

Employer Portal Release Notes

Release November 2022

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1 Overview

Key Feature Deliveries

Upgrade to Employer Maintenance which enables

1. STPv2 support for onboarding employers
1. Support for entering BMS details
2. Ability to add an STPv2 only employer without supplying bank details
 - BPAY switch for employers. Allows custodians to selectively turn on/off BPAY for employers
 - Split batch support for multi-employer submissions.

The SuperChoice Employer Portal will not be available as follows:

UAT:

Monday 14th November, 2022 12:00pm – 5:00pm (AEDT)

Production:

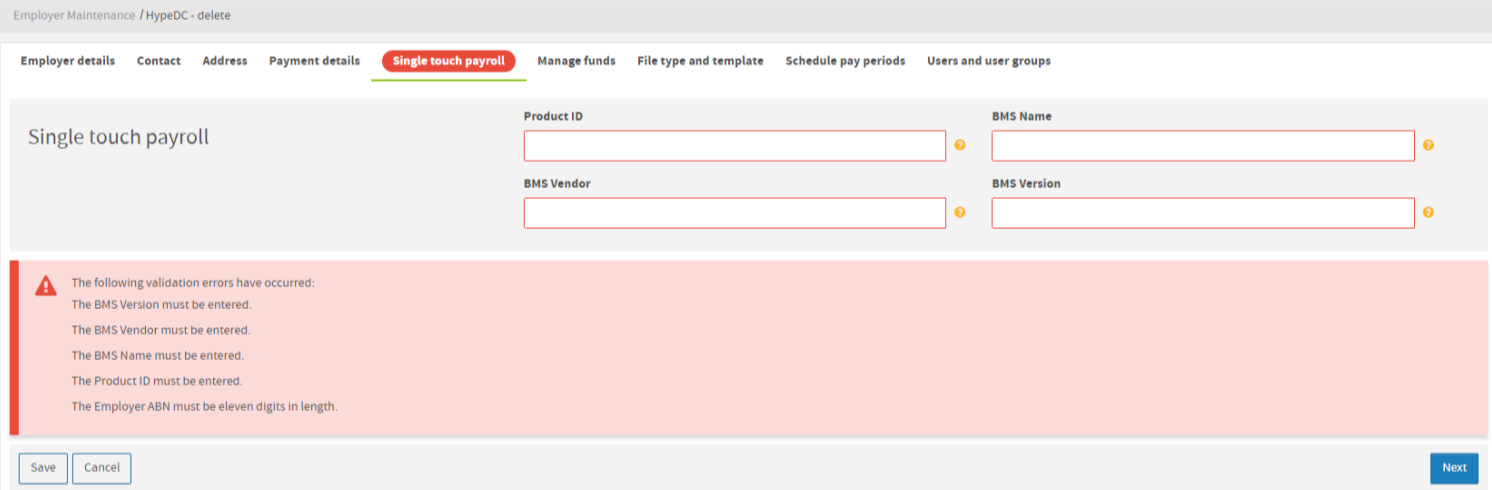
Thursday 24th November, 2022 8:00pm – 11:00pm (AEDT)

1.1 Employer Portal Sprint and Release Dates 2022

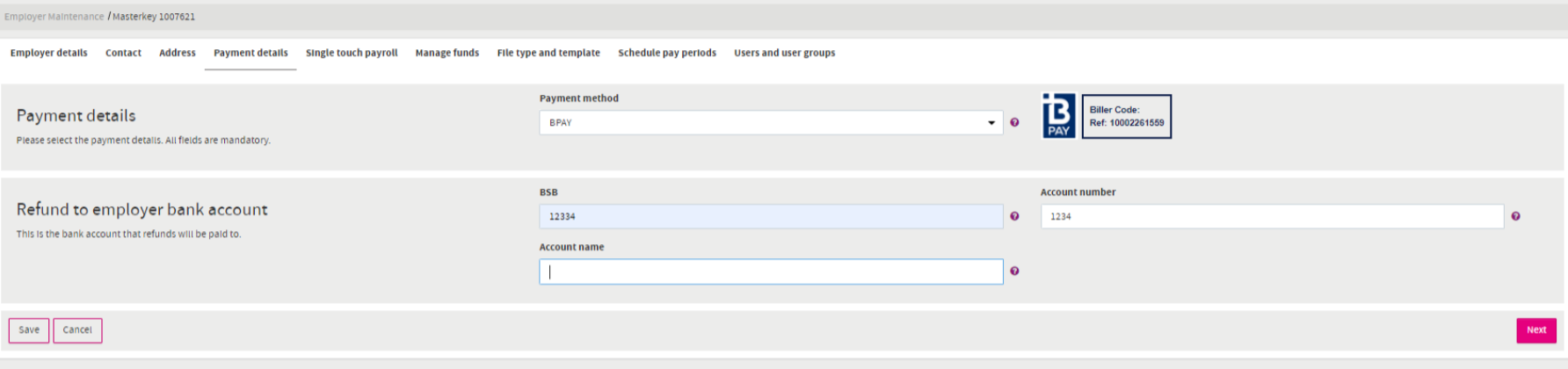
Note that these release dates are subject to change

Release	UAT (Portal)	Prod (Portal)
December	Tuesday 29-Nov	Tuesday 13-Dec

2 Enhancements

<p>various</p>	<p>Employer Maintenance upgrade</p>
<p>Description</p>	<p>This upgrade to use custom fields in Employer Maintenance enables some new features for STPv2, payments and employer migration and onboarding.</p> <p>Employer maintenance now joins the family of custom field aware services such as employee services, scheme maintenance, member maintenance and the grid). This means that a custodian can create their own employer based fields and reference them for validation, enrichments, etc.</p> <p>Specifically, this enables the following features</p> <ol style="list-style-type: none"> 1. STPv2 support for onboarding employers <ol style="list-style-type: none"> a. Support for entering BMS details b. Ability to add an STPv2 only employer without supplying bank details 2. BPAY switch for employers. Allows custodians to selectively turn on/off BPAY for employers 3. Split batch support for multi-employer submissions. Employers can now specify whether a multi-employer batch will be paid for in one payment/PRN for all employers or a separate payment/PRN for each employer. Support for mixed batches containing direct debit and debit credit employers 4. Employer maintenance status change. Migration scenarios where employers don't register via ESE (e.g. multi-employer ABNs, etc) can now be self-serviced via employer maintenance to change employers from registered to active instead of requiring production support to run scripts. 5. We are now capturing the specific Direct Debit Authority acceptance so we record date/time and user details regarding any DDA acceptance or bank account change. 6. The WPN is now captured separately to the ABN for those employers that don't have an ABN. 7. Product enabling switches. STPv2, Gateway contributions and Employer Services (super selector) can now be turned off/on via a simple checkbox in employer maintenance. This controls what details are required to be entered for the relevant service and will control the employer's access to these features in the future. 8. Support for read only (and read only for edit) employer and schedule fields that can only be changed by a custodian with the required permissions 9. Support for custodian specific employer and schedule custom fields. Custodians can now create employer custom fields, write validations and also use them in the member and contribution file upload to enrich or further validate files based on employer level settings. 10. Custodians can now determine what fields appear in the filter selection (this can include their own custom fields). Filtering on both created and updated employers within a time period is now supported. 11. WCAG compliant with new look and feel for error messages, etc. 12. Configurable help text 13. Extra tabs have been added and tabs can also be customised by custodians  <p>A new permission should also be added "Modify All Data (Employers)". The role with this permission will be able to edit all employer data regardless of the Locked or Locked for Update employer property value.</p>
<p>Reason</p>	<p>This allows more freedom for custodians to configure their employer experience</p>
<p>Applies To</p>	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Contributions <input checked="" type="checkbox"/> Members <input checked="" type="checkbox"/> STP <input type="checkbox"/> Gateway
<p>Assumptions</p>	<ul style="list-style-type: none"> • When creating an employer all checkbox fields are defaulted on • All roles that have file upload permission will automatically be given this permission • If Locked or Locked for Update is false then for users that don't have the new "Modify All Data (Employers)" permission existing behaviour remains as currently • Payment method list is filtered by the custodian payment options

Impact	<p>There is now some new information to be maintained</p> <div style="border: 1px solid red; padding: 5px;"> <p>⚠ Migration</p> <ol style="list-style-type: none"> 1. All employers with direct debit have the direct debit authorisation automatically checked. 2. Contributions are enabled for all employers with a bank account. 3. All employers with STP BMS details have STP enabled 4. All employers with a WPN have their WPN migrated to the new field 5. Existing roles with the "Modify All Data (Contributions)" are automatically also given "Modify All Data (Employers)" permission </div>																								
EPRT-16247	<p>As an employer, I want to be able to specify whether to split batches for payments</p>																								
Description	<p>Currently a multi employer batch can either get sent as the one batch or it is automatically split into individual batches based on employer. The decision as to whether to split is based on the refund bank account BSB and account number being the same. The change is to no longer use the refund bank account BSB and account number for this decision but instead use a new employer custom field "Split Batch" to auto split batches.</p> <p>So when a file contains multiple employers and not all employers have the same split batch setting then we will now automatically be organising payments for each individual employer separately that have split batch set to true. These will effectively be split into multiple split batch for each employer and separate CTRs will be sent for each employer. There could be separate payments for each employer on the same bank account.</p> <ul style="list-style-type: none"> • if all employers have split=false then i then these are grouped together into the one batch. • if any employer has split=true then all are split <table border="1" data-bbox="302 1012 1976 1329"> <thead> <tr> <th>Employer</th> <th>Split Batch</th> </tr> </thead> <tbody> <tr> <td>Employer 1</td> <td>✓</td> </tr> <tr> <td>Employer 2</td> <td>✓</td> </tr> <tr> <td>Employer 3</td> <td>✓</td> </tr> </tbody> </table> <p>Three batches will be created (Employer 1 and Employer2 and Employer 3). There will be three employer drop downs.</p> <table border="1" data-bbox="302 1383 1976 1700"> <thead> <tr> <th>Employer</th> <th>Split Batch</th> </tr> </thead> <tbody> <tr> <td>Employer 1</td> <td>✗</td> </tr> <tr> <td>Employer 2</td> <td>✗</td> </tr> <tr> <td>Employer 3</td> <td>✗</td> </tr> </tbody> </table> <p>One batch will be created containing all employers. There will be no employer drop down.</p> <table border="1" data-bbox="302 1754 1976 2071"> <thead> <tr> <th>Employer</th> <th>Split Batch</th> </tr> </thead> <tbody> <tr> <td>Employer 1</td> <td>✓</td> </tr> <tr> <td>Employer 2</td> <td>✗</td> </tr> <tr> <td>Employer 3</td> <td>✗</td> </tr> </tbody> </table> <p>Three batches will be created (Employer 1 and Employer2 and Employer 3). There will be three employer drop downs.</p>	Employer	Split Batch	Employer 1	✓	Employer 2	✓	Employer 3	✓	Employer	Split Batch	Employer 1	✗	Employer 2	✗	Employer 3	✗	Employer	Split Batch	Employer 1	✓	Employer 2	✗	Employer 3	✗
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Reason	<p>This allows users to tailor their payments approach when submitting on behalf of more than one employer</p>																								
Applies To	<p> <input checked="" type="checkbox"/> Contributions <input type="checkbox"/> Members <input type="checkbox"/> STP <input type="checkbox"/> Gateway </p>																								
Assumptions	<ul style="list-style-type: none"> • Either the whole batch split or the whole batch is joined. There is no combinations of join and split employers. • Drop down exists containing all the employers and "All Employers". Will default to All Employers. • When "All Employers" is selected then the total fund breakdown will be shown for all employers but no payment details. • When an individual employer is selected then the fund breakdown will be shown with the employers total along with the generated payment details (PRN for the payment and total amount). • The PRN can be changed for multiple employers individually • Separate CTS messages are sent for each employer that is split • Single payment for one employer or multiple employers all with split payment set to false. Only one CTS message will sent with one PRN. 																								

	<ul style="list-style-type: none"> • The employers can contain a mixture of Direct Credit, BPAY and Direct Debit payment types. • Displays the PRN as currently • If the employer subsequently changes the split method then the final screen may switch from split to combined or vice versa after the file has been submitted • The list of employers only includes employers that the user has access to
Impact	<div style="border: 1px solid red; padding: 5px;"> <p>Migration</p> <p>All existing employers that have been part of a multi-employer submission and have the same refund bank accounts have been set to not split the batch. All other employers have split batch set to true</p> </div>
EPRT-16246	As an employer, I should not see BPAY details if BPAY has not been set
Description	<p>The BPAY logo should only be displayed if the payment method is BPAY. In addition the Direct Credit option is shown.</p> 
Reason	This allows custodians to switch off BPAY for specific employers
Applies To	<input checked="" type="checkbox"/> Contributions <input type="checkbox"/> Members <input type="checkbox"/> STP <input type="checkbox"/> Gateway
Assumptions	<ul style="list-style-type: none"> • If the payment method is not BPAY then the BPAY logo isn't shown • Any custodians that don't use payments don't show payments details • Applies to both submitted and unsubmitted files. • If the payment method is BPAY then Direct Credit details are shown with a BPAY logo • If the payment method is Direct Debit then continues to show Direct Debit details • If the payment method is Direct Credit then continues to show Direct Credit details but without a BPAY logo (regardless of whether the custodian has BPAY set) • ESE is out of scope • Applies to both split and single payment arrangement
Impact	<div style="border: 1px solid red; padding: 5px;"> <p>Migration</p> <p>For existing custodians that have BPAY enabled all employers have been automatically migrated to BPAY</p> </div>

3 Validation And Rule Changes

Six new fields have been added to employer maintenance. These are:

New Field	Description	Field Type
Employer.ContributionsEnabled	This enables contribution submission for this employer.	Checkbox
Employer.EmployeeServicesEnabled	This enables employee services for the employer.	Checkbox
Employer.SplitBatch	If this field is checked it will automatically split a multi-employer batch containing this employer on submission. It is required when individual payments are to be made for this employer in the submission.	Checkbox
Employer.CommsSignatoryName	This is the name used on all email correspondence to employees. It applies to employee services only.	Text
Employer.CommsSignatoryPosition	This is the position used on all email correspondence to employees. It applies to employee services only.	Text
Employer.DDA	Any change to Direct Debit Authorisation needs to be authorised by checking this box.	Checkbox
Employer.STPEnabled	This enables STP for this employer.	Checkbox
Employer.ProductID	This is the Product Id approved by the ATO for the employer's Payroll System. It is an STP field.	Text
Employer.BMSName	This is the product name of the Business Management System used for payroll. It is an STP field.	Text
Employer.BMSVendor	This is the vendor name of the Business Management System used for payroll. It is an STP field.	Text
Employer.BMSVersion	This is the software version of the Business Management System used for payroll. It is an STP field.	Text

The following validation changes have been made:

Field	Description	Details	Alias Impacted
All date fields	All date field enrichments that convert multiple different date formats to the standard format 'yyyy-MM-dd' have been updated to allow another format. This new format is 'ddMMyyyy'. An error will no longer be raised if a date is added in this format. Instead, it will be converted to 'yyyy-MM-dd'.	For example, the updated enrichment for Member.BirthDate is: \$ {fn:formatDate(date:parseDate(_[Member.BirthDate],'dd-MMM-yy','dd-MMM-yy','dd-MM-yy','dd.MM.yy','dd/MM/yy','yyyy-MM-dd','yyyy.MM.dd','yyyy/MM/dd','dd-MM-yyyy','dd.MM.yyyy','dd/MM/yyyy','dd MMM yy','yyyyMMdd',' ddMMyyyy '),'yyyy-MM-dd')}	ENRICH.J.DB.0110 - ENRICH.J.DB.0116, ENRICH.J.DB.0011 - ENRICH.J.DB.0040
Employer payment code and employer refund Payment details	Errors will now be raised on one or more of the fields: Payment method code, Refund BSB number, Refund account number or Refund account name, if the respective field is empty AND Contribution Enabled is checked. As such, the regx validations for the 4 fields have been made optional.	If, for example, payment method code is empty and Contribution Enabled is set to true, an error will be raised on payment method code.	REGX (MIG.R.E4, MIG.R.E27, MIG.R.E28, MIG.R.E36), JUEL (MIG.J.E22, MIG.J.E23, MIG.J.E24, MIG.J.E25)

Employer direct debit payment details	An additional condition has been added on 3 existing JUEL validations for each of the 3 direct debit fields. An error will be raised on direct debit BSB number, account number or account name if the fields are empty while the Payment method code is set to 'DIRECTDEBIT' and contributions are enabled.	If Employer.DirectDebitBSBNumber, Employer.DirectDebitAccountNumber or Employer.DirectDebitAccountNameText are empty and both of the following conditions are true, a validation error will be raised: - <code>_Employer.PaymentMethodCode == 'DIRECTDEBIT'</code> - <code>_Employer.ContributionsEnabled == true</code> The validation error will be shown on the empty direct debit field.	MIG.J.E4, MIG.J.E5, MIG.J.E6
Employer DDA	A validation error will be raised on Employer DDA if direct debit payment has been selected but the DDA has not been checked.	If the Employer.PaymentMethodCode is 'DIRECTDEBIT', the Employer Direct Debit Authorisation must be set to true. The validation error will be raised on Employer.DDA.	MIG.J.E28
STP fields	There are 4 STP fields: Product id, BMS name, BMS vendor and BMS version. If STP has been enabled and one or more of these fields is empty, an error will be raised on the empty fields.	4 JUEL validations have been added, one for each of the STP fields. If Employer.STPEnabled is set to true and an STP field is empty, an error will be raised on this STP field.	MIG.J.E18, MIG.J.E19, MIG.J.E20, MIG.J.E21
Signatory name	The new field Signatory name has regex validations to verify the value is acceptable. The field also becomes mandatory if employee services has been enabled.	There are 2 validations to verify that a valid Employer.CommsSignatoryName has been provided. The first checks that multi-word names are separated by a single space. The second checks the value is less than 60 characters and only contains alphabetic characters and common punctuation. If signatory name is empty and Employer.EmployeeServicesEnabled is set to true, an error will be raised on signatory name until a valid name is provided.	REGX (MIG.R.E49, MIG.R.E50), JUEL (MIG.J.E26)
Signatory position	The new field Signatory position has regex validations to verify the value is acceptable. The field also becomes mandatory if employee services has been enabled.	There are 2 validations to verify that a valid Employer.CommsSignatoryPosition has been provided. The first checks that multi-word positions are separated by a single space. The second checks the value is less than 60 characters and only contains alphabetic characters and common punctuation. If signatory position is empty and Employer.EmployeeServicesEnabled is set to true, an error will be raised on signatory name until a valid name is provided.	REGX (MIG.R.E51, MIG.R.E52), JUEL (MIG.J.E27)
Payee Payment Method Code	'BPAY' has been added as a valid payment method code.	Previously, the grid rule validation only allowed a Payee.PaymentMethodCode of 'DIRECTCREDIT' or 'DIRECTDEBIT'. 'BPAY' is also now a valid code.	MIG.J.Pye.0002
Employer WPN	A validation has been added to raise an error if the WPN does not contain 8 or 9 digits.	The regex validation is: <code>^([0-9]{8,9})?\$</code>	MIG.R.E49

Employer ABN	<p>If an Employer WPN has been entered, an additional check has been added on Employer ABN to ensure the ABN is the same number as the WPN padded with 2 or 3 leading zeros. For example, if a WPN of 123456789 has been entered, the ABN should be 00123456789. This error message will also appear if a WPN has been provided, but an employer ABN has not been given. It will also appear if an ABN is supplied that is not 11 digits.</p> <p>As this padded WPN will not pass the standardised ABN check, the ABN validation MIG.J.E1 has also been updated to only validate if the WPN field is empty.</p> <p>Also, the regex validation that checks the provided ABN is 11 digits has been updated to a JUEL validation that only fires when employer WPN is empty. This is to avoid duplicate errors appearing from both this rule and the new rule discussed above.</p>	<p>MIG.J.E30: There are 3 conditions checked in this new validation. If all the conditions are satisfied no error message will be raised:</p> <ol style="list-style-type: none"> 1. The 8 or 9 Employer.WPN digits must be 'contained' within Employer.ABN. This is done using the fn:contains function. 2. The fn:regx function has also been used to check if the Employer.ABN is 11 digits long when a value for Employer.WPN has been given. 3. If Employer.WPN has been provided, a value for Employer.ABN must also be given. <p>MIG.J.E1: If an invalid ABN fails the fn:abn check, an error will now only be raised if Employer.WPN is also empty.</p> <p>MIG.R.E1: This regex rule has been removed, as it has been replaced by a JUEL equivalent rule.</p> <p>MIG.J.E31: This new rule uses fn:regx to embed the MIG.R.E1 regex within this JUEL rule. It also only fires when Employer.WPN is empty. This avoids the error messages MIG.J.E31 and MIG.J.E30 both appearing when ABN is empty.</p>	MIG.J.E30, MIG.J.E1, MIG.R.E1, MIG.J.E31
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4 Defects Fixed

Ticket No	Applies To	Description	Detail
JEDI-955	<input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input checked="" type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway	Reporting (EDX) is crashing when user is trying to extract a report	The problem only occurs with a huge employer response (27MB) due to prefetching of responses. Prefetching has been removed and fetching strategy on responses' relation has been changed to maintain a good performance.
JEDI-950	<input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input checked="" type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Lidex <input type="checkbox"/> Gateway	Improve performance of grid totals calculation	Improve performance of totals calculation so grid columns totals are shown in a more efficient manner
JEDI-762	<input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input checked="" type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Lidex <input type="checkbox"/> Gateway	Duplicate employee / transaction created	Scenario: 2 or more close matching exceptions are resolved at the same time. As they are close they overlap for rematching. Lets have exception1 and exception2 close to each other so they are included in rematching: <ul style="list-style-type: none"> • exception1 and exception2 are resolved by user(s) at the same time • both are resolved, contributions are created, caches updated • exception1 deletes exception and related entities and start rematching exception2 • exception2 deletes exception and related entities • rematching of exception successfully creates contribution (2nd one) for exception2 • it then tries to delete exception2 again but when not found, it continues instead of throwing exception and rollback
EPRT-154 80	<input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input checked="" type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Lidex <input type="checkbox"/> Gateway	Application does not audit Custom field changes when updated from an empty to a non-empty value	Simply change any value in the grid for an empty custom field to a non empty value. The change is not reflected in the audit history.
EPRT-154 77	<input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input checked="" type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Lidex <input type="checkbox"/> Gateway	Application reset Actual Total Amount and Employer Actual Min Amount when updating Member from Member form	Specifically applies to the UK scenario but will affect any rule that is reading contribution amounts when saving data in the member form.
EPRT-153 98	<input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input checked="" type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Lidex <input type="checkbox"/> Gateway	Financial year incorrect for UK	Tax year is currently showing as Australian, this has now been changed for the other jurisdictions. Expected behaviour: <ol style="list-style-type: none"> 1. Australia: 1st July (01/07) 2. Britain: 6th April (06/04) 3. Ireland: 1st January (01/01) 4. Papua New Guinea: 1st January (01/01) 5. Hong Kong: 1st April (01/04)
EPRT-153 64	<input checked="" type="checkbox"/> Employee <input type="checkbox"/> Contribution <input type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Lidex <input type="checkbox"/> Gateway	Emails not sent if welcome email doesn't get sent	If a welcome email is not sent (e.g. no employee address) then follow up emails are also not sent.
JEDI-952	<input type="checkbox"/> Employee <input type="checkbox"/> Contribution <input type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Lidex <input checked="" type="checkbox"/> Gateway	MACS (WDX) Message processing is sometimes slow	There have been instances where wdx messages are being consumed and processing is slow. The processing method has been enhanced to deal with large batches in a more efficient manner