

## How to do an amendment through BGL, Class or superMate

If you apply for your actuarial certificates using one of the software platforms integrated with our website; Class, SuperMate, SimpleFund 360 or SimpleFund Desktop (version 2019.0 or later) you have two options for submitting an amendment:

1. Complete an amendment directly through our website as described above
2. Apply directly through your software platform

If you are applying through your software platform then the first step is to make the required changes within the software so that this updated information will flow through to the Accurium application form. You may be required to complete additional steps, such as rolling back a period update. Once the fund information is updated simply apply for an actuarial certificate using the normal process for your software platform and this will flow through to us as an amendment.

### Example: submitting an amendment using Class

Consider a contribution was missed from the original fund transactions for the 2017-18 financial year actuarial certificate, and an amendment is required.

First we go back into Class and add the contribution. The Periodic Processing screen will show that the financial year contains modified events.


Fund Feeds Transactions Members Investments **Periodic Processing** Reports Settings

AccuriumD2 / Financial Years / 2017-18: Financial Year

**Financial Year Summary**

Description	2017-18: Financial Year
Status	Open
Auto Publish To Client View	Yes

**Period Updates**

Period Description	Period Start Date	Period End Date	Execution Date	Processed By	Published To Client View	
2017-18: Financial Year	01 Jul 2017	07 Jun 2018	07 Jun 2018 17:02	jvonk@accurium.com.au	Yes (Revoke)	<a href="#">View/Rollback</a>
2017-18: Financial Year	08 Jun 2018	30 Jun 2018	12 Apr 2019 14:51	jvonk@accurium.com.au	Yes (Revoke)	<a href="#">View/Rollback</a> <span style="border: 2px solid red; padding: 2px;">⚠ View Modified Events</span>

**Tax Finalisation and Return**

**Close Financial Year**

Tax Finalisation is required to close the Financial Year.

Click on the 'View Modified Events' link to see a summary of what events were changed and rollback the period update.


[Fund](#) [Feeds](#) [Transactions](#) [Members](#) [Investments](#) [Periodic Processing](#) [Reports](#) [Settings](#)

AccuriumD2 / Period Update Event Summary

Period Description: 2017-18: Financial Year

Period From: 08 Jun 2018 to 30 Jun 2018

Processed Date: 12 Apr 2019 14:51

The following events were processed after this Period Update was processed, and are not included in the current Period Update calculation. It is strongly recommended to rollback and reprocess the period update, or to rollback and correct the date on the events below.

Distinguished Date	Processed Date	Event Type	Event Description	Processed By	Status
29 Jun 2018	12 Apr 2019 15:13	Member Contribution	Contribution Allocation, total value \$5000	jvonk@accurium.com.au	Processed

[Click here to View/Rollback this Period Update 2017-18: Financial Year](#)

We complete a rollback of the period update and then process a new period update. Now we start a new actuarial certificate application for the financial year.


[Fund](#) [Feeds](#) [Transactions](#) [Members](#) [Investments](#) [Periodic Processing](#) [Reports](#) [Settings](#)

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**Tax Finalisation and Return**

[Request Actuarial Certificate](#)

[Finalise Tax](#)

**Close Financial Year**

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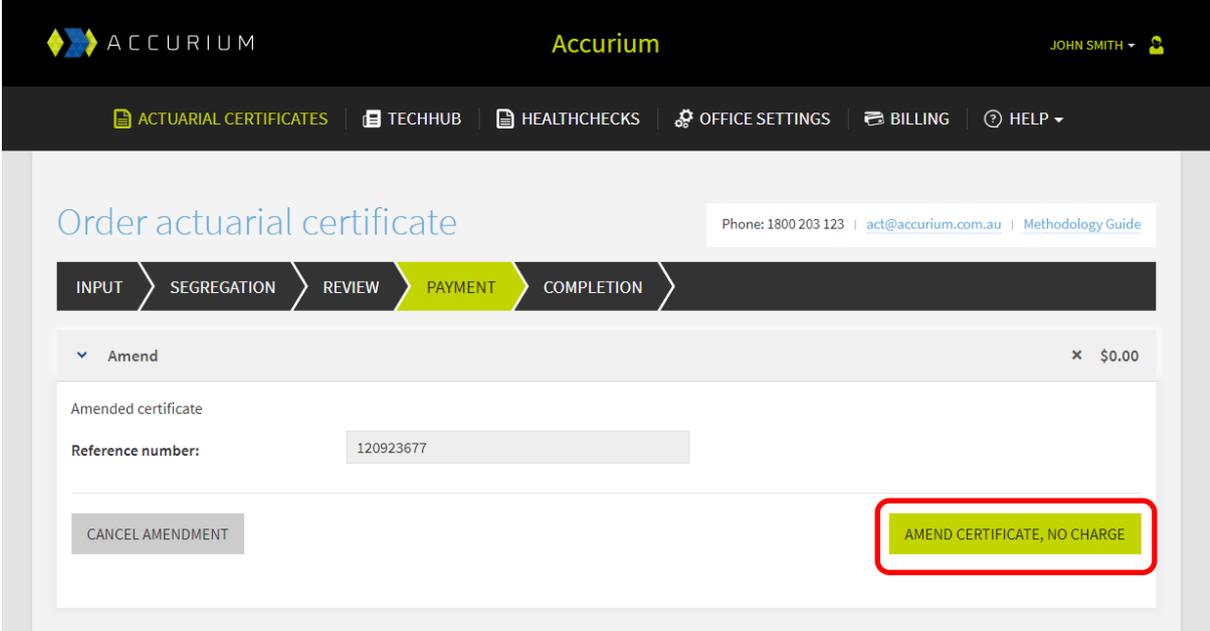

[Fund](#) [Feeds](#) [Transactions](#) [Members](#) [Investments](#) [Periodic Processing](#) [Reports](#) [Settings](#)

AccuriumD2 / Request Actuarial Certificate

Click [here](#) to view your Actuarial Certificate Request at Accurium

The data will pre-populate onto the Accurium application form and it is a good idea to ensure that the updated fund information, the additional contribution in this case, has correctly pre-filled.

You can then continue through to the Accurium payment page. On this page you will see an Amend option with your original reference number pre-filled. Select the 'Amend Certificate, No Charge' button to submit your application.



Our SMSF team will receive and process the application and email you the updated actuarial certificate.