Employer Portal Release Notes

Release September 2023

Table Of Contents

1 Overview

Key Feature Deliveries

- Email viewer - provides an view of all emails sent to employees and employers
- Handling closure or changes in fund bank account at time of transfer.

The SuperChoice Employer Portal will not be available as follows:

UAT:

Tuesday 26 September, 2023 9.30am – 1:00pm (AEST)

Production:

Thursday 5 October, 2023 8:00pm – 11:00pm (AEDT)

1.1 Employer Portal Sprint and Release Dates 2023

Note that these release dates are subject to change

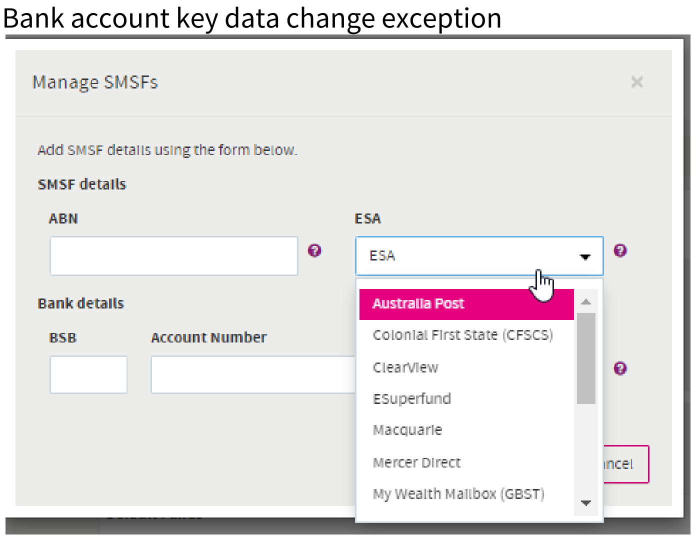
Release	UAT	Production
November	Tuesday 21-Nov	Tuesday 5-Dec
February	Tuesday 16-Jan	Tuesday 6-Feb
March	Monday 20-Feb	Tuesday 5-Mar
April	Tuesday 19-Mar	Tuesday 2-Apr
May	Tuesday 16-Apr	Tuesday 7-May
June	Tuesday 21-May	Tuesday 4-Jun
July	Tuesday 18-Jun	Tuesday 2-Jul
August	Tuesday 16-Jul	Tuesday 6-Aug
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

ClickSuper

The ClickSuper Electronic Service Address (ESA) is merging with the Wrkr ESA. From 1 October 2023, the ClickSuper ESA will be shut down and no longer accept contribution messages, To aid this transition we will automatically update all existing ClickSuper ESAs to Wrkr ESA. Employers should ensure their SAFF files do not contain a ClickSuper ESA. Employers will not be able to select a ClickSuper ESA.

1. A new email view capability has been introduced and automatically added as a link on the home page. All users with "View submission history" permissions have access by default. Details below.
2. The ESA selector now shows a curated description of the ESA rather than the alias. There are four areas where an ESA list is shown
   a. Employer maintenance
   b. Grid member form
   c. Unknown/incorrect fund exception
   d. Bank account key data change exception



3. The employer review screen (used for employee starter and UK opt in/out review) has been updated to use a new grid layout

Employer name	Given Name	Other Name	Last Name	Date of Birth	Date of Birth	Status	Gender	TFN testing ONLY	Payroll No.	Member No.	Fund Name	Reviewed
Team Becks Special	star	star		27/12/2021	27/12/2021	REGISTERED						Select
EG PLUS PTY LTD FREELANCE	Kelly		Smith	24/01/1997	24/01/1997	REGISTERED	2					Select

4. The fund refund notification (for a CTER response with a refund) has been upgraded to include details of each failed payment. They are no longer batched and sent once a day but instead sent as soon as a CTER is received. Details below.
5. STPv2 grids will now show totals

Search:

	Fees Deduction $	Workplace Giving Deduction $	Child Support Garnishee $	Child Support Deduction $
	2.98	2.97	2.96	2.95
	2.98	2.97	2.96	2.95
	2.98	2.97	2.96	2.95
	2.98	2.97	2.96	2.95
	2.98	2.97	2.96	2.95
	14.90	**14.85**	**14.80**	**14.75**

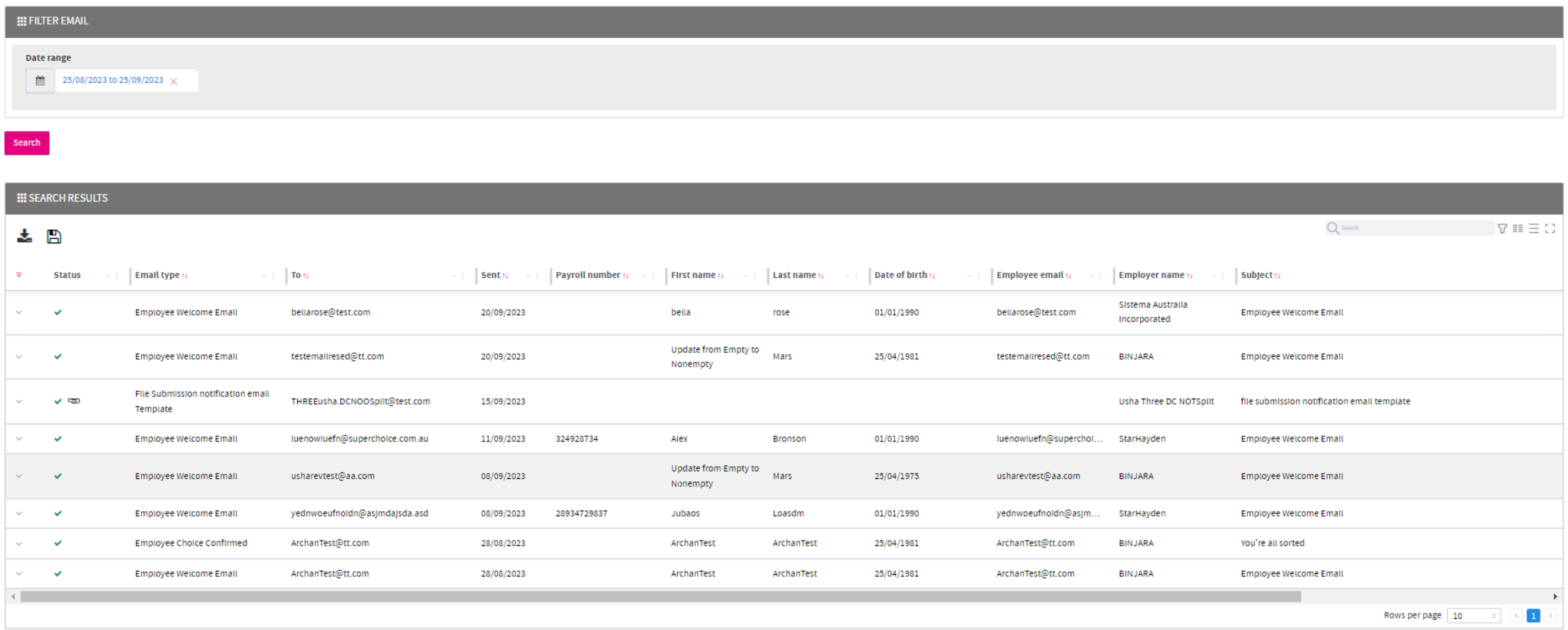
Previous 1 Next

6. Message "**The file XXX is deleted successfully.**" has been updated to be "**The file XXX has been deleted and any changes rolled back.**"

3 Enhancements

<table>
<tr><th>EPRT-17884</th><th>As an employer I want to view emails sent to my employees and I</th></tr>
<tr><td>Description</td><td>
All emails sent to employers and employees can now be viewed via a dashboard link in the employer portal. Employers will see all emails sent to them and also sent to their employees or on behalf of their employees (e.g. a CTER fund refund notification). A new "View emails" permission has been added to give access to this view.

The grid has various options to change the look and feel. These changes can be locked in for the user by pressing the "Save preferences" button. In this release only column ordering will be saved but for subsequent releases column resizing, column pinning (freeze(pin) columns on the left and right) and column visibility will also be saved.



</td></tr>
<tr><td>Reason</td><td>This allows employers to view and manage all emails sent them or their employees.</td></tr>
<tr><td>Applies To</td><td>
- [x] Contributions
- [x] Members
- [x] STP
- [ ] Gateway
</td></tr>
<tr><td>Assumptions</td><td>

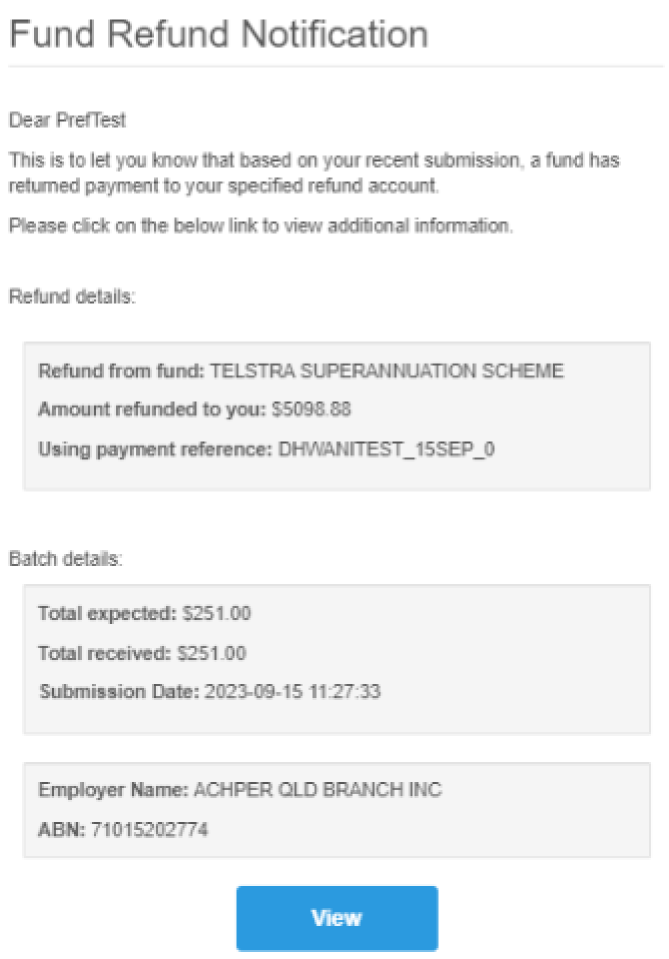
- All roles with "View submission history" permissions automatically have the "View emails" permission
- All scheduled emails are out of scope since we don't currently store the email content
- When viewing an email, any attachments are able to be downloaded
- A user with access to multiple employers (e.g. a custodian) will see all employer and employee emails sent for the employers to which they have access
- If an employee email is sent to an employer (e.g. CTER payment refund notification) then the employee details will be shown. However if the email was only for the employer then no employee details will be shown.
- When the solution is deployed, all historic emails from June last year will be displayed
- Pagination is supported
- When clicking a row, the email content is shown underneath
- The content of the email will never be redacted for the employee even if the email never was sent to the employee
- The date sent is displayed in local time according to the user's timezone
- Date of birth is in DD/MM/YYYY format
- If a user without "View emails" rights attempts to handcraft a URL to the emails page, this fails.
- A user without the View email" rights cannot see the view email link on the home page
- The navbar Emails link is turned off by default
</td></tr>
<tr><td>Impact</td><td>All employers that have "View submission history" permissions will now see a new link on their home page to view emails.</td></tr>
</table>

EPRT-18063

As an employer, I want individual payment failure emails for fund refunds

Description

The current CTER (Contribution Transaction Error Response) email "Refund Notification Template" has been changed to be sent out immediately for a CTER with a refund rather than batched. When the CTER is received, a failed payment email is now immediately sent containing specific refund amounts, payer and PRN.



The template supports the following parameters

- Employer Name and ABN (employerName, employerABN)[^default-payment-notification_template_V2 (3).html]
- Employer contact details First Name, Last Name (name)
- Expected and Received expectedAmount, receivedAmount,
- Refunded Amount (refundedAmount)
- Submission Date (submissionDate)
- Refund PRN (refund PRN)
- Payee (payee) - fund name

Reason

This means that employers can easily reconcile fund refunds to the individual payments

Applies To

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

Assumptions

- The existing batched CTER email with a refund have been deprecated as part of this change
- Email templates for MRORs and CTERs without a refund (typically SMSF invalid ESAs) will still be batched and these will still use the employer email address at submission
- These emails will be sent out immediately the portal receives notification of a CTER containing a refund.
- A separate email will be sent for each separate fund payment in a file (e.g. 5 fund refunds mean 5 separate refund emails)
- The from address and BCC, CC address are based on the existing custodian settings.
- Custodians can configure the email template

Impact

Fund refund emails will now be sent individually rather than batched once a day. Therefore employers may receive more emails than currently.

EPRT-18011

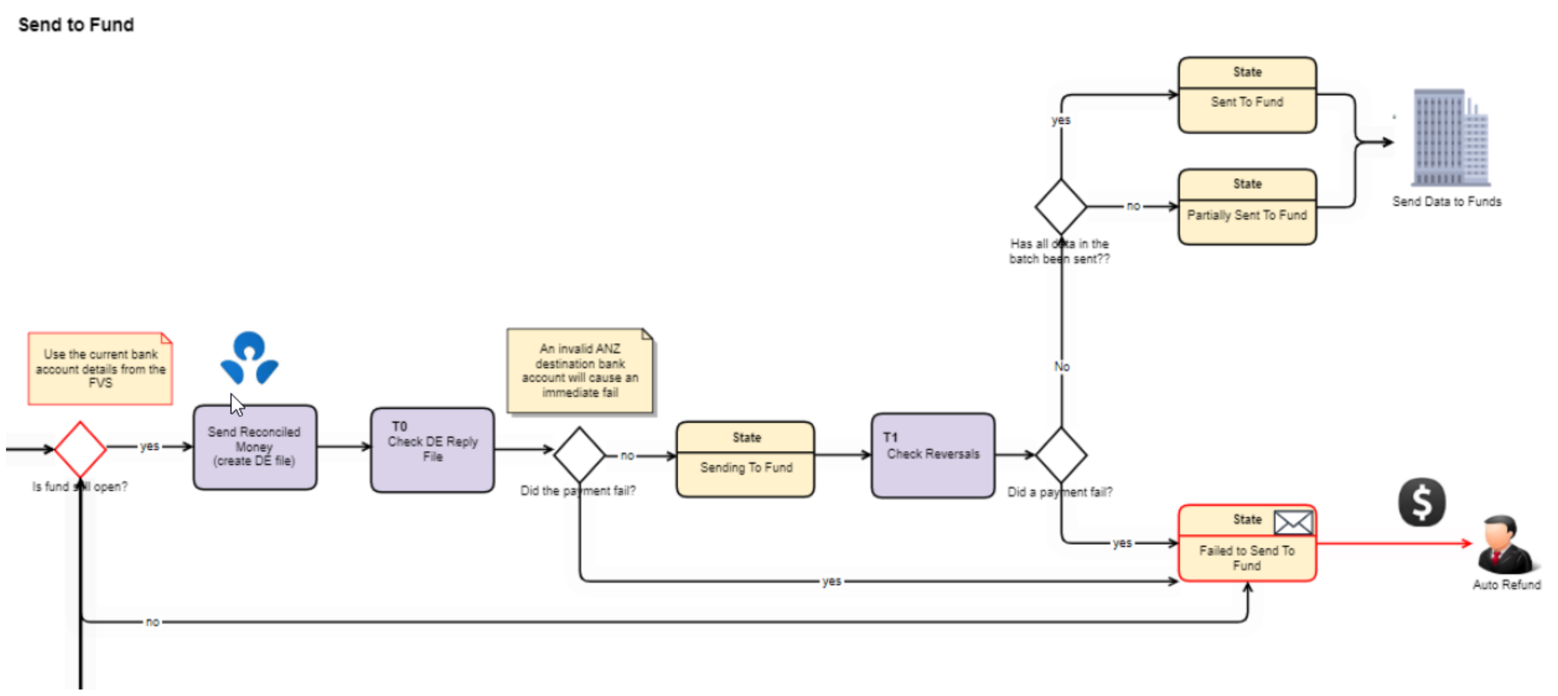
As a banking system, I should use the FVS to determine bank details for payments to funds

Description

When money has been matched and prior to sending a fund payment in the DE file, a new check will be added for fund payments to determine if the fund is still open and to specify the correct bank account to pay to. This is because the fund may have closed or changed bank accounts while the payment is in transit.

1. **Fund has closed** - sets an invalid bank account to force the failed payment flow.

<table>
<tr><td></td><td>
2. Fund is still open - updates the payee BSB/account number/name to reflect the FVS account details.



</td></tr>
<tr><td>Reason</td><td>This means we better handle changes to fund bank accounts to make for an improved employer experience</td></tr>
<tr><td>Applies To</td><td>Contributions
Members
STP
Gateway</td></tr>
<tr><td>Assumptions</td><td>

Loopback (for UAT testing) has been adjusted to immediately reject if it sees the "special" bank account number
No comms will be sent for a changed bank account - the update will be applied silently.
For a closed fund

If the employer's bank account is incorrect and the refund subsequently fails then the money will be moved to the SC refund account
Employers will receive a payment failed email
The PRN used for the employer refund payment will be the same PRN as used for the outbound failed payment
For a multi-employer batch the money will be automatically moved to Superchoice's 8886 account and a person will carry out a manual refund (because we can't automatically identify which employer/s should get the refund)

Applies to both generic and QSuper Plutos

</td></tr>
<tr><td>Impact</td><td>If a fund changes bank account then this will be handled seamlessly. If the bank account is closed then it will be automatically handled as a standard payment failure scenario</td></tr>
</table>

4 Validation And Rule Changes

1. The lookups for SMSFA ESA have been changed to remove ClickSuper and GBST.
2. Only a few additional source fields have been added to the common mapping tab on the baseline rules. No other changes.

5 Defects Fixed

EPRT-15223	☐ Employee ☑ Contribution ☑ Member ☐ STP ☐ Gateway	SMSF BSB, account name and account number is not displayed in member form.	**Scenario:** 1. Try to upload a file with smsf detail. When in review screen, check member form. 2. The value of smsf, account name, number and bsb is not displayed. 3. The value is displayed in grid and it is present in database as well.
EPRT-16971	☑ Employee ☑ Contribution ☑ Member ☑ STP ☑ Gateway	Number of invalid login attempts showing as 6 after creating new user	**Scenario:** Create new user through User Maintenance tab. **Result:** It shows 6 invalid login attempts despite the user never logging in.