

Employer Portal Release Notes

Release July 2024

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1 OverView

Key Feature Deliveries

- Payments changes to improve the automatic money to data matching for direct credit payments

The SuperChoice Employer Portal will not be available as follows:

UAT:

Monday 24 June, 2024 12:00pm – 4:00pm (AEST)

Production:

Tuesday 2 July, 2024 7:00pm – 10:00pm (AEST)

1.1 Employer Portal Indicative Release Dates

Note that these release dates are subject to change



UK deployments are 2 days later than Australian deployments

| Release | UAT | Production |
|-----------|----------------|---------------|
| August | Tuesday 16-Jul | Tuesday 6-Aug |
| September | Tuesday 20-Aug | Tuesday 3-Sep |
| October | Tuesday 17-Sep | Tuesday 1-Oct |
| November | Tuesday 22-Oct | Tuesday 5-Nov |
| December | Tuesday 19-Nov | Tuesday 3-Dec |

2 User Impact

2.1 Menu bar font size standardisation



The font size for the menu bar was incorrectly set to 14px instead of 16px for the following pages

- all contribution grids (e.g. file history, contributions grid, member maintenance, etc)
- review request form
- emails viewer

2.2 Report filtering by employer

Reporting now allows filtering by one or more employers.

FILTER REPORT

Pay period start date 

Submission date

Employer 

3 Enhancements

3.1 Payment Matching Changes Overview

To improve the auto-matching of complex scenarios where employers may have made multiple payments and/or submitted multiple batches, the system will now prioritise exact amount matches before aged money. This ensures that if an employer pays the correct amount, this payment will be prioritised above any previous payments they may have made. After this, money and data will be grouped to facilitate bulk matching.

| Level | Applies to | First preference | Grouping - payment(s) to batch(es) | Second Preference match | Match criteria | Narrative portion |
|----------|-------------------|------------------|------------------------------------|-------------------------|-------------------|-------------------|
| Level 0a | Any money/no data | exact amount | PRN portion of narrative | any amount | 13+ character PRN | PRN portion |
| Level 1a | Pre paid only | exact amount | PRN portion of narrative | sufficient amount | 13+ character PRN | PRN portion |
| Level 2 | Any money/no data | exact amount | PRN portion of narrative | exact amount | any length PRN | PRN portion |
| Level 4a | Any money/no data | exact amount | Employer portion of narrative | exact amount | Employer words | Full Narrative |
| Level 4d | Any money/no data | exact amount | Employer portion of narrative | exact amount | CRN | Full Narrative |
| Level 4e | Any money/no data | exact amount | Employer portion of narrative | exact amount | ABN | Full Narrative |

3.1.1 Matching Process

1. First Preference Matching (All Levels)

- The system loops through unpaid batches from oldest to newest without grouping.
- It nets off any exact amount matches where the unprocessed money and unprocessed batch amount exactly match, based on the narrative matching for the level.
- Example: \$100 won't match \$50 + \$50 even if they are the oldest because there is an exact \$100 match.

2. Second Preference Matching (Grouping)

- The system loops through unpaid money and batches from oldest to newest, grouping unprocessed money by the employer narrative portion or PRN portion and grouping unprocessed batches.
- If there is an exact amount in the grouped unprocessed money, it will take the amount needed for the grouped employer batches (oldest first) and match all that meet the grouped payment total.

3. Underpayment and Overpayment (Level 0a and 1a - where the correct 13+ digit PRN has been supplied)

- The system loops through unpaid batches from oldest to newest:
 - For Level 0a (where the correct 13+ digit PRN has been supplied), it can part-pay a batch and part-process a payment.
 - For Level 1a (where the correct 13+ digit PRN has been supplied but the money has been pre-paid), it won't part-pay a batch but can part-process a payment.
- If there is a sufficient amount in the unprocessed money (oldest to newest), it will take the exact amount needed for that batch and pay it. This might result in a partially-processed payment.
- Processing continues with the next batch for that owner until there is insufficient or no money to pay the batch currently being processed or all batches have been paid.

3.1.2 Example Scenario

Below is a deliberately contrived scenario where the same employer has made multiple payments for multiple batch submissions to explain the ordering of matches

| Money | Employer | Batch | Employer | Batch Match Order |
|-------|----------|-------|----------|-------------------|
| \$100 | A | \$50 | A | 2 |
| \$50 | A | \$30 | A | 3 |
| \$60 | A | \$100 | A | 1 |
| \$34 | A | \$30 | A | 3 |
| \$26 | A | \$30 | A | 4 |
| \$20 | A | \$30 | A | 4 |
| \$92 | A | \$32 | A | 5 |
| \$10 | A | \$32 | A | 5 |
| \$20 | A | \$28 | A | 5 |
| | | \$25 | A | |
| | | \$15 | A | |

3.1.3 Summary

These changes aim to improve the accuracy and efficiency of the payment matching process, ensuring that correct payments are prioritised and reducing the complexity of handling multiple payments and batch submissions.

4 Validation And Rule Changes



No Australian validation or rule changes.



- Update to automatically remove Pound £ symbols from all contribution fields
- The Held Contributions Migration file has been changed to include Employer Name. The purpose of this change is that there are company numbers) that legitimately belong to more than one related entity. In such scenarios, without the inclusion of the employer name, the system is not able to determine which Employer entity to allocate an Employee to.

- **Problem statement**

Issue: During re-enrolment, employers making changes through member maintenance resulted in missing enrolment emails





Cause: There were gaps in the re-enrolment communications process when detours were taken outside the standard contributions journey.

Solution overview

To fix this, a new field called "Re-enrolment Type" has been introduced, which captures the reason for an employee's re-enrolment. This field is populated upon uploading a re-enrolment file and is used to determine the type of re-enrolment communications to be sent.

- New Field Introduction**
 - A new field named "Re-enrolment Type" has been added to store the re-enrolment reason.
 - Possible values for this field: `BELOW_MIN` , `STOPPED_PAYING` , `OPTED_OUT` , `EXEMPT` .
 - Setting the Re-enrolment Type:**
 - When a re-enrolment file is uploaded, the "Re-enrolment Type" field is populated with one of the predefined values based on the reason for both optional and mandatory re-enrolment.
 - This field update is shown in the audit history.
 - Determining Communication Type:** Upon employer re-enrolment submission
 - If the "Re-enrolment Type" is `BELOW_MIN` , then specific communications for below minimum re-enrolment are sent out.
 - For any other re-enrolment type (`STOPPED_PAYING` , `OPTED_OUT` , `EXEMPT`), standard re-enrolment communications are sent.
 - Handling Non-Re-enrolment:**
 - If the employer decides not to re-enrol the employee, the member's status reverts to the value in the "Re-enrolment Type" field on submission
 - Clearing the Re-enrolment Type:**
 - The "Re-enrolment Type" field is cleared when a subsequent standard contribution file is uploaded.
- The above also fixes an issue where standard enrolment comms were sent as well as re-enrolment comms.

5 Defects Fixed

| | | | |
|--|---|--|---|
| EPRT-19148  | <input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway <input type="checkbox"/> Reporting | Some API payment status responses are not being sent | In the situation where then source bsb/account number the same as a destination bsb/account number payment status responses weren't being sent to API clients |
| Various  | <input type="checkbox"/> Employee <input type="checkbox"/> Contribution <input type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway <input checked="" type="checkbox"/> Reporting | Various reporting bug fixes | <ol style="list-style-type: none"> 1. When filtering on a date range in reporting (e.g. pay period start date, leaving date, enrolment date, etc), the results are sorted by submission date rather than the filter date. 2. When selecting pay period start date, a result is being displayed even when it is one day after the selected date. 3. The date format should be dd-mm-yyyy in the reporting date range selector 4. If no change is made to the filter selection date then clicking on the ok button does not close the date popup. 5. Employer contribution and Member contribution are appearing twice even though they are hidden in the column preference area. 6. When the reporting page is opened in new tab, <ol style="list-style-type: none"> a. the top menu bar buttons are misaligned b. the logged in member name is not shown next to user icon in menu bar c. The dropdown menu bar items are empty 7. The reporting button overlaps username button in the reporting page making dropdown difficult to use when clicking on the down arrow. 8. An auto release of a held contribution file should be shown in included contributions rather than excluded. 9. When a member file is submitted with new members that do not have a product assigned (e.g. EW, etc), records are not shown for those members in reporting. 10. Some product columns are not shown in released held files |
| EPRT-16733  | <input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input checked="" type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway <input type="checkbox"/> Reporting | For an employer with multiple categories, if a product is set, the category selector is not shown in the member form | If the Product Type is "Employer Sponsored" and the employer has a scheme then a scheme and category is now shown - otherwise a product selector is shown. This means that employers should always be able to select a category for an employer sponsored scheme. |
| EPRT-19667  | <input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input checked="" type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway <input type="checkbox"/> Reporting | Fix for "out of memory" production issue | The resend email functionality loaded all attachments for all employees which caused an out of memory error and the system to go offline for a short period. |