

Employer Portal Release Notes

Release February 2024

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1 Overview

Key Feature Deliveries

- The member grid filter has been upgraded to include an additional filter to view by status (e.g. to return inactive employees)

The SuperChoice Employer Portal will not be available as follows:

UAT:

Tuesday 23 January, 2024 12pm – 3:00pm (AEDT)

Production:

Tuesday 6 February, 2024 8:00pm – 11:00pm (AEDT)

1.1 Employer Portal Indicative Release Dates

Note that these release dates are subject to change



UK deployments are 2 days later than Australian deployments

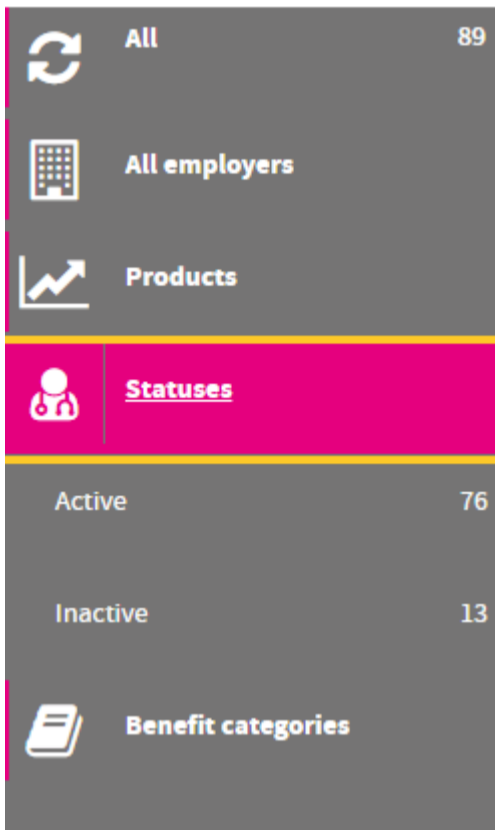
Release	UAT	Production
March	Tuesday 20-Feb	Tuesday 5-Mar
April	Tuesday 19-Mar	Tuesday 2-Apr
May	Tuesday 16-Apr	Tuesday 7-May
June	Tuesday 21-May	Tuesday 4-Jun
July	Tuesday 18-Jun	Tuesday 2-Jul
August	Tuesday 16-Jul	Tuesday 6-Aug
September	Tuesday 20-Aug	Tuesday 3-Sep
October	Tuesday 17-Sep	Tuesday 1-Oct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

2 User Impact

The member filters page (on the left of the grid) is now automatically expanded when first viewing the member grid. A new status filter has been added. 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 members.
- **All employers** - a breakdown of members per employer.
- **Products** - a breakdown of all the products so an employer can filter by funds or SMSFs.
- **Statuses** - a breakdown of all the employees statuses (e.g. active, inactive, provisional, etc)
- **Benefit categories** - 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. For STPv2 files only the Employers filter will be shown. This filter is really only relevant to multi-employer files.
2. Some fixes to the email viewer to not show extra lines and (in some cases) broken borders when viewing an email
3. The file type column on contributions history has been made wider since the standard file types "sets one and two" and "SAFF positional" were not showing.
4. Filters sub filter font size has been increased to 14 pixels (WCAG compliant) and totals are now right justified so there is more space for employer/product/status description.

3 Enhancements

EPRT-18458	As an employer, I want to filter by member status on the member grid
Description	<p>For the member grids, a new member status filter view has been added. The contents of this are dynamic based on how many members are in a particular status. If no members are in a status then the status doesn't show.</p> <p>The status expands concertina style when the main heading is clicked (e.g. clicking Status expands to show Active, Provisional, etc).</p> <p>Any members with an inactive status are only shown in the sidebar when in the member maintenance view. They will be automatically added to the grid when the inactive status is selected. However, the member total will not update to include inactive statuses unless it is refreshed.</p>
Reason	This allows employers to filter members by their status and easily reactivate inactive employees
Applies To	<input type="checkbox"/> Contributions <input checked="" type="checkbox"/> Members <input type="checkbox"/> STP <input type="checkbox"/> Gateway
Assumptions	<ul style="list-style-type: none"> • Applies to member maintenance, member file uploads, new members • The inactive status is only shown for member maintenance files • All items within the status subgroup are sorted alphabetically • If a status isn't present then it isn't shown • A count is shown for each status (including error and warning count) • Totals aren't shown • The status description is shown - not the code
Impact	The left hand filter bar will initially be shown and will have an extra status filter

4 Validation And Rule Changes






- ATO patch v1.9 applied to STPv2 validations
 - Currently the single and multi-employer STPv2 parsers only allow employee document IDs to be a maximum of 30 characters. Update to allow up to 50 characters in line with the ATO documentation.
 - Incorrectly allowed employer termination payment (ETP) to the calculation



- EJH Member Enrolled in to the scheme in a pay period should not be able to choose below min reason
- EW incorrectly going to Opt in request Approved Status
- Updated condition for Held Contribution migration flag so that auto enrol does not need to be defaulted to False. This is to avoid the extra step of setting to true after held cont file is submitted during migration process.
- Update email conditions for assessed EW and NEJH to include leg exempt as previous status
- Update re-enrolment email templates
- Employer can't be updated with Suburb
- Employee contribution percentage validation error when category changes from EJH-EW-NEJH
- Member status is not updating to active when the member changing from EW to NEJH and previously Opted In
- EJH/EW Previously Marked Exempt, Opt In Requested/Join Requested and Opt In Approved/Join Request Approved, having min contribution on the file upload going back to Marked Exempt Status
- Assessment Filters - An employer with Eligibility Postponement and member postponed shown under Scheme Joiners Filter
- Reenrolment and assessment changes for missing members
- Adding mathMax function to expected amount rules to fail safe on the legislative calculations if earnings aren't supplied
- Showing review contribution filter instead of not contributing filter

5 Defects Fixed

EPRT-18839	<input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input checked="" type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway	Audit listing is showing a future date	Scenario: 1. Upload or open any existing unsubmitted file 2. Edit any member data in the grid Actual: The audit history popup is showing a future date/time rather than the current date/time
EPRT-18804	<input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input checked="" type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway	Audit starts returning an error in the grid page	Scenario: 1. Upload or open any existing unsubmitted file 2. View a member that has a leaving date Actual: Audit history stops working for that member and all subsequent members
EPRT-18779	<input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway	For a large file, the filter grid could fail to load due to an exception	A contribution filter that contained more than 16,500 items would fail to load. The upper limit has been removed.
EPRT-18684	<input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway	Contribution filters do not show "not set" entries for products	Scenario: 1. Upload a contribution file 2. Change the employer to reset the product for a member 3. Save the member disregarding the failing validation. Alternatively upload a file with members that have no fund Expected: The product filter will have a sub filter called "Not set" Actual: No filtering option is available for members without a fund
 EPRT-18679	<input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway	Contribution filters - Employee total count in "All" Filter isn't showing correctly and isn't including missing member data.	Scenario: 1. Upload a member file of 3 members. (EJH, NEJH and EW) 2. Upload contribution file containing (EJH, NEJH and EW) and Submit. 3. Now, upload contribution File containing only the EJH member and do not submit contributions for NEJH and EW. 4. Verify if missing member errors were displayed in the validation errors page. 5. Also, Verify "All" contribution filter shows count of all employees including missing members data. Expected: Since two members weren't part of the contribution pay cycle, the filter count should be 2. All contribution Filter should show total employee count including missing members. Actual: Missing Employee data is only showing data for employees where missing reason is specified but not counting the employees where missing reasons were deleted and contribution was submitted. All contribution filter shows count of employees excluding missing members.
EPRT-18837	<input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway	Contribution filters: Products - SMSFs validation error totals are not adding up	Scenario: 1. Upload a contribution file that contains different SMSFs 2. Expand the products side bar filter in the grid review page 3. Observe the number of errors Expected: The total number of errors in the filter for SMSFs should be the total of all validation errors for all records under the SMSF filter Actual: It is showing the number of validation error totals for the last SMSF.
EPRT-18815	<input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway	Contribution sub filters are treating validation errors as warnings if there are no warnings.	Scenario: 1. Upload a file with errors and warnings and navigate to the grid 2. In the contribution filter, open the benefit category for sub filters. 3. Notice that validation errors are highlighted as yellow, for one of the benefit category sub filter

			<p>4. Fix the only warning in the file, then refresh. And notice that all the other sub filters also sees the same problem.</p> <p>Expected: Application should consistently highlight validation error total as red for all filters.</p> <p>Actual: But when there are no existing warnings, all the error totals will be highlighted as yellow in the sub filters.</p>
EPRT-18371	<input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input checked="" type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway	Changing a member from inactive to active was creating a copy of record rather than actually activating the existing inactive record	<p>Scenario:</p> <ol style="list-style-type: none"> 1. Select Add member and look up an inactive member 2. Click on inactive member from drop down and click save 3. Shows in view employee page as Inactive but with a new member icon 4. Search Add Member 5. Returns Inactive record, so the active record appears to be a copy.
 EPRT-18814	<input checked="" type="checkbox"/> Employee <input type="checkbox"/> Contribution <input type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway	Online consent not updating when a US resident chooses to give online consent	<p>Scenario:</p> <ol style="list-style-type: none"> 1. Pre-requisite : Member record have valid email but not verified email address, Online Consent - False. Member must also have US address details 2. EAM - Login to EAM 3. Home - Click on Your Details 4. Your Details Page - Click on Online Consent Checkbox and Submit 5. Log in as Employer 6. Employee Maintenance - Online Consent for the employee record still shows as FALSE <p>Expected: Online Consent should get updated when employee choose on EAM</p> <p>Actual: Online Consent Not updating the flag when a member chooses to give online consent on EAM</p>
EPRT-18789	<input checked="" type="checkbox"/> Employee <input type="checkbox"/> Contribution <input type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway	Submission on employee portal resulted in scheme and category getting wiped for that member	When an employee makes a submission on the employee details, this is resulting in scheme category being wiped out/delinked in member maintenance for that member.
 EPRT-18637	<input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway	Post match enrichments and pullback wasn't running for missing members	<p>This caused a few issues that have been now resolved</p> <ol style="list-style-type: none"> 1. The missing members filter wasn't appearing in the contribution grid. 2. Missing members weren't being picked up on a re-enrolment payroll. 3. Earnings were being pulled back for missing members - now they will be blank so the correct validations can be run