

## 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:

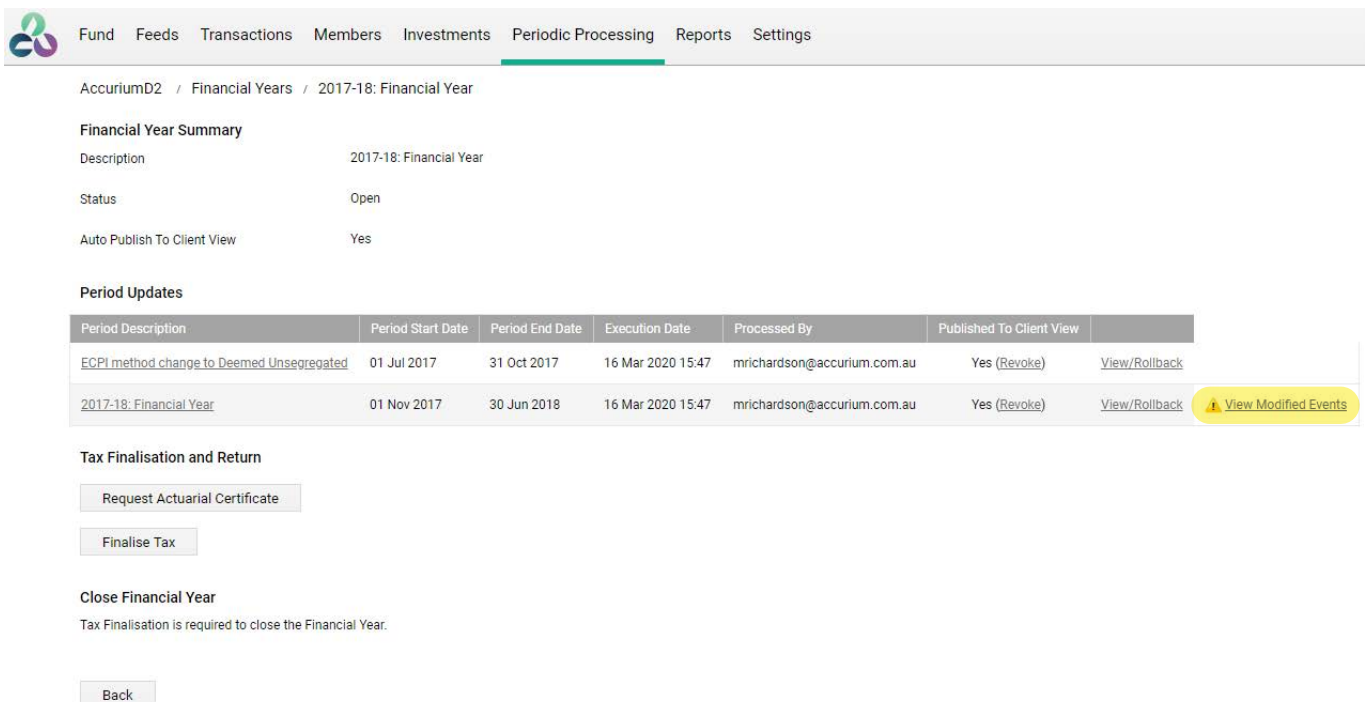
1. Complete an amendment directly through our website as described above
2. Apply directly through your software platform

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.



The screenshot shows the Accurium web application interface. The top navigation bar includes: Fund, Feeds, Transactions, Members, Investments, **Periodic Processing**, Reports, and Settings. The breadcrumb trail is: 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	
<a href="#">ECPI method change to Deemed Unsegregated</a>	01 Jul 2017	31 Oct 2017	16 Mar 2020 15:47	mrichardson@accurium.com.au	Yes ( <a href="#">Revoke</a> )	<a href="#">View/Rollback</a>
<a href="#">2017-18: Financial Year</a>	01 Nov 2017	30 Jun 2018	16 Mar 2020 15:47	mrichardson@accurium.com.au	Yes ( <a href="#">Revoke</a> )	<a href="#">View/Rollback</a> <a href="#">View Modified Events</a>

**Tax Finalisation and Return**

[Request Actuarial Certificate](#)

[Finalise Tax](#)

**Close Financial Year**

Tax Finalisation is required to close the Financial Year.

[Back](#)

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

AccuriumD2 / Period Update Event Summary

Period Description 2017-18: Financial Year  
 Period From 01 Nov 2017 to 30 Jun 2018  
 Processed Date 16 Mar 2020 15:47

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
01 Dec 2017	09 Apr 2020 10:26	Member Contribution	<a href="#">Contribution Allocation, total value \$5000</a>	mrichardson@accurium.c	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.

AccuriumD2 / Financial Years / 2017-18: Financial Year

Financial Year Summary

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<a href="#">2017-18: Financial Year</a>	01 Nov 2017	30 Jun 2018	09 Apr 2020 10:50	mrichardson@accurium.com.au	Yes ( <a href="#">Revoke</a> )	<a href="#">View/Rollback</a>

Tax Finalisation and Return

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[Finalise Tax](#)

Close Financial Year

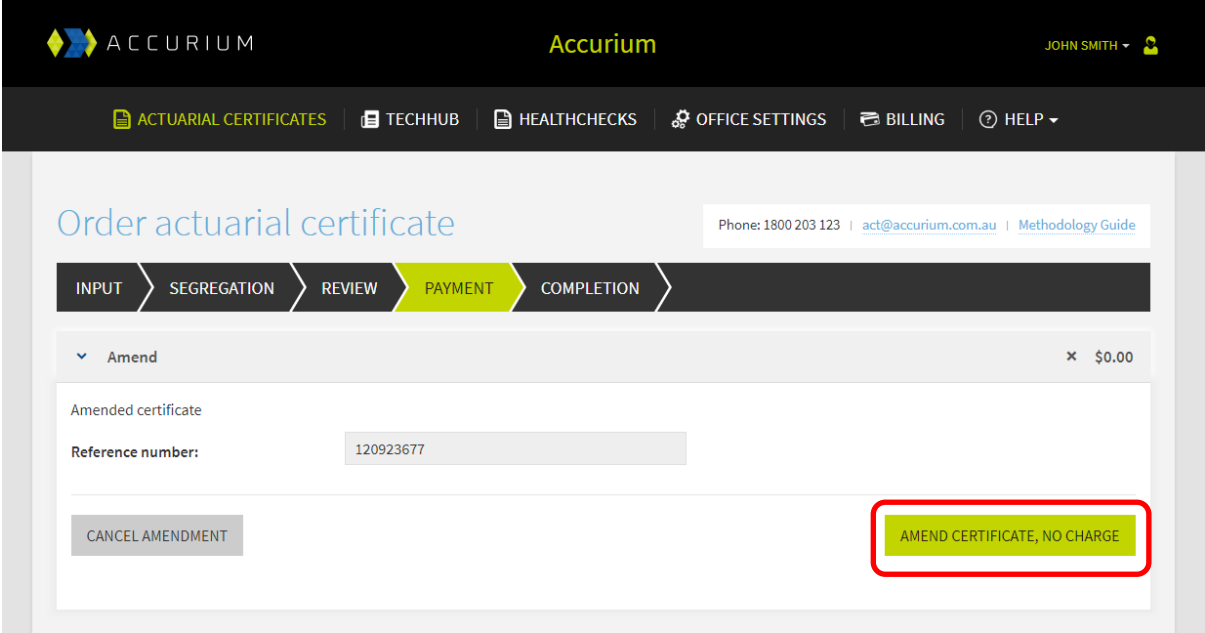
Tax Finalisation is required to close the Financial Year.

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.