

# Employer Portal Release Notes

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Release March 2024

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# 1 Overview

## Key Feature Deliveries

- An employer's linked schemes and categories can be viewed in employer maintenance

The SuperChoice Employer Portal will not be available as follows:

### UAT:

Friday 23 February, 2024 12pm – 3:00pm (AEDT)

### Production:

Tuesday 5 March, 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
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

For every custodian that uses schemes, a new tab will appear on the employer maintenance detailed view to show all the schemes and categories an employer is linked to.

Employer details   Contact   Address   Auto enrolment information   **Schemes**   File type and template   Schedule pay periods   Users and user groups

Craven Dunnill & Co V4 ▲

<b>Scheme name</b>	<b>Product</b>	<b>Status</b>	<b>Allow opt-ins within 12 months of opting out</b>
Craven Dunnill & Co V4	GPP	ACTIVE	
	<b>Investment fund code</b>		
	ULF		
<b>Scheme pension age</b>			
65			

Category name	Category code	Status	Calculation set
Craven Dunnill & Co Ltd Group Personal Pension Plan	144389-SD02	ACTIVE	SET_TWO

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LN Scheme Usha ▲

<b>Scheme name</b>	<b>Product</b>	<b>Status</b>	<b>Allow opt-ins within 12 months of opting out</b>
LN Scheme Usha	GPP	ACTIVE	
	<b>Investment fund code</b>		
	ULF		
<b>Scheme pension age</b>			
65			

Category name	Category code	Status	Calculation set
All employees	144389-LN	ACTIVE	SET_TWO
hstestcat	dfs	ACTIVE	SET_TWO
testinga	test	ACTIVE	SET_ONE

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## 3 Enhancements

EPRT-18877	As an employer, I would like to see my schemes and categories
Description	A new "Schemes" tab has been added to employer maintenance for custodians that support schemes. When clicking on this tab a repeated set of all the schemes and categories are shown for an employer. When there are multiple schemes, they can be seen by using an accordion that allows multiple schemes to be opened. The first two schemes for an employer are open by default.
Reason	This allows employers to see the schemes and categories that have been set up for them. Custodians can also easily view what schemes are set up for an employer.
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 schemes tab is displayed if it is set up in custodian templates (Add/Modify Design). These are automatically added as part of the UAT/production deployment.</li> <li>• A custodian can change the tab description if they don't use the schemes term (e.g. member group).</li> <li>• Where there are multiple schemes then they are ordered alphabetically by scheme name</li> <li>• There can be more than one scheme and more than one category per scheme</li> <li>• The categories are shown in a grid (in the same way as on the schemes maintenance)</li> <li>• All scheme and category details are read only</li> <li>• When showing scheme and category fields, only those with "Show in Summary" set to true are displayed.</li> <li>• If an employer has no active schemes linked then they see "No linked schemes"</li> <li>• If a scheme has no active categories linked then they see "No active categories"</li> <li>• An employer won't see any schemes that aren't linked to them.</li> <li>• We don't show inactive schemes and categories</li> <li>• The order property is used to determine the order that scheme and category fields are shown.</li> <li>• Scheme and category help text is shown for every item to explain to employers what terms mean</li> </ul>
Impact	For employers that belong to a custodian that support schemes, they will see the new tab. Custodians can change the name of this tab (if required).

## 4 Validation And Rule Changes

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A new function has been added - `fn_doesProductSupport` to return whether a product supports a specific feature.



- If an employer has checked Employee Services in employer maintenance, the system will now allow member files without fund details to bypass validations



- **Full support for PS held contributions flows covering auto submitting held contribution files and allowing employers to not hold contributions.**
- **Only enforce earnings for missing members if an earnings type is typed into the grid** - If a member is missing and the user decides to type in current pay period earnings into the grid, then they will be treated like a normal member and will need to provide either Pensionable earnings or all earnings depending on their category. This also works in reverse, if they type in pensionable earnings or all earnings then they will need to provide current pay period earnings. When they provide this, the missing member validation will clear but they will then get the normal errors that are checking contributions meet the minimums.
- **Improve flow and Validations for when earnings are zero or Blank** - now when the reason MVS is selected as a stop paying reason, the member will no longer be set to stop paying as that reason is intended for when an employee is moving schedule, so they are not actually stopping paying. They should be now be paying conts on their new schedule. We have also improved the inconsistent behaviour of a missing member and the paying above in flag. This was inconsistent due to no earnings being provided, however we were still calculating this field.
- **Issue if an employer not populating the Date Joined column in their payroll file** . The worker category wasn't getting calculated. We now assess members even if the employer start date is not in file but clear worker category if it is blank or previously after schedule end date
- **Add provisional Status to rules that looked for Active status** to cover the scenario where the member number has not yet been supplied.
- **Failed executing submission rule on the submission screen due to bad data** - held totals were not being rounded in some cases so floating point errors meant some submission could fail.
- **Use `fn_doesProductSupport` to determine key behaviours of products.** This applies to the following cases.
  - Whether or not the Product accepts Employee Gross or Net amounts.
  - Whether the product supports holding contributions during the opt out period.
  - Whether the product supports holding members during the opt out period.

## 5 Defects Fixed

<b>EPRT-18769</b>	<input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input checked="" type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway	When adding or updating from the member form, automatically update the left side filters	When adding or modifying a member in either member maintenance, a member file or the contributions grid, when clicking Save or Save Anyway (if there are errors), the left hand side filters should automatically refresh to ensure they remain consistent with any member data that the user may have changed.
<b>EPRT-18555</b>	<input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input checked="" type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway	If a key data change is ignored, then pullback does not work on custom fields	If a key data change is ignored by pressing the "ignore changes" button, Then pullback does not work on custom fields which results in all custom fields being cleared incorrectly.
<b>EPRT-17982</b>	<input type="checkbox"/> Employee <input checked="" type="checkbox"/> Contribution <input checked="" type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway	An member or employee not linked to a fund with a leaving date in the past are not having status updated to inactive	Any submitted employee with an exit date should have their status changed to inactive when the exit date is reached. This was not happening if the member wasn't linked to a fund
<b>EPRT-16683</b>	<input type="checkbox"/> Employee <input type="checkbox"/> Contribution <input checked="" type="checkbox"/> Member <input type="checkbox"/> STP <input type="checkbox"/> Gateway	If a user goes into member maintenance lets the browser session expire then the file is still shown in the history page	<p><b>Scenario</b></p> <ol style="list-style-type: none"> <li>1. Go to 'View Members for Maintenance', pick one or a more employers and go to grid review page.</li> <li>2. Don't update any member in the batch. Just leave it until browser session expires.</li> </ol> <p>Since there is no change, this member maintenance batch file should be auto-deleted but it is left in the contributions history.</p>