Employer Portal Release Notes

Release February 2023

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1 Overview

Key Feature Deliveries

- Bulk product updates - this allows an employer to simply execute bulk transitions from one Product (USI) to another Product (USI)
- Member sync process - a new direct member sync process to update member details from an external registry has been implemented outside of SuperStream

Automated User Lockout

To help protect your data and further enhance the security of the SuperChoice platform, a new automated process is being introduced to deactivate dormant user accounts.

This process will run on a weekly basis, and will identify any user account that has not been used to login for more than 18 months, including via the Portal Website, API or other automated process. Once identified the account status will be set to INACTIVE.
Inactive accounts cannot be used to login, nor can the user perform the password reset process to regain access to the system. Inactive accounts can be reactivated by a user with Administrative access to the User Maintenance feature when required

The SuperChoice Employer Portal will not be available as follows:

UAT:

Friday 3rd February, 2023 10:00am – 3:00pm (AEDT)

Production:

Thursday 16th February, 2023 8:00pm – 11:00pm (AEDT)

1.1 Employer Portal Sprint and Release Dates 2023

Note that these release dates are subject to change

Release	UAT	Production
March	Tuesday 28-Feb	Tuesday 14-Mar
April	Tuesday 28-Mar	Tuesday 11-Apr
May	Wednesday 26-Apr	Tuesday 9-May
June	Tuesday 30-May	Tuesday 3-Jun
July	Tuesday 27-Jun	Tuesday 11-Jul
August	Tuesday 25-Jul	Tuesday 8-Aug
September	Tuesday 22-Aug	Tuesday 5-Sep
October	Tuesday 19-Sep	Tuesday 3-Oct
November	Tuesday 24-Oct	Tuesday 7-Nov
December	Tuesday 21-Nov	Tuesday 5-Dec

2 Enhancements

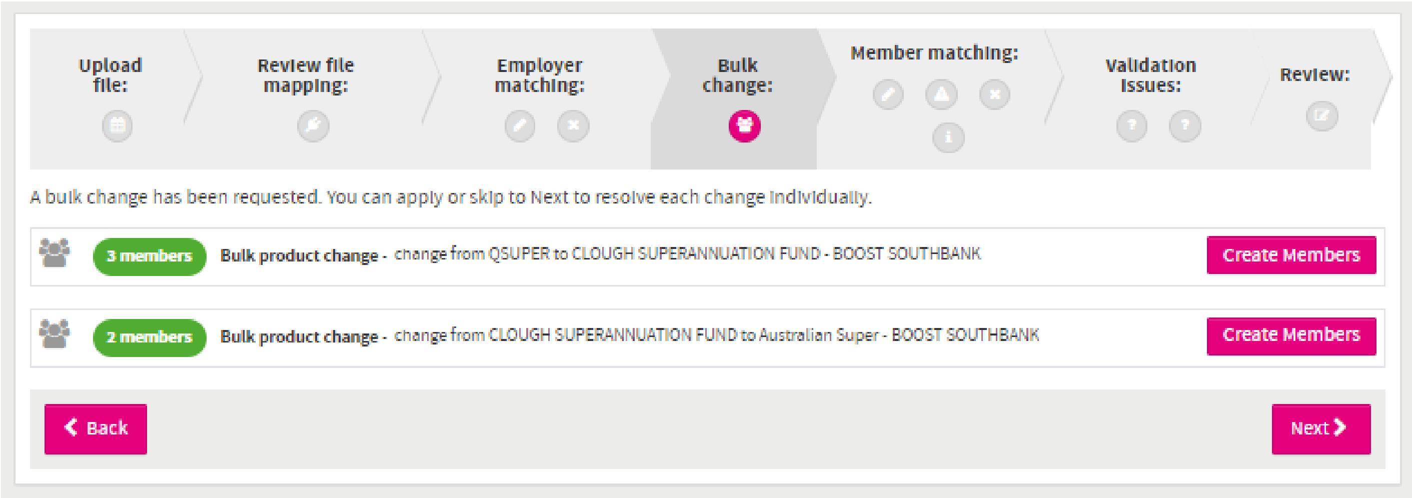
EPRT-16691

As an employer, I want to bulk change member's products

Description

A new bulk change step has been introduced for product change exceptions that affect more than one member. In the example below QSuper has changed to Clough Super for 3 members in the file and Clough has changed to Australian Super for 2 members.

- If the user elects to go ahead with a bulk change they click the "Create Members" button. The portal executes the bulk change and then brings them back to this screen or automatically moves to the next wizard step (depending on whether there are any unresolved bulk change notifications). This continues until the user has executed all the bulk changes they want to.
- Alternatively, the user can skip the bulk changes (and view the individual key data change exceptions) by pressing the Next button



Reason

This is a simple way for employers to manage a transition from one product to another for a bulk group of members.

Applies To

- [x] Contributions
- [x] Members
- [ ] STP
- [ ] Gateway

Assumptions

General

1. The bulk change screen is only shown when there are key data change exceptions. Generally this will occur when there is a fund change but the existing member number is kept the same. If a new fund is created for a member with a new member number then a key data change (& bulk change) is not shown.
2. Employers will still be able to individually resolve each (or some) key data changes by skipping the bulk update screen and resolving the key data change exceptions in the member matching step.
3. Bulk change groupings will not be shown when there is only one member affected
4. After creating new members, if the user has other bulk changes to fix then the bulk change that's just been actioned will no longer be shown..
5. Only the bulk change part of an exception can be bulk resolved. For instance, if an employee had their product and last name changed then the employer would still need to resolve the last name exception after the bulk product change is applied
6. After a bulk change is applied, post match enrichments (e.g. to set benefit category) are run and bulk/key data change matching is re-applied to all bulked members. This means that a last name and product change (for instance) will result in a Last Name key data change after the product bulk resolution
7. Applies to both member and contribution uploads
8. The number of members affected by the bulk change are shown
9. Members affected don't appear under a bulk change notification.
10. Bulk change is only run when the key data change system setting is turned on
11. A new wizard step has been added to member and contribution file upload for bulk change
12. If a user accesses a file that has a bulk change not actioned then the bulk change wizard step is shown
13. Bulk change members only apply to members that have been matched. Unmatched members need to be resolved in the matching screen.
14. There is not a historical filter for bulk change.
15. The user can press next to bypass the bulk change notifications however they can not return to this screen
    - Pressing previous on the next screen will return to either historic contributions or file mapping (as currently)
    - There will be no warning popup - in the future the back button wlll be supported
16. The user can hit the button for the bulk changes in any order. The changes themselves are independent of each other so the order doesn't matter.
17. If there are no bulk changes for a file then the "Bulk Changes" step will be skipped and that element won't appear in the ribbon
18. The bulk change screen is not paginated.
19. Multi employer files are supported. Bulk change exceptions are split by employer.

Product

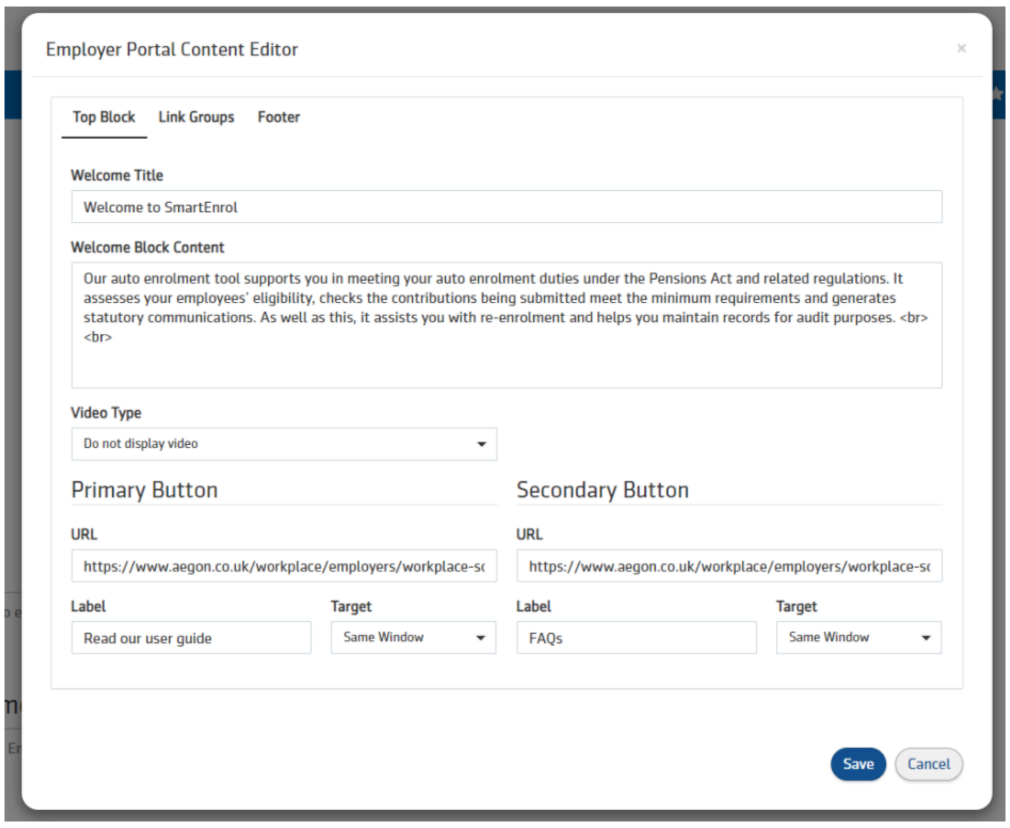
1. Bulk product changes always involve creating a new member and inactivating the previous membership.
2. If "Create Member" is pressed on an individual key data change exception then the previous membership is not inactivated.

	3. If there are two separate product bulk changes (e.g. Hesta to Aware and Unisuper to AMP) then there will be separate bulk product change exceptions to resolve. There can be any number of product bulk changes. 4. The Product USI is shown as hover text when hovering the mouse over the product name. 5. After selecting "Create Member" all buttons are disabled until the process has completed. 6. Closed products are still shown on the matching screen and changing a member to a closed fund still shows an error - this is not a fund redirect feature 7. A product change requires a request for a product to move from one product to another. Any changes that are empty on file or database are ignored.
Impact	A new wizard step has been introduced. This applies to all users and cannot be switched off. **Important Notes** 1. Create member performance is quick for small bulk updates but this could take some time for large numbers of bulk updates 2. Currently, if an employer chooses to bypass bulk changes they cannot return to the bulk change screen. If they change their mind and want to bulk update, they should delete their file from history and re-upload.

<table>
<tr><th>EPRT-15051</th><th>As a custodian, I want to automatically sync member details</th></tr>
<tr><td>Description</td><td>Currently member number updates are automatically applied based on an MROR response. We now have a new facility to update member details outside of Super Stream.

The portal listens to member responses and updates the relevant member with the correct member number.

The member is found by
1. Checking if the member context id exists in the message
    a. if it does then lookup the member based on this id.
    b. If not present then the member is matched on TFN, DOB and Surname but only for all states except inactive.
2. For the situation where there are multiple active members we update both memberships with the new member number. This can be across multiple employers within the custodian.
3. If no members or multiple members are matched then an error is written to the logs.</td></tr>
<tr><td>Reason</td><td>This gives another option for custodians to sync member data outside of Super Stream</td></tr>
<tr><td>Applies To</td><td>☐ Contributions
☑ Members
☐ STP
☐ Gateway</td></tr>
<tr><td>Assumptions</td><td>• The file is also be updated to indicate this is a change as if the user had changed the data. The reason for this is that a user should be able to select "Rows with Changes" in the grid for the submitted file and see the updated member numbers.
• An informational validation created against the member and the following message
    • "X has updated the _Member.MemberClientIdentifier from Y to Z". where X is the product name, Y is the original member no and Z is the new member number. _Member.MemberClientIdentifier is the display name for member number (e.g.. "Group Personal Pension has updated the Plan number from ABC to XYZ")
    • If the existing member no is empty then "X has set the _Member.MemberClientIdentifier to Z" (e.g.. "Group Personal Pension has set the Plan number to XYZ")
• Employers can filter member responses in file history using the "Fund Member Response" filter
• Drilling into the file in history shows the member response as an information.
• The Member IDs that have been changed are recorded as changes for that submission and highlighted to user
• It is not a requirement to auto send emails
• Member number updates will only arrive after held member files are released</td></tr>
<tr><td>Impact</td><td>No impact to existing custodians. This is a custodian configurable setting which needs to be explicitly turned on.</td></tr>
</table>

EPRT-16465	As a custodian, I do not want a video to be shown
Description	A new drop down option for Video Type has been added "Do not display video". If this is selected for a custodian, then a video is not shown on the dashboard/home screen. 
Reason	Allows custodians to tailor the employer user experience
Applies To	☑ Contributions ☑ Members ☑ STP ☑ Gateway
Assumptions	• Applies to all employers for a custodian
Impact	No impact. This is a custodian configurable setting which needs to be explicitly turned on.

EPRT-15051	As a user, I want to access an online knowledge hub
Description	A custodian can now add a new link for access to a knowledge hub. This link opens in a new page. Only roles that are given the "Knowledge Hub" permission will be able to see the new link.
Reason	Allows a user to access online help
Applies To	☑ Contributions ☑ Members ☑ STP ☑ Gateway
Assumptions	• This feature is turned off by default and needs to be enabled in the My Custodian settings. • The link URL and icon can be changed but not it's position (next to the Dashboard link).
Impact	No impact. This is a custodian configurable setting which needs to be explicitly turned on.

3 Validation And Rule Changes

<table>
<tr><th>Field(s)</th><th>Description</th><th>Details</th><th>Alias Impacted</th></tr>
<tr><td>Employment Status Code (Full Time)</td><td>Two new values have been added that will be converted to ‘FULL TIME’. These are
‘PF’ (Permanent Full Time) and
‘TF’ (Temporary Full Time).</td><td>The updated regx is: (?i)(^FT$|^FULLTIME$|^F$|^F\/T$|^FULL.*|^PF$|^TF$)</td><td>ENRICH.R.MEM.0018</td></tr>
<tr><td>Employment Status Code (Part Time)</td><td>Two new values have been added that will be converted to ‘PART TIME’. These are
‘PP’ (Permanent Part Time) and
‘TP’ (Temporary Part Time).</td><td>The updated regx is: (?i)(^PT$|^P$|^P\/T$|^PART.*|^PP$|^TP$)</td><td>ENRICH.R.MEM.0019</td></tr>
<tr><td>Employment Status Code (empty)</td><td>If ‘x’ is entered in the employment status code, it will now be stripped instead of raising an error. Also, ‘unknown.*’ has been removed. This is because ‘unk.*’ matches anything containing ‘unk’ (e.g. unknown).</td><td>The updated regx is: (?i)(^unk.*|^na$|^n\/a$|^x$)</td><td>ENRICH.R.MEM.0037</td></tr>
<tr><td>Title (MISS)</td><td>A new enrichment has been added to convert a title of ‘MIS’ to ‘MISS’.</td><td>The regx is: (?i)(^mis$)</td><td>ENRICH.R.MEM.0038</td></tr>
<tr><td>Title (FR)</td><td>A new enrichment has been added to convert a title of ‘FATHER’ to ‘FR’.</td><td>The regx is: (?i)(^father$)</td><td>ENRICH.R.MEM.0039</td></tr>
<tr><td>Title (.)</td><td>A new enrichment has been added to strip any ‘.’s from titles. For example, ‘MR.’ will become ‘MR’.</td><td>The new regx is: [.]</td><td>ENRICH.R.MEM.0040</td></tr>
<tr><td>Title (Case)</td><td>A new enrichment to convert any title entry to upper case has been added. For example, ‘Mrs’ will be converted to ‘MRS’. As all the title lookups are capitalised, this means lower case entries are now correctly identified.</td><td>The new JUEL enrichment will fire if Member.PersonNameTitleText is not empty. In this case, the following JUEL condition is run: ${fn:upper(_[Member.PersonNameTitleText])}

This converts the title to all upper case.</td><td>ENRICH.J.MEM.0036</td></tr>
<tr><td>TFN</td><td>A regex enrichment has been updated to remove any spaces or dashes '-' in member TFN. Previously, only spaces or dashes after the 3rd and 6th digit were removed.</td><td>The updated regx is: [\s*,-]</td><td>ENRICH.R.MEM.0003</td></tr>
<tr><td>Contributions pay period start & end date</td><td>A set of brackets was missing on the regex expression for contribution pay period start date and contribution pay period end date. This was causing some incorrect date formats to not raise an error. This has been fixed.</td><td>The missing set of brackets for Contributions.PayPeriodStartDate and Contributions.PayPeriodEndDate have been added right before the ‘?’ and right after the ‘^’:
^((((19[0-9][0-9])|(2[0-9][0-9][0-9]))([-])(0[13578]|10|12)([-])(0[1-9]|[12][0-9]|3[01]))|(((19[0-9][0-9])|(2[0-9][0-9][0-9]))([-])(0[469]|11)([-])([0][1-9]|[12][0-9]|30))|(((19[0-9][0-9])|(2[0-9][0-9][0-9]))([-])(02)([-])(0[1-9]|1[0-9]|2[0-8]))|(([02468][048]00)([-])(02)([-])(29))|(([13579][26]00)([-])(02)([-])(29))|(([0-9][0-9][0][48])([-])(02)([-])(29))|(([0-9][0-9][2468][048])([-])(02)([-])(29))|(([0-9][0-9][13579][26])([-])(02)([-])(29)))?$</td><td>MIG.R.Con.0001
MIG.R.Con.0002</td></tr>
<tr><td>BMS upload mapping</td><td>As the BMS file type is no longer being used, all mapping references to BMS upload have been removed.</td><td>The tab ‘BMS UPLOAD.MAPPING’ has been removed as well as the row referencing BMS upload mapping in FILETYPE.JUEL.</td><td></td></tr>
</table>

4 Defects Fixed

Ticket No	Applies To	Description	Detail
EPRT-16782	☐ Employee ☑ Contribution ☑ Member ☐ STP ☐ Gateway	Adding new SMSF in employer maintenance should update immediately	Currently the SMSF ATO service is called only when the Employer is saved after clicking the save button in employer update. The side effects are that a complaint smsf is shown as non compliant and the employer name is not populated. This has now been resolved.
EPRT-16718	☐ Employee ☐ Contribution ☐ Member ☑ STP ☐ Gateway	In STP2 ATO response, employer level errors is only mapped to one of the employees	**Steps to reproduce:** 1. Upload an STP2 file with employer level errors and submit. 2. Wait for an ATO response **Actual:** The ATO employer level error is only applied to one of the employees of the employer: **Expected**: Since it's employer level error, it should apply to all employees of the employer.
EPRT-16747	☐ Employee ☐ Contribution ☐ Member ☑ STP ☐ Gateway	Email is sent to all employers in an STP2 multi-employer file after each ATO Response	**Steps to reproduce:** 1. Upload a multiple employer STP2 file and submit. 2. Wait for an ATO response **Actual:** All emails are sent to all employers in the STP2 file **Expected:** An ATO response is only sent to one of the employers, so one one email should be sent to the corresponding employer,
EPRT-16716	☐ Employee ☑ Contribution ☑ Member ☐ STP ☐ Gateway	Grid display formatting issue for date and numerics for formulas converted from excel	Data is now coming through instead of formulas as expected. Formatting though is incorrect. • Dates that were derived from a formula are coming through as excel serial number instead of the date format displayed. • Numerics derived from a formula sometimes present in the portal with many decimals, but present in excel with two decimal places only.
JEDI-1008	☐ Employee ☑ Contribution ☑ Member ☐ STP ☐ Gateway	Add member on grid creates empty custom fields	When adding a member on the grid, needless empty custom fields are created. Over time this can slow down file uploads for the employer.