Employer Portal Release Notes

Release July 2023

Table Of Contents

1 Overview 3
1.1 Employer Portal Sprint And Release Dates 2023 3
2 User Impact 4
3 Enhancements 5
4 Validation And Rule Changes 10
5 Defects Fixed 11

1 Overview

Key Feature Deliveries

- Failed payments
    - auto refund of failed payments
    - show failed payments in the contributions grid
    - failed payment's email
- Audit history in the contributions and member grid

The SuperChoice Employer Portal will not be available as follows:

UAT:

Thursday 20 July, 2023 12:00pm – 3:00pm (AEST)

Production:

Tuesday 1 August, 2023 7:00pm – 10:00pm (AEST)

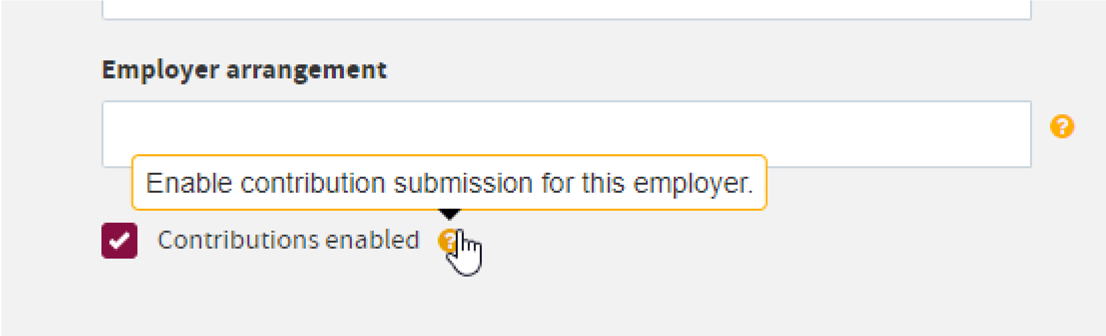
1.1 Employer Portal Sprint and Release Dates 2023

Note that these release dates are subject to change

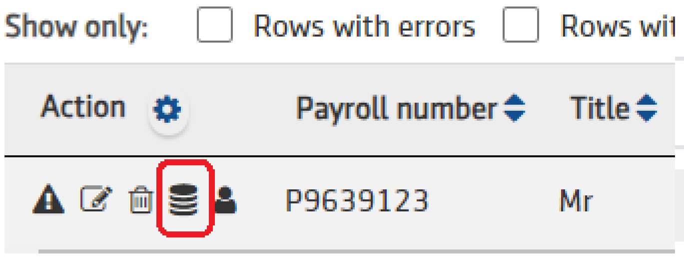
Release	UAT	Production
August	Tuesday 8-Aug	Tuesday 22-Aug
September	Tuesday 29-Aug	Tuesday 12-Sep
October	Tuesday 19-Sep	Tuesday 10-Oct
November	Tuesday 24-Oct	Tuesday 7-Nov
December	Tuesday 21-Nov	Tuesday 5-Dec

2 User Impact

1. A new failed payment notification email will be sent (see details below)
2. Users can now drill in and see failed payments in the grid and validations screen (see details below)
3. Clicking on the logo will now always revert to the landing page.
4. The help text popups have been updated for Scheme and Employer maintenance to resolve some problems.

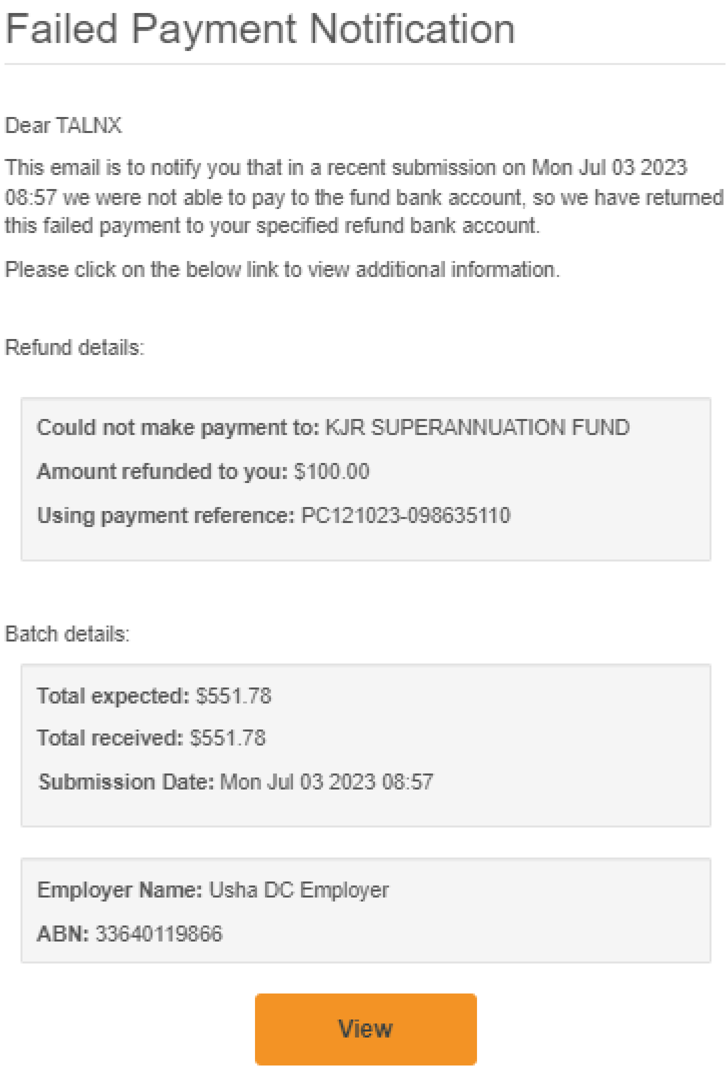


5. A new icon will be shown on all rows in the contribution and member grid to allow employers to view member audit history



3 Enhancements

<table>
<tr><th>EPRT-17621</th><th>As a system we now automatically handle payment refunds for failed payments</th></tr>
<tr><td>Description</td><td>
When an employer pays to a closed fund bank account or an incorrect/closed SMSF bank account, the payment refund is currently manually handled. Now we will automatically return the money directly to the employer's refund bank account and send an explanatory email.



Failed Payment Notification

Dear TALNX

This email is to notify you that in a recent submission on Mon Jul 03 2023 08:57 we were not able to pay to the fund bank account, so we have returned this failed payment to your specified refund bank account.

Please click on the below link to view additional information.

Refund details:

Could not make payment to: KJR SUPERANNUATION FUND
Amount refunded to you: $100.00
Using payment reference: PC121023-098635110

Batch details:

Total expected: $551.78
Total received: $551.78
Submission Date: Mon Jul 03 2023 08:57

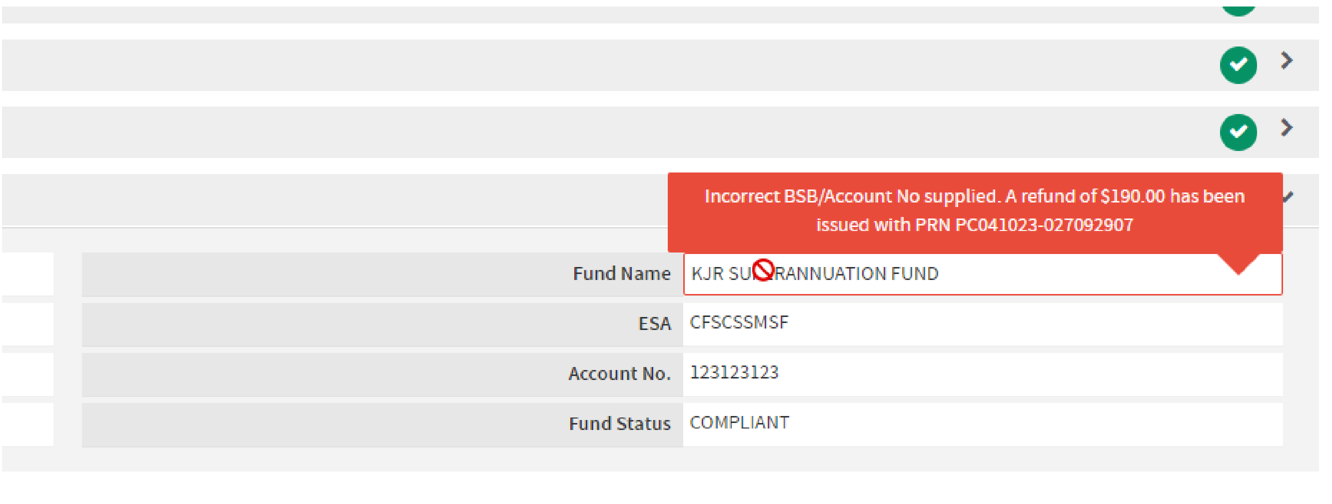
Employer Name: Usha DC Employer
ABN: 33640119866

View
</td></tr>
<tr><td>Reason</td><td>This means refunds are efficiently processed and the employer is now given sufficient detail to decide the next course of action.</td></tr>
<tr><td>Applies To</td><td>
☑ Contributions
☐ Members
☐ STP
☐ Gateway
</td></tr>
<tr><td>Assumptions</td><td>

- A payment can fail immediately T0 (e.g. an ANZ bank account) or on T1 (e.g. another bank's account)
- Manual payment refunds will still be processed in the following cases
  - If the employer's bank account is incorrect and the refund subsequently fails
  - A failed payment for a multi-employer batch
- API users will not receive an email.
- The PRN used for the employer refund payment will be the same PRN as used for the outbound failed payment
- Multiple refunds will not be bulked to the same employer. If the employer has multiple failed payments for a batch then they will be handled individually.
- One email will be sent for each failed payment per SMSF/Fund - so only one email will be sent for a fund failed payment for multiple employees that were paying to that fund.
- Email assumptions
  - These will be sent out immediately the portal receives notification of a failed payment.
  - A separate email will be sent for each separate failed SMSF or Fund payment in a file (e.g. 5 incorrect SMSF bank accounts mean 5 separate payment failure emails)
  - The email will be sent to the registered email address for the employer (email address for the contact in Employer Maintenance)
  - From address and BCC, CC address are based on the existing custodian settings.
  - Custodians can configure the email template
- The email template supports the following configurable parameters
  - Employer Name and ABN (employerName, employerABN)
  - Employer contact details First Name, Last Name (name)
  - Expected and Received (expectedAmount, receivedAmount)
  - Refunded Amount (refundedAmount)
  - Submission Date (submissionDate)
  - Failed payment PRN (failedPaymentPRN)
</td></tr>
</table>

	• Payee (payee)
Impact	Employers will now receive a detailed email regarding the failed payment and the refund will processed more efficiently.

<table>
<tr><th>EPRT-17480</th><th>As a user, I want to be able to see failed payments</th></tr>
<tr><td>Description</td><td>We currently match a failed payment to the original file and show an updated refund amount on the historic contributions. This change involves also showing an error in the file for the fund/smsf payment failure based on the data in the payload. To find the member in the file, we match each payment failure based on the SMSFs ABN or Fund's USI.



</td></tr>
<tr><td>Reason</td><td>This allow employers to view and download failed payments</td></tr>
<tr><td>Applies To</td><td>☑ Contributions
☐ Members
☐ STP
☐ Gateway</td></tr>
<tr><td>Assumptions</td><td>

- When a submission fails due to error paying to the fund/smsf then the Refunded$ total is updated with the amount that has failed.
- This figure is cumulative so the total will increase for every employer and fund for which a payment failure has been received.

</td></tr>
<tr><td>Impact</td><td>Employers will now see failed payments in the grid and validations page for their submitted files</td></tr>
</table>

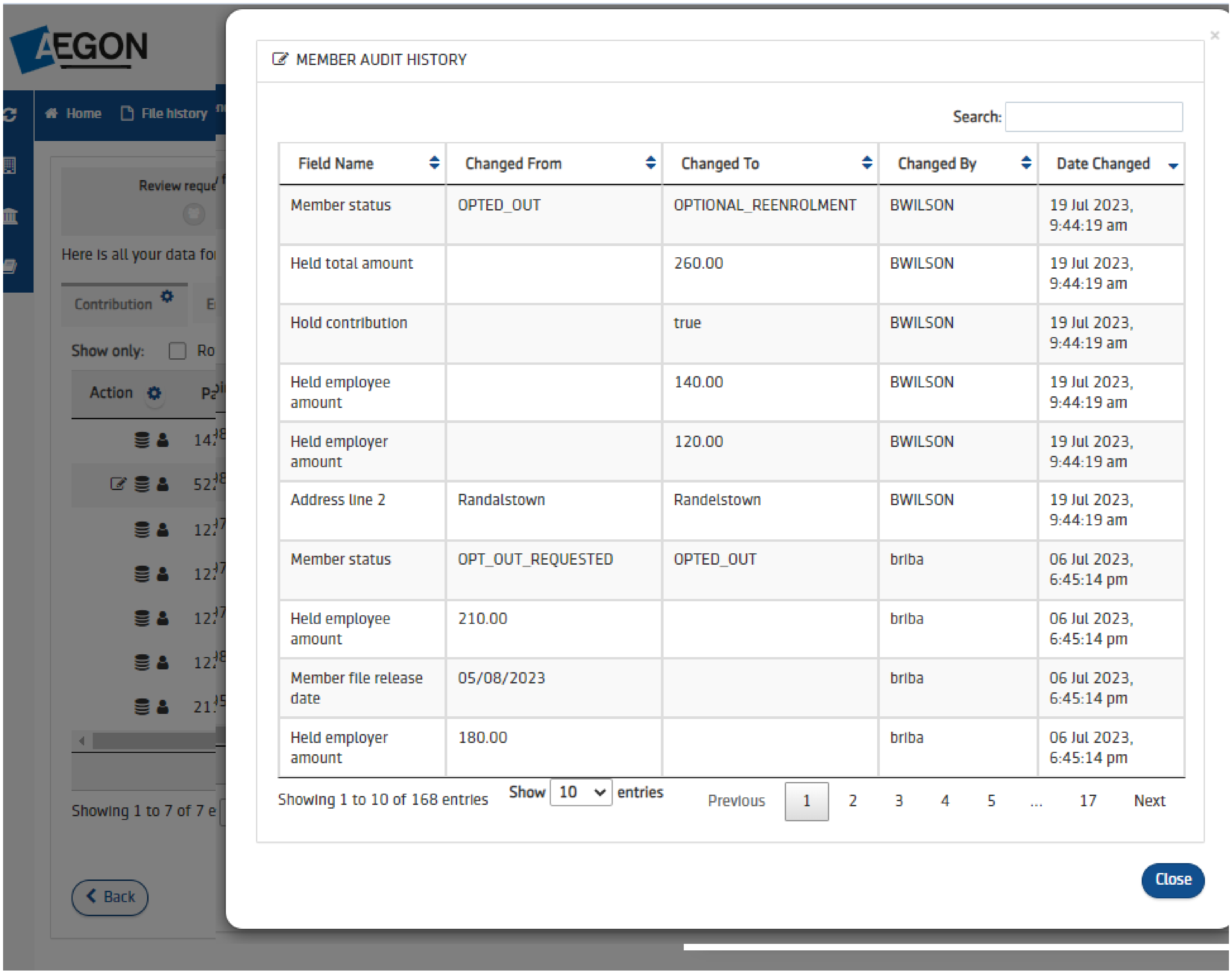
EPRT-17627

As a user, I want to see member audit history

Description

A new icon has been added to the contribution and member file upload grid and member maintenance (shown below). When clicking the icon a list of all the changes for that member and employee since inception will be shown.

The popup audit history behaves and shows the same data as currently implemented apart from not showing contribution data (instead of the changes in the specific file, it shows a full history of all changes to the member).



Field Name	Changed From	Changed To	Changed By	Date Changed
Member status	OPTED_OUT	OPTIONAL_REENROLMENT	BWILSON	19 Jul 2023, 9:44:19 am
Held total amount		260.00	BWILSON	19 Jul 2023, 9:44:19 am
Hold contribution		true	BWILSON	19 Jul 2023, 9:44:19 am
Held employee amount		140.00	BWILSON	19 Jul 2023, 9:44:19 am
Held employer amount		120.00	BWILSON	19 Jul 2023, 9:44:19 am
Address line 2	Randalstown	Randelstown	BWILSON	19 Jul 2023, 9:44:19 am
Member status	OPT_OUT_REQUESTED	OPTED_OUT	briba	06 Jul 2023, 6:45:14 pm
Held employee amount	210.00		briba	06 Jul 2023, 6:45:14 pm
Member file release date	05/08/2023		briba	06 Jul 2023, 6:45:14 pm
Held employer amount	180.00		briba	06 Jul 2023, 6:45:14 pm

Reason

This allow employers to view all changes for an employee/member

Applies To

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

Assumptions

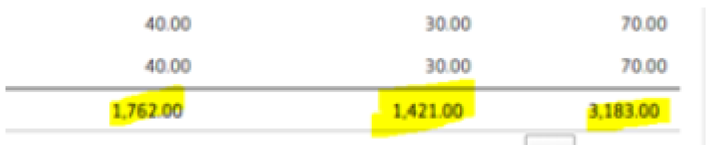
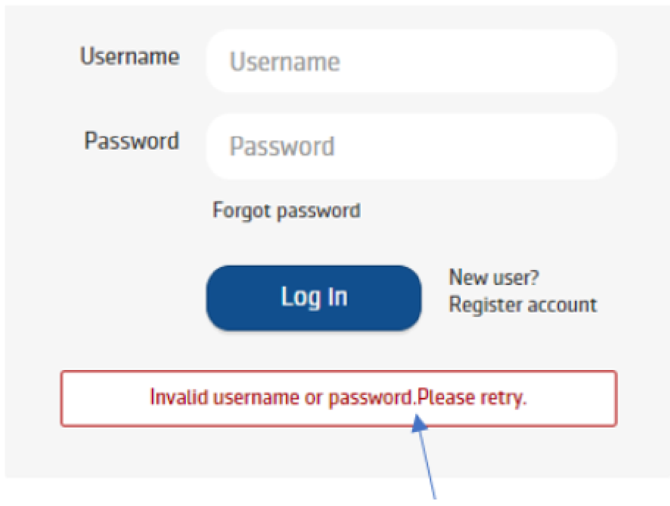
- Applies to member maintenance and contributions
- Applies to ad hoc batch, add member, manual key contribution, re-use existing contribution, file upload
- A new permission has been added called "View History" which shows/hides the view history button (this has been automatically added to all roles that can currently view the grid)
- Only the history of the selected member and linked employee is shown. We do not show other member history for an employee
- This member history only encompass all changes to a member (e.g. personal details, enrolment changes, etc.) and not contribution changes (which are file specific)..
- Audit data is rolled back for deleted files and won't be shown
- Historic audit data is automatically sorted in date changed order (latest first)
- When searching and adding an existing member to a contribution batch, the full member history is shown
- The existing new and changed icons still show for new or changed members in the file
- The icon will always be shown regardless of whether there is any history. When viewing a member with no history the audit dialog will be empty
- The new audit icon is shown before and after submission
- Title for the existing audit popup has been changed to "Batch changes". New audit icon is "Member Audit History"

Impact	A new audit history icon will be shown on all rows in the contribution and member grid

4 Validation And Rule Changes

- Updated to version 1.6 of ATO STP2 validations
  - VR.ATO.PAYEVNTEMP.000352 - English Business Rule modified to where an Income Stream Collection is present, the PAYGW Amount must be provided
  - VR.ATO.PAYEVNTEMP.000305 - Rule modified to remove default TFNs and English Business Rule modified to Reportable Fringe Benefits amount data cannot be provided when Payee TFN isn't provided
  - PAYEVNT.0004 2020 - Now mandates Contact Name
- ENRICH.R.MEM.0043 - ENRICH.R.MEM.0051: new regex enrichments to convert some 3 letter country codes to their respective 2 letter country codes
- ENRICH.R.MEM.0052: new enrichment to convert 'MISTER' case insensitive to 'MR'
- ENRICH.R.MEM.0008: Added a period (.) as a special character to be stripped for telephone/mobile
- ENRICH.J.MEM.0041: Added enrichment to strip Payee.USI that only contains 0's
- ENRICH.J.MEM.0042: Added enrichment to strip Member.TFN that only contains 0's
- ENRICH.J.DB.0001 - ENRICH.J.DB.0004: Updated hours fields to round to 2dp instead of 3dp. Any custodians specifically requesting 3dp should have these rules overidden in their specific custodian.
- ENRICH.R.MEM.0035: Added fixed as a valid value that will be converted to 'CONTRACTOR'
- ENRICH.J.MEM.0043: Added new rule to add a 0 to beginning of postcode if only 3 digits are provided
- ENRICH.R.MEM.0003: Updated TFN enrichment to also strip '/'

5 Defects Fixed

EPRT-13426	☐ Employee ☐ Contribution ☐ Member ☐ STP ☐ Gateway	We are not checking that category code must be unique within a scheme	**Scenario:** 1. Search schemes 2. Click the pencil icon to edit a particular scheme 3. Add the category code details with an already used code for this scheme 4. Save 5. Again Search scheme 6. Go to Category details **Expected Result:** An error on updating the scheme - category code must be unique within a Scheme. **Actual Result:** The scheme is created but without the duplicate category code.
EPRT-17611	☐ Employee ☑ Contribution ☐ Member ☐ STP ☐ Gateway	Fix all timezone related issues with dates	There were various issues in the portal whereby a user in a different timezone could see date fields differently (e.g. a day behind). This has now been resolved so all users will see the same date for date fields (e.g. pay period dates, etc)
EPRT-16719	☐ Employee ☑ Contribution ☑ Member ☐ STP ☐ Gateway	Totals are not aligned	Totals are not aligned to the correct column on review page & member maintenance page. 
EPRT-17039	☐ Employee ☐ Contribution ☐ Member ☐ STP ☐ Gateway	Missing space in login failure message	
EPRT-17241	☐ Employee ☐ Contribution ☐ Member ☐ STP ☐ Gateway	Logo link back to the home page is inconstant	Depending on what screen you are on, clicking the logo doesn't always revert to the landing page. This has been resolved.
EPRT-17594	☐ Employee ☐ Contribution ☐ Member ☐ STP ☐ Gateway	The download receipt is giving error at the end of the contribution upload when employer is created from contribution auto create path	**Scenario:** 1. Auto create employer and use that employer for the contribution file upload. 2. Try uploading a contribution file . 3. Before submitting, try to download the receipt. It is failing.