

Employer Portal Release Notes

Release June 2023

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1 Overview

Key Feature Deliveries

- schedule, scheme and category details in the grid - this helps employers that have multiple schemes and/or schedules and also allows a custodian to download scheme and schedule data for multiple employers.

⚠ Cessation of automated C-code fund translation

For a small group of custodians, as part of the Kernel migration, existing Kernel C-codes were automatically translated to USIs by the portal. We are proposing to discontinue this feature from the beginning of July. For the small number of employers using C-Codes, these can either still be supported using our payroll fund code feature or alternatively they can change their files to use USIs. Please speak to your account manager to confirm whether your custodian is affected and to discuss a transition plan.

The SuperChoice Employer Portal will not be available as follows:

UAT:

Thursday 15 June, 2023 12:00pm – 3:00pm (AEST)

Production:

Tuesday 4 July, 2023 7:00pm – 10:00pm (AEST)

1.1 Employer Portal Sprint and Release Dates 2023

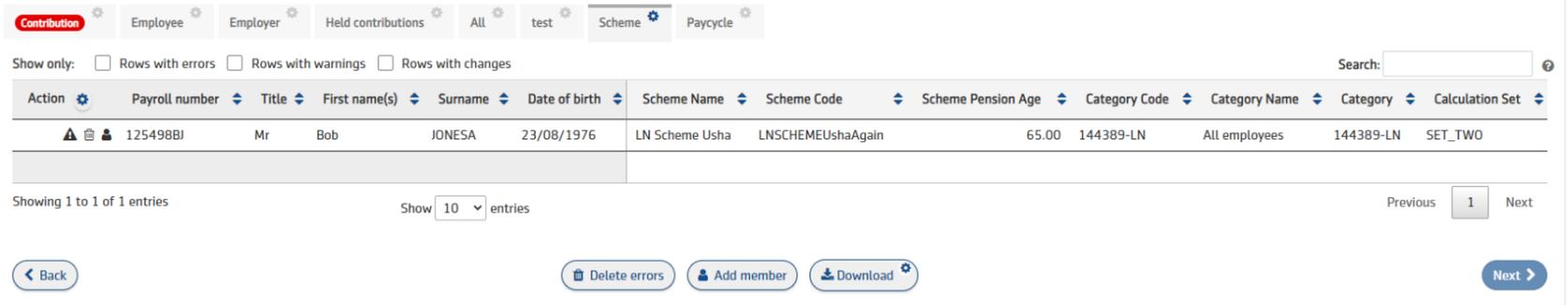
Note that these release dates are subject to change

Release	UAT	Production
July	Tuesday 11-Jul	Tuesday 1-Aug
August	Tuesday 8-Aug	Tuesday 22-Aug
September	Tuesday 29-Aug	Tuesday 12-Sep
October	Tuesday 19-Sep	Tuesday 10-Oct
November	Tuesday 24-Oct	Tuesday 7-Nov
December	Tuesday 21-Nov	Tuesday 5-Dec

2 User Impact

No user impact unless the new schedule, scheme and category columns are added to the default template

3 Enhancements

<p>EPRT-17416</p>	<p>As a user, I want to see all schedule, scheme and category details in the grid</p>
<p>Description</p>	<p>Currently schedule, scheme and category fields are not shown in the grid. The schedule name and frequency, scheme code and name, category code and name and all scheme and category custom fields are now available to be shown in the grid.</p> <p>Here is all your data for the final check before submitting it:</p> 
<p>Reason</p>	<p>This allow employers to view and download schedule, scheme and category data. Helps an employer or custodian to extract scheme and schedule data.</p>
<p>Applies To</p>	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Contributions <input checked="" type="checkbox"/> Members <input type="checkbox"/> STP <input type="checkbox"/> Gateway
<p>Assumptions</p>	<ul style="list-style-type: none"> • Applies to both member maintenance and the contribution grid • Schedule, scheme and category fields can exist on any tab • There can be multiple schedules, schemes and categories displayed in the grid • Schedule, scheme and category fields are available for download. The display name is used for the column header. • Can filter and sort on the new fields • No schedule, scheme and category fields are totalled • Scheme and category custom fields are shown • Australian baseline templates have been updated to allow selection of these fields • Not required for the member form • All fields are locked • Is also shown in the validations page • Only the text is shown - no drop down if there is a pick list of values • Existing employers will need to reset their template to pick up the changes
<p>Impact</p>	<p>Fields need to be manually added by the custodian for employers to view. There will be no impact if the fields are not added by the custodian</p>

4 Validation And Rule Changes

Field(s)	Description	Details	Alias
Date fields using fn:daysBtw or fn:yearsBtw	For various enrichment and grid rules, the function fn:daysBtw and fn:yearsBtw were used to calculate the amount of days or years between 2 date fields. This function required the dates to be in the same format given as a third parameter and a fourth parameter giving the region. These functions have been simplified to fn:daysBetween and fn:yearsBetween. These new functions only take in 2 parameters (the 2 dates) and no longer require the dates to be in the same format.	<p>The previous function required the format: fn:daysBtw(Date1, Date2, date format, region) and required both dates to be in the same format.</p> <p>The new function's format is: fn:daysBtw(Date1, Date2), where the dates can be different formats.</p> <p>This has been applied to various rules under ENRICHMENT.JUEL and GRID_RULES.JUEL</p>	<p>fn:daysBetween: M.ENRICH.J.CUST.MLC.0010 ,</p> <p>MIG.J.Mem.0011, MIG.J.Mem.0013, MIG.J.Con.0001, MIG.J.Mrg.0003, MIG.J.Mrg.0004</p> <p>fn:yearsBetween: MIG.J.Mem.0010, MIG.J.Con.0015 -MIG.J.Con.0020</p>
Contribution fields	Previously, contributions could not be received for members over the age of 75. This has been updated following a refinement by the ATO to now allow contributions for a member up to age 75 years and 2 months.	<p>The rule has been updated to allow contributions up to 75 years and 2 months. This has been done by adding a new condition if the member is more than 75 years old. The fn:monthsBtwPeriod function checks that less than 2 months has passed since the 75 years mark. For example:</p> <pre>fn:yearsBetween(_Member.BirthDate, _Contributions.PayPeriodStartDate) == 75 and fn:monthsBtwPeriod(_Member.BirthDate, _Contributions.PayPeriodStartDate, 'yyyy-MM-dd', 'UK') >= 2)</pre>	MIG.J.Con.0016 - MIG.J.Con.0020
Child Contributions Amount	This check to ensure contributions are not supplied for members over 75 years and 2 months has also been applied to the field Contributions.ChildContributionsAmount.	With this validation introduced for Contributions.ChildContributionsAmount, no contribution amounts can now be supplied for members over 75 years and 2 months.	MIG.J.Con.0015
Common Mapping for Birth Date, E-mail and Mobile.	New mappings have been added for e-mail, mobile and birth date.	<p>These new mappings have been added under the COMMON.MAPPING tab.</p> <p>For Member.BirthDate, 'Birth Dt' has been added.</p> <p>For Member.E-mailAddressText, 'E-mail' has been added.</p> <p>For Member.TelephoneMinimalNumberMobile, 'Mobile' has been added.</p>	
Payee USI	A new enrichment has been added to convert Payee.USI to upper case. This is to resolve an issue where, if a Payee.USI was entered in lower case, it would not match to the upper case Payee.USI.	<p>The new enrichment to convert any Payee.USI entry to upper case is:</p> <pre>\${fn:upper (_[Payee.USI])}</pre>	ENRICH.J.MEM.0040

5 Defects Fixed

<p>EPRT-173 90</p>	<p><input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input checked="" type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway</p>	<p>Portal displays an incorrect birth date for employees older than 80 when uploading from an Excel file</p>	<p>Scenario:</p> <ol style="list-style-type: none"> 1. Upload an Excel file containing employees > 80 years of age. 2. Verify their age in UI . <p>Actual Result:</p> <p>The employee's birth date is future dated</p>
<p>EPRT-175 96</p>	<p><input checked="" type="checkbox"/> Employee <input type="checkbox"/> Contribution <input type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway</p>	<p>Spinning wheel is not shown on the employee portal when submitting</p>	<p>To make it clearer to an employee when a submission is in progress, a spinning wheel has been added with status updates.</p>
<p>EPRT-120 97</p>	<p><input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input checked="" type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway</p>	<p>MROR batch can be resubmitted from history through Member upload</p>	<p>Scenario:</p> <ol style="list-style-type: none"> 1. Submit new member upload file 2. Send MROR (Click Accept button and Update member number) via WDX 3. Now from the contribution history click on the grid for the same batch 4. Check the confirm and send button status <p>Actual Result:</p> <p>Confirm and send button is in enabled status, so the user can resubmit the batch gain.</p>
<p>EPRT-940 4</p>	<p><input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway</p>	<p>Users are able to submit batches that are already submitted if the batch is not paid and has warnings present.</p>	<p>Scenario:</p> <ol style="list-style-type: none"> 1. Select a custodian that allows you to edit fields with errors/warnings in the Validation Issues screen 2. Upload and submit a batch that still has validation warnings for an employer that uses the direct credit payment method 3. Don't pay out to the batch and wait until the status is set to 'NOT_PAID' 4. Navigate to the validation issues screen of the batch 5. Go to a member with validation warnings and edit the field to resolve the warning. 6. Navigate to the payment summary screen. You will be able to submit the batch
<p>JEDI-1095</p>	<p><input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway</p>	<p>Performance improvements for SFTP file uploads</p>	<p>Some performance improvements have been made to the processing of SFTP uploads.</p>