

Rollover Portal User Guide

August 2021



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1. Overview

The SuperChoice Rollovers Portal is a self-serve reporting portal which is intended for use by Fund Administrators. The Rollovers Portal:

- Provides the ability to search for, view, download & send MIGv3 Rollover messages
- Displays messages as individual processing events for a single member transaction.
- Receives data from a variety of sources in real-time (SuperStream Network & SuperChoice Clients) and messages are available as soon as they are received by the system.

The screenshot displays the SuperChoice Rollovers Portal interface. On the left is a sidebar with navigation options: Message Filter, Search Results, Saved Filters, and Last Day All. The main area features a search filter section with various dropdowns and input fields for filtering messages. Below this is a section titled 'GROUP MESSAGES BY' with checkboxes for Date, Message Type, Status, From Product, To Product, Conversation Id, Transfer Mem No, and Receive Mem No. A 'Search' button is present. Below the search section is a table titled 'HERE ARE YOUR FILTERED MESSAGES'. The table shows 2 entries, with columns for Date, Message Type, No. of EPPs, No. of IRRs / Section 20Cs, No. of RAs, No. of RTRs, No. of USMs, and Rollover Amount. The first entry is dated 09 Jun 2021, with Message Type RTR, 0 EPPs, 0 IRRs, 0 RAs, 1 RTR, 0 USMs, and a Rollover Amount of 0. The second entry is dated 28 Jul 2021, with Message Type RTR, 0 EPPs, 0 IRRs, 0 RAs, 1 RTR, 0 USMs, and a Rollover Amount of 0. A search bar is located at the top right of the table area.

| Date | Message Type | No. of EPPs | No. of IRRs / Section 20Cs | No. of RAs | No. of RTRs | No. of USMs | Rollover Amount \$ |
|-------------|--------------|-------------|----------------------------|------------|-------------|-------------|--------------------|
| 09 Jun 2021 | RTR | 0 | 0 | 0 | 1 | 0 | 0 |
| 28 Jul 2021 | RTR | 0 | 0 | 0 | 1 | 0 | 0 |

The following messages are supported by the Rollover Portal:

- Electronic Portability Form (**EPF**)
- Initiate Rollover Requests & Initiate Rollover Error Responses (**IRR & IRER**)
- Section 20C Notices & Section 20C Error Responses (**S20C & S20CER**)
- Release Authority, Release Authority Statements & Responses (**RA & RAER, RAS & RASOR**)
- Rollover Transaction Requests & Rollover Transaction Outcome Responses (**RTR & RTOR**)
- Unclaimed Superannuation Money Rollovers & Unclaimed Superannuation Money Rollover Outcome Responses (**USM & USMOR**)

The **IRR, IRER, RTR, RTOR, USM** and **USMOR** are all bi-directional messages. This means you can send them outbound to other funds and you can also receive them.

- **IRR, IRER, RTR** and **RTOR** messages are to and from other APRA Funds & SMSFs
- **USM** and **USMOR** messages are to and from the ATO

RA are received inbound from the ATO only, and the fund must respond with a **RAER** or **RAS**, for which the latter the ATO will respond with an **RASOR**.

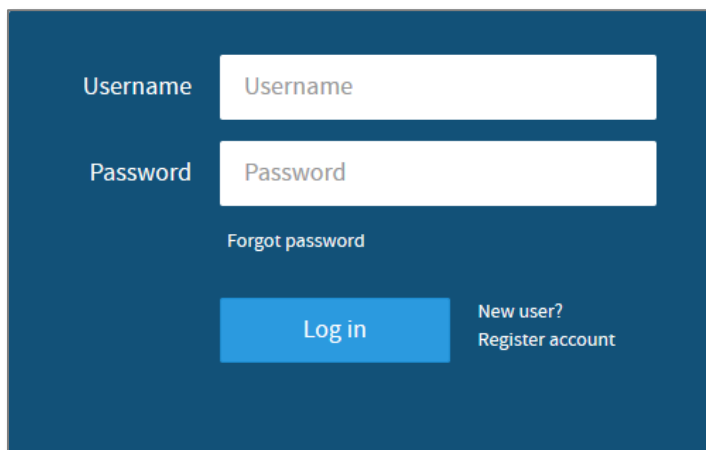
S20C are received inbound from the ATO only. Funds can respond / view any corresponding **S20CER** in the same way as an **IRER & RAER**.

EPF are received inbound from the ATO only, without the option to respond.

2. Accessing Rollover Functionality

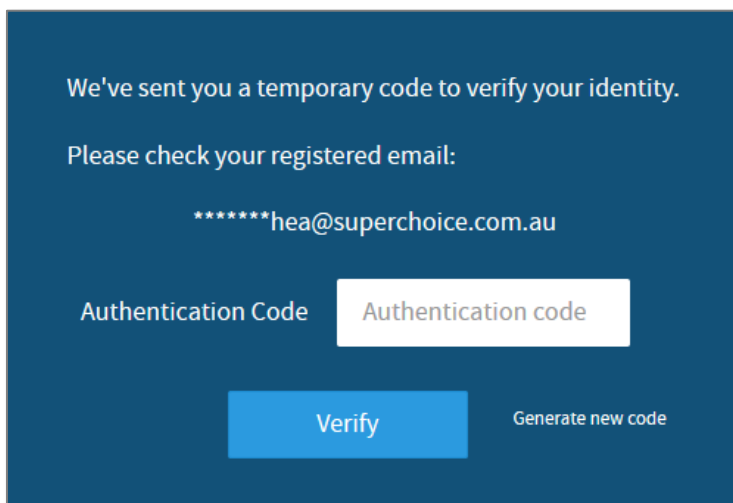
2.1 Login¹

The Rollovers Portal is delivered as part of SuperChoice's EmployerPay platform. To log in to the Rollovers Portal enter your *Username* and *Password* and select **Log in**

A login form on a dark blue background. It features two white input fields: 'Username' and 'Password'. Below the password field is a link 'Forgot password'. At the bottom, there is a blue 'Log in' button and a link 'New user? Register account'.

Multi-Factor Authentication

A conditional Multi-Factor Authentication code will be sent via email on User Login.

A verification screen on a dark blue background. It displays the text 'We've sent you a temporary code to verify your identity. Please check your registered email:' followed by the email address '*****hea@superchoice.com.au'. Below this is an 'Authentication Code' label and a white input field. At the bottom, there is a blue 'Verify' button and a link 'Generate new code'.

The Multi-Factor Authentication code will be issued for the below events:

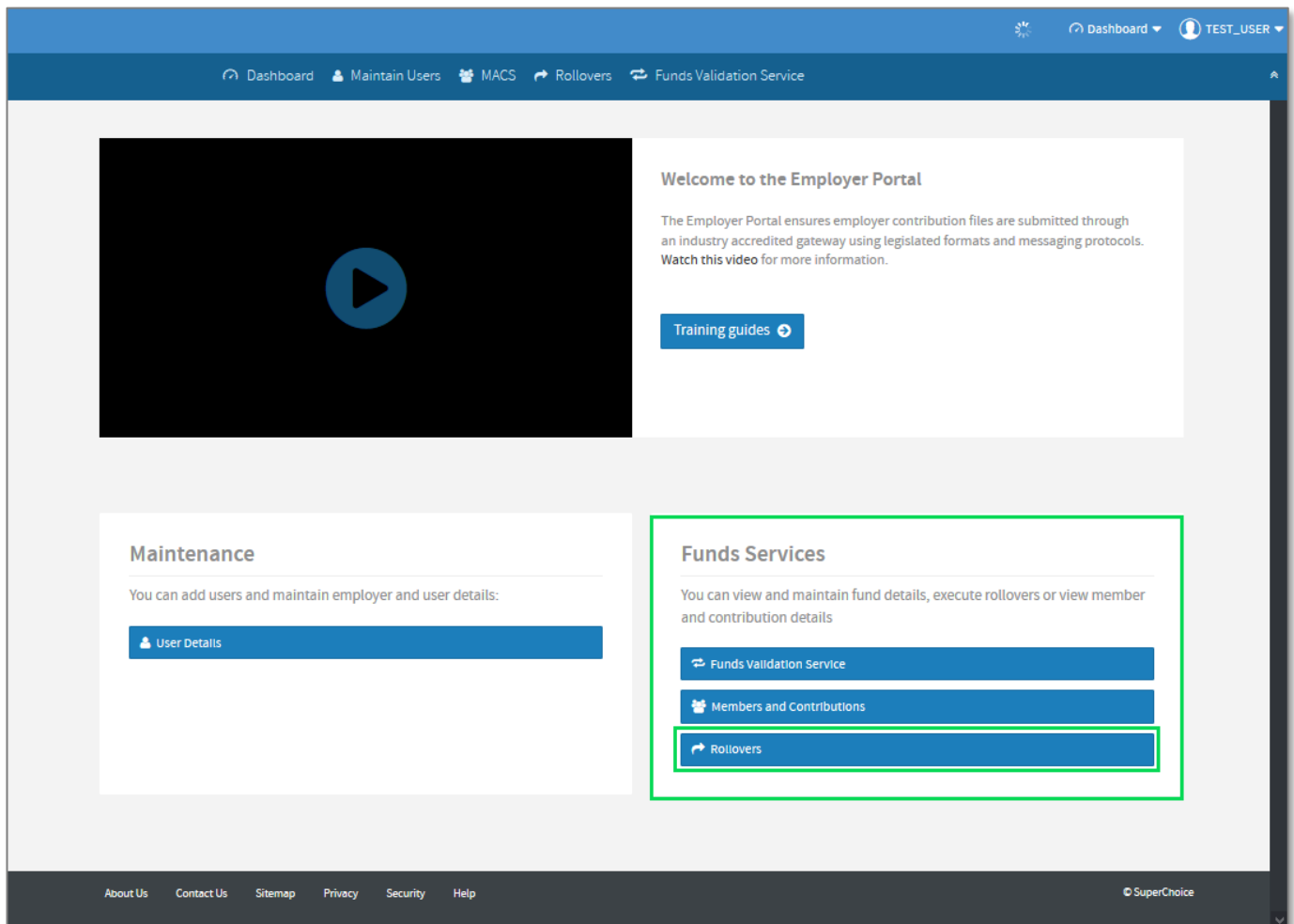
- A New User is created
- A Password Reset have been requested
- When a user logs into EmployerPay using a new web browser
- When a user logs into EmployerPay using a different computer or laptop.

¹ The above login process is not applicable for clients with Single-Sign-on (SSO) access

2.2 Accessing the Rollovers Portal

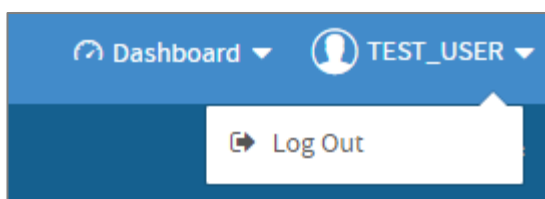
The EmployerPay home page will dynamically display the relevant sections and links based on the user role and permissions. *Note – This screenshot sample is for a User with ‘Gateway Administrator’ role of a client for which SuperChoice provides (i) FVS, (ii) Contribution and (iii) Rollover Gateway Services.*

To access the Rollovers Portal from the home page, click on **Rollovers** from the Fund Services Link Group (highlighted in green below).



2.3 Logout

To logout from the Rollovers Portal, select the user's name from the top right panel, and click on **Log Out**.



2.4 Accessing from various devices

The Rollovers Portal screen has been designed to provide a great user experience on any type of device; including desktop PC's, laptops, tablets and mobile devices. The screen automatically adjusts according to the device used to access the Rollovers Portal.

This User Guide has been prepared using a laptop, so any screenshots provided are specific to that screen size. Thus, while the screens will have exactly the same features on any type of computer, the screen may be laid out slightly differently on the user's particular machine.

2.5 Recommended Browsers & Required applications

The EmployerPay Portal is optimised for usage with Google Chrome, Mozilla Firefox and Microsoft Edge (the version using the Chromium engine).

The recommendation is to always run the latest version of the browser. Although the EmployerPay Portal is compatible with the current and previous 2 versions of these Browsers.

In addition to the supported browsers above, to make use of the SuperChoice Rollover Portal you will require **MS Office 2007** and above (version that supports the .XLSX format) and a PDF reader.

2.6 Branding

If Corporate Branding has been applied to your EmployerPay platform, the branding will be applied to the Rollover portal.

Note – the Screen shots in this document are taken with the standard default SuperChoice Branding.

3. Rollover Portal Functionality


3.1 Overview


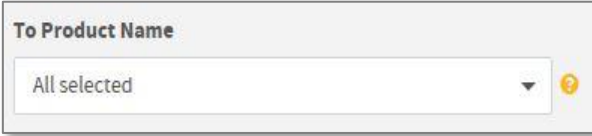
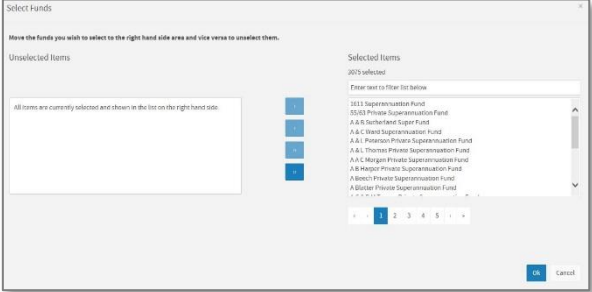
The core features of the Rollover Portal include:




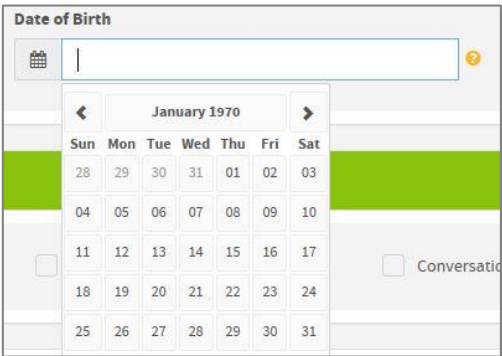
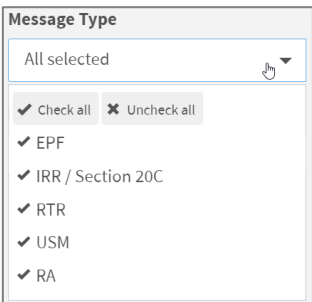
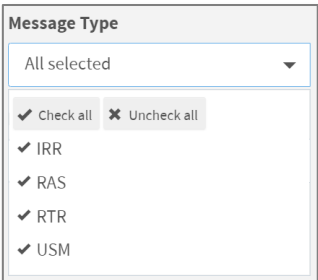
- Ability to search for Inbound messages (coming to you for your products) and Outbound messages (messages which you are sending out)
- Ability to search for messages of type **IRR**, **S20C**, **EPF**, **RA**, **RTR**, **RAS** and **USM** for which there is no feedback or with feedback (where applicable)
- Ability to view messages of status Received and Downloaded (applicable when viewing Inbound messages)
- Ability to download to messages as a spreadsheet (CSV), a Portable Document File (PDF)
- Ability to create **IRR**, **RTR**, **RAS** or **USM**, as one or many messages by using the web-upload functionality

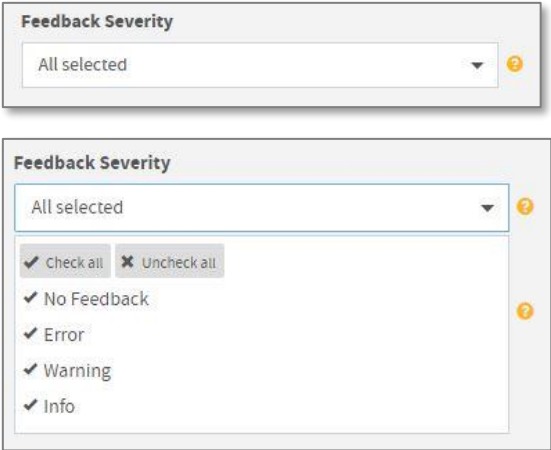
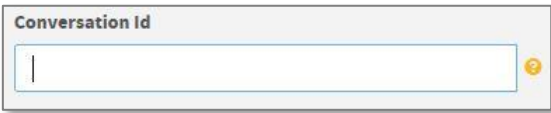


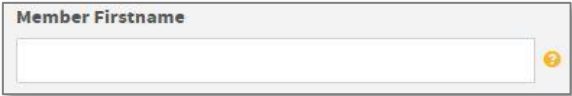

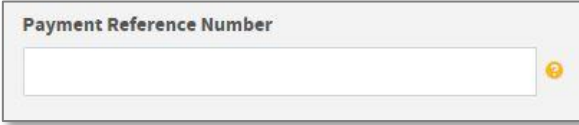
3.2 Search Filters

The Rollover Portal provides a powerful set of search filters, allowing you to find records in the system according to a broad set of criteria, giving you great flexibility. The more search filters specified in a given search, the more refined the results will be. Some search filters are expected to return a relatively large number of results, such as date or product, and some search filters are expected to be quite precise in finding specific records, such as Conversations ID.

The following table will provide descriptions of each search filters available within the Rollovers Portal. For help information on each filter, click on the  icon.


| Search Filters | Description |
|--|---|
| <p>Message Direction (Defaults to <i>Inbound</i>)</p>  | <p>Search for messages Inbound to you (received messages) or Outbound to you (sent messages).</p> |
| <p>To Product Name (Defaults to <i>All Selected</i>)</p>   | <p>Search for messages which were sent for a specific target product.</p> <ul style="list-style-type: none"> ▪ If you are searching Inbound then the To Product List will show products to which you have access to. ▪ If you are searching Outbound then the To Product List will show all products which appear on the FVS register and any specific SMSF for which have you have sent / received an IRR or RTR. <p>To select products, you can drag and drop with the multi-select product widget.</p> |

| Search Filters | Description |
|---|--|
| <p>From Product Name</p>  <p>Defaults to All Selected.</p>  | <p>Search for messages which were sent to a specific target product.</p> <ul style="list-style-type: none"> If you are searching Inbound then the From Product List will show all products which appear on the FVS register and any specific SMSF for which have you have sent / received an IRR or RTR If you are searching Outbound then the From Product List will show products to which you have access to. <p>To select products, you can drag and drop with the multi-select product widget.</p> |
| <p>Date Filters (Defaults to Last Day)</p>   | <p>Search for messages which fall within a specific date range (Last Day, Last 7 Days, Last 30 Days.)</p> <p>Or search for a specific date by selecting Custom Date (within Date Filters).</p> <p>When searching based on Last Day, Last 7 Days, Last 30 Days, the search will return results, 24 hours, 168 hours, 720 hours, respectively, from the time that you execute the search.</p> <p>To retrieve messages based on a specific calendar date(s), use the custom date-picker widget.</p> <p>Note: Please note that all searches and results are based on your local time zone.</p> |
| <p>Message Type (Defaults to All selected)</p> <p>Inbound</p>  <p>Outbound</p>  | <p>Search for a specific message type.</p> <p>The search options are dynamic and based on messages direction (inbound or outbound)</p> <ul style="list-style-type: none"> Inbound: EPF, RA IRR/S20C, RTR, USM Outbound: IRR, RTR, RAS, USM <p>You can select all supported message types by selecting Check all or one or more specific message types.</p> <p><i>Note – To filter specific for S20C search with sending product = Australian Tax Office</i></p> |

| Search Filters | Description |
|---|--|
| <p>Feedback Severity <i>(Defaults to All selected)</i></p>  | <p>Search messages for which there is No Feedback, Error, Warning or Info.</p> <p>A response message is always attached to the original request message.</p> <p>Hence to search for a received IRER, RTOR, USMOR, RASOR from other funds / ATO, search for IRR, RTR, USM, RAS outbound respectively where Feedback Severity is Error, Warning or Info.</p> <p>For an IRER, RAER RTOR, USMOR sent, search for IRR, RA, RTR, USM inbound where Feedback Severity is Error, Warning or Info.</p> |
| <p>Conversation Id <i>(Free text field)</i></p>  | <p>Search on Conversation ID. All messages will have a Conversation ID which is created by the sending party or SuperChoice (when you use the Rollovers Portal web-upload to create messages.).</p> <p>A Conversation ID identifies a specific message and hence when one is provided, all other search filters which have been selected will be overridden.</p> |
| <p>Status <i>(Defaults to Received)</i></p>  | <p>Search for messages of type Received or Downloaded. The status is applicable to Inbound messages only. All records received by system are initially in the status of Received. Records which have been subsequently downloaded will have the status updated to Downloaded.</p> |
| <p>Member Surname <i>(Free text field)</i></p>  | <p>Search for messages based on the Surname of the member.</p> |
| <p>Member First Name <i>(Free text field)</i></p>  | <p>Search for messages based on the First Name of the member.</p> |
| <p>DOB</p>  | <p>Search for messages based on the Date of Birth (DOB) of the member.</p> |
| <p>Payment Reference Number <i>(Free text field)</i></p>  | <p>Search for messages based on the Payment Reference Number.</p> <p>A Payment Reference Number (PRN) identifies a specific message and hence when one is provided, all other search filters which have been selected will be overridden.</p> |

3.3 Group by Filters



Search filters provide the user with the ability to find particular records in the system. The **Group Messages By** feature allows the user to summarise the search results according to zero or more attributes.

 GROUP MESSAGES BY

☒ Date ☒ Message Type ☐ Status ☐ From Product ☐ To Product ☐ Conversation Id ☐ Transfer Mem No ☐ Receive Mem No

That is, if the user specifies **Date** as the grouping attribute; then all records returned from the search will be summarised by the Date.

In the example below, the **Inbound** search result has been grouped by **Date** and **Message** type:

| Date | Message Type | No. of EPFs | No. of IRRs / Section 20Cs | No. of RAs | No. of RTRs | No. of USMs | Rollover Amount \$ | |
|-------------|--------------|-------------|----------------------------|------------|-------------|-------------|--------------------|---|
| 09 Jun 2021 | RTR | 0 | 0 | 0 | 1 | 0 | |  |
| 28 Jul 2021 | RTR | 0 | 0 | 0 | 1 | 0 | |  |


Selecting grouping attributes progressively splits the results according to the attributes selected and in the order of **Date**, **Message Type**, **Status**, **From Product**, **To Product**, **Conversation Id**, **Transfer Mem No** (Transferring Member Number) and **Receive Mem No** (Receiving Member Number).

Deselecting all grouping attributes will only ever return one line in the Search results panel.

The **inbound** search results will show the number of **EPF**, **RA IRR/S20C**, **RTR**, **USM** & **RAS** records returned by the search criteria, where a single member's transaction counts as a single record.

| No. of EPFs | No. of IRRs / Section 20Cs | No. of RAs | No. of RTRs | No. of USMs | Rollover Amount \$ | |
|-------------|----------------------------|------------|-------------|-------------|--------------------|---|
| 0 | 0 | 0 | 2 | 0 | |  |

The outbound search results will display **IRR**, **RAS**, **RTR**, **USM**

| No. of IRRs | No. of RASs | No. of RTRs | No. of USMs | Rollover Amount \$ | |
|-------------|-------------|-------------|-------------|--------------------|---|
| 1 | 0 | 0 | 0 | |  |

3.4 Search Results

Once the search is executed, the Search Results, called "**Here Are Your Filtered Messages**", section presents the summary of messages according to the search filters and grouping attributes selected. The first line provides a description of the search filters and grouping attributes selected. It is recommended that the user reviews the description to ensure it's aligned with their expectations.

The user is able to sort the table by clicking the heading row of the Results table. By default, the results are sorted by the first column. Clicking the heading once will sort the table according to the particular column in ascending order. Clicking the heading a second time will sort the table according the particular column in a descending order.

You will also be able to search within results in order to find a specific record. To do this, enter text in the Search box in the top RHS corner. This is a wildcard search which will allow you to find records based on an entered string.

Showing 1 to 5 of 5 entries

Search:

| Date | Message Type | No. of IRRs | No. of RASs | No. of RTRs | No. of USMs | Rollover Amount \$ | |
|-------------|--------------|-------------|-------------|-------------|-------------|--------------------|--|
| 27 Jul 2021 | IRR | 4 | 0 | 0 | 0 | | |
| 02 Aug 2021 | IRR | 4 | 0 | 0 | 0 | | |
| 19 Jul 2021 | RTR | 0 | 0 | 1 | 0 | | |
| 27 Jul 2021 | RTR | 0 | 0 | 1 | 0 | | |
| 02 Aug 2021 | RTR | 0 | 0 | 2 | 0 | | |

3.5 View Record Details

From the search results you will be able to also drill-down into the records.

By clicking on the numbers under **No. of EPFs**, **No. of RAs**, **No. of IRR/Section 20Cs**, **No. of RTRs**, **No. of USMs**, **No. of RASs** the system will display the line-by-line details of the transactions returned, and you can then drill down into the individual member level rollover transaction record:

ROLLOVER PORTAL

Showing 1 to 1 of 1 entries

Search:

| From Product Name | To Product Name | Message Type | Transferring Member No. | Receiving Member No. | Family Name | Given Name | Date of Birth | Transfer Balance Indicator |
|----------------------|---|--------------|-------------------------|----------------------|----------------------|----------------------|----------------------|----------------------------|
| Super Bond (Calibre) | Traditional - Asteron Legacy Super Bonds & Life Savings Plans | RTR | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | True |

3.6 Viewing EPF, RA, IRR, S20C Detailed Record

The detailed record for an **EPF, RA, IRR, S20C** is as follows:

The actual data & fields displayed is driven by the message type and content of the message.

| Summary | |
|----------------------|---|
| Message Type | IRR |
| Conversation Part ID | 1 |
| Requested Amount | 5,000.00 |
| Conversation ID | Rollover.98350952022.3-45930404737337826... |
| Context Identifier | MBRROLLVR01 |

Amount refers to the Requested Amount.

| Sender | |
|---|--------------------------|
| Sender ABN | 26382680883 |
| Organisation Name | AUTOTEST 2SUNSUPERXML2 |
| Person Name Details Given Name Text | TEST CONTACT GIVEN NAME |
| Electronic Contact Electronic Mail Address... | TESTCONTACTEMAIL@SC.COM |
| Electronic Contact Telephone Usage Code | 03 |
| Electronic Contact Telephone Minimal Nu... | 1234 5678 |
| Organisational Type Code | MN |
| Person Name Details Family Name Text | TEST CONTACT FAMILY NAME |
| Person Name Details Other Given Name Text | TEST OTHER GIVEN NAME |
| Electronic Contact Electronic Mail Usage C... | 03 |
| Electronic Contact Telephone Service Line... | MOBILE |

| Transferring Fund | |
|--|-------------|
| Transferring Super Fund ABN | 73076521161 |
| Transferring Superannuation Fund Unique... | AMP0580AU |

| Member | |
|---------------------------------------|---------------------|
| Member TFN / ID | 933487390 |
| Family Name | V3Fund |
| Other Given Name | V3Format |
| Birth Date | 1991-10-18 |
| Address Line 1 | Address Line 1 game |
| Address Line 3 | Address Line 3 |
| Suburb | Sydney |
| State Or Territory Code | NSW |
| Fund Member Client ID | 3246223 |
| Transferring Fund Allocated Member ID | 3246223 |
| Given Name | ToATO |
| Sex Code | M |
| Address Details Usage Code | POS |
| Address Line 2 | Address Line 2 |
| Address Line 4 | Address Line 4 |
| Postcode | 2000 |
| Country Code | AU |
| Release Authority Product Type | ENCCT |

| Receiver | |
|---|---------------------------------------|
| Receiver ABN (transferring ABN) | 73076521161 |
| Organisation Name Details Organisational... | MAIN_OR_LEGAL_NAME |
| Organisation Name | WEALTH PERSONAL SUPERANNUATION AND... |

| Receiving Fund | |
|---|-------------|
| Receiving Super Fund ABN | 26382680883 |
| Receiving Fund Member Client Identifier | 962319943 |
| Receiving Superannuation Fund Unique S... | IOF0182AU |

| SMSF Details | |
|---------------------|-------------------|
| SMSF ESA | TCS0108AU |
| SMSF Account Number | 301229993 |
| SMSF Account Name | Payclear Services |
| SMSF BSB | 013987 |

| Rollover Details | |
|--|-------|
| Superannuation Rollover Transfer Whole ... | True |
| Superannuation Rollover Requested Amount | 36.03 |

| Other Details | |
|---|----------------------|
| Superannuation Rollover Other Details Text | OTHER DETAILS DESC 1 |
| Superannuation Rollover Other Details De... | OTHER DETAILS TEXT 1 |

Four Other Details tuples (Text and Description pairs) are supported. The example above shows a message with a single tuple populated.

The following is displayed when viewing an inbound **RA, IRR or S20C** which you have received and for which you have **not** responded to with the **RAER, IRER, S20CER**.

Feedback

No feedback has been provided yet.

[Respond to this Record](#)

*Note - For **EPF** there is no accompanying Error response and hence the feedback option is not available.*

The following is displayed when

- When viewing an inbound **RA, IRR or S20C** which you have received and for which you have responded to with an **RAER, IRER, S20CER** or
- When viewing an outbound **IRR** for which the other fund has already responded with an **IRER**.

Feedback

| | | | |
|------------------------|--------------------|-------------------|---|
| Standard Response Code | SUPER.GEN.RLVR.6 | Short Description | ROLLOVER COULD NOT BE PROCESSED DUE ... |
| Detailed Description | TEST DETAILED DESC | | |

3.7 Viewing RTR, USM, RAS Detailed Record

The detailed record for a **RTR, USM, RAS** is as follows.

The actual data & fields displayed is be driven by the message type and content of the message.

| Summary | | | |
|--------------------------------|-------------|-----------------------------|---|
| Transferring Payment Reference | 35455369818 | Receiving Payment Reference | 35455369818 |
| Message Type | USM | Conversation ID | Rollover.94573747704.3-43120423684463674... |
| Conversation Part ID | 1 | Context Identifier | MBRROLLVR01 |
| Rollover Amount | 276.00 | | |

Rollover Amount must equal the sum of the tax components which in turn must equal the sum of the preservation amounts. Please note that this is NOT the Amount Paid for the rollover. These amounts however are expected to be the same.

Transferring Payment Reference number is the Original Payment Reference Number as provided by the Transferring Fund;

Receiving Payment Reference number is the same as the Transferring/Original Payment Reference Number when SuperChoice does not intermediate money for you. If SuperChoice intermediates money on your behalf then the Receiving Payments Reference Number will be the number SuperChoice credits the other fund with;

| Initiator Details | | | |
|--------------------------------|-------------------|---------------------------|----------------------|
| Initiator Message Type | IRR | Initiator Conversation ID | Init.conv.Id.1234 |
| Initiator Conversation Part ID | Init.part.Id.1234 | Initiator Context ID | Init.context.Id.1234 |

| Sender | | | |
|---|--|---|----------------------------|
| Sender ABN | 73076521161 | Organisational Type Code | MAIN_OR_LEGAL_NAME |
| Organisation Name | WEALTH PERSONAL SUPERANNUATION AND ... | Person Name Details Family Name Text | SENDER FAMILY NAME RTR ONE |
| Person Name Details Given Name Text | SENDER NAME RTR ONE | Person Name Details Other Given Name Text | SENDER GIVEN NAME RTR ONE |
| Electronic Contact Electronic Mail Address... | TESTCONTACTEMAIL@SC.COM | Electronic Contact Electronic Mail Usage C... | CONTACT |
| Electronic Contact Telephone Usage Code | CONTACT | Electronic Contact Telephone Service Line... | MOBILE |

| Transferring Fund | |
|--|-------------|
| Transferring Super Fund ABN | 73076521161 |
| Transferring Superannuation Fund Unique... | NMM0102AU |

| Member | | | |
|-------------------------|---------------------|---------------------------------------|----------------|
| Member TFN / ID | 933487390 | Transferring Fund Allocated Member ID | 3246223 |
| Family Name | V3Fund | Given Name | ToATO |
| Other Given Name | V3Format | Sex Code | M |
| Birth Date | 1991-10-18 | Address Details Usage Code | POS |
| Address Line 1 | Address Line 1 game | Address Line 2 | Address Line 2 |
| Address Line 3 | Address Line 3 | Address Line 4 | Address Line 4 |
| Suburb | Sydney | Postcode | 2000 |
| State Or Territory Code | NSW | Country Code | AU |
| Fund Member Client ID | 3246223 | Release Authority Product Type | ENCCT |

| SMSF Details | |
|--------------|-------------|
| SMSF ESA | AUSPOSTSMSF |

| Receiver | | | |
|---|--------------------|-------------------|------------------------|
| Receiver ABN | 26382680883 | Organisation Name | AUTOTEST 2SUNSUPERXML2 |
| Organisation Name Details Organisational... | MAIN_OR_LEGAL_NAME | | |

Receiving Fund

| | | | |
|---|-------------|---|----------------|
| Receiving Super Fund ABN | 26382680883 | Receiving Superannuation Fund Unique S... | 44928361101051 |
| Receiving Fund Member Client Identifier | 962319943 | | |

Rollover Details

| | | | |
|--|------------------|--|------------------|
| Tax File Number Not Provided Indicator | False | Income Tax Taxed free Amount | 100.00 |
| KiwiSaver Tax Free Amount | 101.00 | Income Tax Taxed Element | 50.00 |
| Income Tax Untaxed Element | 25.00 | Rollover Benefit Preserved Amount | 15.00 |
| KiwiSaver Preserved Amount | 101.00 | Benefit Component Unrestricted Amount | 20.00 |
| Benefit Component Restricted Amount | 20.00 | Insured Death Cover Amount | 100.00 |
| Total Permanent Disablement Cover Amount | 25.00 | Insured Income Protection Monthly Amount | 25.00 |
| Remaining Benefit Indicator | True | Lost Member Code | Inactive Flagged |
| Transfer Whole Balance Indicator | True | Eligible Service Period Start Date | 2010-09-15 |
| USM Reason Code | Test reason code | USM Date | 2011-06-30 |
| Death Benefit Tax Code | P | Death Benefit Recipient Age Category | A |

Other Details

| | | | |
|--|----------------------|---|----------------------|
| Superannuation Rollover Other Details Text | OTHER DETAILS DESC 1 | Superannuation Rollover Other Details De... | OTHER DETAILS TEXT 1 |
|--|----------------------|---|----------------------|

Four Other Details tuples (Text and Description pairs) are supported. The example above shows a message with a single tuple populated.

The following is displayed when viewing an inbound **RTR**, **USM** which you have received and for which you have not responded to with an **RTOR**, **USMOR**

Feedback

No feedback has been provided yet.

Accept this Record
Reject this Record

Note you can either send a successful **RTOR** or **USMOR** by clicking on **Accept this Record** or an **RTOR** or as error by selecting a reason when you click on **Reject this Record**.

The following is displayed when

- When viewing an inbound **RTR**, **USM** which you have received and for which you have responded to with an **RTOR**, **USMOR** or
- When viewing an outbound **RTR**, **USM** or **RAS** for which the other party has already responded with an **RTOR**, **USMOR**, **RASOR**.

Feedback

| | | | |
|------------------------|------------------------------|-------------------|--------------------------------|
| Standard Response Code | SUPER.GEN.RLVR.5 | Short Description | ROLLOVER PROCESS UNSUCCESSFUL. |
| Detailed Description | RTOE TEST - GEN.RLVR.5 ERROR | | |

3.8 Viewing messages with Feedback or No Feedback

To view messages for which feedback or a response has been received or sent, ensure that you select the message type and Feedback Severity excludes the **No Feedback** option.

To view messages for which feedback or a response has not yet been received, ensure that you select the message type and Feedback Severity is set to the **No Feedback** option.

Some examples:

| Example | Rollovers Portal Search Filter Settings |
|---|---|
| I want to view all IRR messages, which I have sent out for which I have not yet received a response. | Message Direction: Outbound Message Type: Select IRR option. Feedback Severity: Select No Feedback option. |
| I want to view all IRR messages which I have received a response. | Message Direction: Outbound Message Type: Select IRR option. Feedback Severity: Select Info, Warning and Error options. |
| I want to view all IRR messages which I have received for which I have not yet sent a response. | Message Direction: Inbound Message Type: Select IRR option. Feedback Severity: Select No Feedback option. |
| I want to view all IRR messages which I have received for which I have sent a response. | Message Direction: Inbound Message Type: Select IRR option. Feedback Severity: Select Info, Warning and Error options. |
| I want to view all RTR messages, which I have sent out for which I have not yet received a response. | Message Direction: Outbound Message Type: Select RTR option. Feedback Severity: Select No Feedback option. |
| I want to view all RTR messages which I have received a response. | Message Direction: Outbound Message Type: Select RTR option. Feedback Severity: Select Info, Warning and Error options. |
| I want to view all RTR messages, which I have received for which I have not yet sent a response. | Message Direction: Inbound Message Type: Select RTR option. Feedback Severity: Select No Feedback option. |
| I want to view all RTR messages, which I have received for which I have sent a response. | Message Direction: Inbound Message Type: Select RTR option. Feedback Severity: Select Info, Warning and Error options. |

Each detailed message record will have a tab /section called Feedback, where you can either view or send feedback.

4. Sending Response Messages

4.1 Responding to an Inbound RA, IRR or S20C

1. Drill down into the detailed record
2. Go to the **Feedback** section/tab. If no previous feedback has been sent, the following is displayed:

Feedback

No feedback has been provided yet.

Respond to this Record

3. Click on the **Respond to this Record** button - You will get a list of the following options:

Select the appropriate feedback message(s) from the list below and then click 'Submit Feedback'. Note that you can only send feedback once.

Respond to this Record

☐ TFN failed the TFN algorithm check

☐ Member not found with supplied information.

☐ No longer a member of Superannuation entity.

☐ The account for the provided member identifier has been closed.

☐ Unable to verify SMSF information.

☐ Unable to verify SMSF member.

Cancel

Back to Summary

Close

4. Select an option(s)². The Submit Feedback button is now enabled.
5. Click on **Submit Feedback**. You will be presented with the following confirmation:

Feedback

Feedback has been sent successfully.

4.2 Viewing Responses sent for RA, IRR or S20C

If you search for the same message again by Conversation ID or by using filters (*Message Direction Type set to Inbound, Message Type set to **S20C/IRR, RA**, Feedback Severity set exclude No Feedback & today's date*) & you drill-down into the detailed record, the following is displayed in the Feedback section

Feedback

| | | | |
|------------------------|---------------------------|-------------------|--|
| Standard Response Code | SUPER.GEN.GEN.22 | Short Description | No longer a member of Superannuation entity. |
| Feedback Received Date | 2021-03-11 T 10:41:48.075 | | |

² For each inbound message (**RA, IRR, S20C, RTR** or **USM**), only one response permitted. Multiple reasons can be selected that are sent to the other fund. However, the Rollovers Portal will only display the last option selected.

4.3 Responding to an Inbound RTR or USM

1. Drill down into the detailed record;
2. Go to the Feedback section/tab. If no previous feedback has been sent, the following is displayed:

Feedback

No feedback has been provided yet.

Accept this RecordReject this Record

3. To send a successful **RTOR** or **USMOR**, click on the Accept this Record button. You will get then get the following confirmation:

Feedback

Feedback has been sent successfully.

*SuperStream error code **SUPER.GEN.RLVR.2** (Information Severity) which stands for Rollover Process successful, will automatically be sent to the other fund.*

4. To send an error **RTOR** or **USMOR**, click on the **Reject this Record** button. You will be presented with the following options:

Feedback

Select the appropriate feedback message(s) from the list below and then click 'Submit Feedback'. Note that you can only send feedback once.

Accept this RecordReject this Record

| | | |
|--------------------------|---|---|
| <input type="checkbox"/> | TFN failed the TFN algorithm check | ? |
| <input type="checkbox"/> | Member not found with supplied information. | ? |
| <input type="checkbox"/> | No longer a member of Superannuation entity. | ? |
| <input type="checkbox"/> | The account for the provided member identifier has been closed. | ? |
| <input type="checkbox"/> | Payment Reference Number cannot be reconciled to a payment. | ? |
| <input type="checkbox"/> | Rollover Process unsuccessful. | ? |
| <input type="checkbox"/> | Rollover could not be processed due to rules within Superannuation entity. Contact Superannuation entity for details. | ? |
| <input type="checkbox"/> | Rollover could not be processed due to a pending claim. | ? |
| <input type="checkbox"/> | Fund cannot accept Kiwisaver components. | ? |
| <input type="checkbox"/> | Unable to verify SMSF information. | ? |
| <input type="checkbox"/> | Unable to verify SMSF member. | ? |

Cancel

5. Select an option. The **Submit Feedback** button is now enabled.
6. Click on **Submit Feedback**. You will be presented with the following confirmation:

Feedback

Feedback has been sent successfully.

4.4 Viewing Responses sent for RTR or USM





If you search for the same message again by Conversation ID or by using *filters* (*Message Direction Type set to Inbound, Message Type set to RTR, Feedback Severity set to exclude No Feedback and today's date*) and if you drill-down into the detailed record, then you will see the following in the Feedback section:

| Feedback | | | |
|------------------------|--------------------------|-------------------|---|
| Standard Response Code | SUPER.GEN.GEN.21 | Short Description | Member not found with supplied information. |
| Feedback Received Date | 2021-08-4 T 19:39:04.226 | | |

5. Downloading Data to File

All rollover messages (**EPF**, **RA**, **IRR**, **S20C**, **RTR**, **RAS** and **USM**) can be downloaded in CSV & PDF

6.1 Download Templates

| Message Type | Format | Download Format |
|--|--------|---|
| Initiate Messages (EPF, RA, IRR, S20C) | CSV |  IRR_S20C_RA_EPF_Download.csv |
| | PDF |  IRR Sample PDF.pdf <i>Note – SMSF Section only displayed when IRR is sent/received to/from SMSF. For APRA fund-to-fund IRR, SMSF section will not be displayed. The feedback section shown for all messages except EPF</i> |
| Rollover Transaction Messages (RTR, RAS, USM) | CSV |  RTR_USM_RAS_Download.csv |
| | PDF |  RTR Sample PDF.pdf |


For a list of data elements covered in the download templates, please refer to Appendix.

As the response messages are associated with the request message, any feedback that you have provided or received, you will see the downloaded documents under the Feedback/ Response section.

6.2 Download Process

To download messages:

1. Execute a search as per your required view of the data

| Date | No. of EPFs | No. of IRRs / Section 20Cs | No. of RAs | No. of RTRs | No. of USMs | Rollover Amount \$ | |
|-------------|-------------|----------------------------|------------|-------------|-------------|--------------------|---|
| 02 Aug 2021 | 0 | 2 | 0 | 0 | 0 | |  |

2. Click the Download icon as shown below:

Select Download Configuration

Clicking "Download" will change each request status to "Downloaded".

Message Type

Select a message format

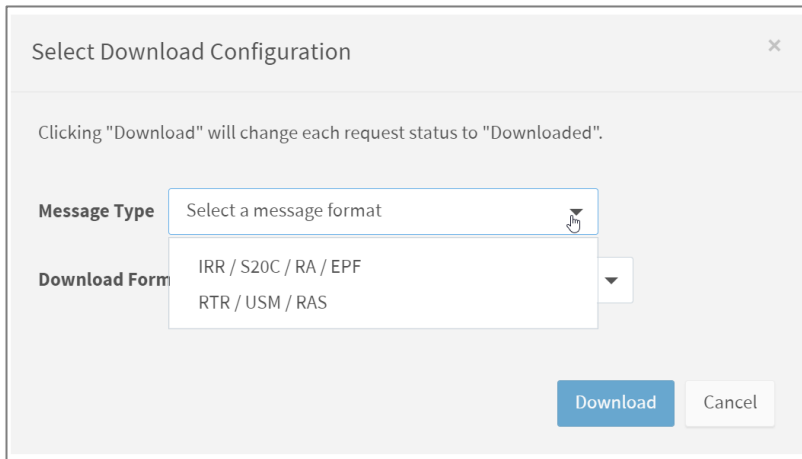
Download Format

Select a download format

Download

Cancel

3. Select the **Message Type**:



Select Download Configuration

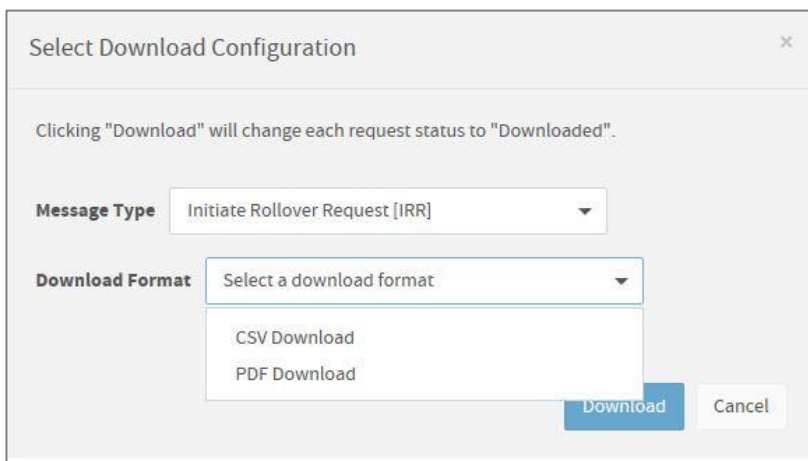
Clicking "Download" will change each request status to "Downloaded".

Message Type Select a message format

Download Format IRR / S20C / RA / EPF
RTR / USM / RAS

Download Cancel

4. Select the Download Format:



Select Download Configuration

Clicking "Download" will change each request status to "Downloaded".

Message Type Initiate Rollover Request [IRR]

Download Format Select a download format

CSV Download
PDF Download

Download Cancel

When you select the CSV download option, then each member transaction will appear as a single row within the download document.

When exporting records in the PDF format, each member transaction will be presented as a single PDF document. All records exported will be presented to you in a compressed folder which you can save on your local drive.

- For **EPFs**, **RAs**, **IRRs** and **S20Cs** you will be presented with the Initiate message PDF template
- For **RTRs**, **RASs** and **USMs** you will be presented based on the Rollover transaction message PDF template.

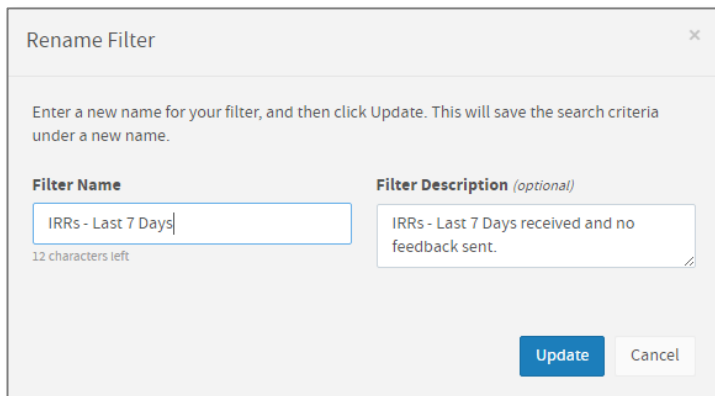
6. Save and maintain filters

Regular queries which you need to run within the Rollovers Portal can be saved to be accessed and re-run when you need.

To save a filter:

1. Set your filters depending on what you would like to see
2. Check the **Group Messages By** setting
3. Click on the **Save as New Filter** button:

Give the filter a meaningful name and description and **Save**:



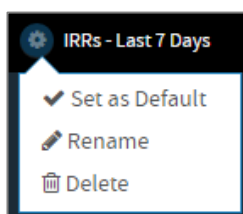
4. You will now be able to access the filter on the Collapsible Side-bar on the LHS of the screen:



5. Clicking on the saved filter executes the query.

Note - Date options Last Day, Last 7 Days and Last 30 Days in your saved search query are relative to the time that the search is executed. If you have set a Custom Date within your saved filter, then you should review to ensure that you search for messages for the correct period

6. The saved filter can be either be set as a default, renamed or deleted if no longer required:



7. Creating / Uploading Messages

To create and send messages out from the SuperChoice Rollovers Portal you must use the SuperChoice .XLSX message template: **Generate IRRs RTRs USMs RASs_v1.4.xlsx**

8.1 Message Creation process

The message creation process is as follows:

1. Open the Generate IRRs RTRs USMs RASs_v1.4.xlsx template
2. Save to your local machine and give it a meaningful name (example date and message type(s))
3. Enter data into relevant workbooks / tabs, following the following rules:
 - The upload template has a workbook for each message type (**IRR**, **RTR**, **RAS** and **USM**)
 - The SuperChoice Rollovers Portal expects that the file you upload will have both the **IRR**, **RTR**, **RAS** and **USM** tab and no missing (deleted) or altered columns.
 - Row 1 – “Column headers” & Row 2 “Expected data format” must remain in the template. Data is read and validated from Row 3 onwards.
 - Row 2 provides guidance as permitted data (see the helpful tips section below)

| Data format expression | Description |
|------------------------|---|
| M | Mandatory |
| O | Optional |
| C | Conditional (i.e., required for SMSF, not APRA fund) |
| X (Number) | String (Allowable Length) |
| [0-9]{Number} | Digit, 0 to 9 {Allowable Length} |
| [0-9](8).[0-9]{2} | Digit, 0 to 9, Two decimal places allowable Example: 352.55 |

- Each line in the workbook is treated as a new message and SuperChoice creates and sends each with unique identifier (Conversation ID).
- **IMPORTANT** - Care must be taken when files are uploaded that **no** duplicates exist **nor** prior submitted messages still exist on any of the tabs. If this arises:
 - Duplicate messages will be sent.
 - If SuperChoice intermediates outbound Rollover monies on your behalf, duplicate **RTR**, **RAS**, **USM** messages will result in double deduction.

The onus is on the user to ensure this does not occur

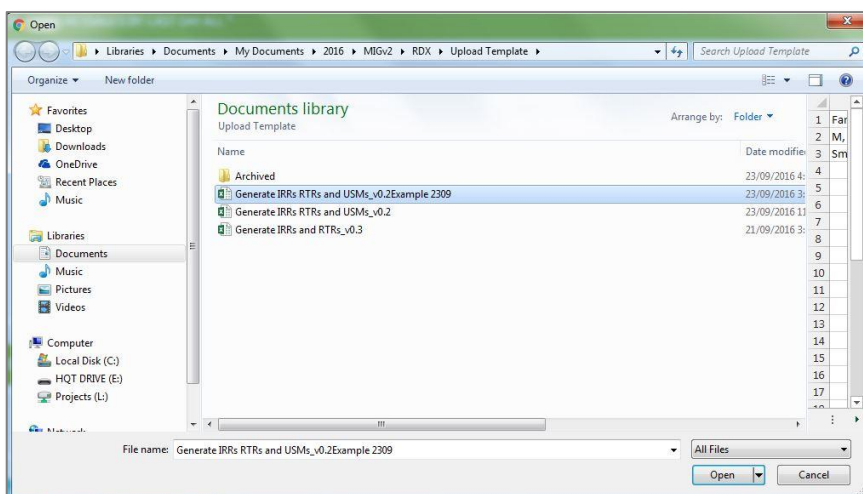
- SuperChoice automatically generates / populates additional data fields to make the message SuperStream compliant including Conversation ID, Context ID, Part ID, Sender Information (SuperChoice as the Gateway).

4. Click on the **Add New Messages** button³ in the Rollovers Portal. You will find this on the main Rollover's page and in line with the Search button;

³ The **Add New Messages** button is disabled during the upload process. Once the upload has finalised & the above confirmation message is displayed, the Add New Messages button is enabled



5. In the Open dialogue window, browse to your completed .XLSX file and then click on Open:



The file will now be validated as follows:

- Check the file integrity to ensure that:
 - All tabs and all columns are present as expected
 - The file uploaded is an .XLSX file
- Check data entered is as per the required format as specified in template row 2 - mandatory fields are observed and the format of the data is as expected (string, number etc.)
- Check that the data entered is SuperStream compliant (i.e. that a SuperStream compliant message can be generated from the upload)
- Check that you are only generating messages for products to which you have been granted access. This means that the source USI (Receiving Fund USI for **IRR** and Transferring USI for **RTR, USM, RAS**) is one you have been authorised to access.
- APRA Funds - check that Source and Target USIs are active and appear on the FVS register

If the file is successfully uploaded, then a message as below, showing the number and type of message created will be displayed below the Add New Messages button:

1 IRR message successfully created ,0 RTR message successfully created ,0 USM message successfully created , successfully imported 1 number of rows

If there is one or multiple exceptions in the file, the first exception encountered will be displayed in red.

The fund usi given is incorrect. ReceivingFundUSI TEST ReceivingFundABN TEST TransferringFundUsi TEST

Please note that the whole file is rejected as at that point and no further messages will be generated.

8.1 Viewing successful sent messages

To view successfully generated messages, go to the Search filters and select the following options:

- Date set to Today's date;
- Message Direction set to Outbound;
- Message Type set to **IRR, RTR, RAS, USM** or ALL;

8.3 Message Creation - Helpful Tips



To minimise errors during the file upload process, please ensure the following:

1. All Mandatory fields have been completed;
2. Date fields are of the format 'dd-mm-yyyy'. To retain this format, ensure that the cell is formatted as a text field;
3. You are generating messages where the From Product Name are products to which you have been given access to, products/USIs which belong to your Custodian;
4. BSB is 6 characters long and includes any leading zeros. To retain this format, ensure that the cell is formatted as a text field;
5. Account Number is 9 characters long and includes any leading zeros. To retain this format, ensure that the cell is formatted as a text field;
6. PRN is 18 characters long and includes any leading zeros. To retain this format, ensure that the cell is formatted as a text field;
7. Telephone service or area codes are entered with leading zeros. For example, '02';
8. Each workbook, tab has the relevant fields for the message the tab supports (i.e.
 - **RTR** includes fields for SMSFs, Death Benefits, Initiator Messages Type
 - **USM** includes USM Reason Code and USM Date (must be **30th June or 31st December**)
 - **RAS** includes Release Authority Product Type
9. When sending **IRR** message to an SMSF:
 - **Transferring Fund USI** (column AE) must be empty (Note - must be populated when sending an **IRR** to APRA Fund)
 - **Target SMSF ESA** (column AP) must be populated.
10. When sending **RTR** message to an SMSF:
 - **Receiving Fund USI** (column AC) must be empty (Note - must be populated when sending an **RTR** to APRA Fund)
 - **Target SMSF ESA** (column BI) must be populated.
 - **Receiving Fund BSB** (column AE), **Receiving Fund Bank Account Number** (AF), **Receiving Fund Bank Account Name** (column AG) must be populated – as SuperChoice is unable to derive this information for SMSF like it can for messages to APRA funds and the ATO.

8. User Maintenance

8.1 Overview

The EmployerPay Portal supports a full self-service management of Users. Users with the “Gateway Administrator” role will have access to the **User Details** component, that allows searching and reporting on all existing users, and creation of new users.

Once within the Portal, there are no restrictions on viewing messages (of any type supported) and viewing feedback as long as it is in the context of the products (USIs) which you have been given access to.

When sending messages to another fund, then this can only be from one of the products which you have access to and they can be sent to any product / fund which appears on the ATO’s published Fund Validation Service (FVS).

Alternatively, when viewing messages, you can only view messages which are intended for one of your products and could be sent from any product/fund which appears on the Fund Validation Service (FVS).

Below is a list of the current User Roles available in the Rollovers Portal.

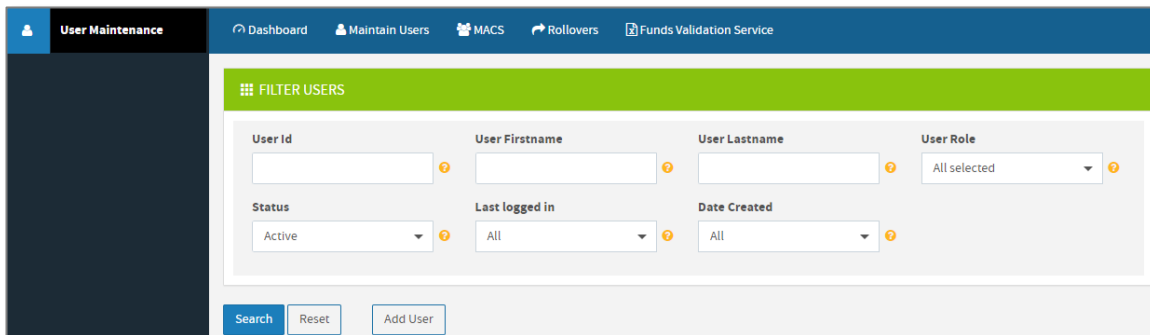
| Role | Permissions |
|-----------------------|---|
| Gateway Administrator | User Management User Creation / deactivation User Maintenance – User Role, Name, Email Rollovers Portal View, search and download Rollover messages Trigger IRR, RTR, RAS and USM messages Trigger Rollover Response Messages |
| Gateway Clerical | Rollovers Portal View, search and download Rollover messages Trigger IRR, RTR, RAS and USM messages Trigger Rollover Response Messages |
| Gateway Read Only | Rollovers Portal View, search and download Rollover messages |

Please note that the Rollover portal does not support dual authorisation when triggering **RTR, RAS** or **USM** messages.

8.2 Add User⁴

To add a New User:

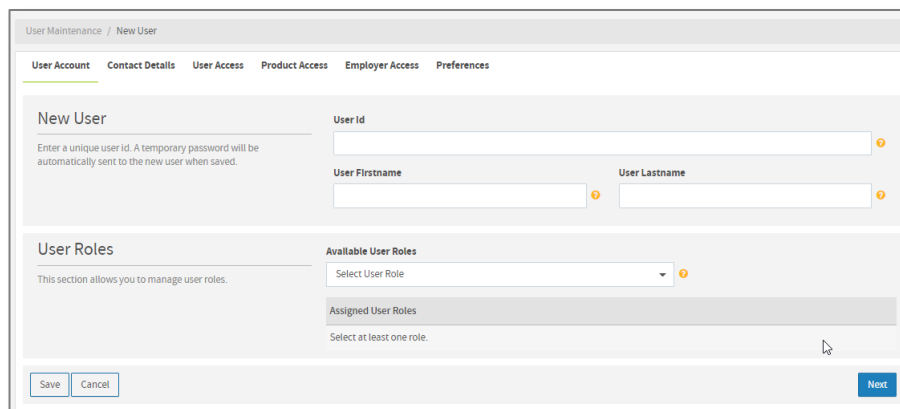
1. Select Add User from the User Maintenance screen



The screenshot shows the 'User Maintenance' screen. The top navigation bar includes 'User Maintenance', 'Dashboard', 'Maintain Users', 'MACS', 'Rollovers', and 'Funds Validation Service'. The main content area is titled 'FILTER USERS' and contains several input fields for filtering users: 'User Id', 'User Firstname', 'User Lastname', 'User Role' (a dropdown menu currently set to 'All selected'), 'Status' (a dropdown menu currently set to 'Active'), 'Last logged in' (a dropdown menu currently set to 'All'), and 'Date Created' (a dropdown menu currently set to 'All'). At the bottom of the filter section are three buttons: 'Search', 'Reset', and 'Add User'.

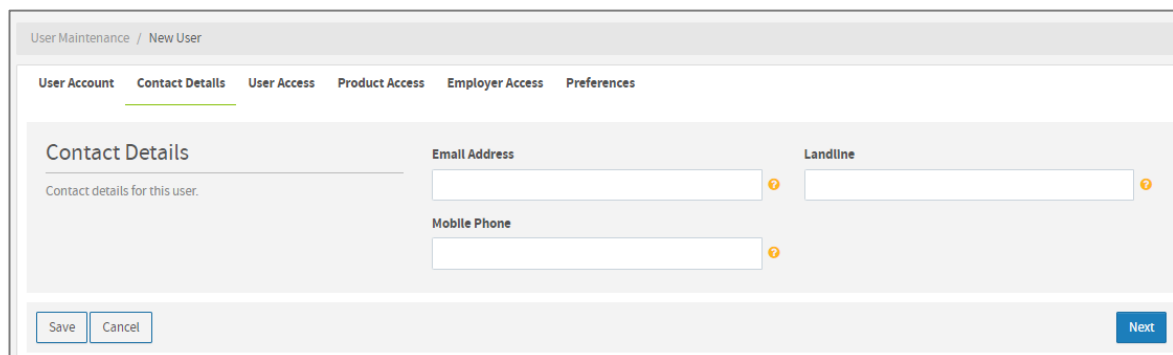
2. Enter Mandatory Data

- User ID
- User First name
- User Last name
- Select Relevant Role



The screenshot shows the 'New User' form with the 'User Account' tab selected. The form includes fields for 'User Id', 'User Firstname', and 'User Lastname'. Below these fields is a section for 'User Roles' with a dropdown menu for 'Available User Roles' and a section for 'Assigned User Roles'. At the bottom of the form are 'Save', 'Cancel', and 'Next' buttons.

3. Users Email Address



The screenshot shows the 'New User' form with the 'Contact Details' tab selected. The form includes fields for 'Email Address', 'Landline', and 'Mobile Phone'. At the bottom of the form are 'Save', 'Cancel', and 'Next' buttons.

⁴ ⁴ The above Add User process is not applicable for clients with Single-Sign-on (SSO) Just-in-Time user provisioning.

4. Add Product Access

The screenshot shows a web interface for 'User Maintenance / New User'. The 'Product Access' tab is selected, showing three options: 'No Product Access', 'Products Access' (selected), and 'All Products Access'. The 'Products Access' section includes a description, an 'Add/Remove Products' button, a 'Products' list (currently empty), and a pagination control showing '1'. At the bottom are 'Save' and 'Next' buttons.

User Maintenance / New User

User Account Contact Details User Access **Product Access *** Employer Access Preferences

☐ No Product Access

This will remove all direct access to products for this user. Note they may still have indirect access based on their membership of User Groups.

☒ **Products Access**

This section will give the user access to specific products.

Add/Remove Products ⓘ

Products

No products.

« < 1 > »

☐ All Products Access

This section will give users access to all products for this custodian.

Save **Next**

5. Click **Save**.

On clicking **Save**, an email with subject “A new user has been created for you” is sent to the new user, including a link for the user to set their password. Note – The User ID is not included in the email for security, therefore the user will need to be informed / made aware of their User ID.

The email template has a blue header and contains the following text: 'Registration Confirmation', 'Dear Name,', 'This email is to confirm that you are registered with the EmployerPay Portal (Test).', 'You cannot reply to this email. If you require any further assistance please contact clientservices@superchoice.com.au.', and a blue 'Log in' button.

Registration Confirmation

Dear Name,

This email is to confirm that you are registered with the EmployerPay Portal (Test).

You cannot reply to this email. If you require any further assistance please contact clientservices@superchoice.com.au.

Log in

9. Appendix: Download Formats

| Download Column | RTR / USM / RAS | EPF / S20C / IRR / RA |
|--|-----------------|-----------------------|
| Date Sent/Received | Y | Y |
| Message Type | Y | Y |
| Conversation Id | Y | Y |
| Part ID | Y | Y |
| Context Id | Y | Y |
| Initiator Message Type | Y | - |
| Initiator Conversation ID | Y | - |
| Initiator Conversation Part ID | Y | - |
| Initiator Context ID | Y | - |
| Family Name | Y | Y |
| Given Name | Y | Y |
| Other Given Name | Y | Y |
| Date of Birth | Y | Y |
| TFN | Y | Y |
| Sex | Y | Y |
| Address Line 1 | Y | Y |
| Address Line 2 | Y | Y |
| Address Line 3 | Y | Y |
| Address Line 4 | Y | Y |
| Suburb | Y | Y |
| Postcode | Y | Y |
| State | Y | Y |
| Country | Y | Y |
| Address Usage Code | Y | Y |
| Tax file number not provided indicator | Y | Y |
| Transferring Fund Product Name | Y | Y |
| Transferring Fund ABN | Y | Y |
| Transferring Fund USI | Y | Y |
| Transferring Fund Member / Account No | Y | Y |
| Transferring Fund Contact Family Name | Y | - |
| Transferring Fund Contact Given Name | Y | - |
| Transferring Fund Contact Other Given Name | Y | - |
| Transferring Fund Contact Email | Y | - |
| Transferring Fund Contact Phone Service Code | Y | - |
| Transferring Fund Contact Phone Area Code | Y | - |

| Download Column | RTR / USM / RAS | EPF / S20C / IRR / RA |
|---|-----------------|-----------------------|
| Transferring Fund Contact Phone Number | Y | - |
| Receiving Fund Contact Family Name | - | Y |
| Receiving Fund Contact Given Name | - | Y |
| Receiving Fund Contact Other Given Name | - | Y |
| Receiving Fund Contact Email | - | Y |
| Receiving Fund Contact Phone Service Code | - | Y |
| Receiving Fund Contact Phone Area Code | - | Y |
| Receiving Fund Contact Phone Number | - | Y |
| Receiving Fund Product Name | Y | Y |
| Receiving Fund ABN | Y | Y |
| Receiving Fund USI | Y | Y |
| Receiving Fund Member / Account No | Y | Y |
| Receiving Fund BSB | Y | - |
| Receiving Fund Bank Account Number | Y | - |
| Receiving Fund Bank Account Name | Y | - |
| Tax Free Component Amount | Y | - |
| KiwiSaver Tax Free Component Amount | Y | - |
| Taxable Component Taxed Element | Y | - |
| Taxable Component Untaxed Element | Y | - |
| Benefit Components Preserved | Y | - |
| KiwiSaver Preserved Amount | Y | - |
| Benefit Components Unrestricted | Y | - |
| Benefit Components Restricted | Y | - |
| Insured Death Cover | Y | - |
| Insured Total Permanent Disablement Cover | Y | - |
| Insured Income Protection Monthly Cover | Y | - |
| Remaining Benefit | Y | - |
| Lost Member | Y | - |
| Eligible Service Period Start | Y | - |
| USM Reason Code | Y | - |
| USM Date | Y | - |
| Death Benefit Recipient Age Category | Y | - |
| Death Benefit Tax Code | Y | - |
| Release Authority Product Type | Y | Y |
| SMSF ESA | Y | Y |
| SMSF Account BSB | - | Y |
| SMSF Account Number | - | Y |
| SMSF Account Name | - | Y |

| Download Column | RTR / USM / RAS | EPF / S20C / IRR / RA |
|--------------------------------|-----------------|-----------------------|
| Transfer Whole Balance | Y | Y |
| Transferring Payment Reference | Y | - |
| Receiving Payment Reference | Y | - |
| Amount Requested | - | Y |
| Amount Paid | Y | - |
| Other Details 1 Text | Y | Y |
| Other Details 1 Description | Y | Y |
| Other Details 2 Text | Y | Y |
| Other Details 2 Description | Y | Y |
| Other Details 3 Text | Y | Y |
| Other Details 3 Description | Y | Y |
| Other Details 4 Text | Y | Y |
| Other Details 4 Description | Y | Y |
| Other Details 5 Text | Y | Y |
| Other Details 5 Description | Y | Y |
| Other Details 6 Text | Y | Y |
| Other Details 6 Description | Y | Y |
| Feedback Date | Y | Y |
| Severity | Y | Y |
| Reason Code | Y | Y |
| Description | Y | Y |
| Long Description | Y | Y |
| Refund Amount | Y | - |
| Refund PRN | Y | - |

10. Version Control

| Version | Date | Detail |
|---------|-------------|--|
| v1.0 | May 2018 | Original Version |
| v2.0 | April 2020 | Key updates include: <ul style="list-style-type: none">▪ Accessing the Rollover Portal via EmployerPay with Multi-Factor Authentication▪ Rollover Portal User Maintenance |
| v3.0 | August 2021 | Updated User Guide reflecting enhancements made to the Rollover Portal for MIG v3, including: <ul style="list-style-type: none">▪ Support for Release Authority Messages▪ SMSF Rollovers. |

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