Employer Portal Release Notes

Release March 2023

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1 Overview

Key Feature Deliveries

• Bulk schedule and category updates - this allows an employer to simply execute bulk transitions from schemes, categories and schedules

The SuperChoice Employer Portal will not be available as follows:

UAT:

Monday 6 March, 2023 12:00pm - 3:00pm (AEDT)

Production:

Tuesday 21 March, 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
April	Tuesday 28-Mar	Tuesday 11-Apr
Мау	Wednesday 26-Apr	Thursday 11-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

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2 User Impact

Below are the main areas impacting the employer user experience for this release.

2.1 Key data change

The key data change screen has changed for employers to enable scheme and category key data change information to be shown. The red highlighted boxes explains what has moved.

- Member No. has moved
- Employment Status has moved
- To make way for Scheme and Category (note that only Benefit Category will be shown for employers that don't use schemes).

4	SEVENTEEN SCOTLAND — 328493 — SCHEME MIGRATION TEST EMPLOYER Remove						
	Key Data Change - Some key details have changed						
	Details you have supplied in the file			Existing details we have from previous files KWrong Employee			
	Name	Gender Update	Birth Dt	Name	Gender Update	Birth Dt	
	SEVENTEEN SCOTLAND		1979-03-29	SEVENTEEN SCOTLAND	MALE	1979-03-29	
	Payroll No.	TFN	Member No.	Payroll No.	TFN	Member No.	
	328493		5106523	328493		5106523	
	Address	E-mail	Phone Test	Address	E-mail	Phone Test	
	Australia		Employment Status	139 STREET 2232 KIRRAWEE NSW Australia		Employment Status	
	Fund Name	Scheme	Category	Fund Name	Scheme	Category	
	MLC INSURANCE (SUPER)	EMPLOYER DEFAULT SCHEME	01: Management [100402]	MLC INSURANCE (SUPER)	EMPLOYER DEFAULT SCHEME	03: Non-Contributory Staff [100404]	
	• Use file details:	✓ Update Member		Use historic details:	✓ Ignore Changes 🧕		

2.2 Bulk Change Notifications

Bulk change exceptions will now be shown when multiple member's schedules are changed (e.g. by incorrectly selecting a weekly schedule for a monthly file) or if categories change. Category changes will generally occur for employers only if they include category on the file. Bulk changing of schemes and categories is normally a process that custodians will undertake on behalf of employers.

2.3 Accessibility

Highlighted focus in now shown on the select file/pay cycle screen

User Impact – 4

3 Enhancements

3.1 Bulk update categories and schemes

EPRT-16693	As a user,	I want to b	ulk update	categories/sc	hemes for n	nembers			
Description	A new bulk change step has been introduced for category change exceptions that affect more than one member.								
	Upload file:	Review f	file mapping:	Employer matching:	Bulk change:	Member mat	tching:	Validation issues:	Review:
	A bulk change has been requested. You can apply or skip to Next to resolve each change individually.								
	Image: Category bulk change - change from 03: Non-Contributory Staff [EMPLOYER DEFAULT SCHEME TWO] to 01: Management [EMPLOYER DEFAULT SCHEME TWO] - SCHEME MIGRATION EMPLOYER TWO Update Members								
	Category bulk change - change from 03A: Non-Contributory Staff [EMPLOYER CLOSED CATEGORY SCHEME] to 03A: Non-Contributory Staff [EMPLOYER DEFAULT SCHEME TWO] - SCHEME MIGRATION EMPLOYER TWO								
	< Back								Next >
	 If the user elects to go ahead with a bulk change they click the "Update 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 								
	Data On The	e File			Bulk Exceptio	'n	Key Data Change Buttons Shown		Shown
	Fund Changed	Scheme Changed	Category Changed	Person Key Data Changed	Product Bulk Change	Category Bulk Change	Create Member	Update Member	Create Employee
	•	•	Ø		0		•		
		0	0			Ø	•	Ø	
	0	0			0		•		
			•			•	•	•	
		0				•	•	Ø	
		0	0	0	0		•		0
		0	0	0		•	•	•	0
	0	•		•	•		•		•
			•	•		•		•	•
		•		•		•		•	0

This is a simple way for employers and custodians to manage a transition from one scheme or category to another for a bulk group of members.

Applies To	 Contributions Members STP Gateway
Assumptions	General
	 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 or if a scheme or category has changed. 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 updating 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 will 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. Multi employer files are supported. Bulk change exceptions are split by employer.

Category/Scheme

- 1. Category changes always involve updating the member's category.
- 2. If there were two separate category changes then there will be separate category change exceptions to resolve with grouped members
- 3. Scheme changes aren't explicitly supported but will be supported implicitly through a bulk category change. Since categories can't be shared between schemes, a scheme change will effectively involve transferring all members to a new category.
- 4. If a category has been moved to a new scheme (i.e. the scheme changes) then the product that the member is linked to could also change. This should result in a bulk fund change exception since the fund has changed and this takes priority.
- 5. If the category code is the same for the new scheme then it should still be matched to the new category in the new scheme.
- 6. Bulk change
 - a. change Scheme A (Cat A) to Scheme A (Cat B)
 - b. change Scheme A (Cat A) to Scheme B (Cat B)
 - c. change Scheme A (Cat A) to Scheme B (Cat A)

Performance	To be calculated
Impact	 This applies to all users and cannot be switched off. No impact unless employers use schemes and categories Important Notes 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. In this release the heading in the key data change screen will be hardcoded to Scheme and Category and not use the custodian specific terminology for employers that have schemes and categories

Enhancements – 6

3.2 Scheme and category key data changes

EPRT-11986	As an employer, I want to see category changes as key data change exceptions					
Description	A change in categor used. Scheme and C	ry is now shown a Category are also	s a key data except displayed.	on. This includes when the scheme has changed but the same category code has been		
	Category					
	On File	On Database	Key Data Change			
			×			
		Scheme A Cat A	×			
	Scheme A Cat A		×			
	Scheme A Cat A	Scheme A Cat A	×			
	Scheme A Cat A	Scheme A Cat B	•			
	Scheme A Cat A	Scheme B Cat A	0			
	Scheme A Cat A	Scheme B Cat B	0			
Reason	This allows employers to simply manage category changes					
Applies To	Contributions					
	Members					
	Gateway					
Assumptions	If there are both product and category changes (inc. implicit scheme change) in the file for members then					
	 there is only one key data change. In this scenario, the change is added to the product bulk update. the update member button should not be shown - only the create member button 					
	 If only the category changes then both add and update member are shown 					
	If Category is set then category name is shown otherwise Benefit Category is shown in the Category column					
Impact	Applies to all custoo	dians. The key dat	ta change screen ha	s been amended (see impact section above)		

Enhancements – 7

3.3 Bulk schedule changes

EPRT-11986	As an employer, I want to be able to back out of bulk schedule changes					
Description	Bulk schedule changes are automatically applied when uploading a file. The employer is now given a warning in the bulk changes screens that allows them to back out the schedule change. This is useful for scenarios where an employer has accidentally picked the wrong schedule (e.g. weekly for a monthly file). The message on the bulk change screen is purely informational.					
	Review requests: Select pay cycle: Review file mapping: Employer matching: Bulk change: Member matching: Validation issues: Review: Summary and submit: A bulk change has been requested. You can apply or skip to Next to resolve each change individually. A bulk change individually. Bulk change: Member matching: Validation issues: Review: Summary and submit:					
	69 members Schedule bulk change - schedule has changed from quarterly to MONTHLY Backout K Back Next >					
	 Notes The message says "Schedule change - schedule has changed from [schedule from name] to [schedule to name]. The popup over schedule name shows the schedule period The back out button deletes the file after presenting a confirmation dialog 					
Reason	This allows employers to manage schedule changes if they have made a mistake					
Applies To	 Contributions Members STP Gateway 					
Assumptions	 Bulk schedule changes always involve updating the member's schedule. For schedule changes, there can be more than one bulk schedule change but all members are only moved to one schedule since only one schedule can be selected for a file Typically all members on the file will be included in the bulk notification Any missing members are not included No change to schedule can occur if the user selects "Use dates in file" or "Specific dates" When members move from no schedule to a new schedule no bulk change is shown Users using schedules are only linked to one employer 					
Performanc e	35 minutes to load 120K. Back out takes approx. 32 seconds,					
Impact	Applies to all custodians. but only impacts employers that use schedules					

Enhancements – 8

4 WCAG Compliance

• Select Pay Cycle screen changed to be keyboard accessible and show highlighted focus



WCAG Compliance – 9

5 Validation And Rule Changes

Field(s) impacted Description		Details	Alias
At Work Indicator (TRUE)	A new enrichment has been added to convert case insensitive entries of 'Y' and 'YES' to the standard format of 'TRUE' for the field MemberRegistration.AtWorkIndicator.	The enrichment regex expression is: (? i)(^Y\$ ^YES\$)	ENRICH.R.MEM.0041
At Work Indicator (FALSE)	A new enrichment has been added to convert case insensitive entries of 'N' and 'NO' to the standard format of 'FALSE' for the field MemberRegistration.AtWorkIndicator.	The enrichment regex expression is: (? i)(^N\$ ^NO\$)	ENRICH.R.MEM.0042
E-mail Address	A new enrichment has been added to strip an entry of '0' from Member.E-mailAddressText. This will leave the field empty.	The enrichment JUEL expression is: \$ {_[Member.E- mailAddressText].trim().equals("0")} This enrichment will also strip any e- mail address' containing spaces	ENRICH.J.MEM.0037
Telephone Landline	A new enrichment has been added to strip an entry of '0' from Member.TelephoneMinimalNumberLandline. This will leave the field empty.	The enrichment JUEL expression is: \$ {_[Member.TelephoneMinimalNumber Landline].trim().equals("0")} This enrichment will also strip any landlines containing spaces around a '0'.	ENRICH.J.MEM.0038
Mobile	A new enrichment has been added to strip an entry of '0' from Member.TelephoneMinimalNumberMobile. This will leave the field empty.	The enrichment JUEL expression is: \$ {_[Member.TelephoneMinimalNumber Mobile].trim().equals("0")} This enrichment will also strip any mobiles containing spaces around a '0'.	ENRICH.J.MEM.0039
Contribution amount fields	For all 8 contribution fields, a new validation has been added to raise an error when contributions are provided for an inactive member.	Eight separate JUEL validations have been added for each of the contribution amount fields: Contributions.SuperannuationGuaran teeAmount Contributions.AwardOrProductivityA mount Contributions.PersonalContributionsA mount Contributions.SalarySacrificedAmount Contributions.VoluntaryAmount Contributions.SpouseContributionsA mount Contributions.ChildContributionsAmo unt Contributions.OtherThirdPartyContrib utionsAmount	MIG.J.Con.0021 - MIG.J.Con.0028

An error will be raised if any value other than '0' or '0.00' appears in the contribution amount field.	
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Validation and Rule Changes – 10

Suburb, Sex code, Address line 1, Address usage code, Country code	The 5 fields: Member.LocalityNameText, Member.SexCode, Member.AddressDetailLine1Text, Member.AddressUsageCode and Member.CountryCode have validations to make the fields mandatory if Payee.USI has been provided. These have been updated to also make these fields mandatory if a value for Payee.TargetElectronicServiceAddress has been provided. This means an error will be raised if these fields are empty for both SMSFs and APRA funds.	An example of the updated GRID_RULES.JUEL validation is: \${(!empty _Payee.USI or !empty _Payee.TargetElectronicServiceAdd ress) ? !empty _Member.LocalityNameText : true	MIG.J.Mem.0036 - MIG.J.Mem.0040
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Validation and Rule Changes – 11

6 Defects Fixed

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EPRT-167 54	 Employee Contribution Member STP Gateway 	Member audit history shows changes for fields not available (e.g. employee portal fields) in the contribution grid	 Scenario Navigate to the grid Select a member and open the member form Do some updates on member eg: change member status , or change some data eg: Title Save the changes. Now check the member audit history Some extra checkbox fields (employee fields like TFN Declaration) are also changed from blank to FALSE. These don't apply to contributions, only to the employee portal.
EPRT-163 45	 Employee Contribution Member STP Gateway 	At Work Indicator and Insurance Opt Out Indicator from blank to FALSE for any data change using Member popup and it leads to create MRRs	 Scenario Navigate to the grid Select a member and open the member form Edit a member with no data in the checkbox fields (At Work Indicator and Insurance Opt Out), Save the changes. Now check the member audit history The At Work Indicator and Insurance Opt Out Indicator are changed from blank to FALSE.
EPRT-170 32	 Employee Contribution Member STP Gateway 	Rollovers results screen has shrunk in size	Scenario: 1) Login in to Portal 2) Click Rollovers menu 3) Click search on Rollover landing page Now see the screen, The page display only 40% of the screen size.
EPRT-169 72	 Employee Contribution Member STP Gateway 	Employer Search Result displays 'undefined records' in warning message, instead of actual record numbers when max limit is exceeded	 Scenario: Go to My Custodian, Under 'Preference' tab, Change the 'Employer Maintenance Response Limit' to a value, lower than the records for a search filter. I.e. if you search on Employer Organisation Name 'xyz' and you received 50 records then set this limit to <50. Search using the search filters so that you have more records than the 'response limit' Observe the 'warning' message' bar in between the Search Filter Panel and the Search Result Panel. Employer Search Result display shows 'undefined records' instead of actual record numbers when max limit is exceeded.
EPRT-167 78	 Employee Contribution Member STP Gateway 	Post Match Contribution field rules not running on member form Save	When an update is made to the member form, all contribution based field rules are being run but the results are not being saved correctly. This is resulting in inconsistent outcomes when the same steps are done but a different order is followed. Mainly affects UK based scenarios.
EPRT-150 18	 Employee Contribution Member STP Gateway 	When user returns to the Employer Maintenance tab after browsing one of the Employers in the search result application should remember/list the last search result	 Scenario: Click on Employer Maintenance tab Search by typing in any search filter criteria and browser to one of the employer's tab from the search result Click on Employer Maintenance tab again Expected : Application should show the last search Employer list with filters also set to last search. Actual: Filter is reset and there are no employers listed
EPRT-170 29	 Employee Contribution Member STP Gateway 	Bulk change needs to handle large number of same member/ multiple product change items	 For the last release we put in a mechanism to exclude items from the bulk change where multiple product changes related to the same member. This allowed those items to pass through to the standard exceptions screen where they would be processed correctly. However we need these types of items to be handled within the bulk change before we can process certain types of employer files (ones where every single member has multiple rows). In these scenarios : a member M1 with a product change appears on multiple rows - contribution C1 and contribution C2, for example

			 each row gives rise to a key-data exception - KD1 and KD2 When the bulk change handles this scenario it needs to : create a new member for M1 once only create both contributions C1 and C2 delete KD1 if it contains no other key-data changes delete KD2 if it contains no other key-data changes The total number of members shown are the number of unique members and not the no of rows affected
EPRT-170 01	 Employee Contribution Member STP Gateway 	UI doesn't keep session alive during long bulk product change	Currently executing a large (60k) bulk product change takes just under 2 hours but the UI session times out after an hour. That generates an error on the screen even though the processing is continuing in the background and provides a less-than-smooth user experience That should allow the spinning wheel to keep going for the whole time and no errors to be shown. When the bulk product change is finished the UI should continue smoothly on to the next stage. the Also note that a large file containing (120K bulk updates) will take about 3 1/2 hours.
EPRT-169 55	 Employee Contribution Member STP Gateway 	Remove pagination on bulk change screen	 Scenario: Upload file to produce more than 15 bulk update records. Click on create member from bulk first page. Notice even though all create member button have been clicked , the records from second page are not shown. User needs to click page 2 to attend to create member from second page. Click on all create members from second page which will be in page 1 now. Wait a while and the page number 2 will change to 1 as only few records will be remaining. At this time user need to click on the page again , then only remaining bulk records will be shown. User can move to next page after resolving all bulk exceptions. Note - This issue has been resolved by removing pagination on the screen under the assumption that there won't be hundreds of bulk change items

Defects Fixed – 13