Employer Portal Release Notes

Release September 2025

Table Of Contents

1 Overview

Key Feature Deliveries

- **Payment handling for RTORs** - Support for the automatic handling of RTOR rollover responses
- **Automatic file deletion** - When a user loads a contribution file using a schedule, all previously unsubmitted files will be automatically deleted

The SuperChoice Employer Portal will not be available as follows:

UAT:

Wednesday 3 September, 2025 12pm– 4:00pm (AEST)

Production:

Tuesday 16 September, 2025 7:00pm – 10:00pm (AEST)

UAT:

Thursday 4 September, 2025, 9:00am – 1:00pm (AEST) - 0:00am – 4:00am (BST)

Production:

Thursday 18 September, 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

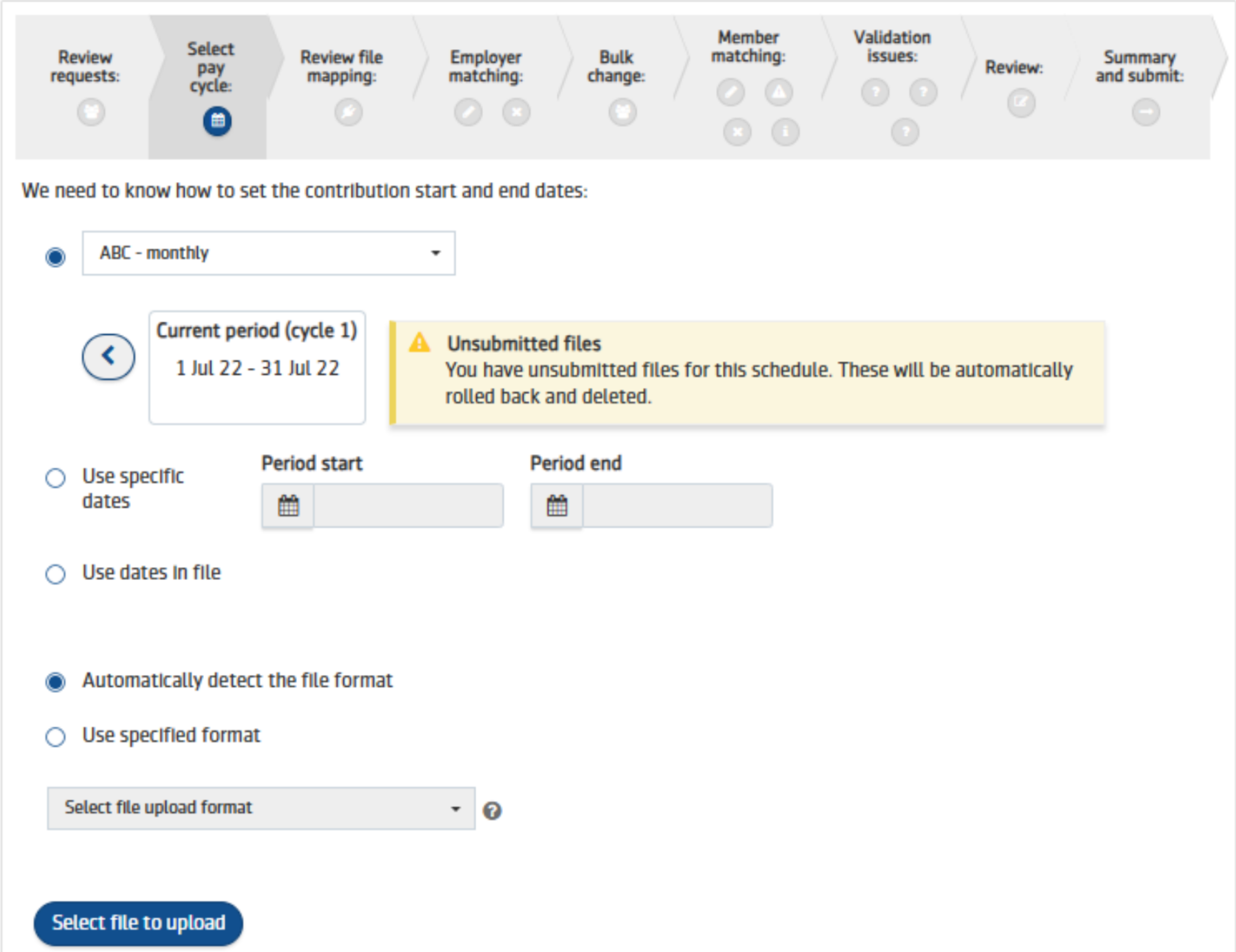
UK deployments are 2 days later than Australian deployments

Release	UAT	Production
October	Tuesday 30-Sep	Tuesday 14-Oct
November	Tuesday 21-Oct	Tuesday 4-Nov
December	Tuesday 18-Nov	Tuesday 2-Dec

2 User Impact

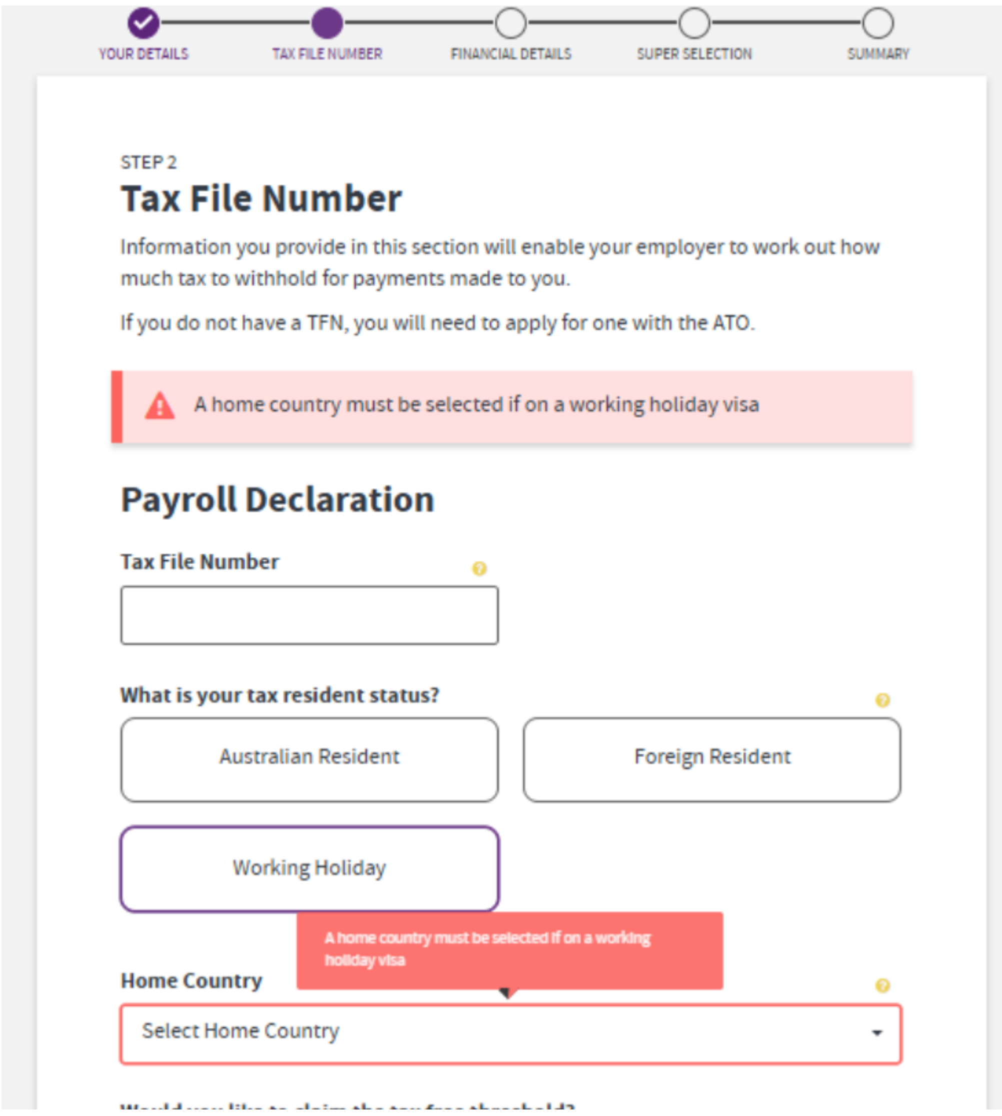
2.1 Employer Portal

Employers who try and load a schedule with previous unsubmitted files will get a warning (see below) and their unsubmitted files will automatically be rolled back and deleted.



2.2 Employee Portal 

For a working holiday maker, their home country is now mandatory and must be entered.



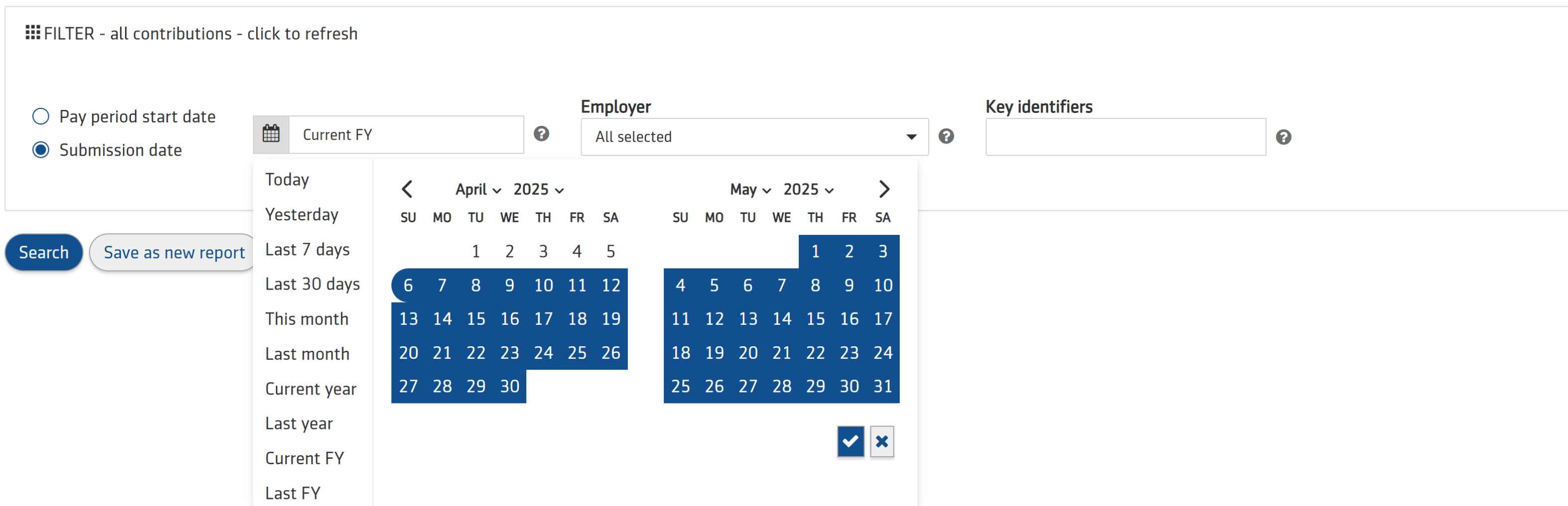
2.3 Reporting solution

2.3.1 Date filter short cuts

A few short cut options have been added to the filter

If we are on 19 June 25 then

- **Current month** will return all for June,
- **Last month** will return all from May.
- **Current FY** will return all from 1 July 2024 to 30 June 2025 (AU) and 6 April 2025 to 5 April 2026 (UK)
- **Last FY** will return all from 1 July 2023 - 30 June 2024 (AU) and 6 April 2024 - 5 April 2025 (UK)



2.3.2 Money data (phased delivery)

The money-related columns that were previously only available in the “Money” report are now also being populated in most of the other reports (including the “Payment” report and the “Analytics” reports, which will be available in the next release).

This means that for each contribution submission, the associated money-related data is now displayed across most reports.

The “Money” report provides a detailed breakdown of each individual payment received from an Employer. In contrast, the other reports present a summarised, single-row view of each submission. Therefore, where multiple payments are received for a single submission, this information is consolidated.

The table below shows how multiple payments are summarised for clarity.

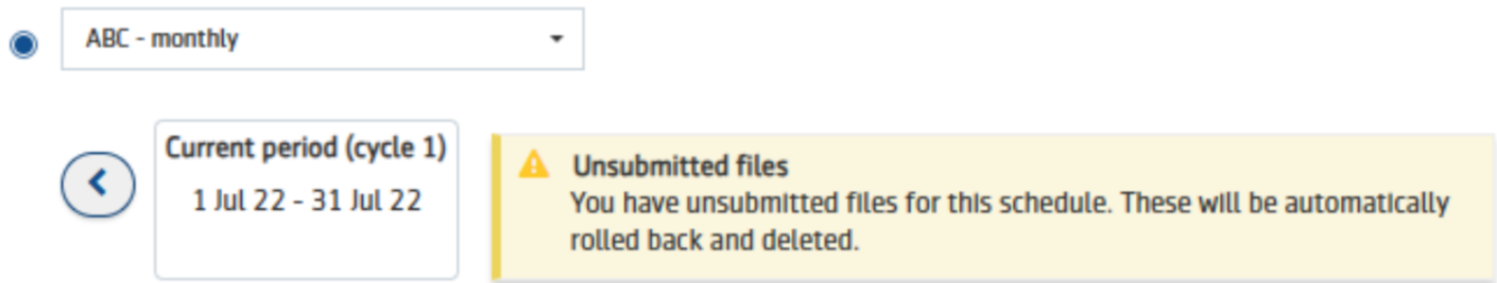
Payments and Analytics Reporting

The money related columns is not yet available in the payments or analytics reports in a summarised form. This feature will be added in the next release.

Column	Multiple Payments	Description
Age	Earliest	Calendar days since money was received (calculated from receipt date).
Match Status	First	Current state (e.g., unmatched, matched, refunded, sent to fund, partial).
Amount $	Sum	Amount deposited into the PayClear bank account.
Unmatched $	Sum	Portion that remains unmatched.
Holding $	Sum	Portion of the amount that has been matched to batch data.
Refunded $	Sum	Amount refunded to the employer (can be partial).
Sent to Fund $	Sum	Amount sent to funds (updated after the bank has acknowledged receipt of transfer).
Account Balance	N/A	Employer current account balance (positive = employer credit) in the employer sub account maintained by SuperChoice.
Batch ref no	Comma list	Reference of the related batch submission.
Received date	Latest	Date money was deposited into the PayClear bank account.
Matched date	Latest	Date money was matched.
Refunded date	Latest	Date money was refunded from the PayClear bank account to the Employer..
Sent to Fund date	Latest	Date funds were distributed to the funds/SMSFs.
Payment type	First	Employer's payment method: Direct Debit, Direct Credit or BPAY.
Narrative	Comma list	Banking narrative from the payment.
Match Type	First	How the match was made (e.g., manual, automated match levels).

3 Enhancements

3.1 Automatic file deletion

EPRT-21854	As a user loading a schedule, all previously unsubmitted files will be automatically deleted
Description	Currently, employers can upload multiple contribution files for the same schedule period and leave them unsubmitted. This can lead to unintended side effects, such as artificially inflated held contribution totals and data not being validated correctly. To prevent this, the system will automatically detect and remove any unsubmitted contribution files for the same schedule period when a new file is uploaded. Specifically: 1. When an employer loads a contribution file for a schedule, the system will check for any previously uploaded, unsubmitted contribution files for the same schedule period. 2. If any unsubmitted files exist, they will be automatically rolled back and deleted. 3. If any unsubmitted member files (including member maintenance updates) exist that were loaded after the last submitted contribution file then they will also be automatically rolled back and deleted., 4. A warning will be shown to the user when selecting the schedule or changing the schedule period 
Reason	This is to avoid employers getting into an inconsistent state based on unsubmitted files that should have been deleted.
Applies To	☐ Employee ☑ Contributions ☑ Members ☐ STP ☐ Gateway
Assumptions	• This rule applies **only** to employers who select a **schedule**. It does **not** apply to those using "Use specific dates" or "Use dates in file." • Any manual changes made in the previous unsubmitted contribution file (e.g., exiting an employee) will be lost and must be reprocessed in the new file. • Only one unsubmitted contribution file can exist for a given schedule period at any time. There could be multiple unsubmitted member files. • Upon initial deployment, there may be multiple unsubmitted files (both member and contribution) for a schedule period. After the fix is in place, a maximum of one unsubmitted contribution file will exist at any given time. however there could be multiple unsubmitted member files. • If a schedule period is rolled back, the check for unsubmitted files will apply to the rolled-back schedule timeframe. • Where an employer uses the Previous Pay Period function, it will check for any unsubmitted files for the pay period selected • For the scenario where an employer has never submitted a contribution file we should not delete any member files. • The status bar is updated with the message "deleting unsubmitted file" • A user that doesn't have rights to delete can't have their unsubmitted files deleted • If a member file contains members from multiple schedules then that member file will still be deleted
Impact	Only impacts employers that use schedules. They will now have unsubmitted files automatically deleted to keep their data consistent.

3.2 Rollover payments response handling

For rollover payments, the receipt of an RTOR/USMOR/RASOR with error response is now automatically handled

Receipt

Funds are not always supplying details about the refund in an error response. Therefore we have built the following logic to automate refunds.

On receipt of a processed RTOR/USMOR/RASOR.

- If the RTOR/USMOR/RASOR contains an error response and Sending Superannuation Fund USI is one of our payment supported USIs
  - If the Refund Payment Total has been set, await Refund Payment Total with Refund Payment Reference
  - If the Refund Payment Total is not set, await Original Payment Total with Original Payment Reference
  - If Refund Payment Total and Original Payment Total are not available then we lookup the amount for the original RTR and use that to match.

Payment matching

- Primary matching is based on amount and supplied payment reference number (PRN) from the returning fund or SMSF.

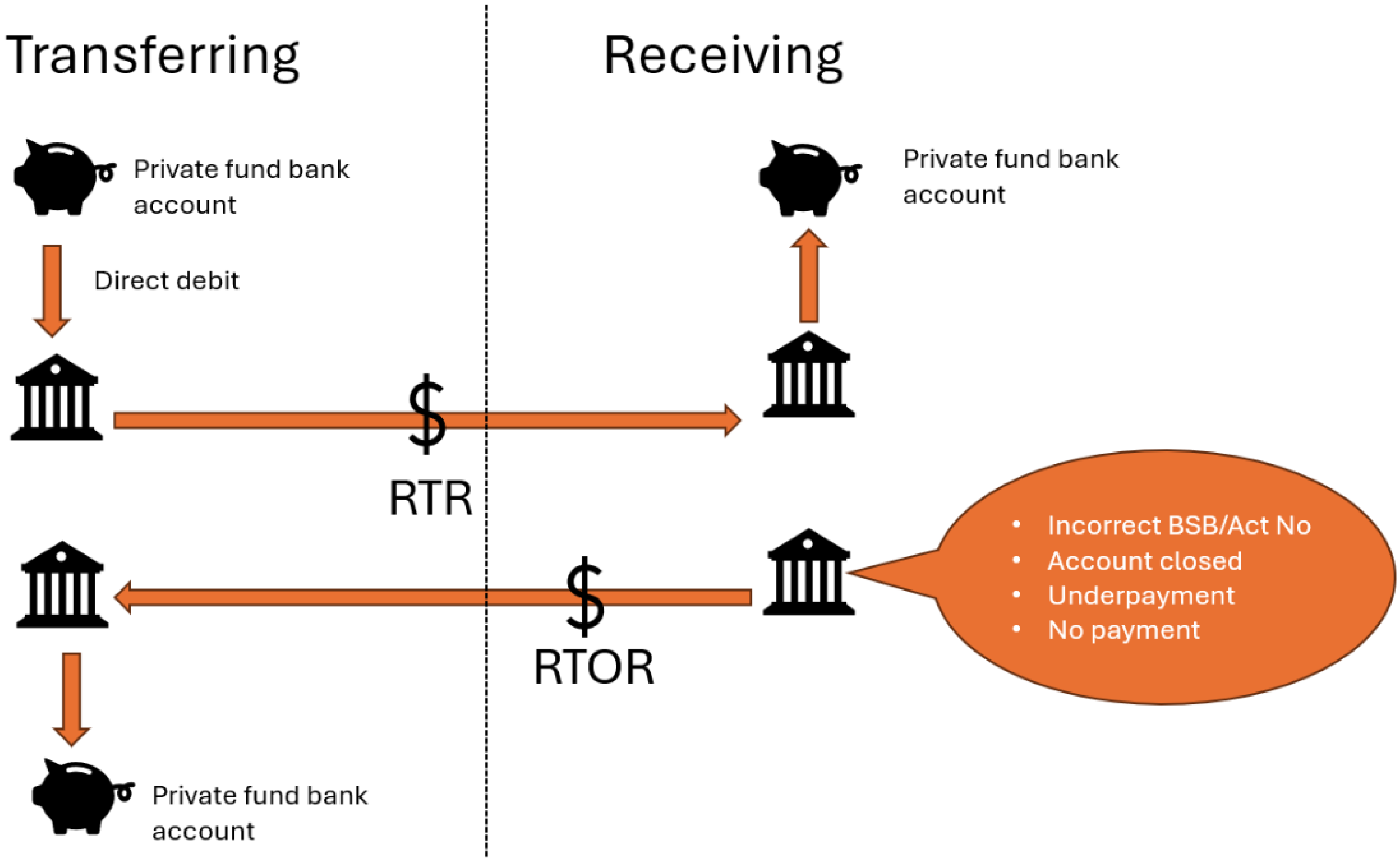
- If no match is found then the matching falls back to similar PRN, then to amount only.

Payment

- When money is matched, the refund payment is paid to the private fund bank account in with the original PRN.

Stale Transactions Handling:

- If no money is received within **14 calendar days**, the corresponding RTOR,USMOR/RASOR transaction is **automatically cancelled**.
- If money is received but no matching data (e.g. RTOR,USMOR/RASOR) is found within **10 business days**, funds are **automatically returned**.



4 Validation And Rule Changes

Support for rules and lookups for the working holiday home country change

1. Added Mx as title for PS to employee and employer portal
2. For Held Total, Employer, Employee and Salary Sacrifice the totals for all employers will be reset based on extracting the held total for a member and populate based on all the contributions that are in the status of held or awaiting held later than the last contribution file submitted date
3. Updated attachments for PS and EB

5 Defects Fixed

Various	☐ Employee ☐ Contribution ☐ Member ☐ STP ☐ Gateway ☑ Reporting	Various reporting bugs	1. The height for the left hand scroll filter was incorrectly set meaning that the report names and scrollbar were not always shown 2. Under certain scenarios, with the online money no data reporting, it appears that manual adjustments are not being reflected in reporting. As part of this fix, historic data will be remediated. 3. When creating custom report, the user is no longer redirected to the custom report with the custom reports sidebar section expanded, rather the sidebar structure remains unchanged, and the active filter remains on screen so that the user can access the newly created filter from custom reports. 4. For direct debit refunds the holding amount is incorrect. Money gets sent to fund but then following a refund, the sent to fund money effectively gets "reset" to holding in reporting after the failed payment. As part of this fix, historic data will be remediated. 5. Quick search keywords separated by space does not return right values 6. Search with key identifiers for Payments and Fund Refunds reports is throwing a session expired error 7. For money reporting, the multi employer expand down arrow is not captured when the money filter is clicked for first time
	☑ Employee ☑ Contribution ☑ Member ☐ STP ☐ Gateway ☐ Reporting	Old email pdf attachments (which have recent updates) don't open in the Employee or Employer Portal and can't be resent by the employee or employer	**Scenario** 1. Open employee/employer portal 2. Open employee communications/employer emails 3. Search for any emails with attachments sent before 20/08/2025 . Example Enrolled EJH attachments 4. Click on all the attachments present 5. Observe that all the attachments that have changed show an error 6. These emails can also not be resent.
EPRT-22542	☑ Employee ☑ Contribution ☑ Member ☐ STP ☐ Gateway ☐ Reporting	Rolling back unsubmitted member maintenance files reverts member data modified from employee portal and any review employee processes	**Scenario** 1. Upload member file and contribution files 2. Create an unsubmitted member maintenance / member / contribution file 3. Go to one of the employees in employee portal and trigger their process (e.g. Join, Opt In, Opt out) 4. Trigger rollback of that unsubmitted member maintenance file, either upload a 2nd contribution file or delete the unsubmitted member maintenance file 5. In the grid audit page it is observed that the member status is rolled back to a prior status. **Expected Behavior** Rollback should not rollback values changed by the employee portal **Actual** It reverts changes made by the employee in employee portal
Various	☐ Employee ☑ Contribution ☐ Member ☐ STP ☐ Gateway ☐ Reporting	Various payments fixes	1. Change to support auto matching of real time gross settlements 2. When an employer changed their company name, this was not automatically reflected in the payments matching process 3. Fix for reporting direct debit refund holding amount (as above)
EPRT-21867	☑ Employee ☐ Contribution ☐ Member ☐ STP ☐ Gateway ☐ Reporting	"Review Onboarding Requests" report not in order or reflective of data within screen	When pressing download on the "review onboarding requests screen", the ordering and columns don't align with the columns shown on the grid.