Employer Portal Release Notes

Release March 2025

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1 Overview

Key Feature Deliveries

- For the early adopters group, the new reporting allows users to schedule custom reports
- Support for NPP payments
- Improvement to source bank account payment's matching

The SuperChoice Employer Portal will not be available as follows:

UAT:

Tuesday 25 February, 2025 12pm – 3:00pm (AEDT)

Production:

Thursday 6 March, 2025 8:00pm – 11:00pm (AEDT)

1.1 Employer Portal Indicative Release Dates

Note that these release dates are subject to change

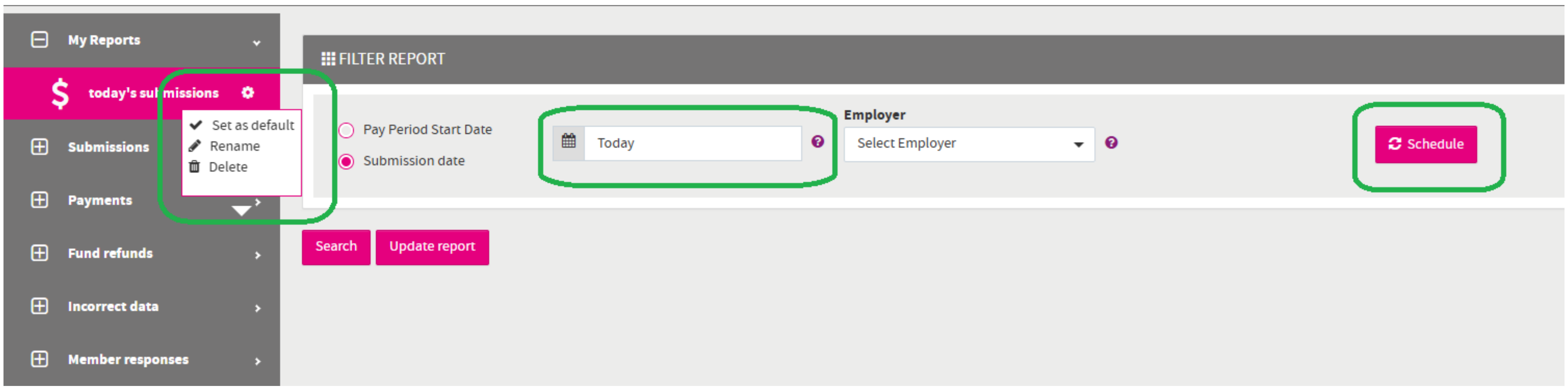
UK deployments are 2 days later than Australian deployments

Release	UAT	Production
April	Tuesday 18-Mar	Tuesday 1-Apr
May	Tuesday 22-Apr	Tuesday 6-May
June	Tuesday 20-May	Tuesday 3-Jun
July	Tuesday 24-Jun	Tuesday 8-Jul
August	Tuesday 22-Jul	Tuesday 5-Aug
September	Tuesday 19-Aug	Tuesday 2-Sep
October	Tuesday 23-Sep	Tuesday 7-Oct
November	Tuesday 21-Oct	Tuesday 4-Nov
December	Tuesday 18-Nov	Tuesday 2-Dec

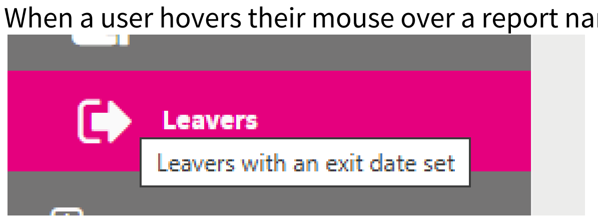
2 User Impact

2.1 The new reporting solution

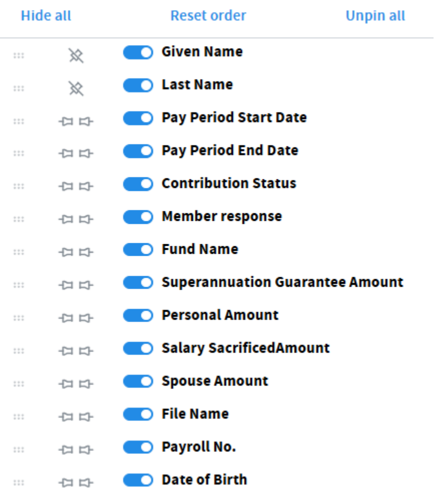
Applies to UK and the Australian early adopters group



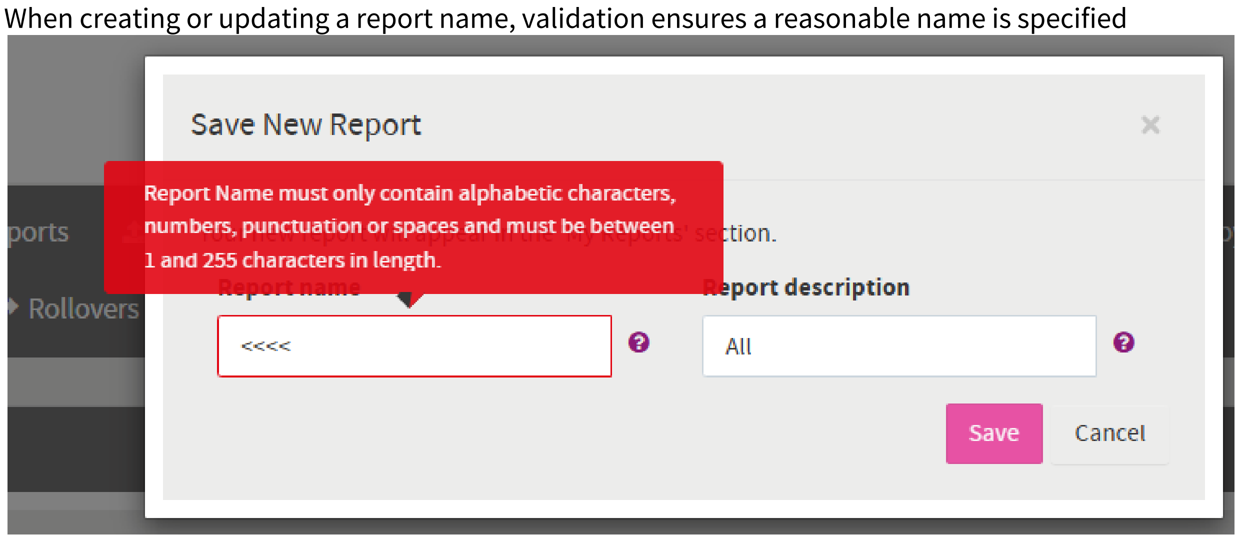
- Users can now perform the following actions on their custom reports
  a. Set a custom report as default so that it automatically is selected when accessing reporting
  b. Rename their custom report and change the report's description
  c. Delete the custom report and any associated schedules - a confirmation dialog will be shown.
- If a short cut date range is selected (e.g. Today) then that is displayed in the calendar instead of the actual date
- If a user is given access to the scheduling permission then they will also be able to schedule custom reports (see detail below)
- When a user hovers their mouse over a report name, it's description will also be shown



- The list of columns to select now only includes relevant columns with data. This means that for the UK, Australian super stream fields are no longer shown and for Australia, STP fields are not shown



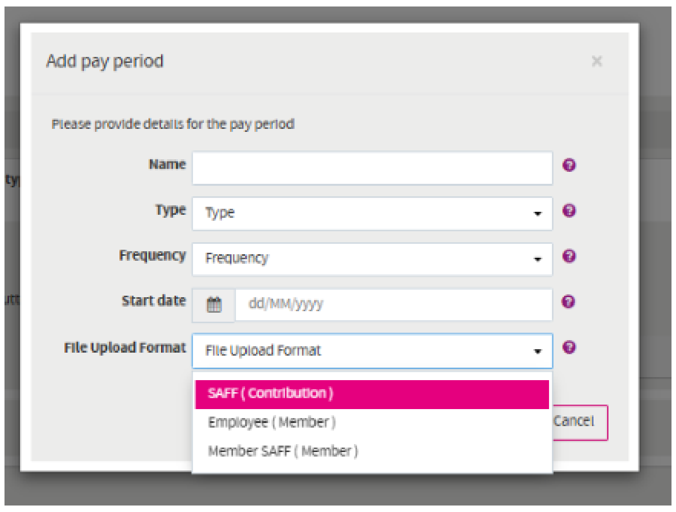
- When creating or updating a report name, validation ensures a reasonable name is specified



- Most employer, schedule, scheme, category and custom fields should now be available. There are some exclusions.

2.2 Schedule File Type linking

When a user adds a schedule pay period, they should be able to assign it to a file upload format if they have been assigned specific file uploads. This feature disappeared after a react upgrade and has now been reinstated.


Add pay period
Please provide details for the pay period
Name
Type
Type
Frequency
Frequency
Start date
dd/MM/yyyy
File Upload Format
File Upload Format
SAFF (Contribution)
Employee (Member)
Member SAFF (Member)
Cancel

3 Enhancements

3.1 NPP Payments Go Live

We can currently receive employer transactions via NPP but we can't send them. We now allow payments to be transmitted via NPP. Initially this will be a select group of NPP reachable accounts. Although NPP supports 24/7, payments will be batched up and sent at the same time as BECS payments.

3.2 Source account matching improvements

Match on refund to source - for unmatched payments, we now looks at the source BSB/account no and match it to the outstanding data no money based on whether the employer's refund account BSB/account no matches the source bank account.

Level	Applies To	First Preference	Grouping - Payment(S) To Batch(Es)	Second Preference Match	Match Criteria
Level 4g	Any money/no data	exact amount	reject to source BSB/account no	exact amount	Refund account BSB/ account no

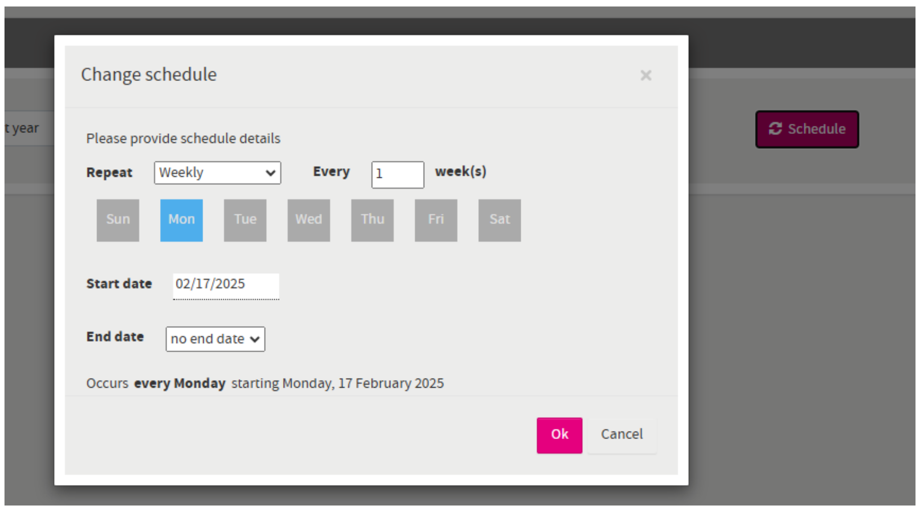
Assumptions

- If the employer refund BSB/account no changes then the next match attempt uses the updated change
- This uses the standard narrative matching algorithm for matching multiple monies to multiple data
- The return to source and the refund account BSB/account are generally unique per employer but some employers may have the same account details
- When grouping by refund to source BSB/account number, if this matches against multiple employers (i.e.. more than one employer has the same refund bank account) then we still match because we are matching on exact amount

<table>
<tr><th>EPRT-21128</th><th>As a user I want to schedule my reports</th></tr>
<tr><td>Description</td><td>
Any of my reports can be scheduled. A new schedule button is shown if the schedule permission has been set for the user's role. To schedule a report the user selects the button and determines the schedule frequency, start date and end date. The scheduled reports are automatically delivered to the user's SFTP location.

Daily - the report will contain all transactions (based on the filter) up to 12 am
Weekly - requires day(s) of week to be specified
Monthly - requires day of month/first/last day to be specified
Yearly - requires month/day to be specified

The reports are run from 2am every morning based on the scheduled time,

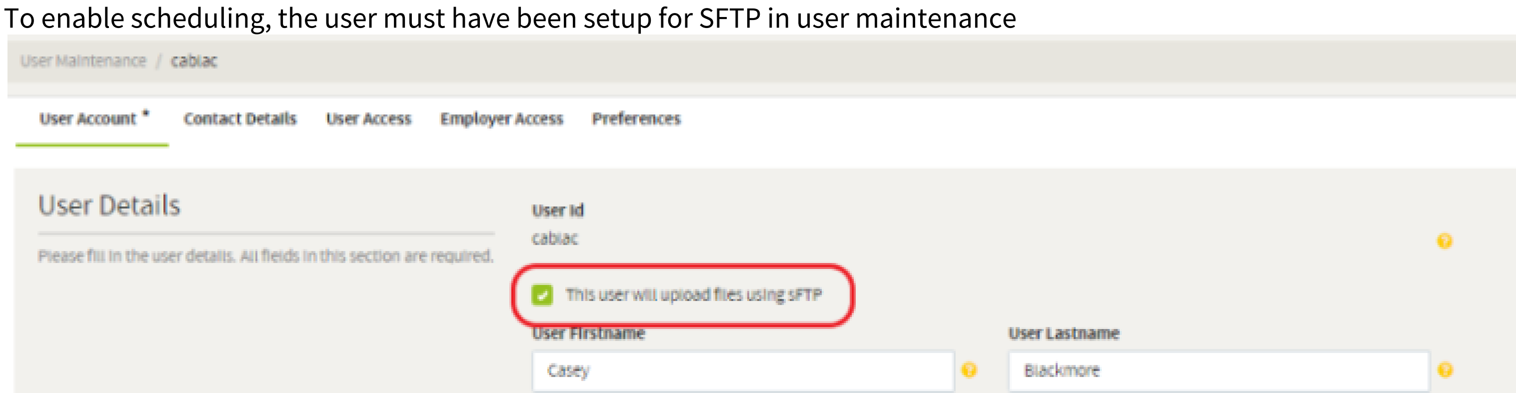


Based on the report filter time period

Today - (assuming it runs at 02:00 (local) - 3rd April) all transactions from 2 April 00:00 to 3 April 00:00 (local time)
Yesterday - (assuming it runs at 2am - 3rd April) all transactions from 1 April 00:00 to 2 April 00:00 (local time)
Last 7 days
Last 30 days
Current year
Last year

</td></tr>
<tr><td>Reason</td><td>This allows users to schedule reports to automatically run overnight</td></tr>
<tr><td>Applies To</td><td>
☑ Contributions
☑ Members
☐ STP
☐ Gateway
</td></tr>
<tr><td>Assumptions</td><td>

If the scheduled reporting permission isn't assigned to the user's role then the schedule button won't be shown
If the scheduled reporting permission is removed then all previously scheduled reports for that user continue to run (until the report is deleted)
If a report has been scheduled then the short schedule description is shown
If no end date is specified then the report will always run
If the system is down while a report schedule is run, then the schedule is rerun when it is started but ones that are due immediately are prioritised
All employer or specific employers filters are supported
The format of the scheduled report is identical to the downloaded report
The file name format is a csv file with the report name appended with the time executed using date and hour
To enable scheduling, the user must have been setup for SFTP in user maintenance



The CSV file is automatically dropped into the employer's own SFTP folder in a new folder called Reports.
The SuperChoice SFTP site is located at Sftp.employerpay.com.au on port 22
The employer uses the portal user name and password to logon to SFTP.
Only a username and password is required for authentication. No security keys, white-listing or Multi Factor Authentication is needed.
Users can change the schedule for a report
If a report is deleted then it's associated schedule is also deleted.
Only 10 reports can be assigned for a user - this means that users may receive multiple reports in their SFTP inbox

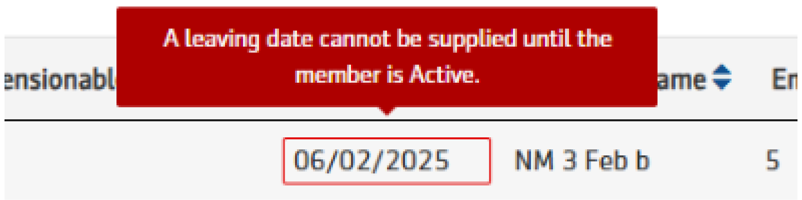
</td></tr>
</table>

Impact	The new schedule button will only be shown if the user's role has been allocated the schedule permission. This needs to be manually updated by the custodian.

4 Validation And Rule Changes

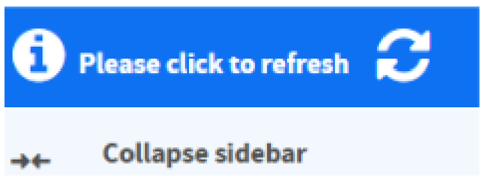
None

- **#302064** Member status get changed from in opt out period to inactive so held contributions are stuck. Two related fixes
  - When EJH is a missing member, leaving date is not set if the member is in In Opt Out Period.
  - When a leaving date is added, an error is triggered to which prevents a leaving date being set until the member is active.



- **#302140** , **#302382**, #300582 An employer selected Opt in request approved during the first assessment before the employee receives the assess NEJH comm. This caused the incorrect enrolment date to be set. Fix is to not show the options of Opt In Approved and Join Approved for first time assessed NEJH and EWs. Once they have completed their first assessments and comms have gone out the approve options will be shown in the drop down.
- **#297566** A new entrant file is not being created for an Entitled Worker if their earnings are not provided in the file
- **#291913** , **#295126** A stopped paying employee incorrectly gets auto opted in when there are £0.00 contribution and £0.00 earnings in the payroll file.

5 Defects Fixed

Various	☐ Employee ☑ Contribution ☑ Member ☐ STP ☐ Gateway	Reporting bug fixes	1. Resize filter column is not saved for custom report. 2. After creating the first custom report, sub filters are getting merged. 3. Same date range value is stored for all saved custom reports instead of selected one. 4. After a custom report is created, the sub filter position for the member response filter is changed. 5. When updating the custom report, sub filters and saved reports are duplicated. 6. When an employer is unselected from select employer popup, it is not listed in left side. 7. Re-use Contribution batch submission with no changes to Employee/Member details could wipe out some member column data (Australia only) 8. Repeatedly pressing save button creates multiple reports 9. If we click save my reports quickly after the initial save, blank is shown in popup. 10. When we search one custom report and click another, it shows the search result of previous report until the user presses search.
EPRT-21199	☐ Employee ☑ Contribution ☑ Member ☐ STP ☐ Gateway	No refresh button shown when a user changes the a field via Member form or contribution grid	A refresh button should be shown automatically on the left hand side filter. 
EPRT-21103	☑ Employee ☐ Contribution ☐ Member ☐ STP ☐ Gateway	Verify email is not working when an employee clicks on the welcome email link	If a welcome email is resent by an employer or another email is sent after the welcome email then the verify link no longer works and the user's online consent is not acknowledged.