Employer Portal Release Notes

Release November 2024

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1 Overview

Key Feature Deliveries

- Users can now rollback submitted data
- The new reporting supports payment responses and fund CTER responses

The SuperChoice Employer Portal will not be available as follows:

UAT:

Tuesday 22 October, 2024 12pm – 3:00pm (AEDT)

Production:

Tuesday 5 November, 2024 8:00pm – 11:00pm (AEDT)

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
December	Tuesday 19-Nov	Tuesday 3-Dec

2 User Impact

2.1 Audit grid

The audit grid now shows whether an audit point has been submitted and also shows revision numbers. For users that have the permission, there is also an option to rollback submitted data.

2.2 The new reporting solution

The download button is shown based on a new reporting download permission. All users that currently have new reporting rights have been automatically assigned this download permission
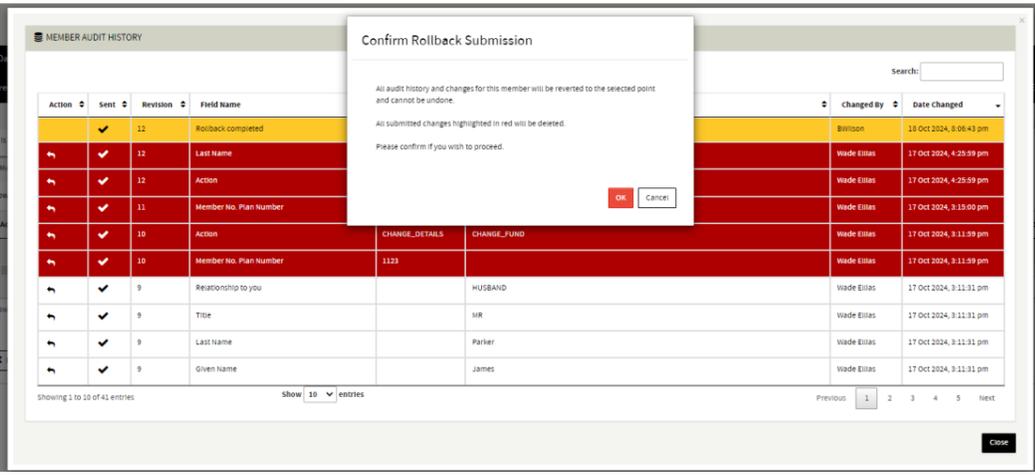

For those in the early adopters group, payment responses and fund CTER responses are now shown along with relevant filters.

A separate filter has been added for member submissions.

3 Enhancements

EPRT-20473	As a user, I want to rollback submitted data
Description	A new button has been added to each row of the member audit history in member maintenance, enabling users with the required permission to roll back all changes for a member to a specific time and event. When pressed (following a confirmation prompt), this button will automatically delete all audit history after the selected change, restoring the member and employee to their previous state as of that audit rollback point. This feature allows corrections to be reapplied from the moment the error occurred. Upon clicking the rollback button, users receive immediate feedback showing which changes will be undone, highlighted in red for clarity. Additionally, the audit view now displays revisions, previous rollbacks and indicates whether an audit record has been submitted.
Reason	This allows a service desk or employers to remove incorrectly submitted member/employee data in the event and replay with corrected data.
Applies To	☐ Contributions ☑ Members ☐ STP ☐ Gateway
Assumptions	• The row is revalidated after the rollback has occurred. • The button is permission based so that only certain roles will have access. The permission is called "Rollback data (member)". • Rollback cannot be done for members that have unsubmitted data. The working files need to be deleted first. • No sent comms can be rolled back although new comms may be generated based on further actions. • All employee and member data that has been changed will be rolled back. • A confirmation dialog ensures that the button isn't accidentally pressed. • Members linked to products and members linked to categories are rolled back • Submitted contributions cannot be rolled back. We are only rolling back member changes. • This applies to the audit history in member maintenance only. • If the rollback button is pressed then that member isn't marked as "changed" in member maintenance unless subsequent changes are made. • Rollback is instantaneous - the member maintenance file doesn't require to be submitted to enable the changes to take effect. • All audit history of changes will be removed post the rollback point. • Reporting cannot be rolled back - it will still contain all the history of member changes. • The audit history of all previously submitted member and contribution files will change to reflect the new rollback point. • The user just needs to click on the one roll-back button from the point the error is to be corrected and all subsequent entries above in the audit history would be automatically rolled-back • Every system action after the point of the correction/rollback would also be rolled back, and as a result there may be scenarios where this may require employers to recreate certain actions to get the employee record back to the point it needs to be if several steps in the process had been executed prior to the error needing correction being identified. • The rollback icon will only be shown for occasions where a rollback is possible. For instance, when multiple changes are simultaneously applied, there will only be one rollback point. and a rollback icon shown only for the first change. • A toast is shown to indicate that rollback has been successful. • The audit history view indicates the time at which prior rollbacks have been initiated and the person that initiated the rollback. • The audit history cannot be rolled back for backfilled items. • A new button on each row of the member audit history will allow a user to rollback all changes to that time and event • Highlighting is red for rows to rollback and yellow for previous rollback point • Submitted data has been already sent to the fund so the feature does not communicate with the fund to indicate they also may need to rollback. Instead the changes will come through as updates as the correct data is replayed.
Impact	There is a new column in the audit history showing whether an audit point has been submitted and revision numbers. If a role does not have permissions then the rollback button will not be shown.

4 Validation And Rule Changes

- **Account name validation doesn't support : and + characters** - : and + characters are valid account names. Updated all validation in employer maintenance, SMSF maintenance, employee portal and grid to reflect this.
- **Fix so that member address validations apply to SMSFs -** updated State or Territory and postcode validation to apply also for members linked to an SMSF
- **Prevent the super choice clearing account being used for SMSFs -** all the bank accounts below are not allowed to be used for SMSFs. The SMSF will need to be recreated by the employer if the error occurs.

BSB	Acc Number
012352	836111675
012352	836603944
012352	836728894
012352	836063116

- **ISA filter** - add ISA filter to reporting and assessment filters
- **PS specific**
    - Do not produce output files when a user selects a previous pay period
    - Summary File - new entrant and the amendment file has country populated as GB for employees - should be UK
- **Member held file naming -** Include the schedule name also in the Member Held file name 'Opt out period ended' generated after Opt out period.

5 Defects Fixed

EPRT-20691	☐ Employee ☑ Contribution ☑ Member ☐ STP ☐ Gateway	Issues loading files without close quotes	**Scenario** 1. Upload a file with an opening quote but no closing quote Now an error will be shown "File format problem. Odd number of double-quotes is not allowed."
various	☐ Employee ☑ Contribution ☑ Member ☐ STP ☐ Gateway	Various reporting fixes	• Table row density should default to the lowest - not the highest • Unselected employers are not listed in the select employer popup screen in reporting page. • Reporting menu bar is not right aligned • In reporting dates should always show in the DD/MM/YYYY format. It is not consistent since this only happens for pay period start date. But is not shown correctly for date of birth or pay period end date. • When focus is set to the cancel button on select employer, the text is not visible • There is no outline for the cancel cross button in the date selector • The background for reporting has been hardcoded to white. It should take the background colour from the custodian branding.
JEDI-1437	☑ Employee ☑ Contribution ☑ Member ☐ STP ☐ Gateway	Realms service concurrency fix	Fix to better handle concurrent situations where updates are happening simultaneously with reads in the realm service