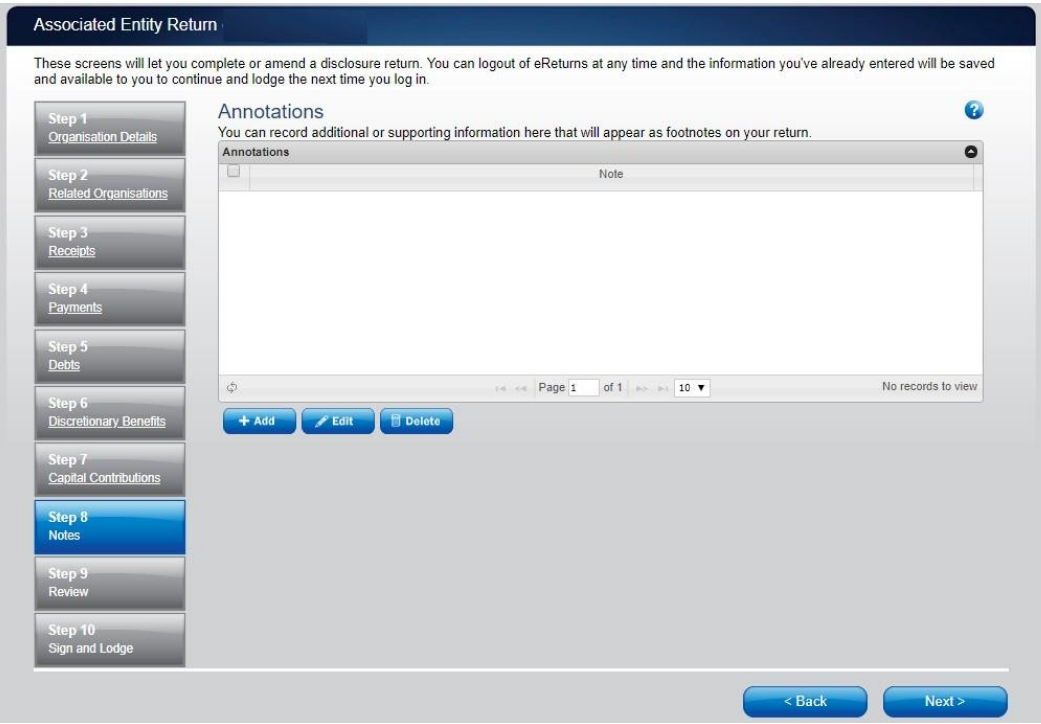


In the 'Add a capital contribution' window you can fill in the details of individual capital contributions. All required fields must be completed. Once all the information has been entered click the 'Add' button to add the capital contribution to the list. The 'Add a capital contribution' window will remain open to allow you to enter more capital contributions. Once you finished entering all capital contributions click the 'Close' button to return to the

Capital Contributions screen. Once you have recorded all your capital contributions click ‘Next’.

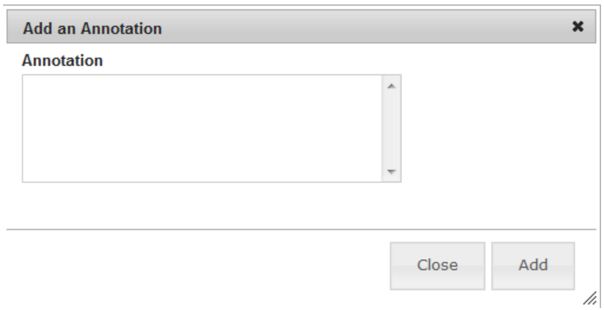
Step 8 - Notes

The Notes screen allows you to record annotations against the return.



These annotations will be presented on the return as footnotes.

To add an annotation, click the ‘Add’ button. This will launch the ‘Add an annotation’ window.

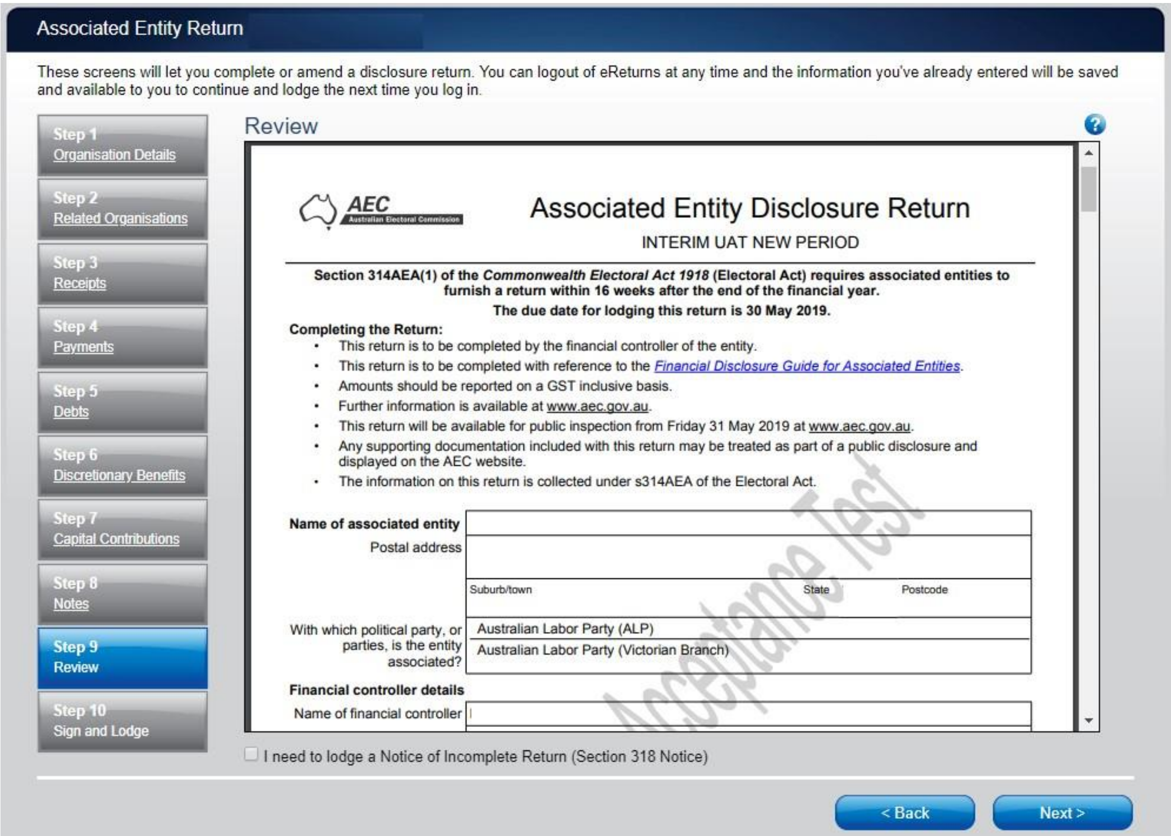


Enter the text of your annotation and click ‘Add’ to save it. Click ‘Close’ once you have entered all your annotations.

When you have finished recording annotations, click ‘Next’.

Step 9 - Review

The next screen is the review screen.



Here you will be presented with an image of what the data in your return will look like. Use the scroll bar on the right of the screen to view all of the pages of the return.

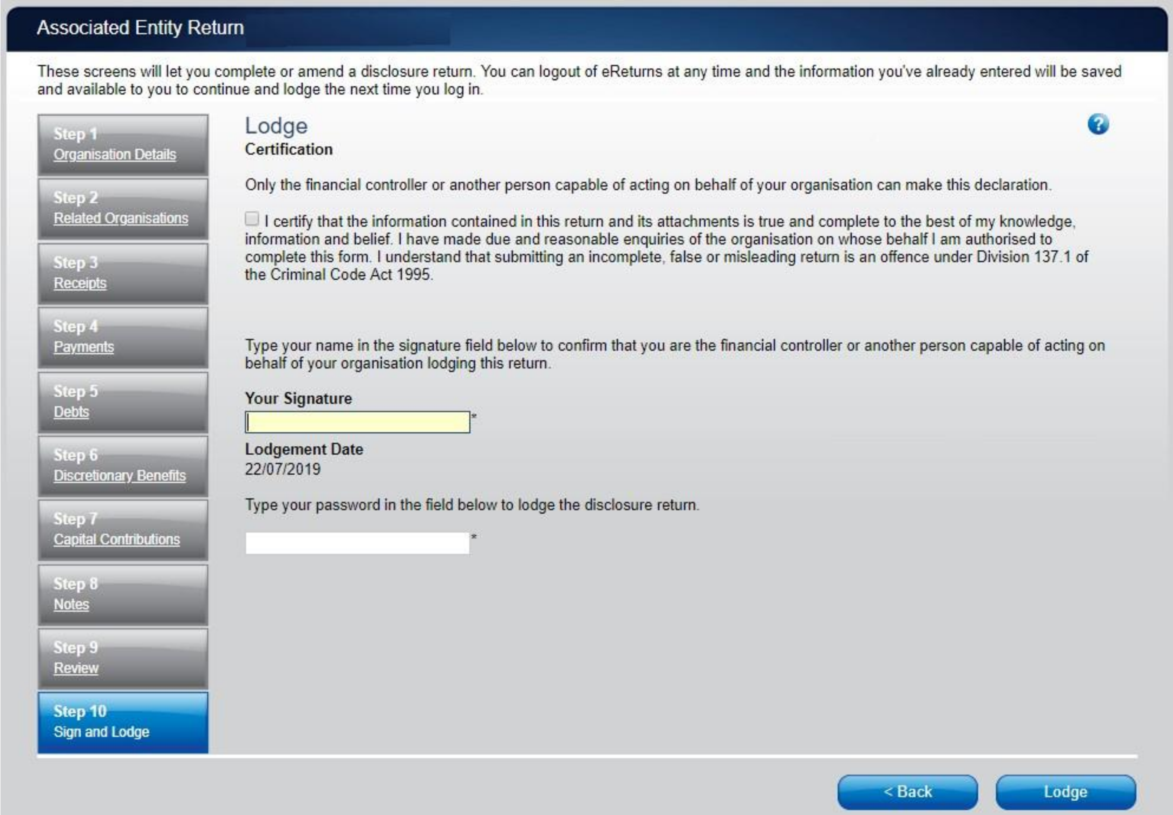
You'll notice that there is nothing in the signature or date fields on the front of the return. These fields will only be populated once you have completed the lodgement screen and will appear on the final version of your return.

If you need to make changes to the data in the return, click 'Back'. Once you have reviewed the image of your return and all data is correct, click 'Next' .This will take you to the Sign and Lodge screen.

NOTE: At the bottom of this screen, above the 'Back' and 'Next' buttons is a checkbox. Selecting this box will allow you to lodge a Notice of Incomplete Return. For more detail on this, go to the Lodging a Notice of Incomplete Return section of this guide.

Step 10 – Sign and Lodge

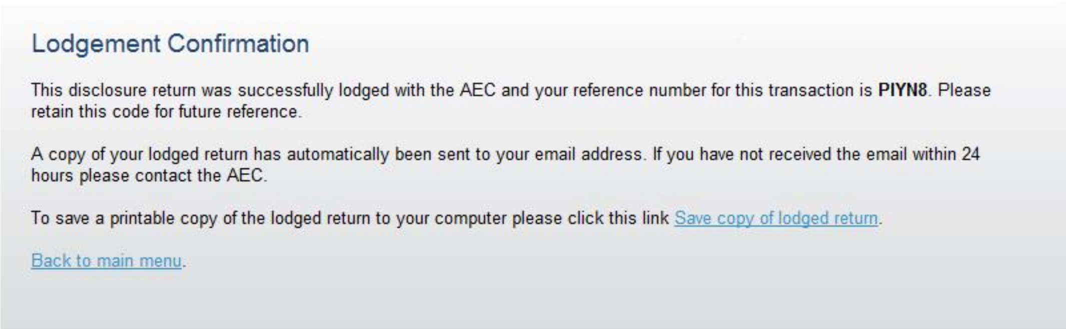
Once you have reviewed your return you will be able to lodge it with the AEC.



On this screen, you will need to select the box next to the certification. As the financial controller of the associated entity you will need to type your name into the Signature box and type your password into the Password box.

Once you have done this, click ‘Lodge’ to lodge your return.

Upon lodging your return you will be presented with a confirmation screen.

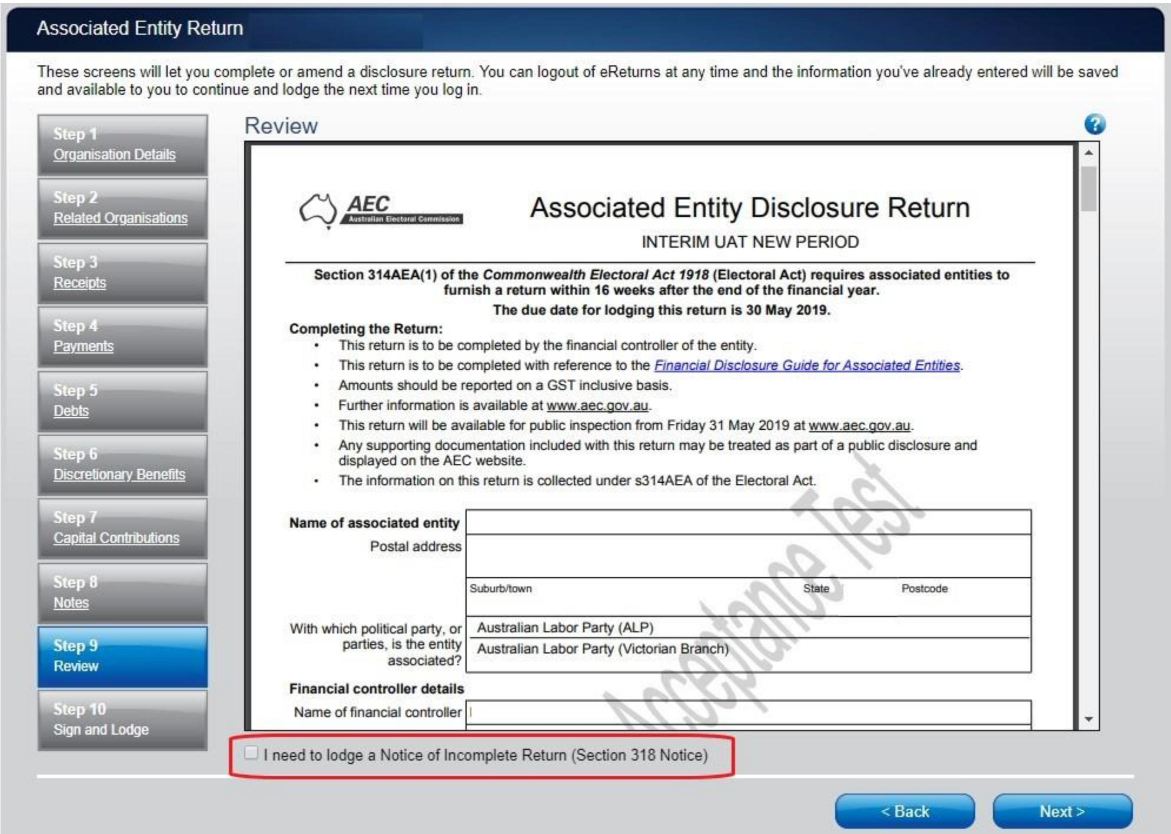


From this screen you may save a PDF copy of your return. The AEC recommends that you save a copy of your return in case you need to print or refer to it at a later date. The unique reference number presented on this screen is also recorded on the return form in the bottom right hand corner. eReturns will also email you a copy of your lodged return automatically.

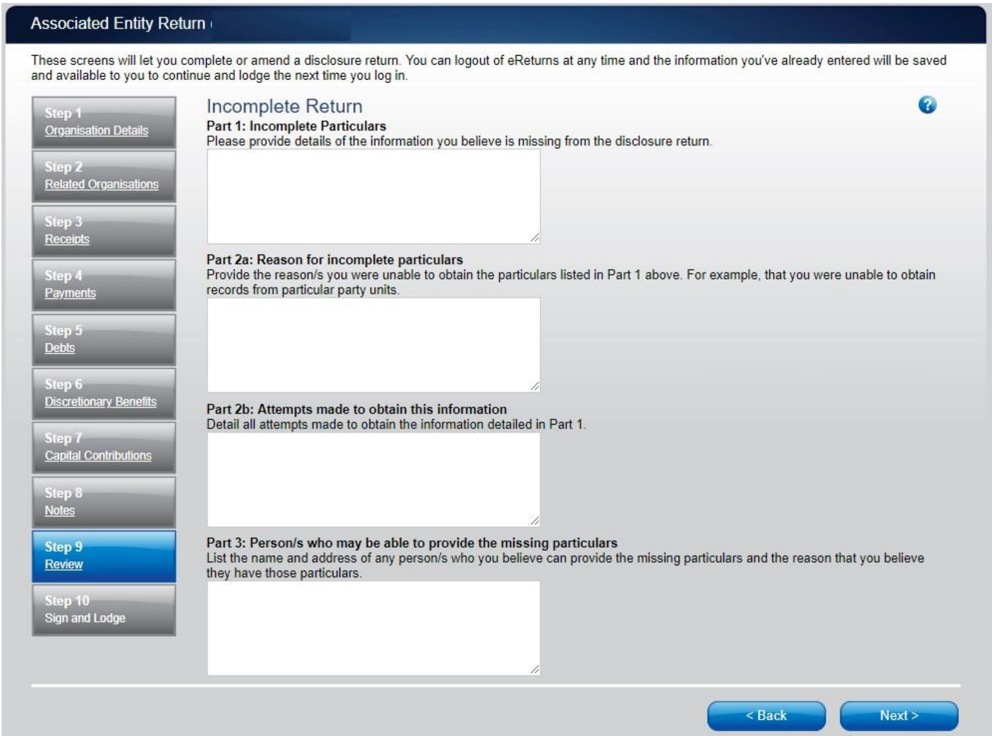
Lodging a Notice of Incomplete Return

eReturns will allow you to lodge a Notice of Incomplete Return online. For more information about when it is appropriate to lodge a Notice of Incomplete Return please consult the *Financial Disclosure guide for Associated Entities* available on the AEC's website at www.aec.gov.au.

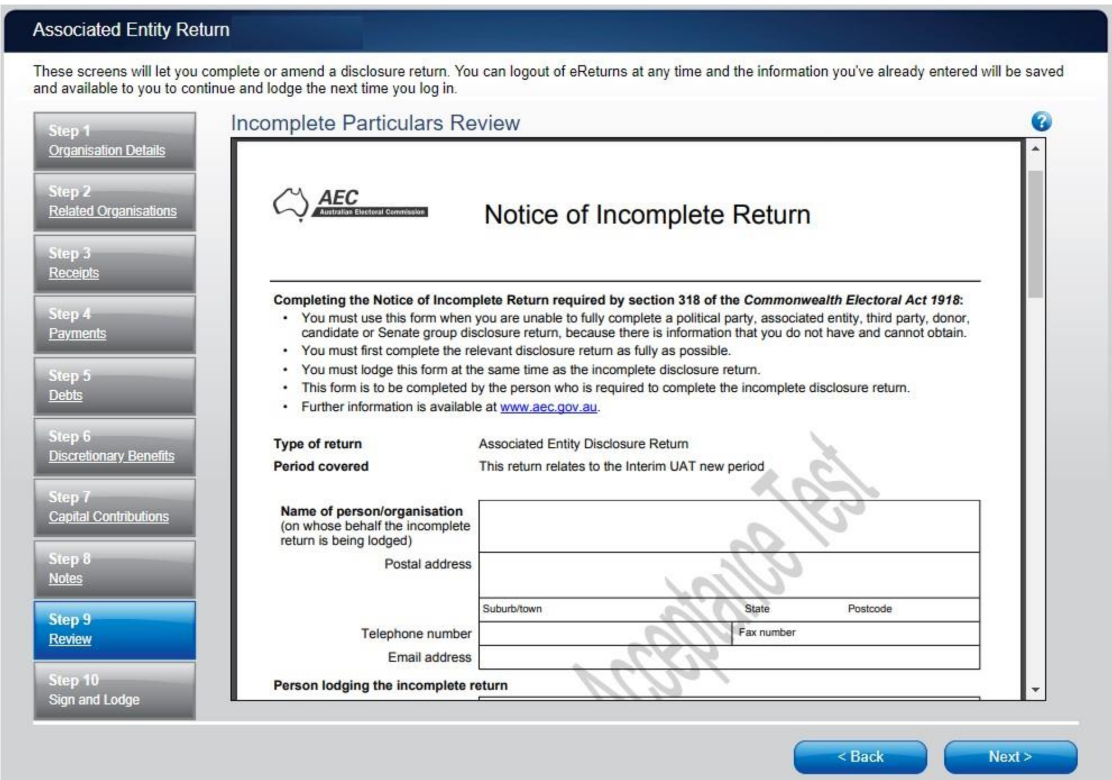
To lodge a Notice of Incomplete Return in eReturns you will need to select the checkbox at the bottom of the review screen.



Selecting this box will take you to the Notice of Incomplete Return screen.



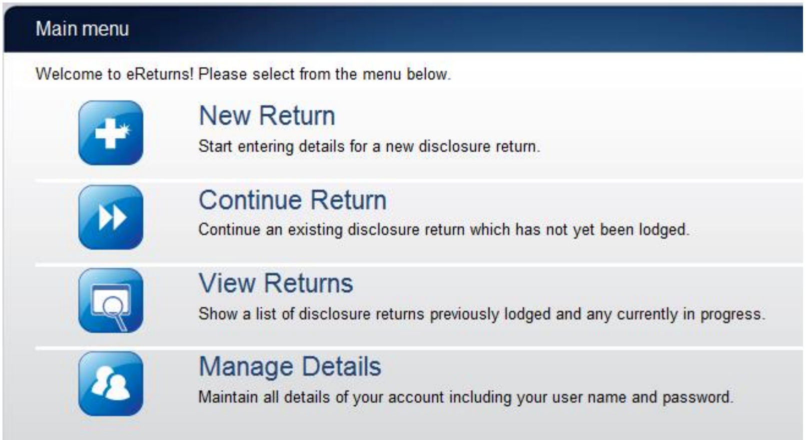
Here you are required to fill in the fields, detailing the information that is missing from your return, the reason why you were unable to obtain that information, who you believe may have the information which is missing, and why you believe that person has it. Once you have completed all of the fields on the screen, click ‘Next’ to review the Notice of Incomplete Return.



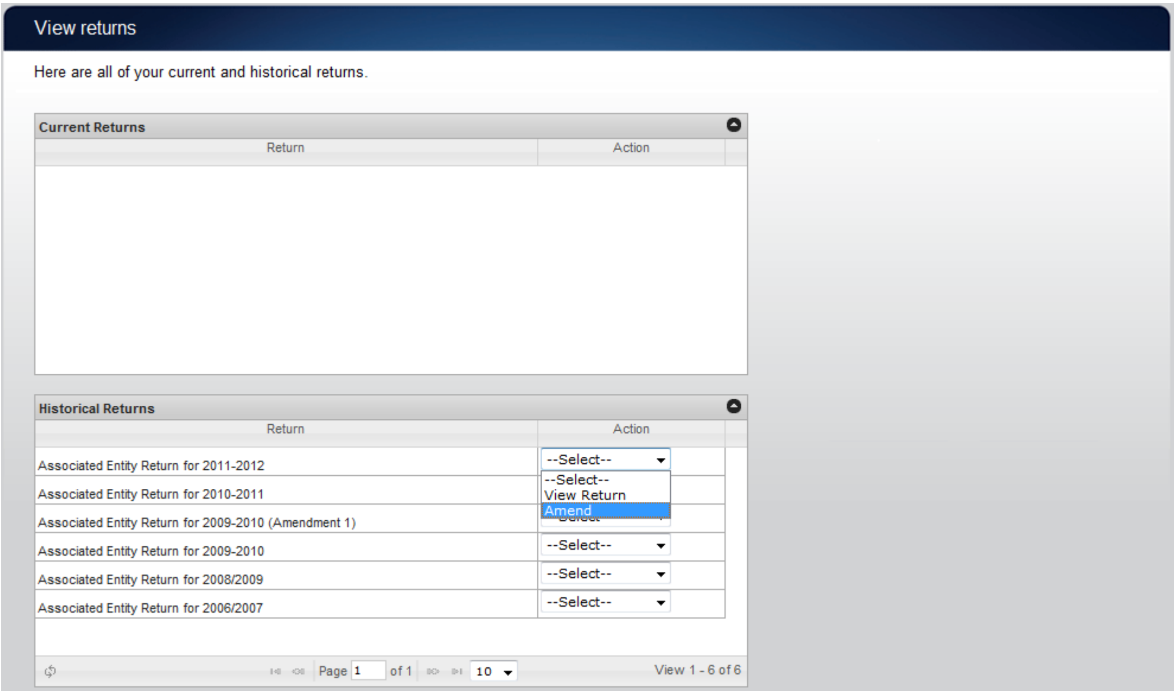
Once you have reviewed your Notice of Incomplete Return click ‘Next’ to go to the Sign and Lodge screen. To lodge your return and Notice of Incomplete Return follow the instructions at Step 9–Sign and Lodge of this guide.

Amending a Return

Returns lodged using eReturns can also be amended using eReturns. To amend a return click the ‘View Returns’ button on the main menu.



The view returns screen will display.



Use the ‘Amend’ option in the drop down list next to the return you wish to amend. Only returns lodged online can be amended online.

This will launch the amendment wizard. The amendment wizard is exactly the same as the return wizard, except it already contains all of the data from your original return. To amend something, simply add, edit or delete as appropriate. Once you have finished working your way through the wizard, the system will generate an amendment form for you to review which will detail the changes. This amendment form can be lodged in the same way as the original return.

Troubleshooting

Forgotten Password

If you have forgotten your password, please contact Funding & Disclosure on 02 6271 4552 or by email at fad@aec.gov.au. Passwords for associated entity eReturn accounts can only be resent via mail to the financial controller.

Forgotten User name

If you have forgotten your user name please contact Funding & Disclosure on 02 6271 4552 or by email at fad@aec.gov.au. Associated entity eReturn account user names can only be provided by Funding & Disclosure staff of the AEC.

Other problems

If you experience any difficulties while using eReturns, please contact Funding & Disclosure on 02 6271 4552 or by email at fad@aec.gov.au.