

# Employer Portal Release Notes

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Release October 2023

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# 1 Overview

## Key Feature Deliveries

- The system will now auto cancel all unpaid submitted batches after 2 weeks.
- Employers can edit lookup data via a drop down in the grid.
- Employee comms history is available for employees to view their emails.
- Emails can be resent by an employer/help desk in the employer portal or an employee in the employee portal.

The SuperChoice Employer Portal will not be available as follows:

### **UAT:**

Friday 27 October, 2023 11am – 3:00pm (AEDT)

### **Production:**

Thursday 9 November, 2023 8:00pm – 11:00pm (AEDT)

## 1.1 Employer Portal Indicative Release Dates

Note that these release dates are subject to change

Release	UAT	Production
November	Tuesday 28-Nov	Tuesday 12-Dec
February	Tuesday 16-Jan	Tuesday 6-Feb
March	Monday 20-Feb	Tuesday 5-Mar
April	Tuesday 19-Mar	Tuesday 2-Apr
May	Tuesday 16-Apr	Tuesday 7-May
June	Tuesday 21-May	Tuesday 4-Jun
July	Tuesday 18-Jun	Tuesday 2-Jul
August	Tuesday 16-Jul	Tuesday 6-Aug
September	Tuesday 20-Aug	Tuesday 3-Sep
October	Tuesday 17-Sep	Tuesday 1-Oct
November	Tuesday 22-Oct	Tuesday 5-Nov
December	Tuesday 19-Nov	Tuesday 3-Dec

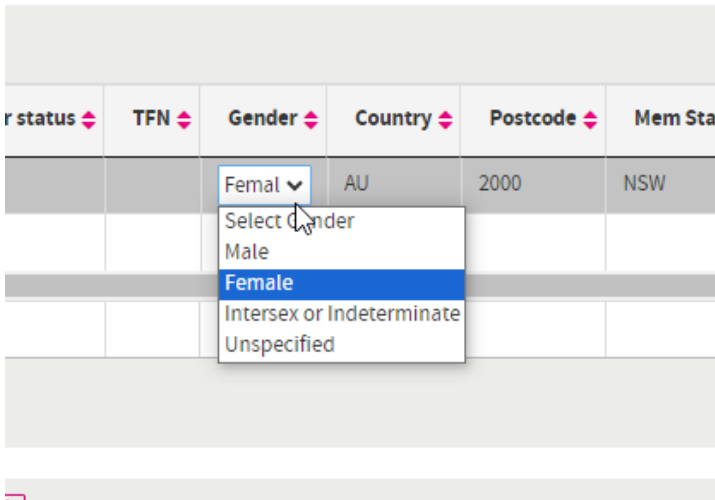
## 2 User Impact

### Auto cancel batches

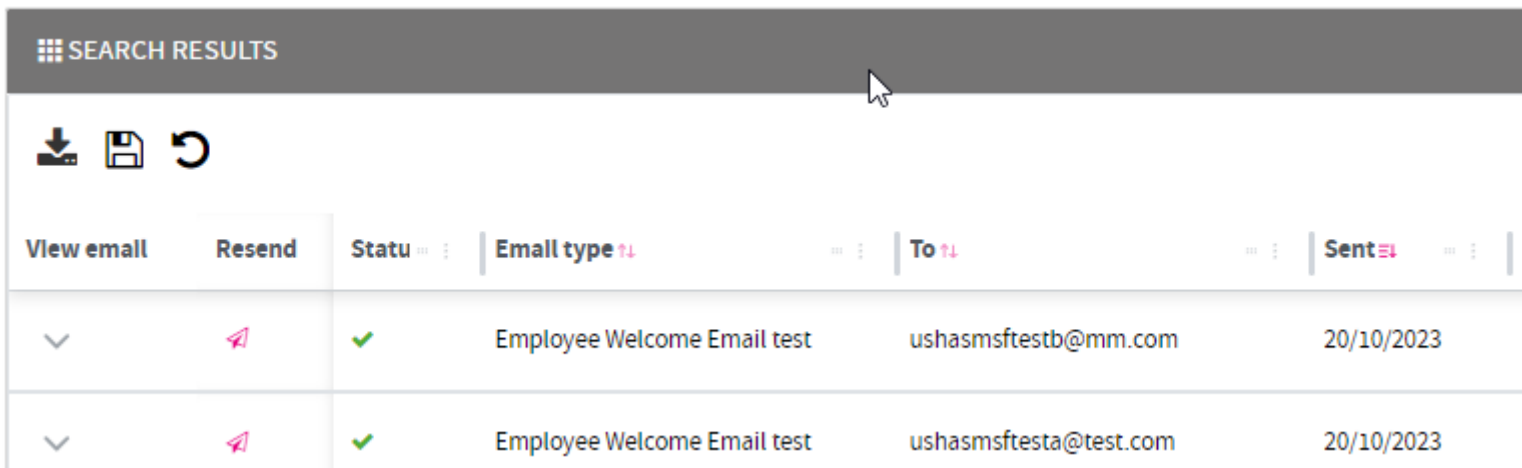
Any submitted contribution batches that have not been fully paid will now be automatically canceled two weeks (14 calendar days) after the submission was made.

- Any payments we have received for these batches will be automatically refunded to the employer's designated refund bank account.
- Non payment notification, underpaid, dishonoured and cancellation emails will all be updated in advance of production to provide prior warning to employers. This will be completed after the end of the blackout period (31October).
- All custodian custom templates for these emails will be automatically removed to force an update to the new template wording. If custodians require specific text then they should update their own custom template based on the default template.
- On release night (Thursday 9th October) all outstanding historic submitted batches > 2 weeks will be cancelled. Please contact your account manager if you require a list of your affected employers.

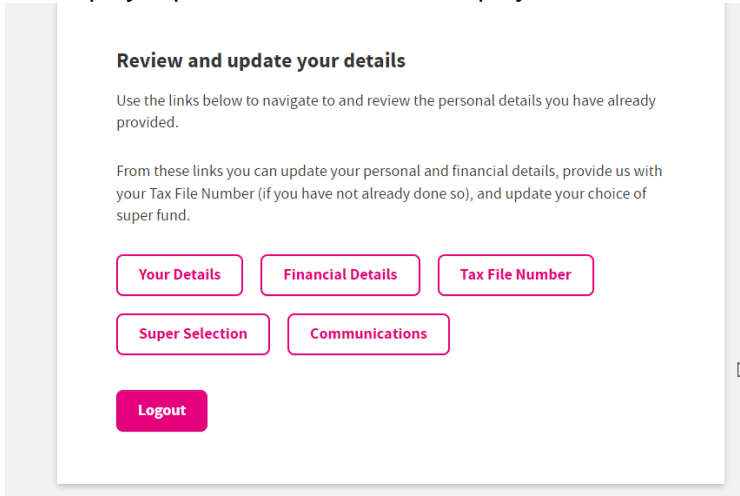
1. Batches will now be automatically cancelled (with accompanying cancel batch notification email) if full payment has not been made after 2 weeks from submission.
2. Users can now edit lookup data in the grid.



3. The email viewer now allows users to resend an email and save their column preferences (column ordering, column width, sorting, pinning, shown/hidden columns). They can also reset to the default preferences.



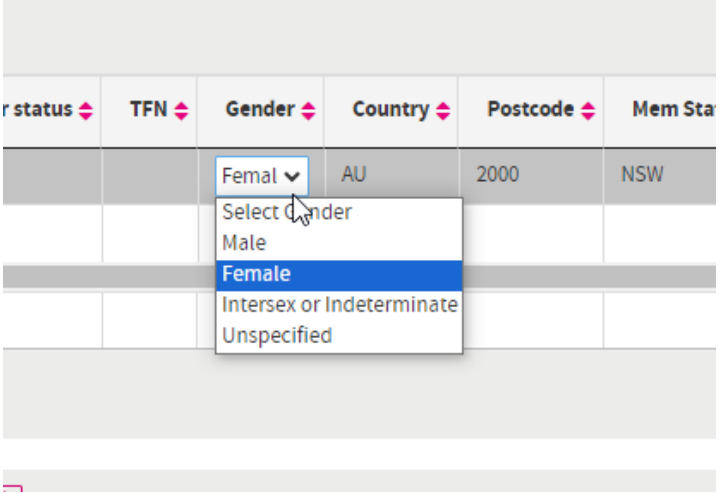
4. The employee portal also now allows employees to view and resend emails. A new communications button is now shown on the dashboard.



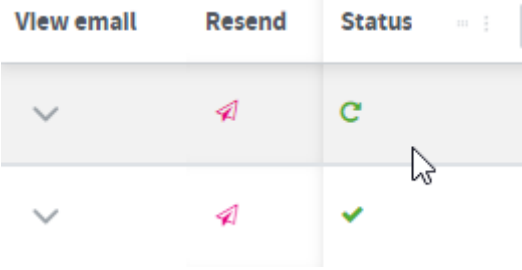
5. Any changes initiated by the system (e.g. overpayment, underpayment, etc) will be audited as System in the historic contributions file history view.

Icon	Status	File Name	Author	Icon	Action	Date	Entity	Count	Amount	Flags	Checkmark
\$x	Cancelled	ato-happy-clean_file_upload AFTER DE MO multiempl BPAY UNDERPAY.csv	ADRIAN SMITH ...	\$🔄	copy	Fri, 20 Oct 2023, 06:34	guild-cust	2	700.00	x x	✓
✓	Validated	...	...			Fri, 20 Oct 2023, 05:58	guild-cust	2	700.00		
➔	Confirmed and Sent	...	...			Fri, 20 Oct 2023, 06:15	guild-cust	2	700.00		
\$-	Underpaid	...	...			Fri, 20 Oct 2023, 06:30	System	2	200.00		
\$🔄	Partially Paid	...	...			Fri, 20 Oct 2023, 06:31	System	2	200.00		
\$x	Cancelled	...	...			Fri, 20 Oct 2023, 06:34	System	2		x x	

## 3 Enhancements

<b>EPRT-18177</b>	As a user, I want to be able to edit lookups in the grid
Description	<p>Currently, when editing and showing details in the grid, all data is shown as text. Now when editing column data, the grid is now context sensitive when there is a lookup field and allows the user to pick from a lookup list.</p> 
Reason	This allows users to easily edit lookup data
Applies To	<input checked="" type="checkbox"/> Contributions <input checked="" type="checkbox"/> Members <input type="checkbox"/> STP <input type="checkbox"/> Gateway
Assumptions	<ul style="list-style-type: none"> <li>• The lookup dropdown only appears when the cell is given focus</li> <li>• The edit widget is only be shown if the field is editable (i.e. contributions file that hasn't been submitted and field is not read only)</li> <li>• If a field is locked then the edit widget isn't shown.</li> <li>• When editing a field, the relevant lookup value is auto populated based on the data in the box.</li> <li>• We are not restricting the custodian from adding the same field multiple times on the grid.</li> <li>• Applies to custom fields as well as system fields.</li> <li>• If a user clicks into a cell that contains an invalid value and doesn't change it then when they click out, the invalid value still remains</li> <li>• Invalid values are shown with a red border and the invalid value and a hover over error are shown</li> <li>• Mandatory data that doesn't have a value is shown with a red border and a hover over error</li> <li>• Applies to all tabs (including All if defined)</li> <li>• For lookup data, the description is shown in the validations lookup list (not the code). For example Gender shows as Male, Female and not 0,1.</li> <li>• The JUEL rules to determine whether a value is in the list are run prior to showing the validations lookup</li> <li>• Applies to member maintenance, contributions, ad hoc and manual member contribution</li> <li>• Applies to both existing and new members</li> <li>• If an existing lookup value for a member, etc does not exist in the filtered drop down then the value is still shown</li> <li>• No freeform text is allowed to be entered.</li> <li>• The lookup is shown for all lookup fields regardless of whether they are in error</li> <li>• Does not apply to scheme, category, employer and fund/product drop downs.</li> <li>• If other related conditional fields change then the lookups values are recalculated</li> <li>• Space bar is used to select from the drop down list</li> <li>• The lookup field isn't shown as editable if no options are available</li> </ul>
Impact	There will now be a lookup pick list to select from when changing lookup data in the grid

<b>EPRT-18226</b>	<b>Auto cancel submitted batches after 2 weeks</b>
Description	<p>If a batch is submitted and not paid, there is a risk that this batch is subsequently unintentionally used to match a payment for a later batch. The change is to auto cancel submitted batches after 2 weeks (14 calendar days) if they haven't been paid.</p> <p>Any files that are in the following statuses will be automatically cancelled after this time (based on submission date). Any money that has been paid for the submission will be automatically refunded to the employer.</p> <ul style="list-style-type: none"> <li>• Confirmed and Sent</li> <li>• Not Paid</li> <li>• Underpaid</li> <li>• Dishonour</li> </ul> <h2>Cancellation Notification</h2> <hr/> <p>Dear name,</p> <p>This email is to notify you that your contribution batch has been cancelled.</p> <p>We will automatically refund any payments we have received for this batch to your designated refund bank account.</p> <p>Please click on the below link to view additional information.</p> <div data-bbox="306 1071 1178 1205" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p><b>Expected Amount:</b> \$300.00</p> <p><b>Received Amount:</b> \$0.0</p> </div> <div data-bbox="306 1249 1178 1383" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p><b>Employer Name:</b> ACCOUNTARY SERVICES PTY. LTD.</p> <p><b>ABN:</b> 26055625897</p> </div> <div data-bbox="611 1418 877 1507" style="text-align: center; margin: 10px 0;"> <p><a href="#" style="background-color: #00a651; color: white; padding: 5px 15px; text-decoration: none; border-radius: 3px;">View</a></p> </div>
Reason	This means that old batches won't accidentally be matched to the wrong money
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"> <li>• 14 calendar days is based on the submission date regardless of what subsequently occurred. In other words its 14 days after submission, for unfunded and partially funded batches.</li> <li>• Unsubmitted, Held, Locked, Paid, Awaiting Cancel and Overpaid files are not cancelled</li> <li>• Any status post sending the data out (e.g. sent to fund, fund payment failed, payment failed, etc) are not cancelled apart from dishonours that have been resurrected.</li> <li>• Only applies to contribution submissions. Does not apply to STP or member files.</li> <li>• EDX reporting will still show the cancelled data</li> <li>• Applies to both portal and API clients</li> <li>• Note that in all cases once the cancel is invoked, the final state will be cancelled.</li> <li>• The cancelled by user is System for an auto cancelled batch</li> </ul>
Impact	Any submitted batches, with either no payment or an under payment will be automatically cancelled after 2 weeks

<b>EPRT-18228</b>	<b>As an employee or employer, I want to be able to resend comms</b>
Description	<p>A button has been added to the email viewer to allow an email to be resent. When this button is pressed, the email will be resent to the original destination (or the latest email address for employee related emails such as a fund refund notification). The new email will be shown in the email viewer for the resent email with a resent status icon.</p>  <p>A new custodian property "Resent header" has been added. If this is set then the subject line is preceded by the text in resent header (e.g. Retransmission: Welcome email)</p>
Reason	This allows the help desk, employers or employees to resend emails
Applies To	<input checked="" type="checkbox"/> Contributions <input checked="" type="checkbox"/> Members <input checked="" type="checkbox"/> STP <input type="checkbox"/> Gateway
Assumptions	<ul style="list-style-type: none"> <li>• When resending an email, the content and attachments are the same as originally sent.</li> <li>• The BCC, CC address, sender and email recipient are all recalculated based on the custodian settings.</li> <li>• If the email recipient condition is empty then the email will be resent to the original recipient</li> <li>• Applies to both employer and employee email viewers</li> <li>• All users with access to the email viewer will be able to resend emails,</li> </ul>
Impact	No impact if the new resend button isn't pressed



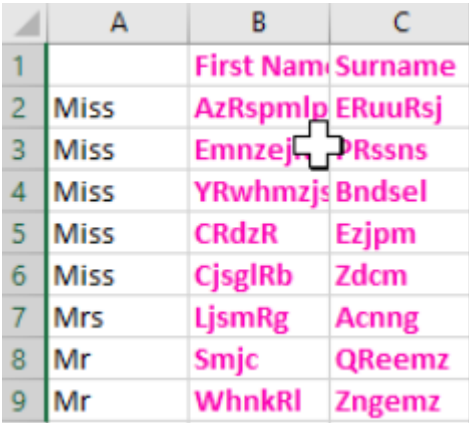
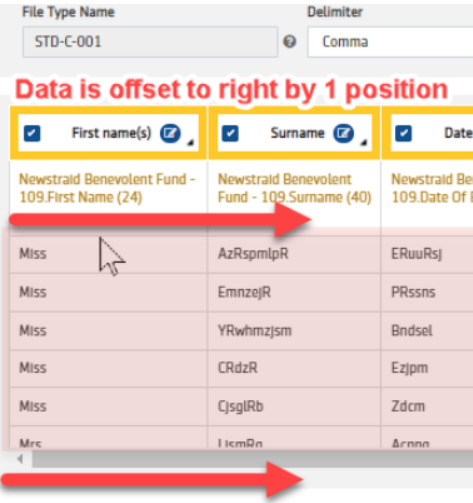








## 4 Validation And Rule Changes

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- Simple Fund 360 description changed to BGL Simple Fund 360
- Added communications button to employee action lookup list.

## 5 Defects Fixed

<p><b>EPRT-183</b> <b>76</b></p>	<input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input checked="" type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway	<p>CTER Refund Notification email is not send to current email address (updated email address)of the employer</p>	<p><b>Scenario:</b></p> <ol style="list-style-type: none"> <li>1. Submit a contribution batch from Employer Portal</li> <li>2. Complete payments to generate CTR</li> <li>3. Now navigate to employer maintenance and <b>update the email address</b> of the employer</li> <li>4. Send the CTER notification from WDX</li> <li>5. Verify the Refund Email is generated and check the employer's email address</li> </ol> <p><b>Actual Result</b></p> <p>Refund Email is sent to the old email address ( the one that was set before submission)</p> <p><b>Expected Result</b></p> <p>Email should be sent to the updated email address</p>
<p><b>EPRT-179</b> <b>76</b></p>	<input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input checked="" type="checkbox"/> Member <input checked="" type="checkbox"/> STP <input type="checkbox"/> Gateway	<p>GRID Download (Super and STP) is including unexpected / unwanted fields.</p>	<p><b>Scenario:</b></p> <ol style="list-style-type: none"> <li>1. Login to Portal</li> <li>2. Access any submission in Submission History (STP or Super)</li> <li>3. Navigate to Grid and click download</li> <li>4. Review downloaded file</li> </ol> <p>STP Download contains extra irrelevant Super (i.e. Schedule Status) / Employee Service (i.e. Enable Employee Services) fields.</p> <p>Super Download contain extra irrelevant STP and other fields</p>
<p><b>EPRT-123</b> <b>89</b></p>	<input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input checked="" type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway	<p>Failed to upload SAFF file if a cell value contains newline character within double quotes</p>	<p><b>Scenario:</b></p> <ol style="list-style-type: none"> <li>1. Open a successfully uploaded CSV or Excel file</li> <li>2. Copy a field from an excel file that contains a New line character (CRLF) and paste it into one column in one record in the CSV file</li> <li>3. Save the CSV file &gt;&gt; note - this file looks fine in Excell.</li> <li>4. Now upload the file</li> </ol> <p>Get an error "Failed to process ..."</p>
<p><b>EPRT-163</b> <b>77</b></p>	<input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input checked="" type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway	<p>Excel file data mapping incorrectly offset when encountering a blank first column</p>	<p>Data is being incorrectly offset by one position when you have a blank first column header for an Excel file.</p>  
<p><b>EPRT-171</b> <b>57</b></p>	<input type="checkbox"/> Employee <input type="checkbox"/> Contribution <input type="checkbox"/> Member <input checked="" type="checkbox"/> STP <input type="checkbox"/> Gateway	<p>Portal is allowing an empty value for Payroll Run Date</p>	<p><b>Scenario:</b></p> <ol style="list-style-type: none"> <li>1. Upload an STPv2 file with an empty payroll run date</li> <li>2. No error is shown and the user can submit</li> </ol> <p><b>Expected:</b> An error should be displayed.</p>

	<ul style="list-style-type: none"><li><input type="checkbox"/> Employee</li><li><input checked="" type="checkbox"/> Contribution</li><li><input type="checkbox"/> Member</li><li><input type="checkbox"/> STP</li><li><input type="checkbox"/> Gateway</li></ul>	SMSF Name is truncated in SMSF exception	<p>Fund name was truncated in an SMSF exception</p> <div style="border: 1px solid #ccc; padding: 5px;"><p>Fund with ABN [89780974005] has modified bank account details. -</p><p>Please select the record you wish to keep.</p><table border="1"><thead><tr><th>Source</th><th>ABN</th><th>Fund Name</th></tr></thead><tbody><tr><td> File</td><td>89780974005</td><td>The trustee for Y and V I E Sathianathan Superannuation Fund</td></tr><tr><td> Database</td><td>89780974005</td><td>The trustee for Y a...</td></tr></tbody></table></div>	Source	ABN	Fund Name	 File	89780974005	The trustee for Y and V I E Sathianathan Superannuation Fund	 Database	89780974005	The trustee for Y a...
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