Employer Portal Release Notes

Release April 2025

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1 Overview

Key Feature Deliveries

- Reporting now allows users to quickly search on key data
- Default vs choice filters are shown in the grid and a default and choice report is available in reporting

The release will be deployed to each environment during the dates and times shown below. During the deployment process, a maintenance page will be displayed and users will not be able to login.

UAT:

Tuesday 1 April, 2025 12pm – 3:00pm (AEDT)

Production:

Thursday 10 April, 2025 7:00pm – 10:00pm (AEST)

UAT:

Thursday 3 April, 2025 9:00am – 1:00pm (AEDT) - 2:00am – 5:00am (BST)

Production:

Thursday 17 April, 2025 10:00 am – 3:00 pm (AEST) - 1:00 am – 6:00 am (BST)

1.0.1 Employer Portal Indicative Release Dates

Note that these release dates are subject to change

 UK deployments are 2 days later than Australian deployments

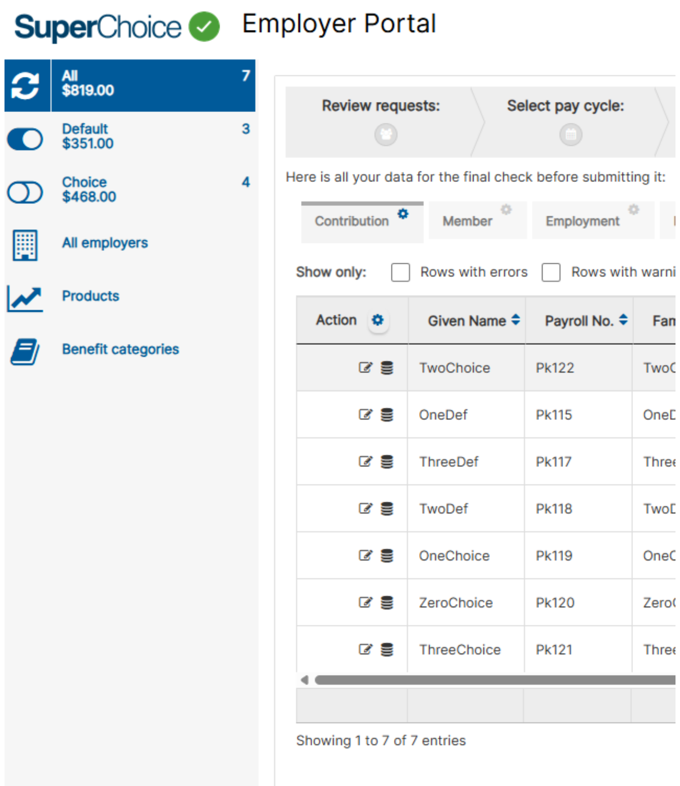
Release	UAT	Production
May	Tuesday 22-Apr	Tuesday 6-May
June	Tuesday 20-May	Tuesday 3-Jun
July	Tuesday 24-Jun	Tuesday 8-Jul
August	Tuesday 22-Jul	Tuesday 5-Aug
September	Tuesday 19-Aug	Tuesday 2-Sep
October	Tuesday 23-Sep	Tuesday 7-Oct
November	Tuesday 21-Oct	Tuesday 4-Nov
December	Tuesday 18-Nov	Tuesday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

2 User Impact

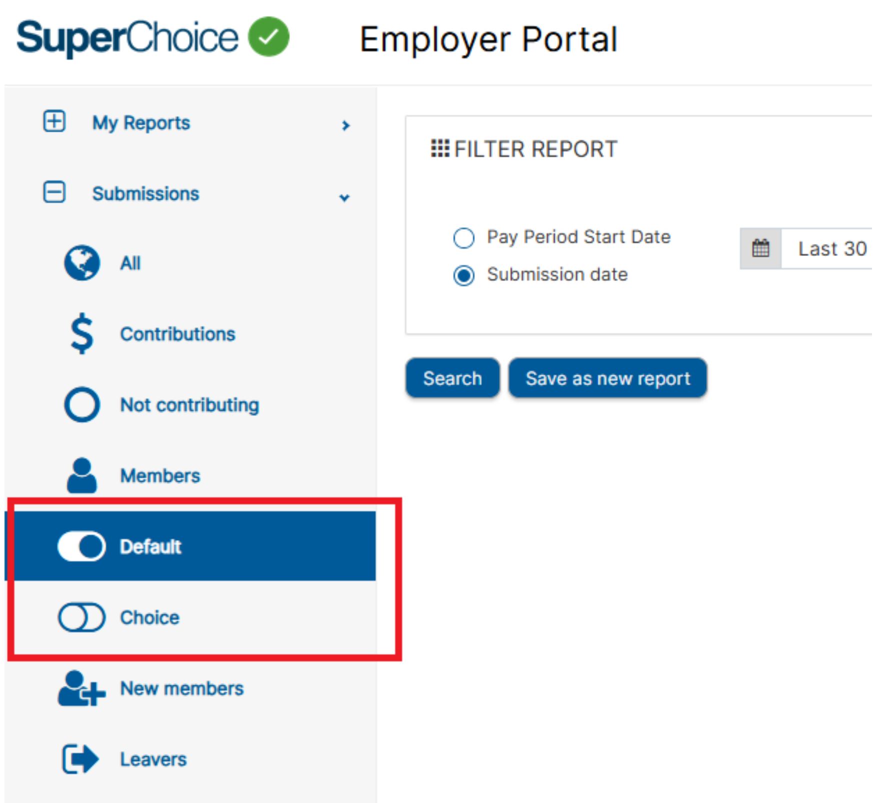
2.1 Contributions grid

Choice vs Default $ Totals and Member Totals are now accessible across both reporting and the grid, enhancing clarity. This marks the first step in an ongoing focus on reporting choice vs default.

In this release, the left-hand filter panel has been updated to include a choice and default summary, allowing employers to easily view and access choice and default contributions.



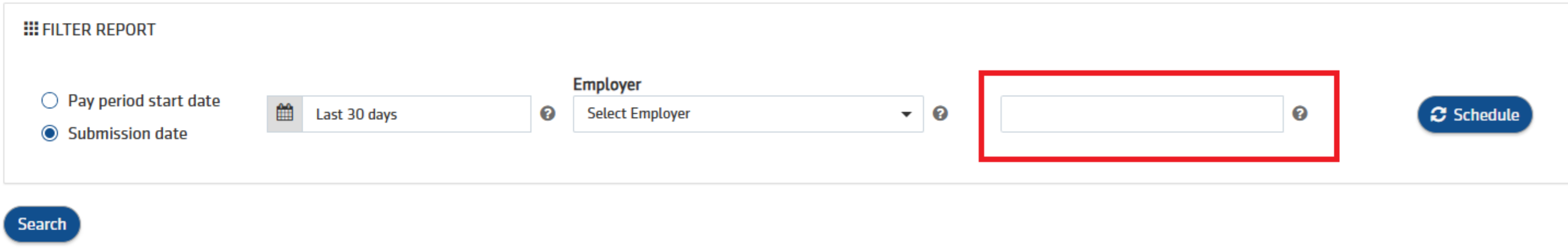
Two new submission reports—Choice and Default—have been introduced, allowing separate reports to be generated for choice and default contributions.



2.2 Reporting

2.2.1 Quick search

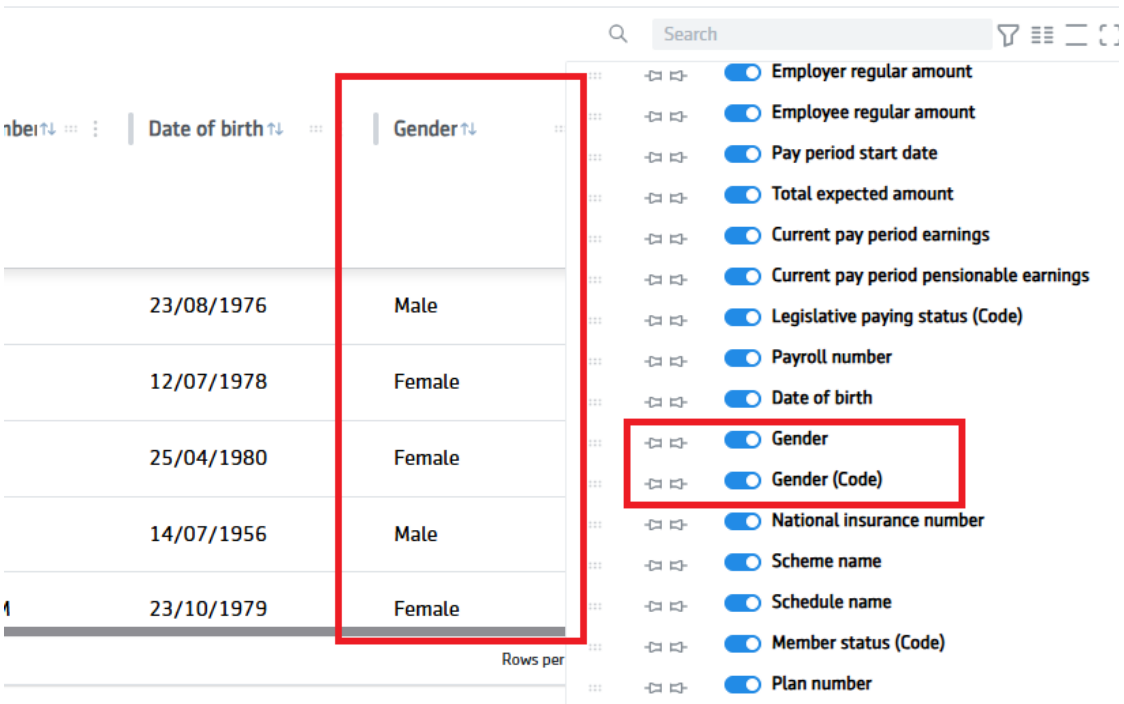
A new filter has been added to search by employee PII (e.g. names, birth dates, payroll number, TFN/NINO, etc.), Payment Reference Numbers (employer, SC to fund, fund refunds, amounts), and Fund IDs (e.g. member numbers, correlation ids, FEN, etc.).



2.2.2 **Show Descriptions and Codes**

We've enhanced readability by displaying clear descriptions for code-based data. For example, instead of showing ATO numerical codes (1 and 2), we now display "Male" and "Female."

For member fields that include both a code and a description, reports can now show both. By default, descriptions are displayed, but users have the option to select the code if needed (see example below).



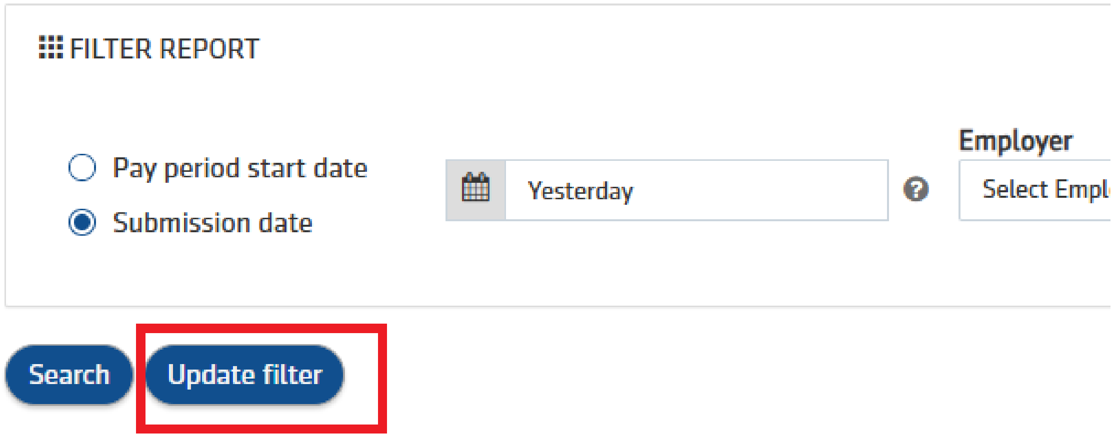
Specifically these are

Member.StateOrTerritory
Member.Sex
MemberRegistration.EmploymentStatus
Member.AddressUsage
Member.Status
Member.Country
Member.PersonNameSuffixText
Member.PersonNameTitleText

Member.Sex
Member.LeavingReason
MemberRegistration.EmploymentStatus
Member.AddressUsage
Member.Status
Member.Country
Member.BelowMinReason
Member.PersonNameTitleText

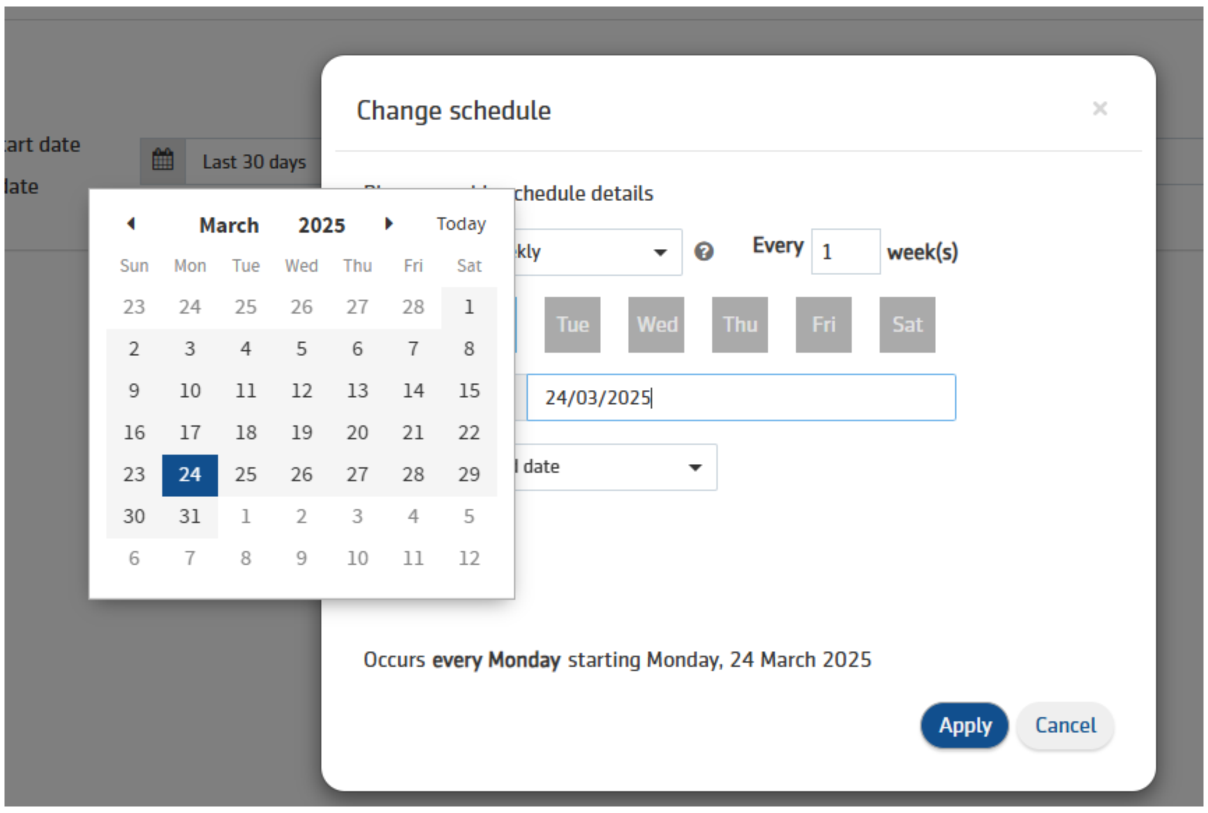
2.2.3 Update filter changes

For custom reports, the text **"Update report"** has been changed to **"Update filter"** and now only appears when a filter has been modified. This update aligns with the look and feel of EDX reporting.



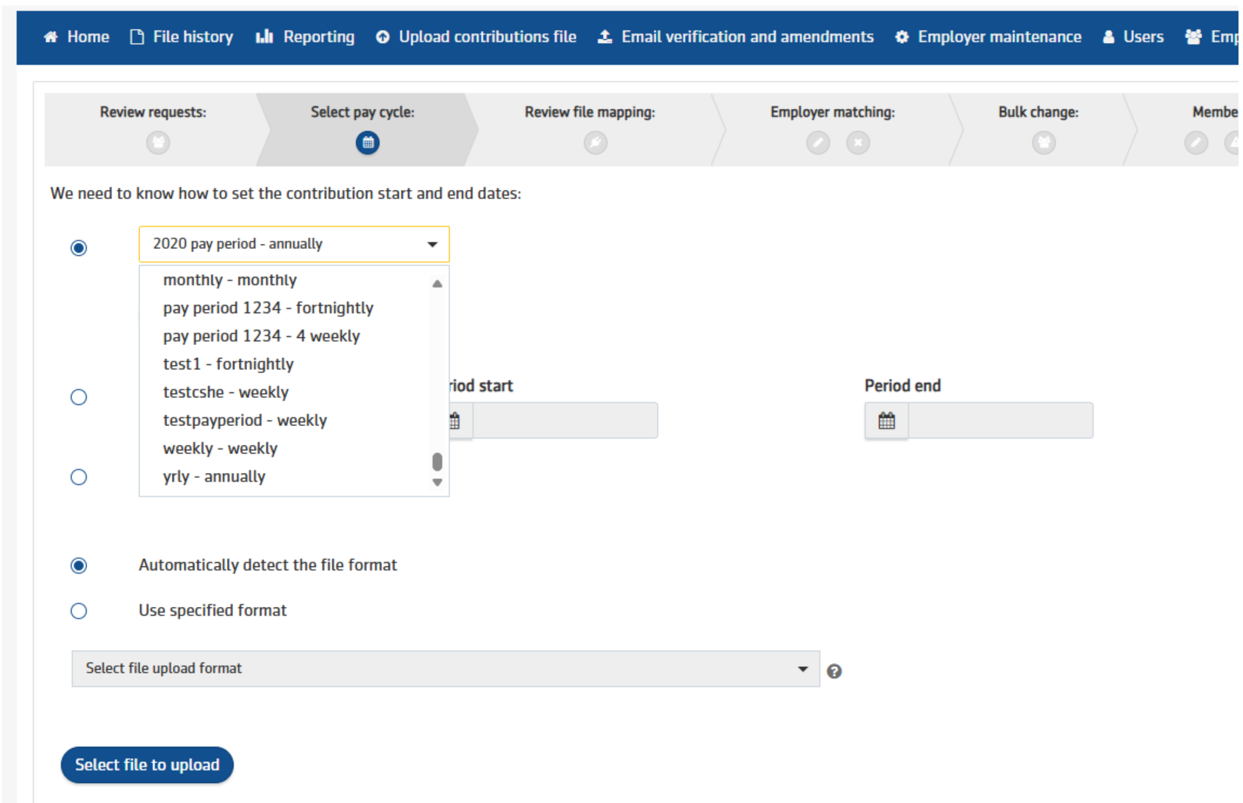
2.2.4 Schedule filter changes

The schedule popup has been upgraded to our standard look and feel - underlying functionality is still the same



2.3 File Upload – All Schedules Now Shown

When a user is linked to multiple employers, all employer schedules are now displayed when uploading a contribution file. Previously, only one employer's schedule was shown. This enhancement allows users to upload schedule-based files for multiple employers seamlessly.



3 Enhancements

EPRT-21329	As a user, I want to search quickly for specific data
Description	A new free form text box has been introduced in reporting, allowing users to search for specific keywords efficiently. Users can enter space-separated keywords (e.g., *John Lennon*) for an **"AND"** search or a comma-separated list (e.g., *John Lennon, Paul McCartney*) for an **"OR"** search. **Searchable Fields:** • **Conversation ID** • **Fund Employer No.** • **Member No.** • **First Name** • **Surname** • **TFN/NINO** • **Date of Birth** (must be entered in *dd/mm/yyyy* format) • **Payroll No.** • **Employer PRN** – Payment Reference Number for employer payments • **Fund PRN** – Payment Reference Number for fund payments • **Refund PRN** – Payment Reference Number for fund refund payments
Reason	This allows users to easily query for specific data to do with an employee, payment or fund submission
Applies To	☐ Employee ☑ Contributions ☑ Members ☐ STP ☐ Gateway
Assumptions	• Applies to both **custom and default** reports. • **Space-separated** searches (e.g., *John Lennon* or *John and Lennon*) return results where **both** terms match (AND search). • **Comma-separated** searches (e.g., *ABCD, DEFG* or *ABCD or DEFG*) return results where **either** term matches (OR search). • Supports **partial string matching**. • **Case-insensitive** search. • Respects existing report filter criteria (e.g., employer selection and date range). • When displayed in the grid, all standard grid functionalities apply (e.g., download). • **Does not apply to scheduled reports**. • Special characters that could be used for injection are excluded for security reasons.
Impact	All users will see a new free text filter

EPRT-21329	As a user, I want to see default and choice data

Description	We now determine whether a member is **Choice** or **Default** based on the member's product.
	Determination Process:
	1. Check the products linked to the employer as a **default fund**.
	2. If no default products are linked, compare against the **Products assigned to the custodian (My Products)**.
	Features
	• A new custom field, **IsDefaultFund**, is introduced with values:
	    • **Empty** (if fund not set)
	    • **True** (if default fund)
	    • **False** (if choice fund)
	• A **new filter** has been added to the grid's left-hand panel, displaying:
	    • **Choice and Default total $ values**
	    • **Choice and Default member counts**
	    • Selecting either filter will show **only default or choice members**.
	• **Reporting updates** include a new **Choice and Default report**.

Reason	This allows employers to easily distinguish between choice and default members.
Applies To	☐ Employee ☑ Contributions ☑ Members ☐ STP ☐ Gateway

Assumptions	• The default fund is empty if a fund hasn't been set.
	• SMSFs are classified as choice funds.
	• Choice/Default status is set when:
	    • A member is created.
	    • A member's fund changes.
	• Applies to contributions and member submissions (manual, reuse, and file upload), as well as member maintenance.
	• The filter is only visible for contributions.
	• An employer can have multiple default funds.
	• This update applies only to new submissions and is not backwards compatible with existing data.
	• IF no choice and default members are in the contribution file then the respective filter will not be shown

Impact	All employers will now see a new choice and default filter

4 Validation And Rule Changes

Rules file update to set new isDefaultFund field. New function (fn:isDefaultFund) to determine a default fund.

- **#305770** a category missing error is displayed for a leaving/ missing member postponed in the previous payroll. The fix is for missing members from the file upload to remain in postponement status and not change to an in opt out period status. The reason this scheme and category error was occurring was because the members were incorrectly placed into an in opt out period status.
- **#303142** Employees marked as exclude from re enrolment (EFR) in the re-enrolment payroll are incorrectly getting enrolled in the next payroll
- **#305520**,**#306273**, **#306667** Held file validation should not be run for earnings for the following validation rules.
  - A contribution amount cannot be supplied for an employee who is not enrolled. This means pay period start date must not be prior to the employees enrolment date. **Reason** - pay period start date could be prior to employees enrolment date
  - All below minimum checks. **Reason-** the employee's earnings may have increased in the latest payroll

AEGON.J.Min.0001b
AEGON.J.Min.0001d
AEGON.J.Min.0001f
AEGON.J.Min.0002
AEGON.J.Min.0002b
AEGON.J.Min.0002h
AEGON.J.Min.0002j
AEGON.J.Min.0002k
AEGON.J.Min.0003
AEGON.J.Min.0003b
AEGON.J.Min.0004
AEGON.J.Min.0004b
AEGON.MIG.J.Mem.0010
AEGON.MIG.J.Mem.0011

- PS Specific changes
  - #306870 SFTP contribution file is missing a member record when member is marked exempt (XMP status).
  - #301687 SFTP file showing codes instead of descriptions.
    - If a country code is not GB then use "Member.CountryCode.Description" . GB should still be set for UK country codes. **Applies to New Joiners file and Member Updates.**
    - Below minimum reason (line 13) of the **Contribution File** should be set to "Member.BelowMinReason.Description".
    - Leaving reason (line 8) of the **Leavers file** should be set to "Member.LeavingReason.Description"
- EB Specific changes
  - **#301588** A new join form has been included

5 Defects Fixed

Various	☑ Employee ☑ Contribution ☑ Member ☐ STP ☐ Gateway	Reporting bug fixes	1. **Provider Code Issue**: Previously, certain fields were not shown in reporting if the provider code was not set. Now, data will appear in reports regardless of whether the provider code is set. This includes fields like Reviewed, Payroll Fund Code, and some custodian custom fields. 2. **Font Colour for Highlighted Report**: For some custodians, the highlighted report was not clearly visible due to the font colour being hardcoded to white. This has been fixed, and now the default highlight font colour is used. 3. **Custom Filter Renaming**: After renaming a custom filter, the highlighted selected filter would reset. This has been addressed, so the selected filter will now remain in place after renaming. 4. **Redirect Loop on Reporting Page**: For some users, the reporting page remained stuck in a redirect loop when trying to access it. This issue has been resolved. 5. **Duplicated Sub Filters and Saved Reports**: When adding and deleting custom reports of the same type, sub-filters and saved reports were being duplicated. This has been fixed to prevent duplication. 6. **Right-Pinned Column Preference**: The right-pinned column preference was not showing in the generated schedule report. 7. **WCAG Accessibility Issue**: The options to rename, set default, and delete were not selectable using only keyboard controls. This has now been fixed for WCAG compliance. 8. **Hover Text on Custom Reports**: The hover text on custom reports now displays the report description for better clarity. 9. **Employer Category and Country**: Employer category and country were not displaying in reports. 10. **Update Filter and Schedule Button Disabled During Search**: The Update Filter and Schedule buttons will now be disabled when a search is in progress to prevent multiple actions. 11. **Merged Sub Filters After First Custom Report Creation**: After creating the first custom report, sub-filters were being merged. 12. **Download Report Naming**: Previously, downloaded reports were named report.csv. Now, the file name includes a combination of the report name and the date it was run for better clarity.
EPRT-21353	☐ Employee ☑ Contribution ☐ Member ☐ STP ☐ Gateway	Multi employer users cannot see all employers schedules when processing contribution	As an employer with access to multiple employers who have multiple schedules, I am only able to see and select one employers schedule information when processing a contribution. Now all schedules for all linked employers are shown.
EPRT-20517	☐ Employee ☑ Contribution ☑ Member ☐ STP ☐ Gateway	The member status does not change using the add member screen after selecting a member from Lookup search	**Scenario** 1. Login to portal using employer user. 2. Click on Add member. 3. Search for any Active member in the "Lookup existing member (typeahead search)" . 4. Change the status of the member from Active to Inactive. 5. Click Save. 6. Click Confirm and Send. 7. Check for the member status. **Expected Result:** Member status changes to Inactive. **Actual Result:** Member still remains Active.