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The **Contributions History** view is one of several options where you can see the results of past uploads and the status of payments. In addition, any refund or payment notifications sent via email from the Portal will contain a link to this view.

To access the view from the Dashboard screen, on the **SuperStream** panel, click the **History** button.
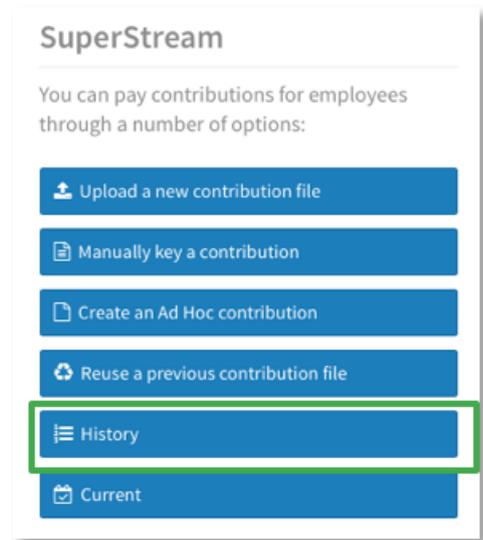
The Contributions History screen displays a high-level view of each of your submissions. You can see:

a   the overall status of a submission at any given time

b   each stage a submission has gone through and when the stages occurred (via expanding the submission)

c   the status of payments.

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Submission status

On the **History** screen you can click the ⊞ at the front of a submission's row to see an expanded timeline of the submission's progress through each status.

This allows you to check when the contribution amounts have been paid by the Clearing House to the super funds.

In the Direct Credit (EFT) example above:

a   The file upload commenced at 12:18 pm Thursday.

b   The file was submitted at 12:47 pm Thursday (after resolving some exceptions).

c   The Clearing House confirmed and reconciled the employer's payment at 10:02 am Friday.

d   The Clearing House sent the money and data to the super funds at 2:42 pm Friday.

Filtering

The filter fields of **Status**, **Date** and/or **Employer** at the top of the History screen can be used to limit the submission information in the grid below.
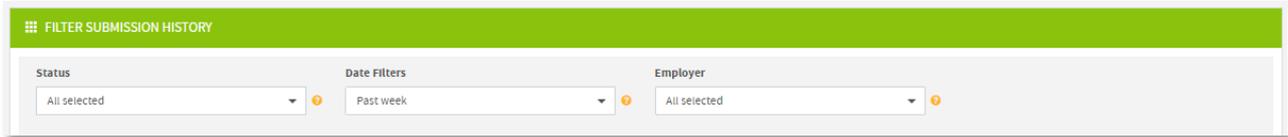
Filter by Status

To filter the Contribution History by **Status**:

1 Click the **Status** filter field.

2 Click **Uncheck all** to clear the current filter.

3 Click each status that you want to use as a filter.
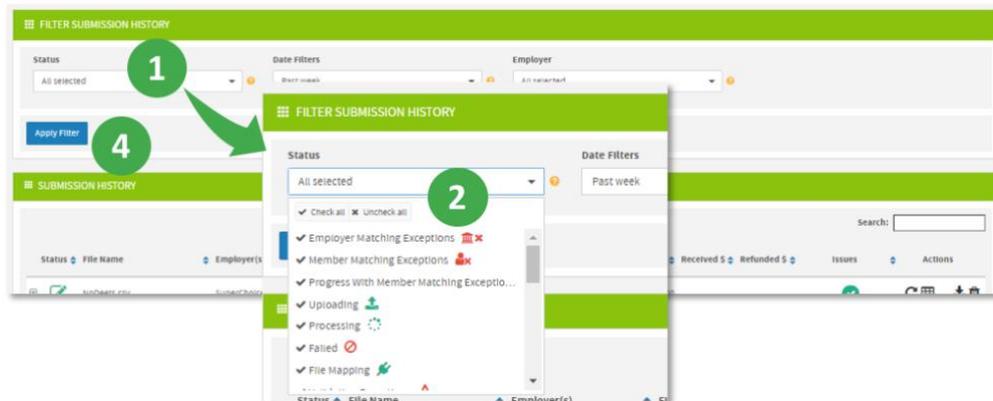
4 Click the **Apply Filter** button. The filtered results display in the **Submission History** panel.

Reset the status filters

To reset the Submission History panel to display every status option:

1. Click the **Status** filter field.
2. Click **Check All** to reselect every status.
3. Click the **Apply Filter** button.

If required, you can use the **Date Filters** field to specify a date range, and/or use the **Employer** field to filter for submissions on behalf of one or more employers. These filters can be used with the **Status** filter, or instead of it.

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Status icons

The Contributions History view displays numerous icons that provide information about the status and progress of your submissions. The most common icons, with their descriptions and actions required, are listed below. A detailed list of status icons is available in the *Payment Handling Reference Guide*.

Status Icon	Status Wording	Explanation	Action Required
👤✗	Member Matching Exceptions to Resolve	Member Matching exceptions exist and must be resolved before the contribution file can be submitted.	Resolve the Member Matching exceptions. See the *Uploading your File* quick reference guide.
⚠	Errors to Resolve	Validation errors exist and must be resolved before the contribution file can be submitted.	Correct the data in the Portal or generate a new contribution file with corrected data.
⚠	Validation Exceptions - Warnings	Validation warnings exist.	Review and correct the data as required.
✔	Validated	The data has been validated. All validation errors have been resolved or there were none present.	No action required. This status occurs immediately before Ready to Submit is triggered.
✎	Ready to Submit	The contribution file is ready to submit.	If you are sure the data is correct, submit the contribution file.
🔒	Saved and Held	The Save and Hold button has been clicked. The file cannot be edited and is waiting to be submitted.	Submit the contribution file. Because the file is in a Saved and Held status, data can **not** be edited.
→	Data Submitted and Sent	The contribution file has been submitted.	No action required.
✗	Batch Awaiting Cancel	The contribution file has been cancelled.	No action required.
$	Paid	The correct amount of money has been received and matched with the contribution file.	No action required.

Response icons

Response icons display when a response message has been sent from a super fund.

Status Icon	Status Wording	Explanation	Action Required
	Fund Member Response	A SuperStream response message has been received from a super fund. (Sometimes a Contribution Transaction Error Response (CTER) is used to confirm a Member Number rather than notify a refund. If this occurs, EmployerPay will treat it as a Fund Member Response. You will have received an email from EmployerPay confirming the correct Member Number.)	Update your payroll system with the correct Member Number. **Note:** The EmployerPay Portal will have updated the Member Number confirmed by the super fund. Future payroll extracts need to either contain the correct Member Number or have a 'blank' Member Number, in which case EmployerPay will use the Member Number in its database when sending to the super fund.
	Fund Warning Response	A Contribution Transaction Error Response (CTER) message has been received from a super fund.	Review the warning response. If required, correct the data in your payroll system, generate a new contribution file, and then submit it. (If a CTER merely confirms a Member Number, complete the same action as for a Fund Member Response).
	Fund Error Response	A Contribution Transaction Error Response (CTER) message has been received from a super fund, which generally indicates a refund. You will receive an email if a CTER has been received, and the refunded amount from the super fund will be in your refund account.	Review the error response. If required, correct the data in your payroll system, generate a new contribution file, submit the file, and then make the corresponding payment. (If the CTER merely confirms a Member Number, complete the same action as for a Fund Member Response).

Payment status

The Contribution History screen also provides a quick view of the current status of each submission's payment(s).

a   The **Expected** column shows the total amount of the contributions submitted via the contribution file.

b   The **Received** column shows the total of the payments received for a submission.

c   The **Refunded** column shows the total of any refund amounts for a submission.
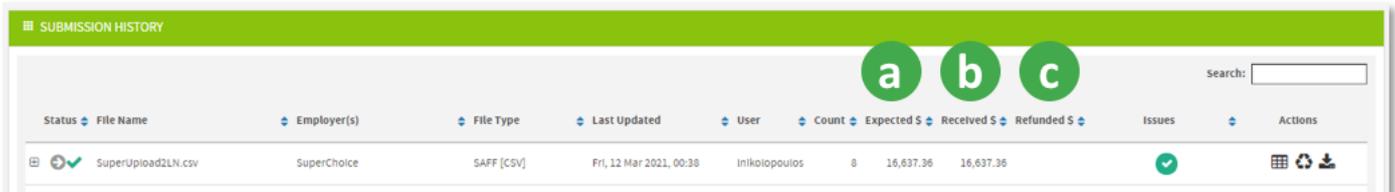
Payment status timing

As soon as you click **Confirm and Send** during a file upload, the total contribution amount will display in the **Expected** Column in the History screen. This occurs whether the payment type is Direct Debit or Direct Credit.

The amount in the **Received** column displays after the payment has been received and matched against the submitted data, and is ready for pay out.

- Direct Credit payments display in the **Received** column after the Clearing House has matched a payment to a submission.

- Direct Debit payments display in the **Received** column after the direct debit payment has been cleared.

Refund amounts display in the **Refunded** column when the Clearing House receives a refund message from a super fund. The payment is sent to the employer refund account directly from the fund.

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Cancel a submission

It is possible for a user with the appropriate permissions to cancel a batch after a contribution file has been submitted – as long as the money has not been sent to the fund.

If the contribution batch has a Status of **Sent to Fund** or **Partially Sent to Fund**, it is not possible to cancel the batch.

1 On the Dashboard view, on the **SuperStream** panel, click the **History** button.

2 Search for and locate the contribution batch file that you want to cancel.

A contribution batch can only be cancelled if a red cross ✖ displays at the end of the row as this indicates the money has not yet been sent to the fund.
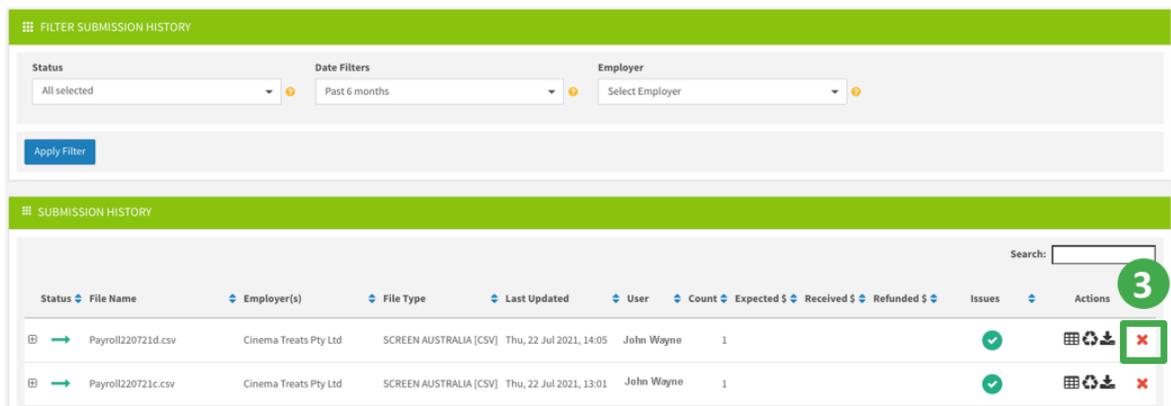
3 On the end of the file's row, click the red cross button ✖.

A confirmation message displays.

Confirm Cancel Batch

Please note, that this decision is irreversible. If a payment has already been made for this batch, the refund back to you could take up to 5 business days whilst we await the funds to clear.

Do you wish to continue?
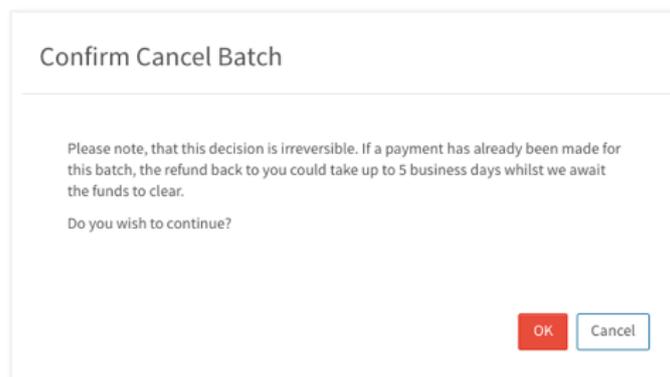
OK   Cancel

4 If you are sure that you want to cancel the batch, click **OK**.

The Status of the contribution batch file changes to **Batch Awaiting Cancel**.

If the request is for a **direct debit** and the contribution batch is **cancelled before** the overnight direct debit batch is run, no refund will be required. However, if the contribution batch is **cancelled after** the overnight direct debit batch is run but before money has been sent to the funds, there will be a refund.

If the request is for a **direct credit**, as long as the money hasn't been sent to the fund, any matched money (matched, underpaid or overpaid) will be refunded to your refund account. If no money has been matched, the batch is cancelled immediately.

After the money has been refunded, the batch Status changes to **Cancelled**.

Notifications

Many events in the Portal, including issues with payments, trigger automatic email communications that contain details of the issue or event, and provide a **View** link to the Contribution History.

Scenario	Communication	Timing	Action Required
Non Payment	Non Payment Notification Dear name, This email is to notify you of the payment status of your recent contribution which was submitted on . We have not yet received payment for this submission. If you have not recently made a payment, please organise payment for this contribution within the next 10 business days. If we do not receive the payment the contribution data will be cancelled. Please click on the below link to view additional information. Expected Amount: $ Employer Name: ABN: VIEW	2 business days after submission. Unpaid contribution submissions are manually removed after 20 business days from the date of submission.	Employer should make payment to ensure money and data is released to the super funds.
Underpayment	Underpayment Notification Dear name, This email is to notify you that a recent contribution submission was underpaid. Please pay the remaining amount of $ using a PRN of to enable the submission to be processed. Click on the link below to view further details. Expected Amount: $ Received Amount: $ Remaining Amount: $ Payment Reference No.: Submission Date: Employer Name: ABN: VIEW	Notification is sent immediately on receipt of an underpayment. The contribution submission is cancelled and the total amount refunded if the shortfall is not paid and matched after 10 business days.	Employer needs to pay the underpaid amount before 10 business days elapse.

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Notifications (continued...)

Scenario	Communication	Timing	Action Required
Refund (Fund to Employer)	Refund Payment Notification Dear name, This email is to notify you that a superannuation fund has refunded a previously submitted contribution. Please click on the below link to view additional information. Refund Amount: $ Employer Name: ABN: VIEW	Sent daily when a refund message is received. 1 communication sent per day regardless of the number of refunds received. Sent after midnight	Review the data via link to Contribution History in the email. Employer needs to resubmit data and payment using the corrected details.
Overpayment Refund	Overpayment Refund Dear name, This email is to notify you that a recent contribution submission was overpaid. We have automatically refunded $. Click on the link below to view further details. Expected Amount: $ Received Amount: $ Refunded Amount: $ Payment Reference No.: Submission Date: Employer Name: ABN: VIEW	Any unmatched overpaid monies are automatically refunded if 5 business days after the original payment, the overpaid amount remains unmatched. The refund is instigated on business day 6.	No action required. Or adjust the next contribution payment amount if submitting within 5 business days. Refund is automated and will include a reference number that can be used for support purposes.

For details on other notifications, see the *EmployerPay Payments Handling Reference Guide*.