

Phoenix payroll integrates with Employment Hero Work and uses Beam as the clearing house. Work through this list before 1 July 2026.

Pre-1 July 2026 setup checks for Phoenix (by AGDATA)

- Confirm your Employment Hero Work subscription and Beam clearing house are active.
How to: Phoenix Payroll → Settings → Integrations → Employment Hero Work. In Employment Hero Work, register for Beam under Payroll Settings → Pay Super Settings.
- Map Phoenix pay categories to the right super classification and Single Touch Payroll Phase 2 reporting category in Employment Hero Work.
How to: Employment Hero Work → Payroll Settings → Pay Categories — set "Super applies" and the Australian Taxation Office reporting category for each pay code.
- Confirm employee fund details and member numbers in Employment Hero Work are complete.
How to: Employment Hero Work → People → Employee → Pay run defaults / Super funds. Use the self-service portal to chase missing details.
- Coordinate integration testing with AGDATA support before 1 July 2026.
How to: Call AGDATA Support to schedule a Phoenix-to-Employment-Hero-Work test run before June. Don't leave this to the last week.
- Plan timing — Phoenix posting plus the Employment Hero Work super submission must complete within 7 business days of payday.
How to: After each Phoenix pay export, log into Employment Hero Work and submit super through Beam the same day. Build it into the pay-run routine.

Transition checks — before 30 June 2026

- Mark all super already paid for periods up to 30 June 2026 as "paid" in Phoenix payroll.
Reconcile: Reconciles every super batch up to and including the June 2026 quarter so the new payday-super system doesn't try to lodge them again. Open the Pay Super or Superannuation Payments screen and confirm each batch shows as settled.
- Reconcile your Super Payable account on 30 June 2026 against your general ledger.
Reconcile: Run a balance sheet on 30 June and confirm the Super Payable account agrees with what's outstanding to funds. Fix any errors before the new system starts — they are much harder to unwind once payday super is running.
- In mid-to-late June 2026, run a live super submission for one pay cycle as a final dry run.
Reconcile: Lodge a real super batch through your clearing house close to the changeover. Confirm timing, signatory authorisation and bank settlement all work end-to-end before the 7-business-day rule kicks in.

► **Want a walk-through?** Watch the official Phoenix (by AGDATA) Payday Super guide:

www.agdata.com.au/video/pay-day-super-with-beam-in-phoenix-payroll/