Employer Portal Release Notes

Release November 2023

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1 Overview

Key Feature Deliveries

- The contribution grid filter has been upgraded to include additional filters such as new members and leavers

The SuperChoice Employer Portal will not be available as follows:

UAT:

Thursday 30 November, 2023 12pm – 3:00pm (AEDT)

Production:

Thursday 14 December, 2023 8:00pm – 11:00pm (AEDT)

1.1 Employer Portal Indicative Release Dates

Note that these release dates are subject to change

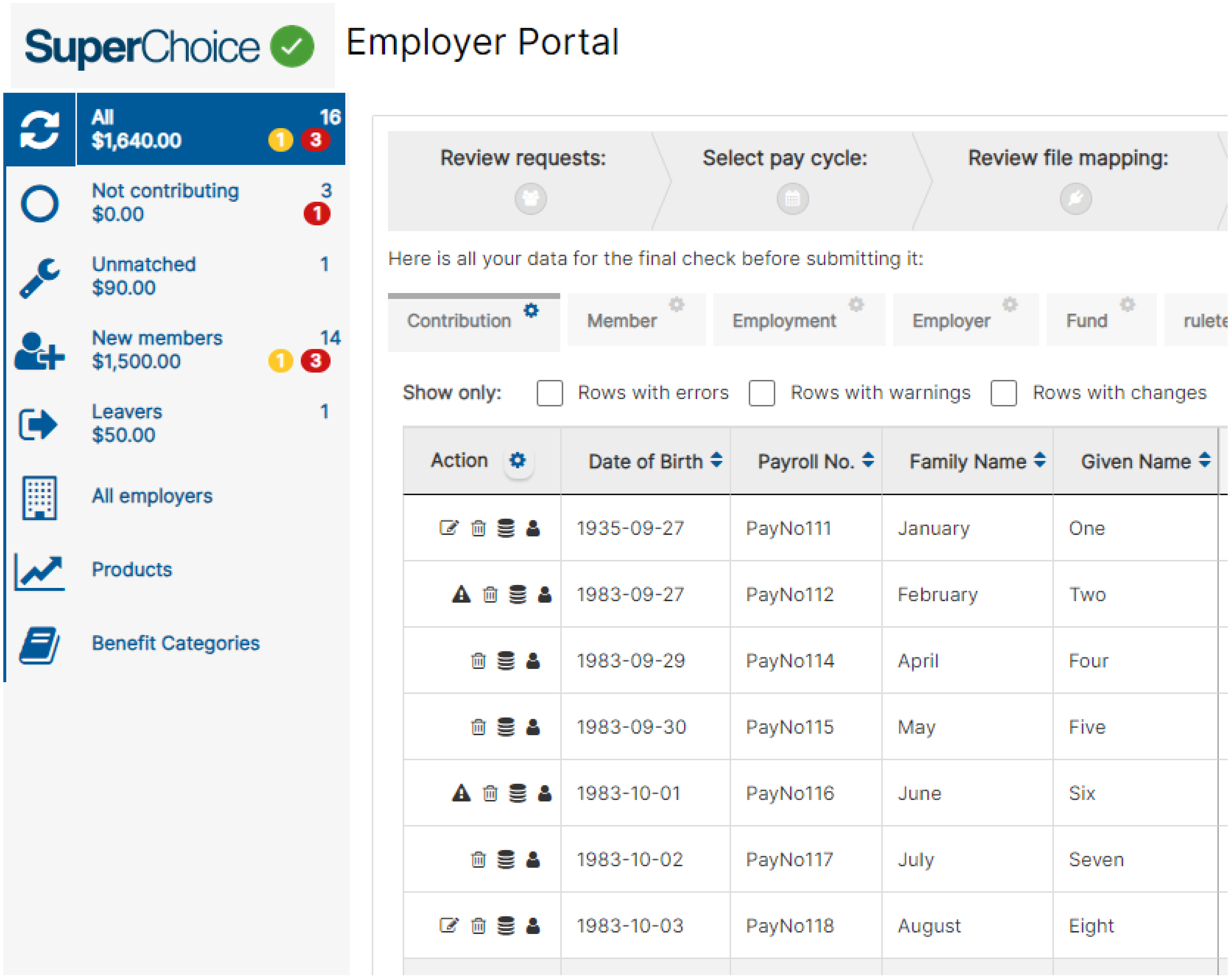
Release	UAT	Production
February	Tuesday 16-Jan	Tuesday 6-Feb
March	Monday 20-Feb	Tuesday 5-Mar
April	Tuesday 19-Mar	Tuesday 2-Apr
May	Tuesday 16-Apr	Tuesday 7-May
June	Tuesday 21-May	Tuesday 4-Jun
July	Tuesday 18-Jun	Tuesday 2-Jul
August	Tuesday 16-Jul	Tuesday 6-Aug
September	Tuesday 20-Aug	Tuesday 3-Sep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

2 User Impact

The contribution filters page (on the left of the grid) is now automatically expanded when first viewing the contributions grid. Some new filters such as not contributing, new members and leavers have been added. These only show if relevant (e.g. if there are no new members in the file, the new members filter will not show). The user can choose to close the sidebar and this will be remembered for subsequent sessions.

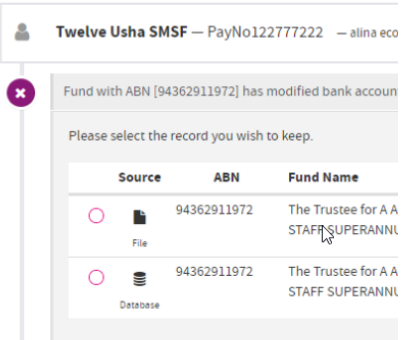
The default filters shown are as follows:

- **All -** all contributions in the file. Clicking the refresh button will refresh the left hand side totals.
- **Not contributing** - filters employees that have contributions of $0
- **Unmatched -** displays a total for all the rows in a file that haven't yet been matched due to a key data exception or other matching criteria.
- **New members** - filters for new members in the file. These can be either new employees or existing employees that have changed their super fund.
- **Leavers** - these are employees in the file with an exit date (i.e. are leaving the company).
- **All employers** - for a multi employer file, this gives a breakdown of contributions per employer.
- **Products -** gives a breakdown of all the products in a file so an employer can filter by funds or SMSFs.
- **Benefit categories** -gives a breakdown by benefit category. This can be tailored for custodians that use a different name (e.g. Category or Member group) .



2.1 Other user impact changes

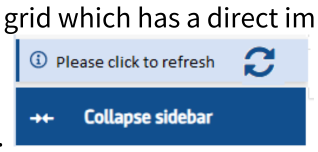
1. SMSF exception icons are now shown correctly



2. The email viewer will now show a failed email in every scenario an email fails to send.
3. The email viewer now automatically redirects to the login page on session expiry.

3 Enhancements

EPRT-18457	As an employer. I want to filter by a range of different criteria on the contribution grid
Description	The contributions filter side bar in the contributions grid has been enhanced to support extra configurable filters.
Reason	This allows employers to filter data in the file in an intuitive manner
Applies To	☑ Contributions ☐ Members ☐ STP ☐ Gateway

Assumptions	• Applies to add hoc contributions, file upload and manual contribution batch.
	• A filter will only be shown if there are contributions associated with that filter. In other words, filters are dynamic. Custodians can decide to have some filters always shown.
	• A hover over description is displayed to explain the filter to a user 
	• This side bar is expanded by default only for the contributions grid on a file upload.
	• The filters with a subgrouping (employer, products and benefit categories) are closed by default
	• Currently in the navigation menu there is a filter called 'Funds', This has been renamed 'Products'.
	• When the user clicks any filter the grid on the right-hand side updates to show the relevant contribution rows. Please note that the tabs on the Review screen and the fields within each tab remain the same when you click on a filter. This data can be downloaded into excel by clicking the 'Download' button.
	• For a field to be available in the 'Download' report, the field must exist in the Review screen on one of the tabs i.e., Contribution, Member or Held contributions.
	• Employees may fall into more than one filter (e.g. a none contributing leaver will be shown in the "Not contributing" and "Leavers" filter).
	• When clicking the download button on the screen, it will only download the employees within the filter you are on and the columns are based on the user selection (default to all columns in the grid). Note that all downloads for a user will have the same columns.
	• All filters show total employees and total contribution $ and number of errors and warnings (if relevant) on screen.
	• If no errors and/or warnings are shown then the error/warning count is not shown
	• When you select a filter on the left side of the page it will automatically default you to the first tab.
	• The status of each filter will only remain unchanged after submission for contribution filters. For example, if an employee was in the “new members” filter originally but in subsequent pay periods they are no longer a new member then the file history for that original submission will still show them as a new member. This is to ensure the employer can rerun reports if required .
	• As the employer completes their contribution process they may alter data in the grid which has a direct impact on the status of the employee, The filters on the left hand side will show a refresh option in this case. 
	• Some filters can be highlighted to give prominence (note that this is a custodian configuration).
	• All filter columns will have a total and count. If the total and count is 0 then 0 is shown.
	• Order of filters
	    • Default Australia- All, Not contributing, Unmatched, New members, Leavers, Employers, Products, Benefit Categories
	• When the user enters the grid, since All is selected all data will be shown
	• The filter results won't update when a user changes key grouping data (e.g. fund, employer, status, etc)
	• Minimised and expanded behaviour is supported for the side navigation bar.
	• When clicking on the side navigation bar icons, they automatically expand
	• The currently selected filter is highlighted
	• If all the text can't be shown then "..." is displayed but a popup is displayed when the user hovers over the text.
	• The totals are displayed with comma separators
	• The totals shown in each grouping will always be no of contributions and should match the total of all items and unmatched items
	• We allow more than one subgroup to be open simultaneously (e.g. employers and funds)
	• All grouped items within a subgroup (employers, funds, status and benefit category) are sorted alphabetically
	• A user can't see employers in the breakdown that they have no rights to view
	• All users will see the same filters for a custodian
	• Clicking the refresh button will:
	    • cause a refresh of the concertina i.e. collapse all groups
	    • blow away all cached totals - these will not be re-requested until the user expands the relevant group
	    • The grid should revert to showing all data i.e. no filtering
	• For the benefit categories filter, any categories not set (or blank) are grouped together with a filter tag of "Not set"

Impact	The left hand filter bar will initially be shown and may have some extra filters dependant on the file contents

4 Validation And Rule Changes

- Some new enrichment rules have been added to set the filters
- A validation rule has been added to ensure a dummy entry of 000000 is not accepted as a valid refund BSB number

5 Defects Fixed

EPRT-18563	☐ Employee ☑ Contribution ☐ Member ☐ STP ☐ Gateway	Non payment emails being sent out incorrectly	There were some identified scenarios where non payment emails were still being incorrectly being sent out when the employer had paid. The logic has now been tightened up as below to ensure that the banking system is fully checked before sending out the non payment email. 1. Check for change in day for every location every 30 minutes 2. If there's a change of day only in the banking location (currently identified as New South Wales) check if statement has been processed 3. If statement has not been processed yet, retry the command after 15 minutes 4. If statement has been processed, check for payment request changes to get the latest statuses 5. Check for payment delays/expirations
EPRT-18541	☐ Employee ☑ Contribution ☐ Member ☐ STP ☐ Gateway	A paid notification is incorrectly sent for an underpayment	The contribution grid incorrectly shows a paid notification for an underpayment. This doesn't affect the underpayment process (e.g. emails, etc) but is confusing for a user.
EPRT-18448	☐ Employee ☑ Contribution ☐ Member ☐ STP ☐ Gateway	Given Name is incorrect in the CTER Refund and Non-Refund Notification email for a Non-Split Multiple Employer file	**ECTER Refund scenario:** 1. Submit a multi-employer contribution batch 2. Complete payments to generate CTR 3. Send the Refund CTER notification from WDX for the first employer in the batch 4. Verify the Refund Email generated and check the employer's email address 5. Refund email has incorrect Given name in the Email content (it is referencing the second employer in the batch, instead of the first employer with the refund notification)
EPRT-18435	☐ Employee ☐ Contribution ☐ Member ☑ STP ☐ Gateway	STPV2 employer fields should be blank if the values are not provided in the upload file	Upload an STPv2 file with employer fields containing blank values: These values should show as empty but instead it is showing the old values from a previous file upload.
EPRT-18434	☐ Employee ☑ Contribution ☑ Member ☐ STP ☐ Gateway	Contributions are not validating when a matching change is bypassed	**Scenario** 1. Uploaded a file containing different members who all have a negative contribution and that triggers a key data change. 2. Navigate to the member matching tab. 3. Don't resolve anything and click next. Then click continue 4. Navigate back to the member matching tab 5. Now resolve one of the exceptions by clicking "Create Employee" 6. Repeat step 3 by clicking next and continue 7. This will bypass the validations tab and go straight to the grid 8. Notice the negative contribution don't validate
EPRT-15108	☑ Employee ☐ Contribution ☐ Member ☐ STP ☐ Gateway	Employee with country US is getting errored in employee portal when data is confirmed and submitted	**Scenario** • Upload a member file with a member containing a US country code and submit - welcome emails will be sent to members. • Login to the employee portal as the US employee and submit. **Actual result:** error shown "Error saving employee details"