

Xero

If you run payroll in Xero, work through this list before 1 July 2026. Auto Super is included at no extra cost on every Xero plan with payroll.

Pre-1 July 2026 setup checks for Xero

- Enable or confirm Xero Auto Super (powered by Beam) is active and authorised.
How to: Payroll menu → Payroll settings → Automatic superannuation. A signatory must complete the bank-account direct-debit authorisation.
- Review every pay item — confirm the super classification, salary-sacrifice handling and Single Touch Payroll Phase 2 reporting category.
How to: Payroll settings → Pay Items → Earnings, Deductions and Reimbursements. Tick the right super box on each one and check the Australian Taxation Office reporting category.
- Confirm every employee has a fund linked via SuperChoice or Beam with a valid member number.
How to: Payroll → Employees → Select Employee → Super Membership. Validate the Unique Superannuation Identifier and member number — invalid funds block the auto-submit.
- Set a reminder to submit super on each pay date, not at the end of the quarter.
How to: Add "submit super" to your pay-run checklist. After approving the pay run, click "Auto Super" on the same day.

Transition checks — before 30 June 2026

- Mark all super already paid for periods up to 30 June 2026 as "paid" in your Xero 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?** Read the official Xero Payday Super guide:

www.xero.com/au/programme/payday-super-resources/