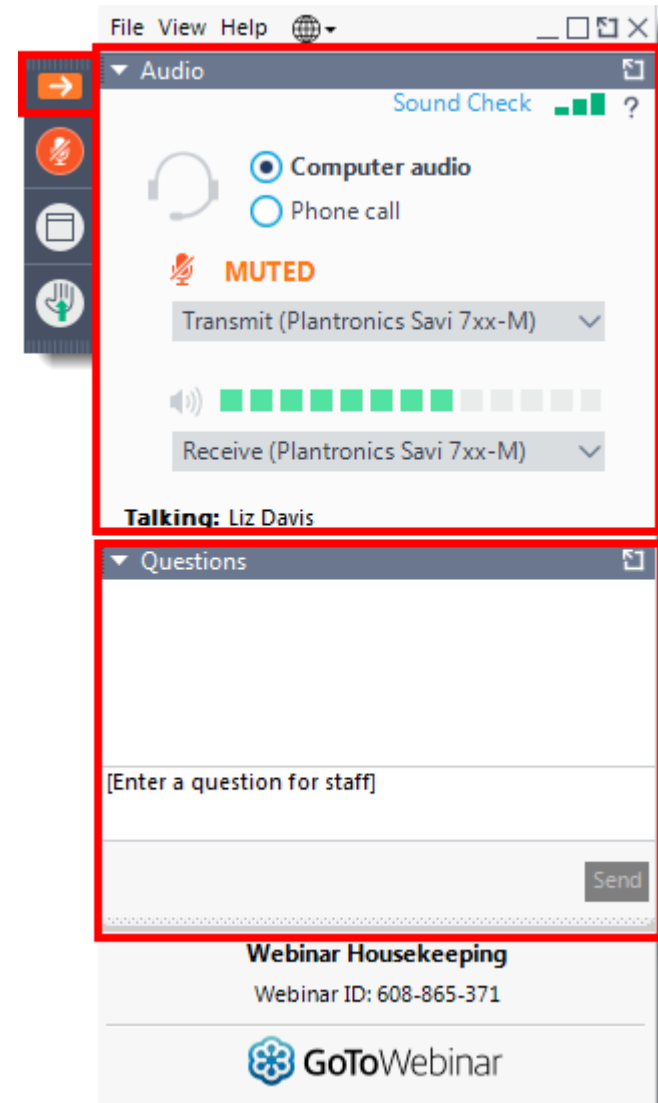


While we wait – audio instructions

- Select the Audio section of the GoToWebinar control panel.
- Select Computer audio.
- To submit a question or comment, type it in the Questions panel.





Employer Portal: Termination and Pension Application Process

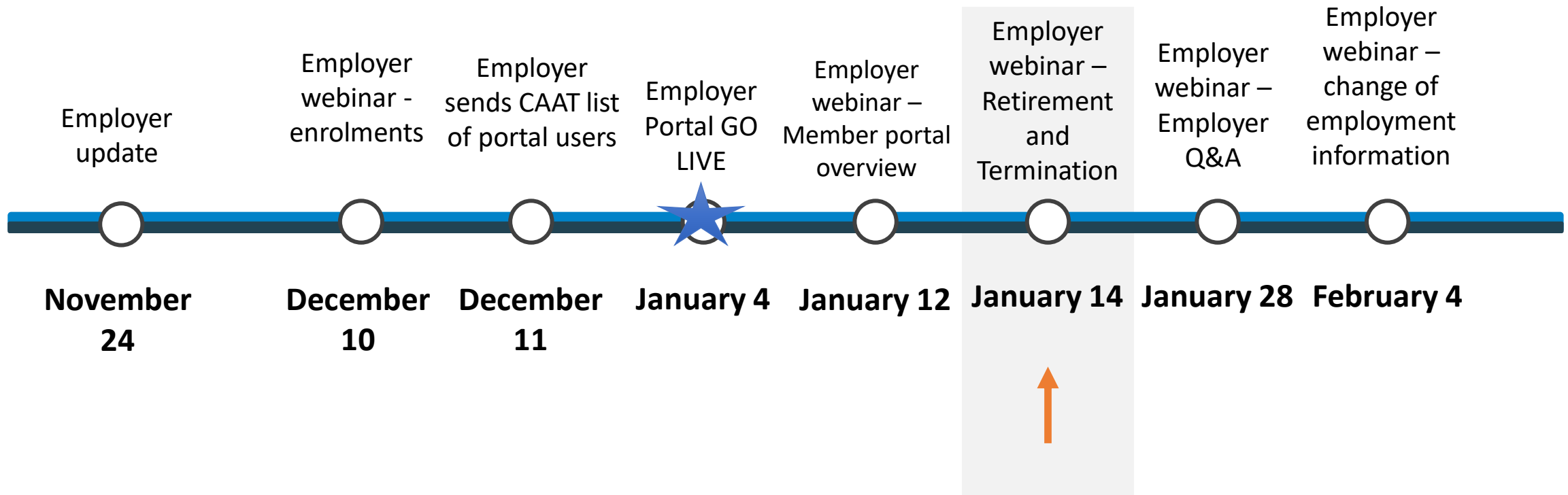
January 14, 2021



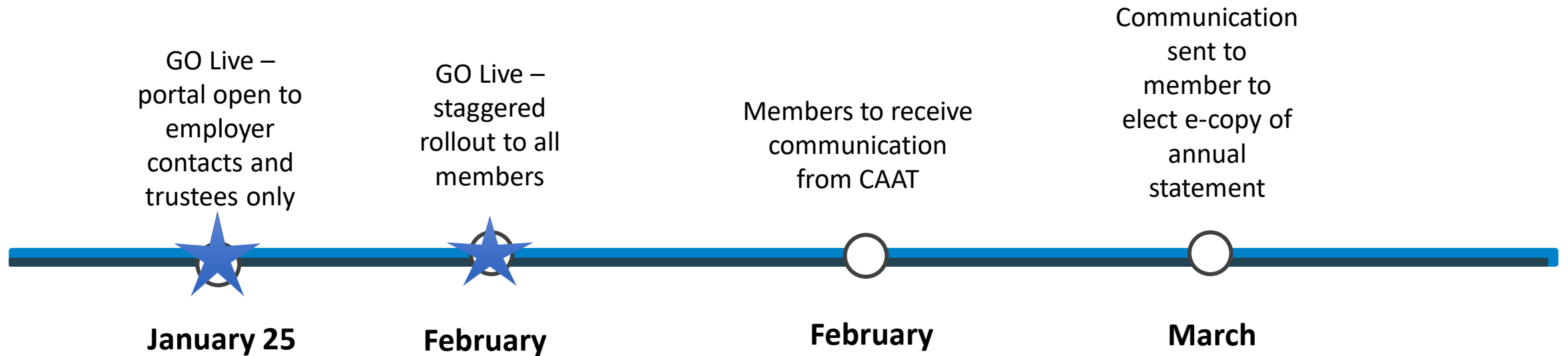
Agenda

1. Termination of employment process
2. Pension application process
3. Live demo
4. Questions

Portal roadmap – Employers



Portal roadmap – Members

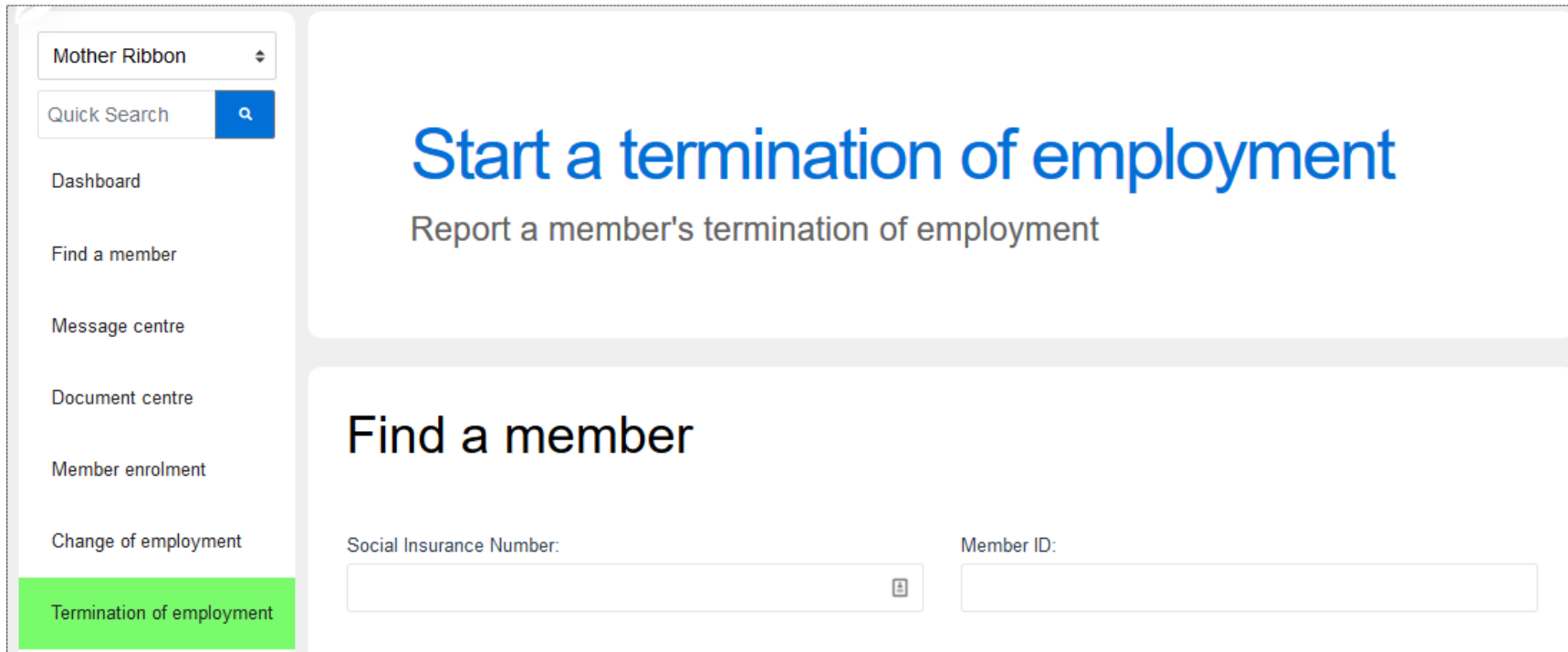


A group of people's hands are stacked in a circle, symbolizing teamwork or support. The image is overlaid with a semi-transparent blue rectangle containing the text.

Termination of employment process

Termination of employment process

- Select “Termination of employment” to start the process.



The screenshot shows a web application interface. On the left is a vertical navigation menu with the following items: "Mother Ribbon" (with a dropdown arrow), "Quick Search" (with a search icon), "Dashboard", "Find a member", "Message centre", "Document centre", "Member enrolment", "Change of employment", and "Termination of employment" (highlighted in green). The main content area is divided into two sections. The top section has the heading "Start a termination of employment" in blue, with the sub-heading "Report a member's termination of employment" below it. The bottom section is titled "Find a member" and contains two input fields: "Social Insurance Number:" and "Member ID:". The "Social Insurance Number" field has a small icon to its right.

Termination of employment process

- Search using their SIN, Member ID, First name or Last name
- Avoid use of hyphens

Find a member

Social Insurance Number:

Member ID:

First name:

Last name:

Termination of employment process

- Click “Submit” and the result will be displayed in the Search results box below
- Click on the member to commence the process

Find a member

Social Insurance Number: Member ID:

First name: Last name:

Search results

First name	Middle initial	Last name	Social Insuran...	Date of birth	Member ID	Employment st...
FNAME		LNAME	001318187	23-Oct-1984	143689	Active

Termination of employment process

- After selecting the member, you will be directed to the “Termination of employment” page
- Here, you can start the termination process

Termination of employment

If the member is eligible to retire, complete the Pension Application.

Member ID: ██████████ Current Plan design: DBprime Jurisdiction of employment: ON

Member personal information

First name	Middle initial
<input type="text" value="FNAME"/>	<input type="text"/>
Last name	Social Insurance Number
<input type="text" value="LNAME"/>	<input type="text" value="001318187"/>
Date of birth	
<input type="text" value="23-Oct-1984"/>	

Termination of employment – Member personal information

- Confirm that the correct member has been selected

Member personal information

First name	Middle initial
FNAME	
Last name	Social Insurance Number
LNAME	001318187
Date of birth	
23-Oct-1984	

Termination of employment process – Member contact information

- You can review the current information for the member

Member contact information

Email address	Phone number
<input type="text" value="AAAAA00@AA.AAAAAAAAAAAAAAAAAAA.AA"/>	<input type="text"/>
Ext	
<input type="text"/>	
Street address 1	
<input type="text" value="00 AAAAA AA."/>	
Street address 2	
<input type="text"/>	
City	Province/State
<input type="text" value="AAAAAAA"/>	<input type="text" value="Ontario"/>
Country	Postal/Zip code
<input type="text" value="Canada"/>	<input type="text" value="A0A0A0"/>

Termination of employment process – Member contact information

- The information can be updated if changes are required

Member contact information

Email address	Phone number
<input type="text" value="AAAAA00@AA.AAAAAAAAAAAAAAAAAA.AA"/>	<input type="text"/>
Ext	
<input type="text"/>	
Street address 1	
<input type="text" value="1 Anywhere St."/> ✓	
Street address 2	
<input type="text"/> ✓	
City	Province/State
<input type="text" value="Anywhere"/> ✓	<input type="text" value="Ontario"/>
Country	Postal/Zip code
<input type="text" value="Canada"/>	<input type="text" value="M1M 1M1"/> ✓

Termination of employment process – Wrong format error

- If the information is entered incorrectly, a red error notification will be automatically displayed (i.e., incorrect postal code format)

Member contact information

Email address Phone number

Ext

Street address 1 ✓

Street address 2 ✓

City ✓ Province/State

Country Postal/Zip code ⓘ
Postal code format is A1A 1A1

Termination of employment process – Earnings and contributions for DBplus

- Enter the requested information in the required fields
- If the DCT has been submitted for the previous year, select “YES” otherwise select “NO”

Earnings and contributions for DBplus

Last day worked	Date of termination of employment
30-Nov-2020 ✓	30-Nov-2020 ✓
From	To
01-Jan-2020 ✓	30-Nov-2020 ✓
Current year eligible earnings	Employer contributions
10,000.00 ✓	900.00 ✓
Employee contributions (Does not include purchased leaves)	Pension adjustment (PA) (Include current year purchased leave)
900.00 ✓	0 ✓

Has the DCT for the previous year been submitted?

YES NO

Termination of employment process – Earnings and contributions for DBplus

- If you selected "NO" complete the required fields in the drop-down menu

Has the DCT for the previous year been submitted?

YES NO

From	To
<input type="text" value="DD-MMM-YYYY"/>	<input type="text" value="DD-MMM-YYYY"/>
Previous year eligible earnings	Employer contributions
<input type="text" value="###"/>	<input type="text" value="###"/>
Employee contributions (Does not include purchased leaves)	Pension adjustment (PA) (Include current year purchased leave)
<input type="text" value="###"/>	<input type="text" value="##"/>

Termination of employment process – Earnings, contributions and pensionable service for DBprime

- Enter the requested information in the required fields
- If the DCT has been submitted for the previous year, select “YES” otherwise select “NO”

Earnings, contributions, and pensionable service for DBprime

Start date of pay period for the first pay of the year	01-Jan-2020 ✓	Last day worked	30-Nov-2020 ✓
Date of termination of employment	30-Nov-2020 ✓		
Current year			
From	01-Jan-2020 ✓	To	30-Nov-2020 ✓
Pensionable service	0.91221 ✓	Regular contributory earnings	60,205.86 ✓
Lump sum contributory earnings	###	Vacation contributory earnings	###
Retroactive pay	###	Total earnings	60205.86
Basic contributions	6,967.95 ✓	CAAT RCA contributions	###
Annual rate of salary	66,000.00 ✓	Pension adjustment (PA)	6,909 ✓

Has the DCT for the previous year been submitted?

YES NO

Termination of employment process – Earnings, contributions and pensionable service for DBprime

- If you selected "NO" complete the required fields in the drop-down menu

Has the DCT for the previous year been submitted?
 YES NO

Previous year

From	To
<input type="text" value="DD-MMM-YYYY"/>	<input type="text" value="DD-MMM-YYYY"/>
Pensionable service	Regular contributory earnings
<input type="text" value="#.#####"/>	<input type="text" value="##"/>
Lump sum contributory earnings	Vacation contributory earnings
<input type="text" value="##"/>	<input type="text" value="##"/>
Retroactive pay	Total earnings
<input type="text" value="##"/>	<input type="text" value="0.00"/>
Basic contributions	CAAT RCA contributions
<input type="text" value="##"/>	<input type="text" value="##"/>
Annual rate of salary	Pension adjustment (PA)
<input type="text" value="##"/>	<input type="text" value="##"/>

Termination of employment process – Purchases in process

- Make the appropriate “YES” or “NO” selection based on the question as it pertains to the member

Purchases in process

Report any leaves of absence and/or purchases for the current year (and the previous year if the DCT has not been submitted).

Select the leave type. Ensure the applicable service purchase form and the payment is submitted for all leaves included below, including leaves currently in process.

The member has a purchase currently in process

YES NO

Termination of employment process – Termination details

- Make the appropriate selection of “YES” “NO” or “Unknown” based on the question as it pertains to the member

Termination details

Is the member going to work at another participating employer?

YES NO Unknown

Is the member currently employed at another participating employer?

YES NO Unknown

Termination of employment process – Employer authorization

- You have the option to assign the task to another user or you can leave it blank if submitting to CAAT

Employer authorization

Employer HR representative

Date

Assign to

Termination of employment process – Employer authorization

- If you need to assign the transaction to another user, select the individual

Employer authorization

Employer HR representative: Marsha mpattest1

Date: 13-Jan-2021

Assign to: Marsha marshauattest ✓

Save Validate Send to CAAT Cancel

Termination of employment process – Message Centre

- The message can be seen in the “Search results”
- Notification preferences should be updated to ensure that you can receive any notices

The screenshot displays the 'Message Centre' interface. On the left is a navigation menu with options: Quick Search, Dashboard, Find a member, Message centre (highlighted), Document centre, Member enrolment, Change of employment, Termination of employment, Pension application, Pension estimate, and Help. The main content area is titled 'Message Centre' with the subtitle 'A secure way to communicate with the CAAT Plan'. Below this is a 'Find a message' section with a 'Send a message' button and input fields for Reference ID, Subject, and Date (format DD-MMM-YYYY). At the bottom is a 'Search results' table with one row highlighted in orange:

Process ID	Reference ID	Subject	Date
		Termination task has assigned to you - Process ID 7997 – FNAME LNAME	13-Jan-2021

Termination of employment process – Dashboard

- The message can also be seen in the “Transaction in process” on the Dashboard

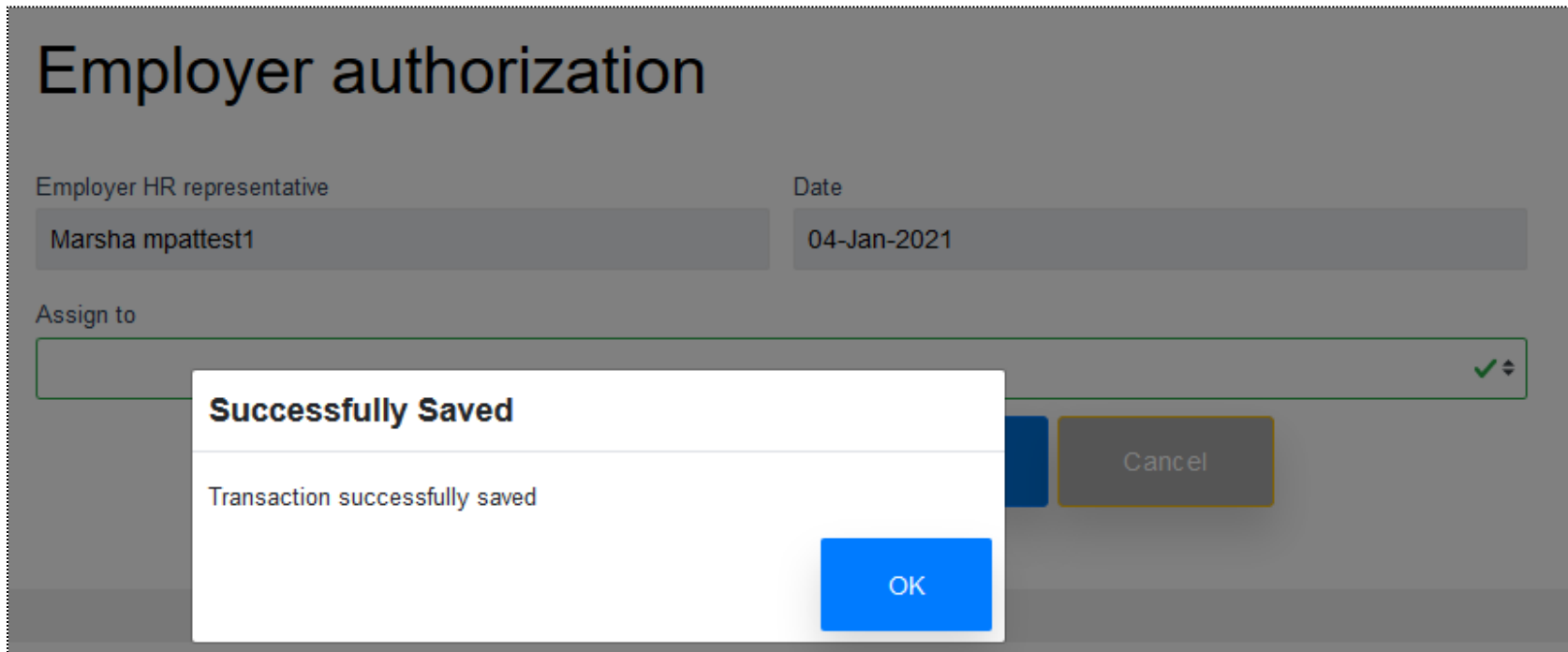
Transactions in process

In progress	Member name	Type of transaction
7997	sFnsK Sasn	Termination
7725		Enrolment
7704	XBYLB TCZZF	Change of Employment

[View all in process](#)

Termination of employment process - Save

- You can save the termination prior to submission
- You will see a pop-up box indicating that it was successfully saved
- If it is not successful, the pop-up box will indicate that it has failed



The screenshot displays the 'Employer authorization' form. The form includes the following fields and elements:

- Employer HR representative:** A text input field containing 'Marsha mpattest1'.
- Date:** A date input field containing '04-Jan-2021'.
- Assign to:** A dropdown menu with a green checkmark and a downward arrow on the right side.
- Buttons:** A blue 'OK' button and a grey 'Cancel' button are visible at the bottom right of the form.

A white pop-up dialog box is overlaid on the form, containing the following text:

- Header:** **Successfully Saved**
- Message:** Transaction successfully saved
- Action:** A blue 'OK' button.

Termination of employment process - Save

- Once successfully saved, you will be redirected to the dashboard
- Here, you can view the process in both the “Recent activity” and “Transactions in process” sections
- You can retrieve the termination application form from the “Transactions in process” section

Recent activity

Start time	Activity
13-Jan-2021 01:07 AM	143689 - sFnsK Sasn- Termination Assigned to Marsha mpattest1

[View all activities](#)

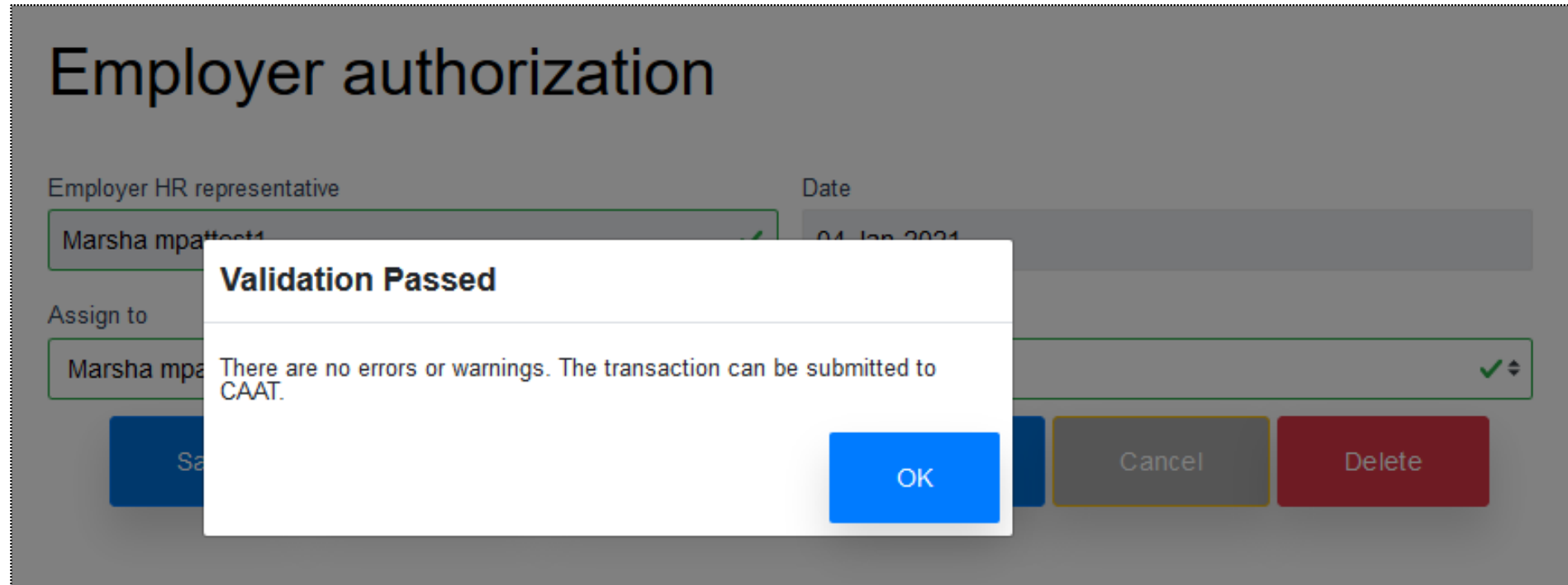
Transactions in process

In progress	Member name	Type of transaction
7997	sFnsK Sasn	Termination
7725		Enrolment
7704	XBYLB TCZZF	Change of Employment

[View all in process](#)

Termination of employment process - Validate

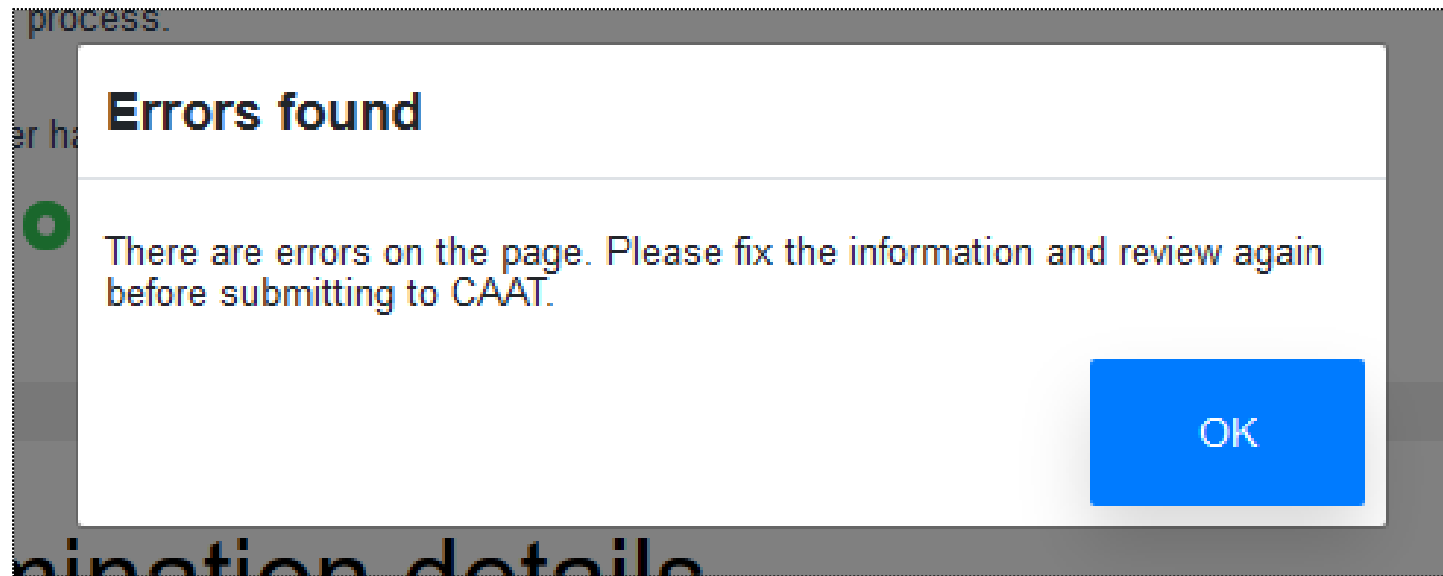
- Validate the process to confirm all applicable fields are correctly entered
- You will receive a pop-up box to confirm success



The screenshot shows a web form titled "Employer authorization". The form has several fields: "Employer HR representative" with the value "Marsha mpattest1", "Date" with the value "04 Jan 2021", and "Assign to" with the value "Marsha mpattest1". A "Validation Passed" pop-up box is overlaid on the form, containing the text: "There are no errors or warnings. The transaction can be submitted to CAAT." The pop-up box has an "OK" button. The form also has "Save", "Cancel", and "Delete" buttons.

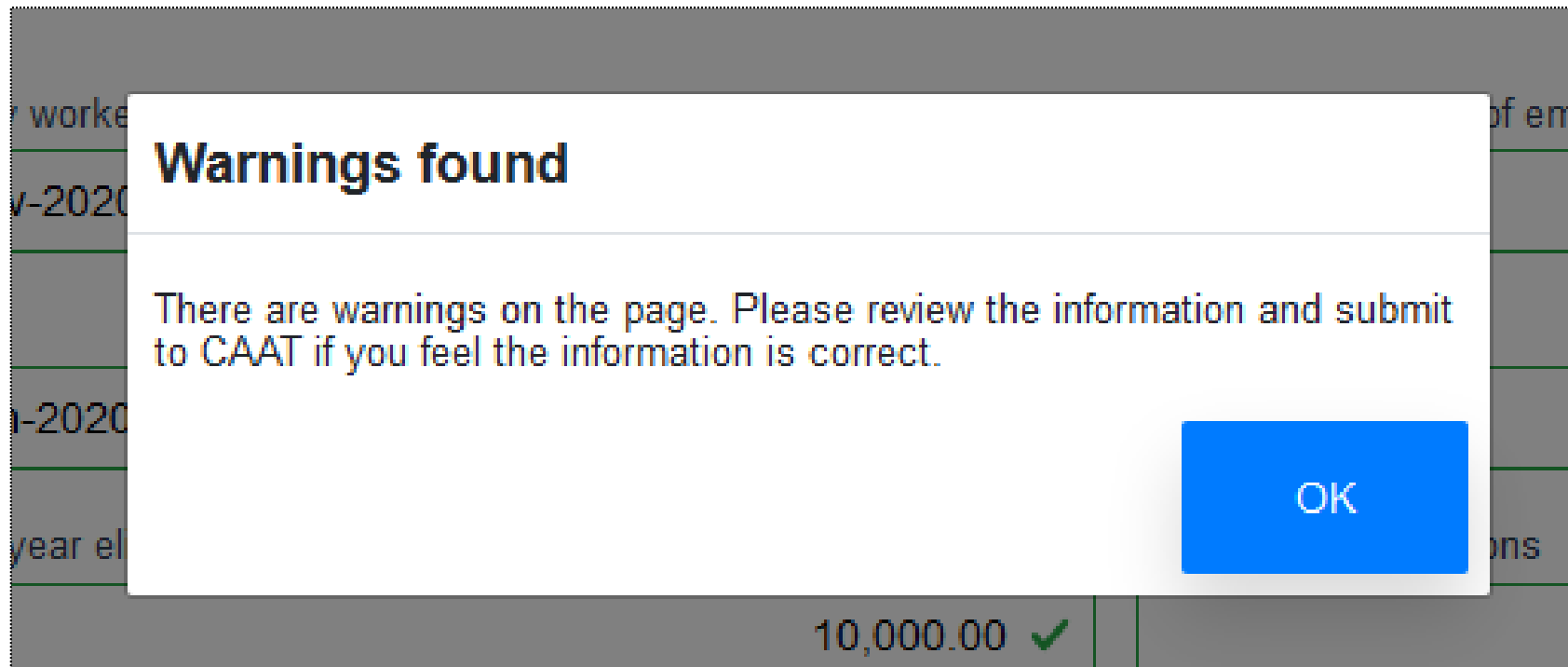
Termination of employment process – Validation error

- If validation is unsuccessful, you will be directed to the section that has the error



Termination of employment process – Validation warning

- A validation warning may appear to advise review of information before submission to CAAT.



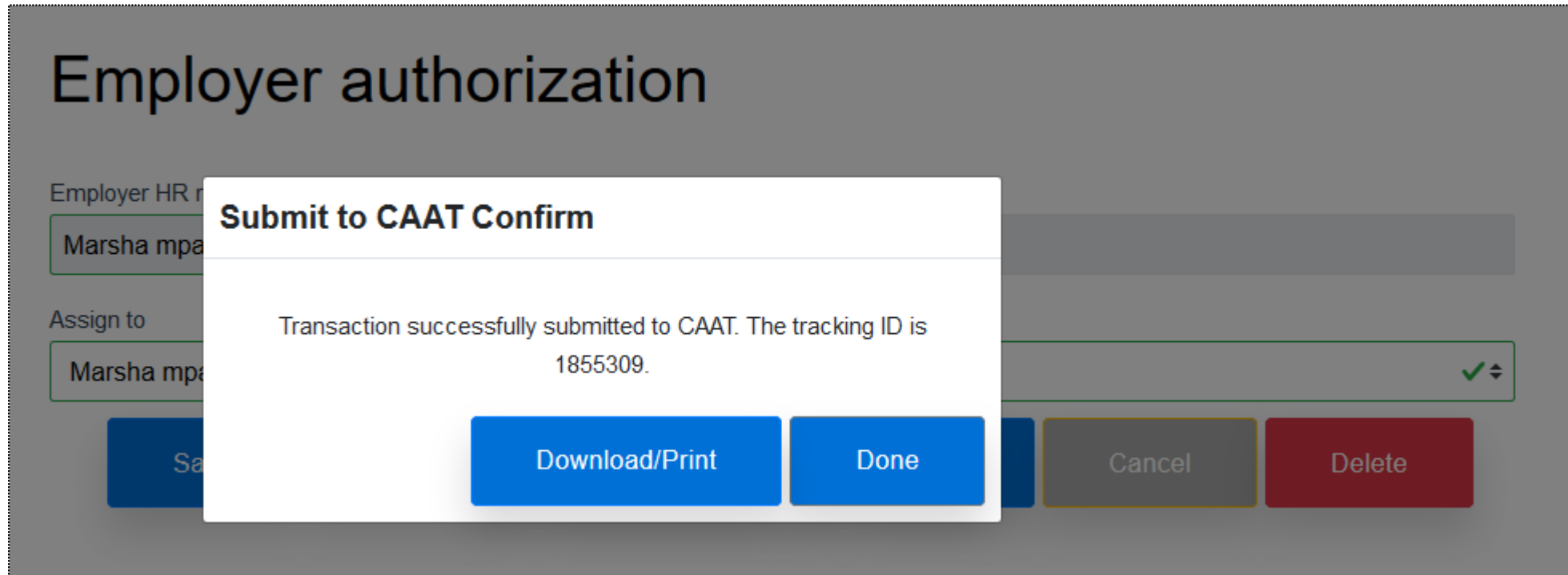
Termination of employment process – Submit to CAAT

- Once successfully validated, you can submit to CAAT
- You will receive a notification to confirm the successful submission

The screenshot shows a web interface for 'Employer authorization'. The background form has a table with columns 'Employer HR representative' and 'Date'. The first row contains 'Marsha mpa' in both columns. Below the table, there is an 'Assign to' field with 'Marsha mpa' selected. At the bottom of the form, there are buttons for 'Save', 'Cancel', and 'Delete'. A white dialog box is overlaid on top of the form. The dialog box has the title 'Submit to CAAT Confirm'. Below the title, it says 'By continuing, you indicate your acceptance of the Terms of Use.' There is a checked checkbox followed by the text 'I accept the [Terms of Use](#)'. At the bottom of the dialog box, there are two buttons: 'OK' and 'Cancel'.

Termination of employment process – Send to CAAT

- Another pop-up box will appear upon successful creation of the *Termination Benefit Application*
- Each transaction is assigned a tracking ID



Termination of employment process

- View the *Termination Benefit Application* by selecting the “Download/Print” button

Employer authorization

Employer HR t
Marsha mpa

Assign to
Marsha mpa

Submit to CAAT Confirm

Transaction successfully submitted to CAAT. The tracking ID is 1855309.

Download/Print Done Cancel Delete



#R7997#T#260896#P#1855309
Submitted via 2021-01-13 via employer portal

caat PENSION PLAN Termination Benefit Application

Note: Date format is dd-mm-yyyy for all date fields

If member is eligible for retirement complete a Pension Application. Complete section B, or C as applicable, depending on your Plan design. All other sections of this form must be completed.

Current design: DBprime DBplus Jurisdiction of employment: ON

Data has been revised – use for any data changes

Date of revision: Employer representative initials: M.M. Employer name: Centennial

A. Member information

Last name	First name	Initial	Social Insurance Number
LNAME	FNAME		001318187
Date of birth	Phone number	Email	
23-Oct-1984		AAAAA00@AA.AAAAAAAAAAAAAAAAAA.AA	

Mailing address
1 Anywhere St. Anywhere, ON, M1M 1M1, CAN

B. Earnings, contributions, and pensionable service for DBprime

Start date of pay period for the first pay of the year	Last day worked	Termination of employment date (complete if different from Last day worked)	Reason for difference
01-Jan-2020	30-Nov-2020	30-Nov-2020	

Submit your contribution calculation worksheet along with this application.

	Current year		Previous year
	From: 01-Jan-2020	To: 30-Nov-2020	(If DCT has not been submitted) From: To:
Regular contributory earnings <small>Does not include earnings for purchased leaves, lump sum, vacation pay or retroactive pay. Report the last three amounts separately below.</small>	\$ 60,205.88		\$ 0.00
Lump sum contributory earnings	\$ 0.00		\$ 0.00
Vacation contributory earnings <small>Include only current entitlement year</small>	\$ 0.00		\$ 0.00
Retroactive pay <small>Prior to reporting year. Attach Retro-Pay Allocation form from the CAAT Plan website</small>	\$ 0.00		\$ 0.00
Total earnings <small>Combined total of all four rows above</small>	\$ 60,205.88		\$ 0.00
Basic contributions <small>Does not include purchased leaves</small>	\$ 6,967.95		\$ 0.00
RCA contributions	\$ 0.00		\$ 0.00
Annual rate of salary	\$ 66,000.00		\$ 0.00
Pension adjustments (PA) <small>Include current year purchased leaves</small>	\$ 6,909.00		\$ 0.00
Pensionable service <small>Total service, excluding purchased service, used for PA calculation (5 decimals)</small>	0.91221		0.00000

C. Earnings and contributions for DBplus

Last day worked	Termination of employment date	Current year	Previous year
			(If DCT has not been submitted)
Current year eligible earnings		\$ 0.00	\$ 0.00
Contributions <small>Does not include purchased leaves</small>		\$ 0.00	\$ 0.00
Pension adjustments (PA) <small>Include current year purchased leaves</small>		\$ 0.00	\$ 0.00

CAAT Pension Plan 250 Yonge Street, Suite 2900, Toronto ON M5B 2L7 Tel: 416.673.9000 Toll Free: 1.866.350.2228 Fax: 416.673.9028 www.caatpension.on.ca
TRD-130-07-2020-E Employer: Please send a copy of this form to the CAAT Plan via S-DCC

Termination of employment process

- You will see the submission on the dashboard under the “Recent activity” and “Transactions sent to CAAT” sections

Recent activity

Start time	Activity
13-Jan-2021 01:58 AM	143689 - sFnsK Sasn- Termination Assigned to CAAT
13-Jan-2021 01:58 AM	143689 - sFnsK Sasn- Termination Assigned to CAAT
13-Jan-2021 01:58 AM	143689 - sFnsK Sasn- Termination Assigned to CAAT

[View all activities](#)

Transactions sent to CAAT

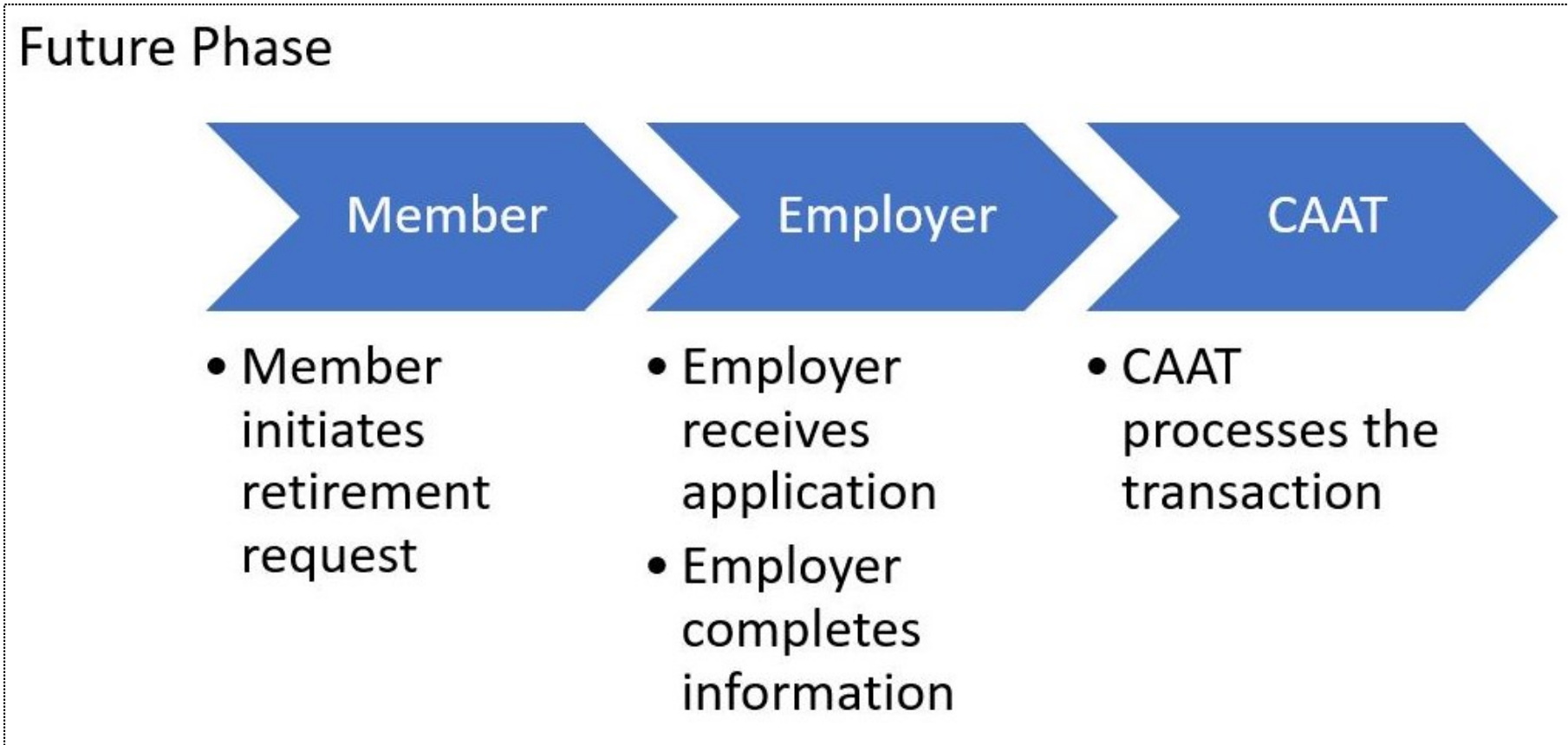
Submitted	Case number	Tracking ID	Member name	Type of transaction
7997	CA0012137	1855309	sFnsK Sasn	Termination
7997	CA0012137	1855309	sFnsK Sasn	Termination
7997	CA0012137	1855309	sFnsK Sasn	Change of Employment

[View all sent](#)



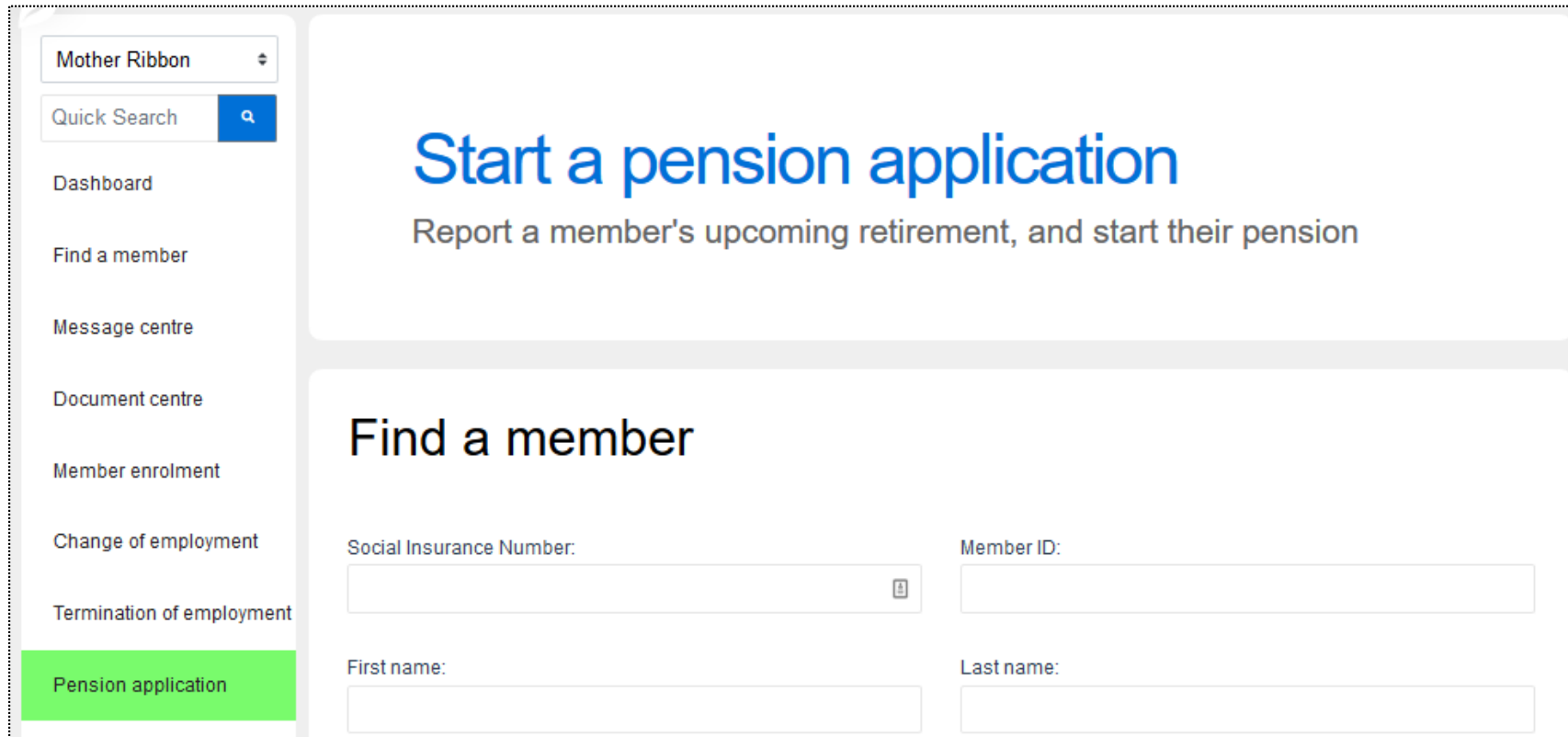
Pension application process

Pension application process – Future Phase



Pension application process

- Select “Pension application” to start the process



The screenshot shows a web application interface. On the left is a vertical navigation menu with the following items: "Mother Ribbon" (with a dropdown arrow), "Quick Search" (with a search icon), "Dashboard", "Find a member", "Message centre", "Document centre", "Member enrolment", "Change of employment", "Termination of employment", and "Pension application" (highlighted in green). The main content area is divided into two sections. The top section is titled "Start a pension application" in large blue text, with the subtitle "Report a member's upcoming retirement, and start their pension" below it. The bottom section is titled "Find a member" and contains four input fields: "Social Insurance Number:" (with a calendar icon), "Member ID:", "First name:", and "Last name:".

Pension application process

- Search using their SIN, Member ID, First name or Last name
- Avoid use of hyphens

Find a member

Social Insurance Number:	Member ID:
<input type="text" value="001499979"/>	<input type="text"/>
First name:	Last name:
<input type="text"/>	<input type="text"/>

Pension application process

- Click search and the result will be displayed in the “Search results” box below
- Click on the member to commence the process

Find a member

Social Insurance Number: Member ID:

First name: Last name:

Search results

First name	Middle initial	Last name	Social Insuran...	Date of birth	Member ID	Employment st...
FNAME		FNAME	001499979	12-Feb-1960	115286	Active

Pension application process

- After selecting the member, you will be directed to the “Pension application” page
- Here, you can start the retirement process

Pension application

Use to confirm a member's intention to retire.

Member ID: ██████████ Current Plan design: DBprime Jurisdiction of employment: ON

Member employment information

Last day worked: Retirement date (must be the last day of the month):

Member personal information

First name: Middle initial:

Last name: Social Insurance Number:

Date of birth:

Pension application process – Member employment information

- Enter “Member employment information”

Member employment information

Last day worked

30-Nov-2020



Retirement date (must be the last day of the month)

30-Nov-2020



Pension application process – Member personal information

- Confirm that the correct member has been selected

Member personal information

First name	Middle initial
FNAME	
Last name	Social Insurance Number
FNAME	001499979
Date of birth	
12-Feb-1960	

Pension application process – Member contact information

- You can review the current information for the member

Member contact information

Email address	Phone number
<input type="text" value="AAxxxxxxxx@xx.xx.xx"/>	<input type="text"/>
Ext	
<input type="text"/>	
Street address 1	
<input type="text" value="000 AAAAAAA AAA."/>	
Street address 2	
<input type="text"/>	
City	Province/State
<input type="text" value="AAAAAAA"/>	<input type="text" value="Ontario"/>
Country	Postal/Zip code
<input type="text" value="Canada"/>	<input type="text" value="A0A0A0"/>

Pension application process – Member contact information

- The information can be updated if changes are required

Member contact information

Email address	Phone number
<input type="text" value="AAxxxxxxxx@xx.xx.xx"/>	<input type="text"/>
Ext	
<input type="text"/>	
Street address 1	
<input type="text" value="1 Anywhere St."/> ✓	
Street address 2	
<input type="text"/> ✓	
City	Province/State
<input type="text" value="Anywhere"/> ✓	<input type="text" value="Ontario"/>
Country	Postal/Zip code
<input type="text" value="Canada"/>	<input type="text" value="M1M 1M1"/> ✓

Pension application process – Wrong format error

- If the information is entered incorrectly, a red error notification will be automatically displayed (i.e., incorrect postal code format)

Member contact information

Email address Phone number

Ext

Street address 1 ✓

Street address 2

City ✓ Province/State

Country Postal/Zip code Expected postal code format is A1A 1A1!

Pension application process – Earnings, contributions and pensionable service for DBprime

- Enter the requested information in the required fields
- “From” and “To” dates must be in the same calendar year
- If the DCT has been submitted for the previous year, select “YES” otherwise select “NO”

Earnings, contributions, and pensionable service for DBprime

Start date of pay period for the first pay of the year
01-Jan-2020 ✓

Current year

From 01-Jan-2020 ✓ To 30-Nov-2020 ✓

Pensionable service	0.91221 ✓	Regular contributory earnings	100,160.66 ✓
Lump sum contributory earnings	###	Vacation contributory earnings	###
Retroactive pay	###	Total earnings	100160.66
Basic contributions	12,881.26 ✓	CAAT RCA contributions	###
Annual rate of salary	109,800.00 ✓	Pension adjustment (PA)	14,101 ✓

Has the DCT for the previous year been submitted?
 YES NO

Pension application process – Earnings, contributions and pensionable service for DBprime

- If you selected "NO" complete the required fields in the drop-down menu

Has the DCT for the previous year been submitted?
 YES NO

Previous year

From	To
<input type="text" value="DD-MMM-YYYY"/>	<input type="text" value="DD-MMM-YYYY"/>
Pensionable service	Regular contributory earnings
<input type="text" value="#.#####"/>	<input type="text" value="#.##"/>
Lump sum contributory earnings	Vacation contributory earnings
<input type="text" value="#.##"/>	<input type="text" value="#.##"/>
Retroactive pay	Total earnings
<input type="text" value="#.##"/>	<input type="text" value="0.00"/>
Basic contributions	CAAT RCA contributions
<input type="text" value="#.##"/>	<input type="text" value="#.##"/>
Annual rate of salary	Pension adjustment (PA)
<input type="text" value="#.##"/>	<input type="text" value="##"/>

Pension application process – Earnings and contributions for DBplus

- Enter the requested information in the required fields
- “From” and “To” dates must be in the same calendar year
- If the DCT has been submitted for the previous year, select “YES” otherwise select “NO”

Earnings and contributions for DBplus

From	To
01-Jan-2020 ✓	30-Nov-2020 ✓
Current year eligible earnings	Employer contributions
10,000.00 ✓	900.00 ✓
Employee contributions (Does not include purchased leaves)	Pension adjustment (PA) (Include current year purchased leave)
900.00 ✓	1,127 ✓

Has the DCT for the previous year been submitted?

YES NO

Pension application process – Earnings and contributions for DBplus

- If you selected "NO" complete the required fields in the drop-down menu

Has the DCT for the previous year been submitted?

YES NO

From	To
<input type="text" value="DD-MMM-YYYY"/>	<input type="text" value="DD-MMM-YYYY"/>
Previous year eligible earnings	Employer contributions
<input type="text" value="###"/>	<input type="text" value="###"/>
Employee contributions (Does not include purchased leaves)	Pension adjustment (PA) (Include current year purchased leave)
<input type="text" value="###"/>	<input type="text" value="##"/>

Pension application process – Purchases in process

- Make the appropriate “YES” or “NO” selection based on the question as it pertains to the member

Purchases in process

Report any leaves of absence and/or purchases for the current year (and the previous year if the DCT has not been submitted).

Select the leave type. Ensure the applicable service purchase form and the payment is submitted for all leaves included below, including leaves currently in process.

The member has a purchase currently in process

YES NO

Pension application process – Termination details

- Make the appropriate “YES” “NO” or “Unknown” selection based on the question as it pertains to the member

Termination details

Is the member going to work at another participating employer?

YES NO Unknown

Is the member currently employed at another participating employer?

YES NO Unknown

Pension application process – Employer authorization

- You have the option to assign the task to another user or you can leave it blank if submitting to CAAT

Employer authorization

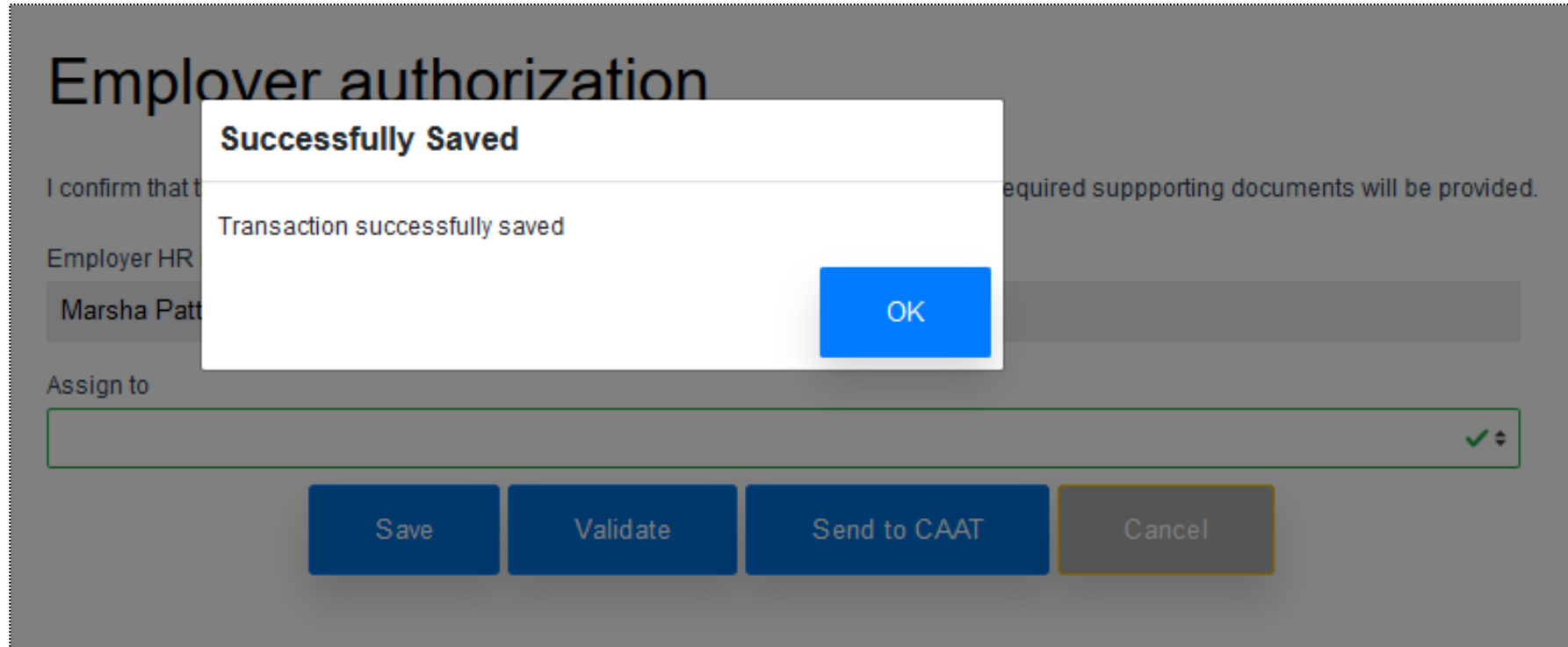
I confirm that this information is true and correct according to our records, and that any required supporting documents will be provided.

Employer HR representative	Date
Marsha Patterson	06-Jan-2021

Assign to

Pension application process - Save

- When complete, save the process
- A pop-up box will be displayed to show that it was successfully saved
- If it is not successful, the pop-up box will indicate that it has failed



The screenshot displays a web application interface for 'Employer authorization'. A white pop-up dialog box is centered on the screen, containing the text 'Successfully Saved' and 'Transaction successfully saved', with a blue 'OK' button. The background form is dimmed and includes the following elements:

- Title: **Employer authorization**
- Text: 'I confirm that' and 'required supporting documents will be provided.'
- Text: 'Employer HR' and 'Marsha Patt'
- Text: 'Assign to' followed by a dropdown menu with a green checkmark and a plus sign.
- Buttons: 'Save', 'Validate', 'Send to CAAT', and 'Cancel'.

Pension application process - Save

- Once successfully saved, you will be redirected to the dashboard
- Here, you can view the process in both the “Recent activity” and “Transactions in process” sections
- You can also retrieve the form from the “Transactions in process” section

Recent activity

Start time	Activity
13-Jan-2021 03:33 AM	115286 - ciUZDhNx PfssS- Pension Application Form Assigned to Marsha mpattest1
13-Jan-2021 03:33 AM	115286 - ciUZDhNx PfssS- Pension Application Form Assigned to Marsha mpattest1
13-Jan-2021 03:33 AM	115286 - ciUZDhNx PfssS- Pension Application Form Assigned to Marsha mpattest1

[View all activities](#)

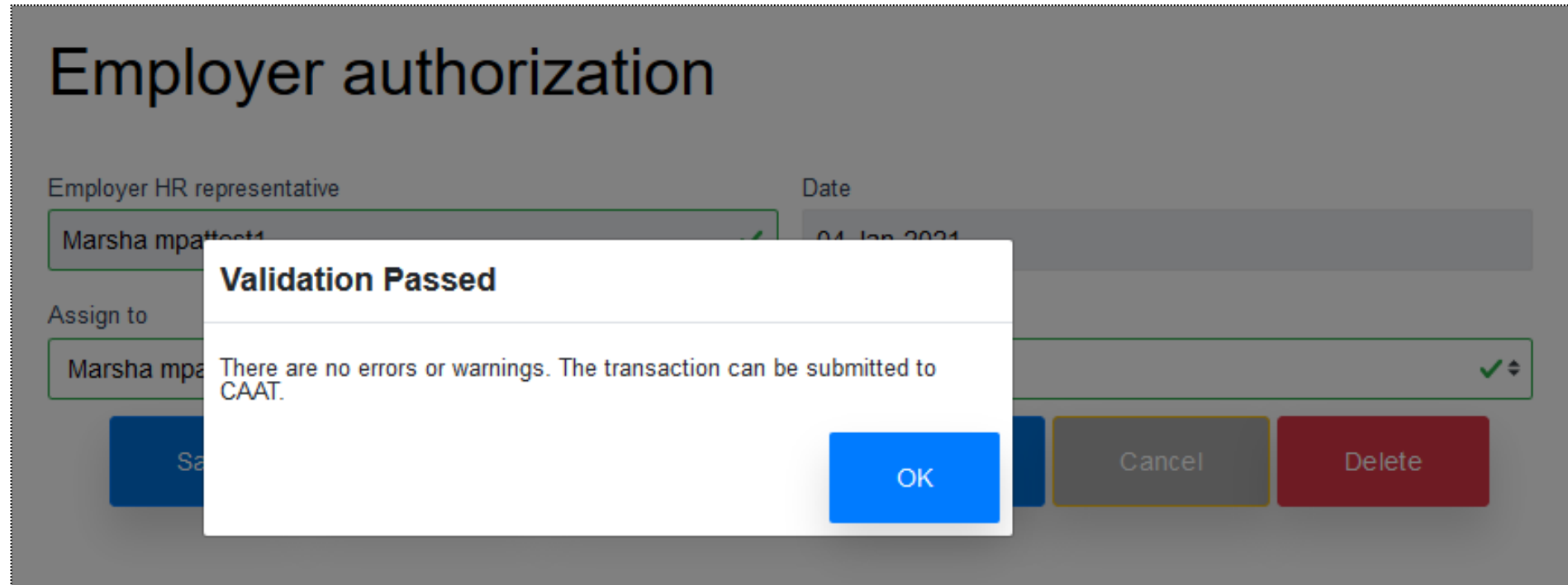
Transactions in process

In progress	Member name	Type of transaction
8006	ciUZDhNx PfssS	Pension Application
8006	ciUZDhNx PfssS	Change of information

[View all in process](#)

Pension application process - Validate

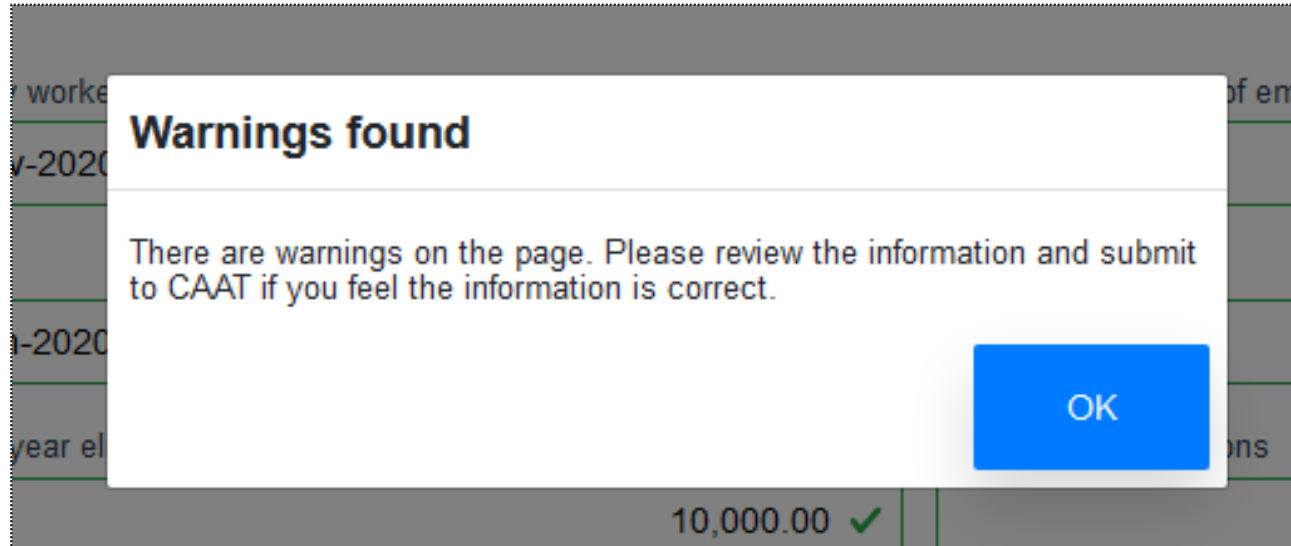
- Validate the process to confirm all applicable fields are correctly entered
- You will receive a notification to confirm success



The screenshot shows a web form titled "Employer authorization". The form has several fields: "Employer HR representative" with the value "Marsha mpattest1", "Date" with the value "04 Jan 2021", and "Assign to" with the value "Marsha mpattest1". A blue "Save" button is partially visible. A white dialog box is overlaid on the form, titled "Validation Passed". The dialog box contains the text: "There are no errors or warnings. The transaction can be submitted to CAAT." and has an "OK" button. In the background, there are "Cancel" and "Delete" buttons.

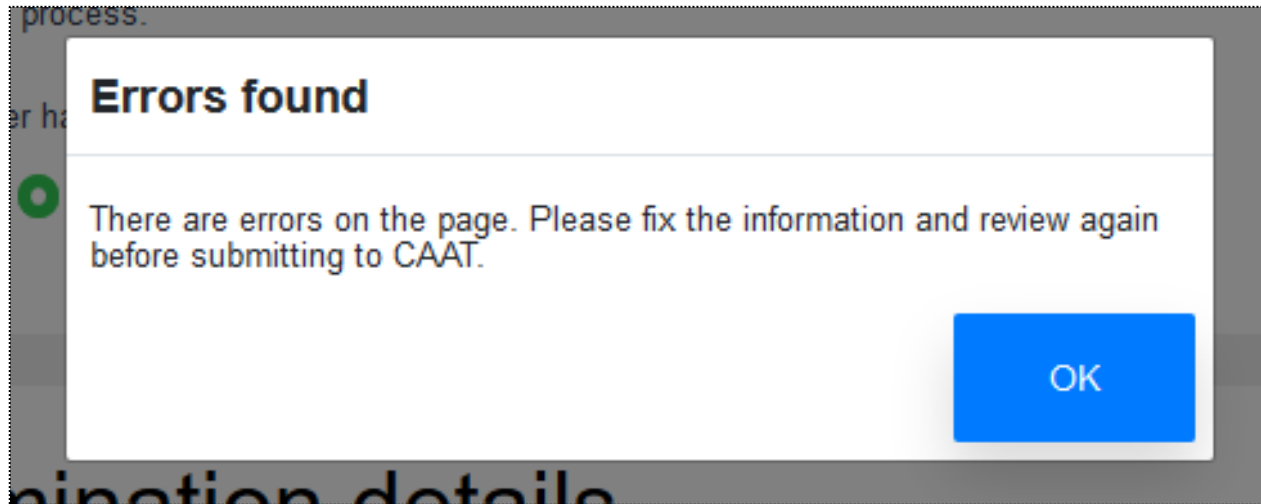
Pension application process – Validation warning

- A validation warning may appear to advise review of information before submission to CAAT



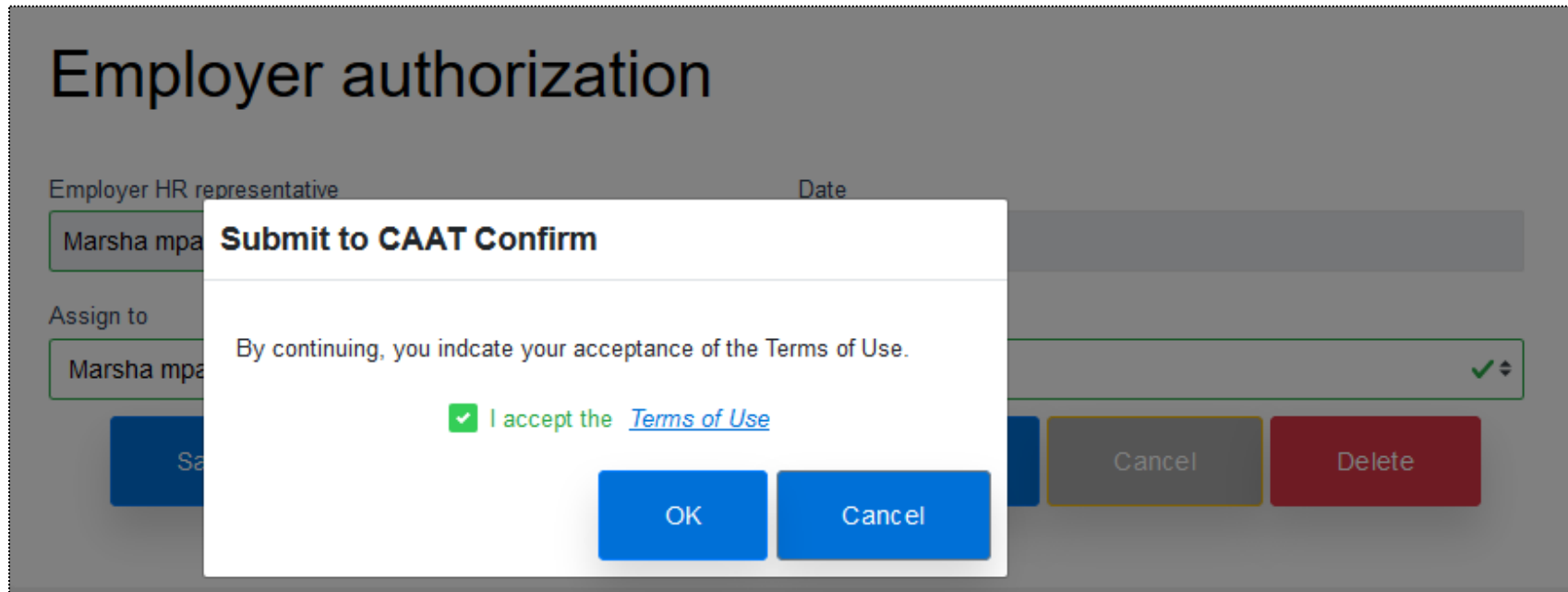
Pension application process – Validation error

- If validation is unsuccessful, you will be directed to the section that has the error



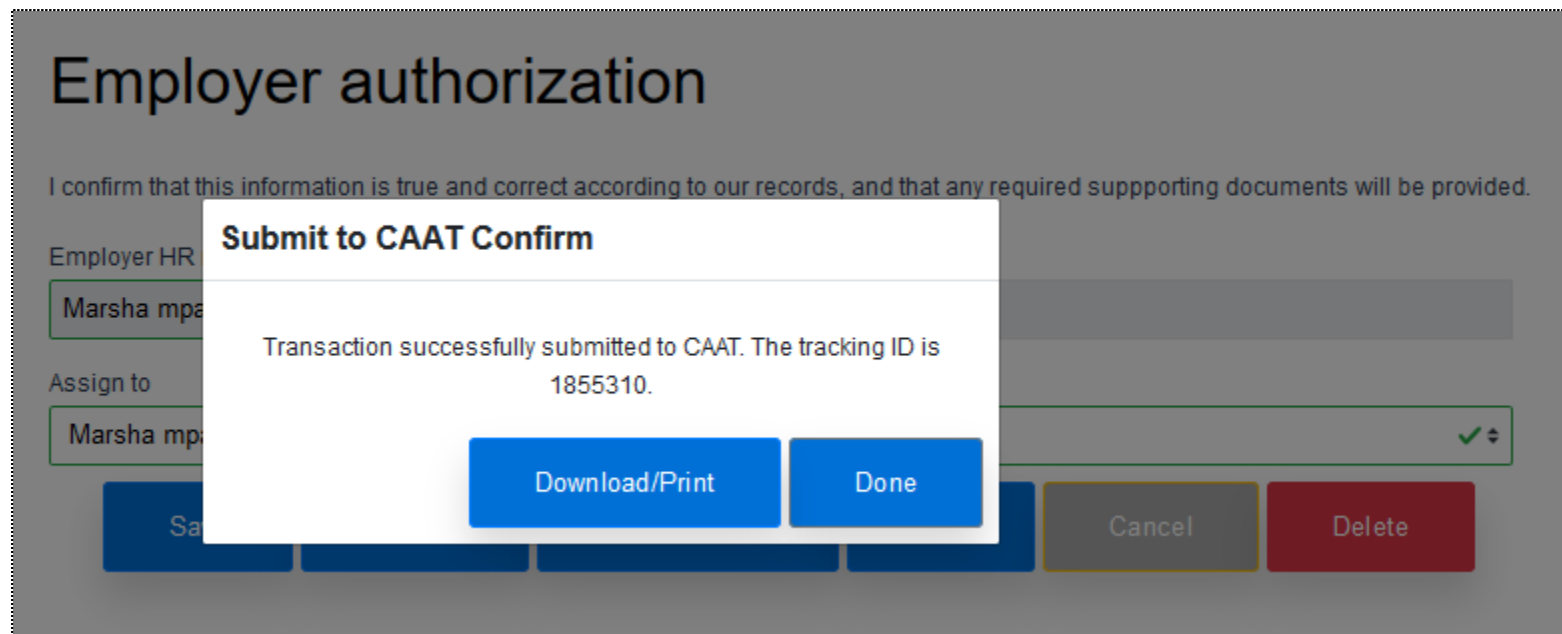
Pension application process – Send to CAAT

- Once successfully validated, you can submit to CAAT
- A pop-up box will be displayed to confirm the successful submission



Pension application process – Send to CAAT

- Another pop-up box will appear upon successful creation of the *Pension Application*
- Each transaction is assigned a tracking ID



Pension application process

- View the *Pension Application* by selecting the “Download/Print” button

Employer authorization

I confirm that this information is true and correct according to our records, and that any required supporting documents will be provided.

Employer HR
Marsha mpa

Assign to
Marsha mpa

Submit to CAAT Confirm

Transaction successfully submitted to CAAT. The tracking ID is 1855310.

Download/Print Done Cancel Delete



#R8006#T#260897#P#1855310
Submitted via 2021-01-13 via employer portal

caat PENSION PLAN

Pension Application

Complete section B, or C as applicable, depending on your Plan design. All other sections of this form must be completed.

Current Design: DBprime DBplus Jurisdiction of employment: ON

Data has been revised - use for any data changes

Date of revision: _____ Employer representative initials: M.M

Last day worked: 30-Nov-2020
Retirement date: 30-Nov-2020
Employer name: Centennial

A Member information

Last name FNAME	First name FNAME	Initial	Social Insurance Number
			001499979
Date of birth	Phone number	Email	
12-Feb-1960		AAAAAAAAA@AA.AAAAAAAAAAAAAAAAAAA	

Mailing address
1 Anywhere St. Anywhere, ON, M1M 1M1, CAN

B Earnings, contributions, and pensionable service for DBprime

Start date of pay period for the first pay of the year
01-Jan-2020

Submit your contribution calculation worksheet along with this application.

	Current year From: 01-Jan-2020 To: 30-Nov-2020	Previous year (if DCT has not been submitted) From: To:
Regular contributory earnings <small>Does not include earnings for purchased leave, lump sum, vacation pay or retroactive pay. Report the last three amounts separately below.</small>	\$ 100,160.86	\$ 0.00
Lump sum contributory earnings	\$ 0.00	\$ 0.00
Vacation contributory earnings <small>Include only current employment year.</small>	\$ 0.00	\$ 0.00
Retroactive pay <small>Prior to reporting year. Attach Retro Pay Allocation form from the CAAT Plan website.</small>	\$ 0.00	\$ 0.00
Total earnings <small>Combined total of all four rows above.</small>	\$ 100,160.86	\$ 0.00
Basic contributions <small>Does not include purchased leave.</small>	\$ 12,881.28	\$ 0.00
RCA contributions	\$ 0.00	\$ 0.00
Annual rate of salary	\$ 109,800.00	\$ 0.00
Pension adjustments (PA) <small>Include current year purchased leave.</small>	\$ 14,101.00	\$ 0.00
Pensionable service <small>Total service, including purchased service (5 decimal)</small>	0.91221	0.00000

C Earnings and contributions for DBplus

	Current year	Previous year (if DCT has not been submitted)
Eligible earnings	\$ 0.00	\$ 0.00
Contributions <small>Does not include purchased leave.</small>	\$ 0.00	\$ 0.00
Pension adjustments (PA) <small>Include current year purchased leave.</small>	\$ 0.00	\$ 0.00

CAAT Pension Plan 350 Yonge Street, Suite 2900, Toronto ON M5B 2T7 Tel: 416.673.9000 Toll Free: 1.866.350.2228 Fax: 416.673.9028 www.caatpension.on.ca
Pension Application Page 1 / 2 700-200-017-2000-01 Employer: Please send a copy of this form to the CAAT Plan via S-GOC

Pension application process

- Now that the form has been submitted to CAAT you can view this submission on the dashboard under the “Recent activity” and “Transactions sent to CAAT” sections

Recent activity

Start time	Activity
13-Jan-2021 03:37 AM	115286 - ciUZDhNx PfssS- Pension Application Form Assigned to CAAT
13-Jan-2021 03:37 AM	115286 - ciUZDhNx PfssS- Pension Application Form Assigned to CAAT
13-Jan-2021 03:37 AM	115286 - ciUZDhNx PfssS- Pension Application Form Assigned to CAAT
13-Jan-2021 03:37 AM	115286 - ciUZDhNx PfssS- Pension Application Form Assigned to CAAT

[View all activities](#)

Transactions sent to CAAT

Submitted	Case number	Tracking ID	Member name	Type of transaction
8006	CA0012138	1855310	ciUZDhNx PfssS	Pension Application
8006	CA0012138	1855310	ciUZDhNx PfssS	Pension Application
8006	CA0012138	1855310	ciUZDhNx PfssS	Pension Application

[View all sent](#)

A top-down view of a group of people's hands stacked in a circle, symbolizing teamwork and collaboration. The image is overlaid with a semi-transparent blue filter. The text "Live demo" is centered in white.

Live demo

