Employer Portal Release Notes

Release September 2024

Table Of Contents

1 OverView

Key Feature Deliveries

- Visual indicator showing the type of file upload

The SuperChoice Employer Portal will not be available as follows:

<u>UAT:</u>

Friday 23 August, 2024 12:00pm – 4:00pm (AEST)

<u>Production:</u>

Tuesday 3 September, 2024 7:00pm – 10:00pm (AEST)

1.1 Employer Portal Indicative Release Dates

Note that these release dates are subject to change

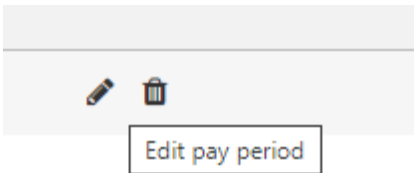UK deployments are 2 days later than Australian deployments

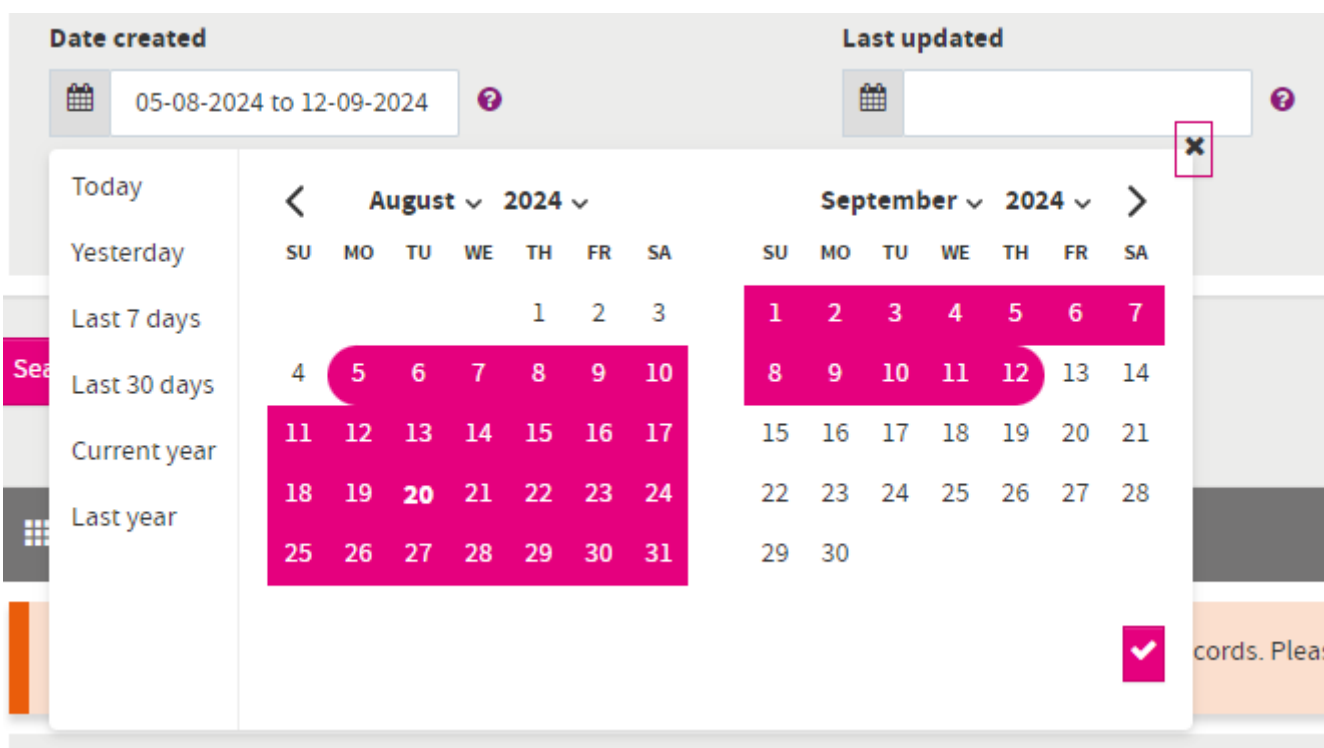| Release	UAT	Production
October	Tuesday 17-Sep	Tuesday 1-Oct
November	Tuesday 22-Oct	Tuesday 5-Nov
December	Tuesday 19-Nov	Tuesday 3-Dec

2 User Impact

New indicators on the file history page will show whether a previous pay period for a schedule has been used < or use specific dates has been selected when uploading a file 📅

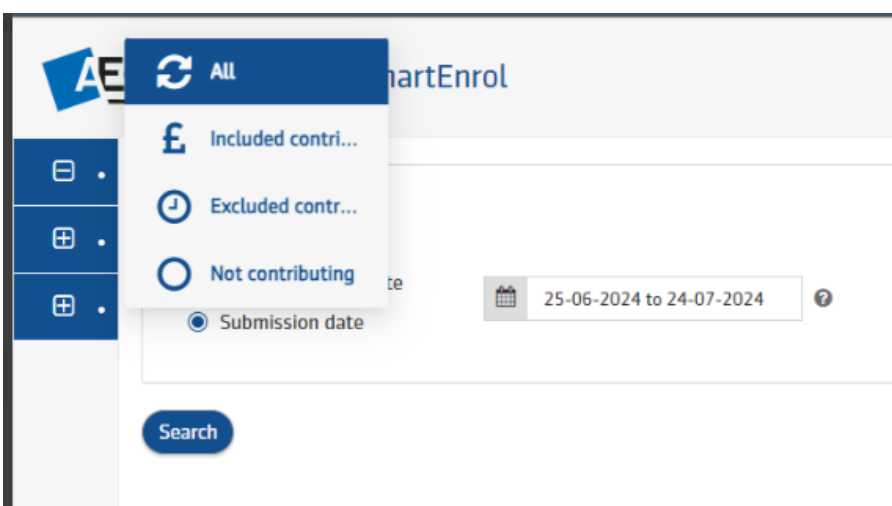|	Status	File Name	Employer(s)	File Type		Last Updated	User	Count	Expected $	Received $	Refunded $	Issues		Actions
⊞	✏	ato-happy-clean_file_upload - Copy.csv	fromoffice	$📄♻<	copy	Fri, 26 Jul 2024, 15:47	STAR-CUST	1	51.00			✔		⟳ ⊞ ⬇ 🗑
⊞	✏	ato-happy-clean_file_upload - Copy.csv	car6bad ...	$📄♻📅	copy	Fri, 26 Jul 2024, 15:44	STAR-CUST	1	51.00			✔		⟳ ⊞ ⬇ 🗑

Pay period help text pop up corrected in employer maintenance - maintain pay periods

Date created and last updated date range selector in Employer maintenance updated to be WCAG compliant and consistent with the email date selector.

🇬🇧 Reporting - shows popup selection when the side bar is collapsed

New file types can be selected and grouped by in reporting to show which employers have ad hoc amendments.

3 Enhancements

No enhancements

Commercial in Confidence

4 Validation And Rule Changes

There re some file properties that can now be referenced in enrichment, submission and validation rules

Id	Description
File.BatchId	The batch id of the file
File.SubmittedBy	The file submitter user name
File.FileName	The file name
File.DataContentType	Content of the file. One of • CONTRIBUTION • MEMBER • MEMBER_UPLOAD • STP
File.FileType	The type of file. One of • MANUAL • UPLOAD • UPLOAD_FROM_SCHEDULE • UPLOAD_FROM_PRIOR_SCHEDULE • UPLOAD_SPECIFIC_DATES • FILE_UPLOAD_REQUEST • COPY_FROM_MANUAL • COPY_FROM_UPLOAD • API • HELD
File.FormatType	The file format • CSV • EXCEL
File.MappingType	File mapping name

New facility to store attachments (PDFs, T&C's, etc) for the employee portal to be automatically available to all custodians if not explicitly set.

- Member is not getting enrolled after selecting opt in request or join request approved on the first contribution upload
- Implementation of the "use specific dates" feature.
    - **Process**
        - File upload only is supported using the same format as standard contribution files
        - Only specific amendment fields need to be populated and are validated. This is primarily used to change employee, employer and salary sacrifice amounts.
        - No contribution filters will be shown
        - On submission, the employer will be presented with a payment summary total by product.
        - The file type will be shown with a date icon in the historic contributions view.
    - **Enrolment Assessment:**
        - Enrolment assessment will not run, leaving worker category and member status unchanged.
        - There are no below minimum checks carried out as part of this submission
        - No enrolment-related emails will be sent.
    - **Member changes**
        - If any amendments are made to the employee personal data, an ad hoc amendment file is generated.
        - If a new e-mail address is provided this should trigger a new welcome e-mail to be sent to the employee.
    - **New Members:**
        - New members cannot be processed via this method and will trigger an error against the member in the file. They must first go through the regular payment process for assessment.
        - The employee (who they are paying an ad hoc payment for) must be in a provisional / active / stopped paying / below minimum status. An error will be triggered against the member if not.
    - **Exiting Members:**
        - Members cannot be exited during this process. Attempting to do so will result in an error against the member.
    - **Schedule Determination:**
        - The schedule is determined by the members, as they are linked to schedules.
        - A file may include members from multiple schedules.
- Fix spelling in MIG.R.E1 error message
- Unable to update County for Non-UK address - there is now a '-' option for when county is not applicable.

- New entrant files - held contribution file are not auto submitted due to the missing earnings caused by a member upload
- Members in opt out period are not having the opt out start/end date and member release date set if a contribution file is uploaded twice but without submitting the first one,
- For Contribution Process - trigger warning on worker category field if employer auto enrol flag is unchecked

5 Defects Fixed

No defect fixes