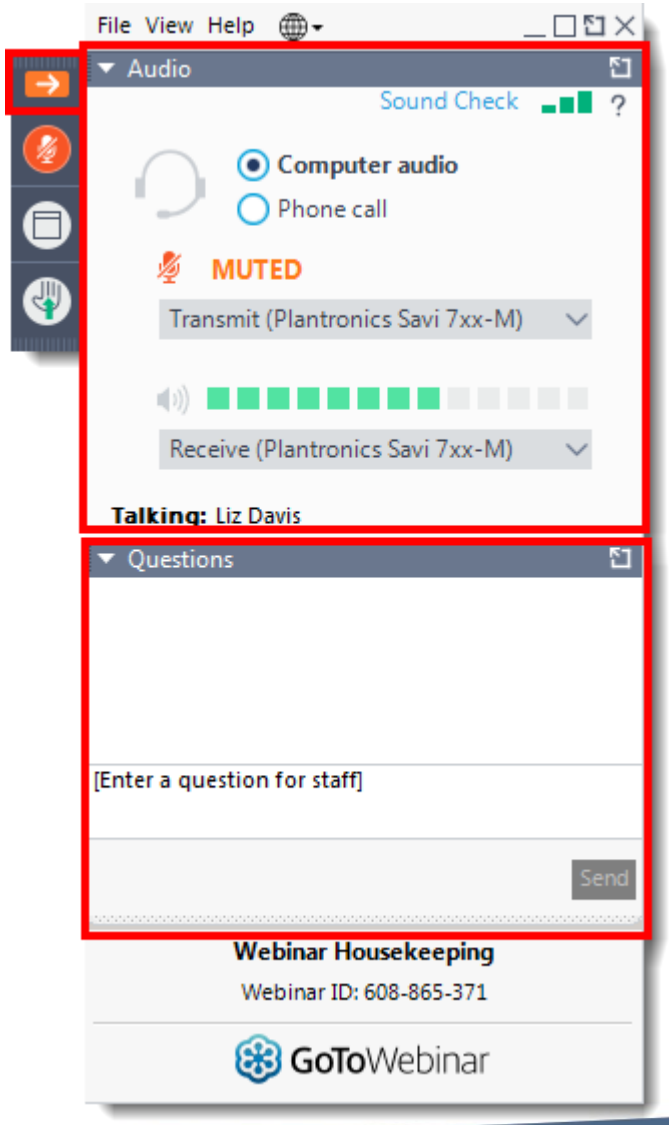
While we wait – audio instructions

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



caat
PENSION PLAN

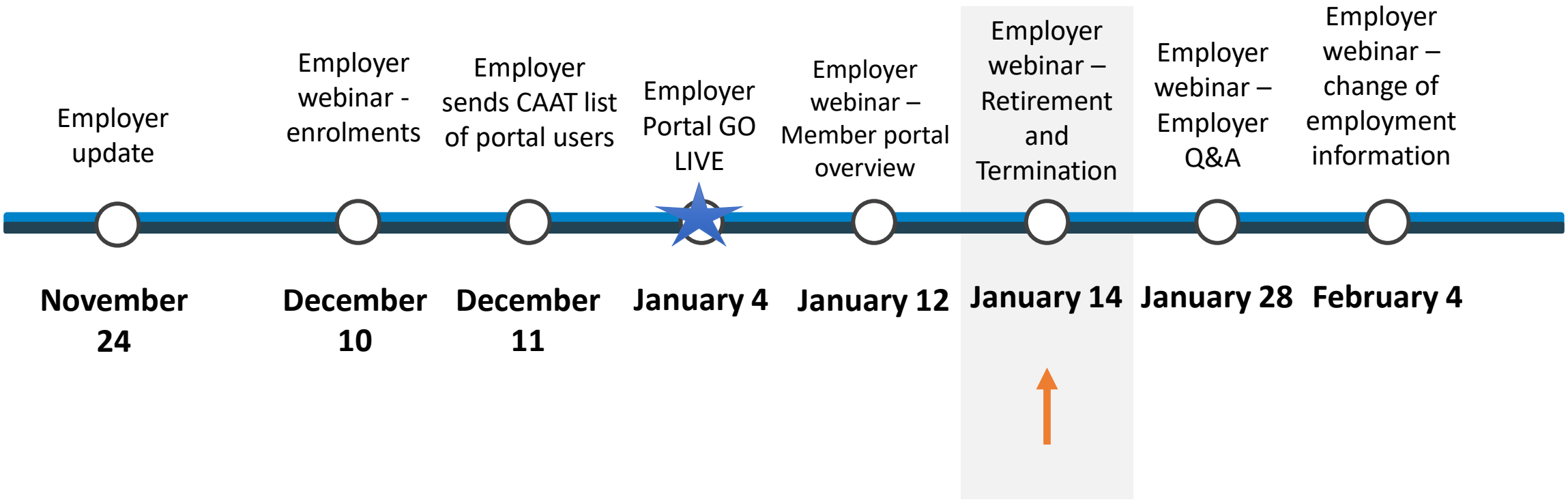
Employer Portal:
Termination and Pension Application Process

January 14, 2021

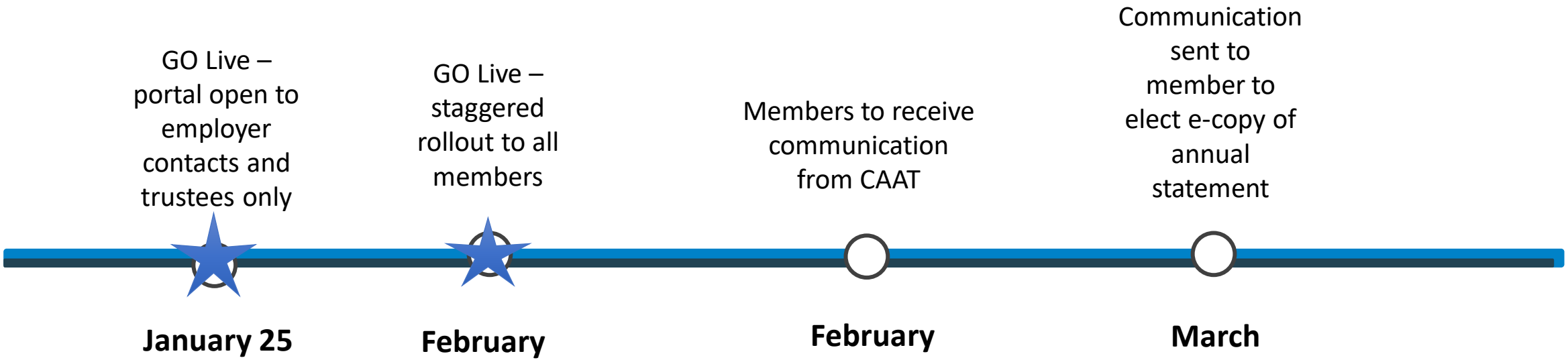
Agenda

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

Portal roadmap – Employers



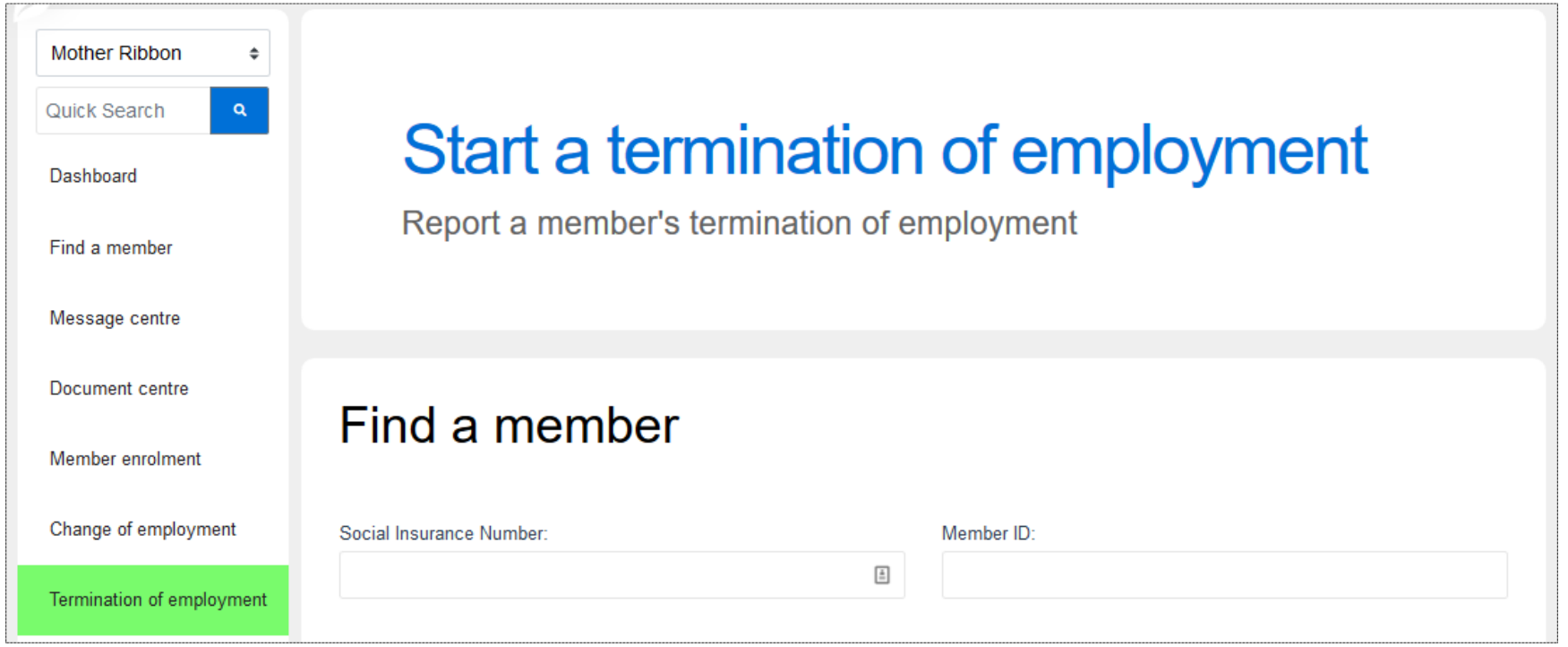
Portal roadmap – Members



Termination of employment process

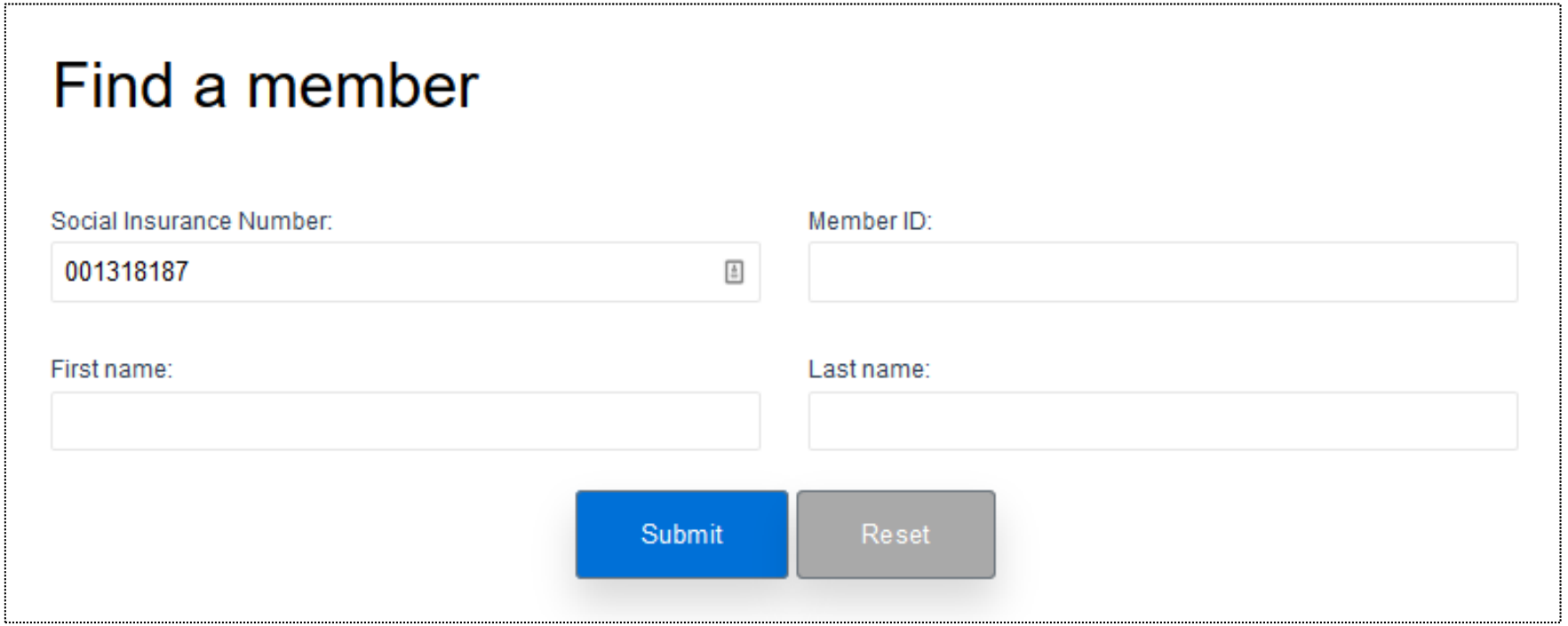
Termination of employment process

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



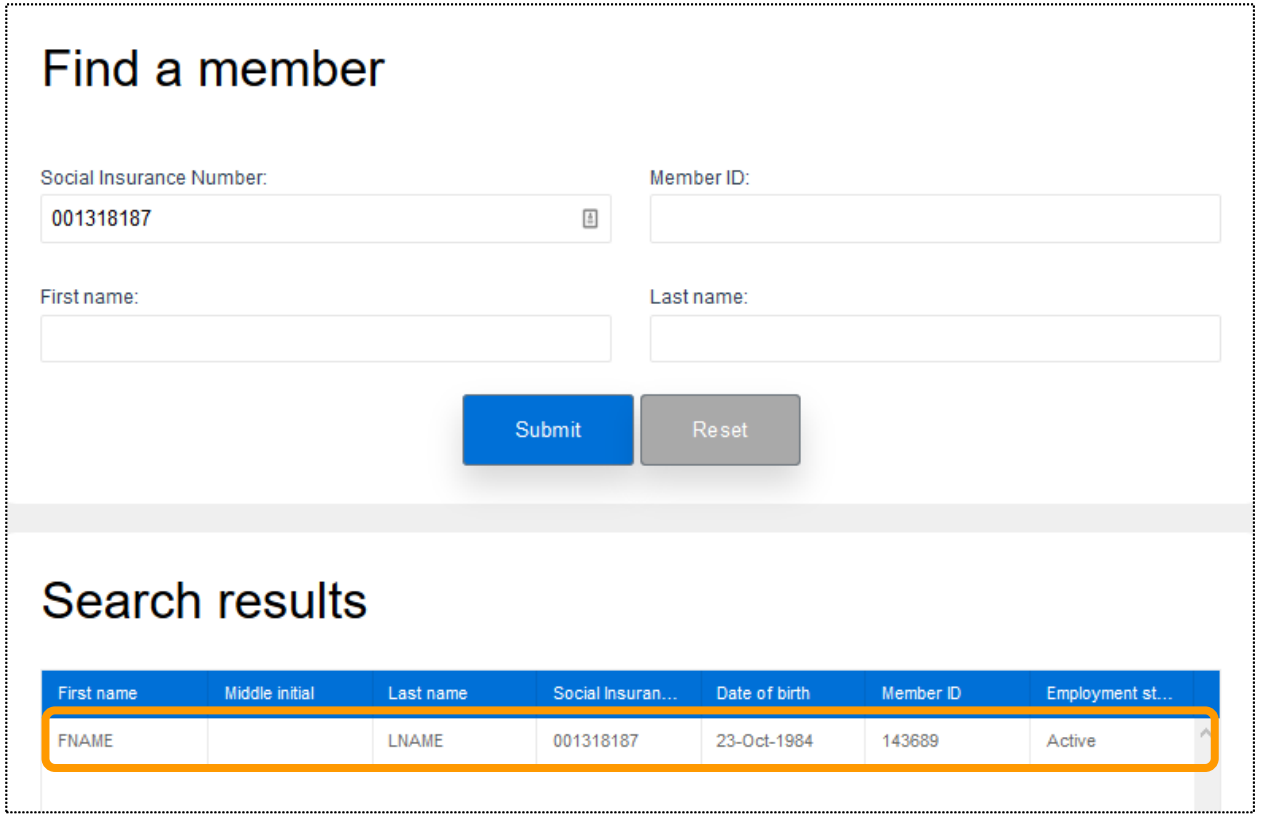
Termination of employment process

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



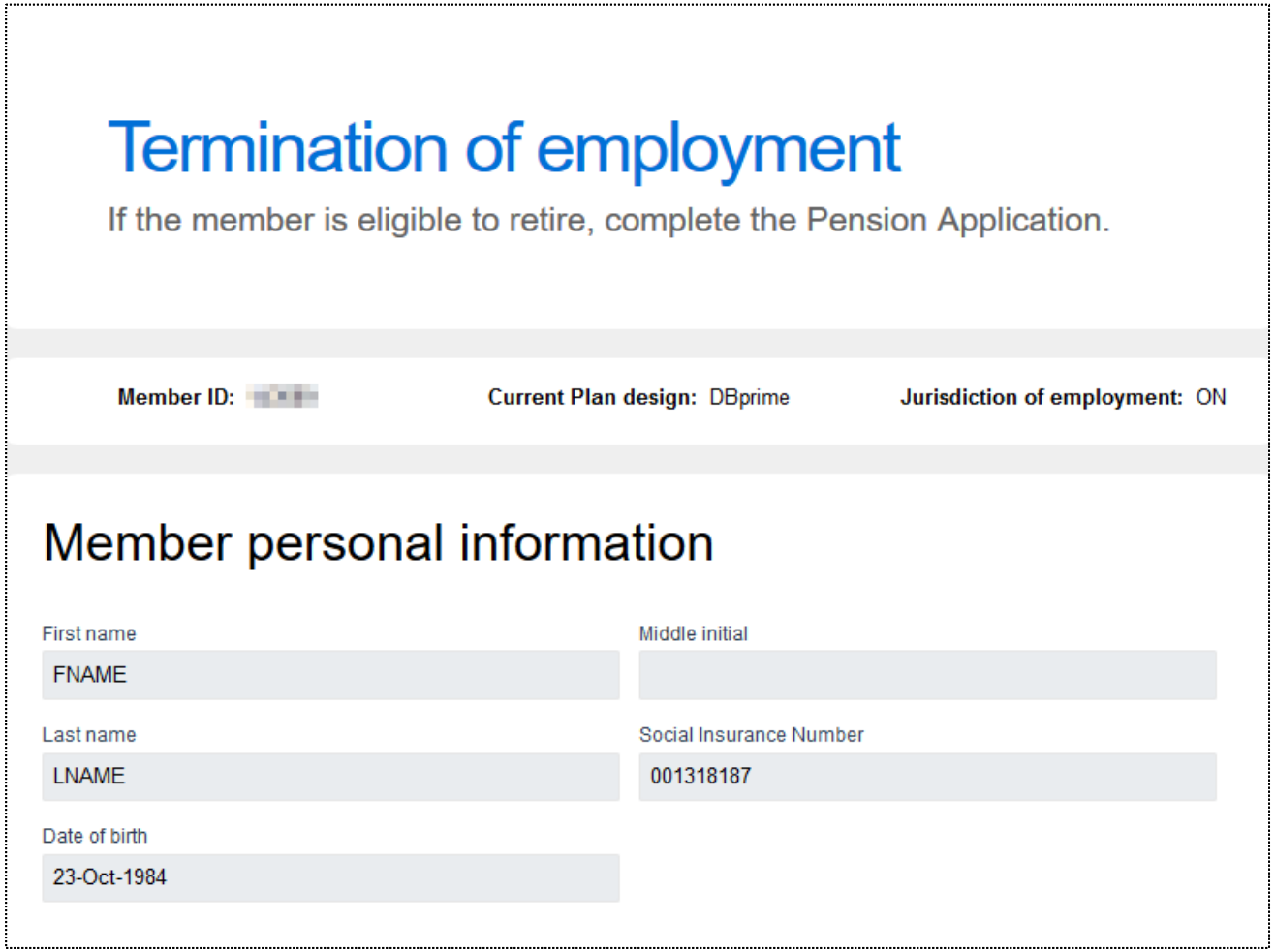
Termination of employment process

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



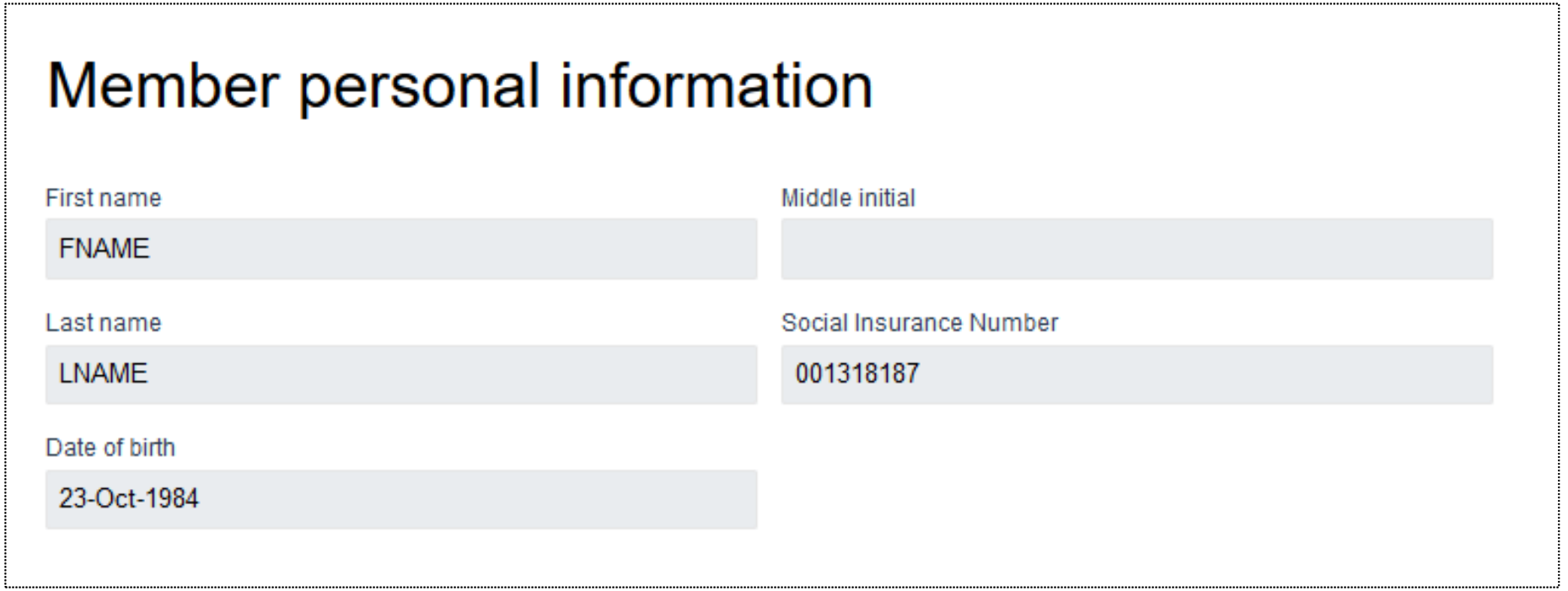
Termination of employment process

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



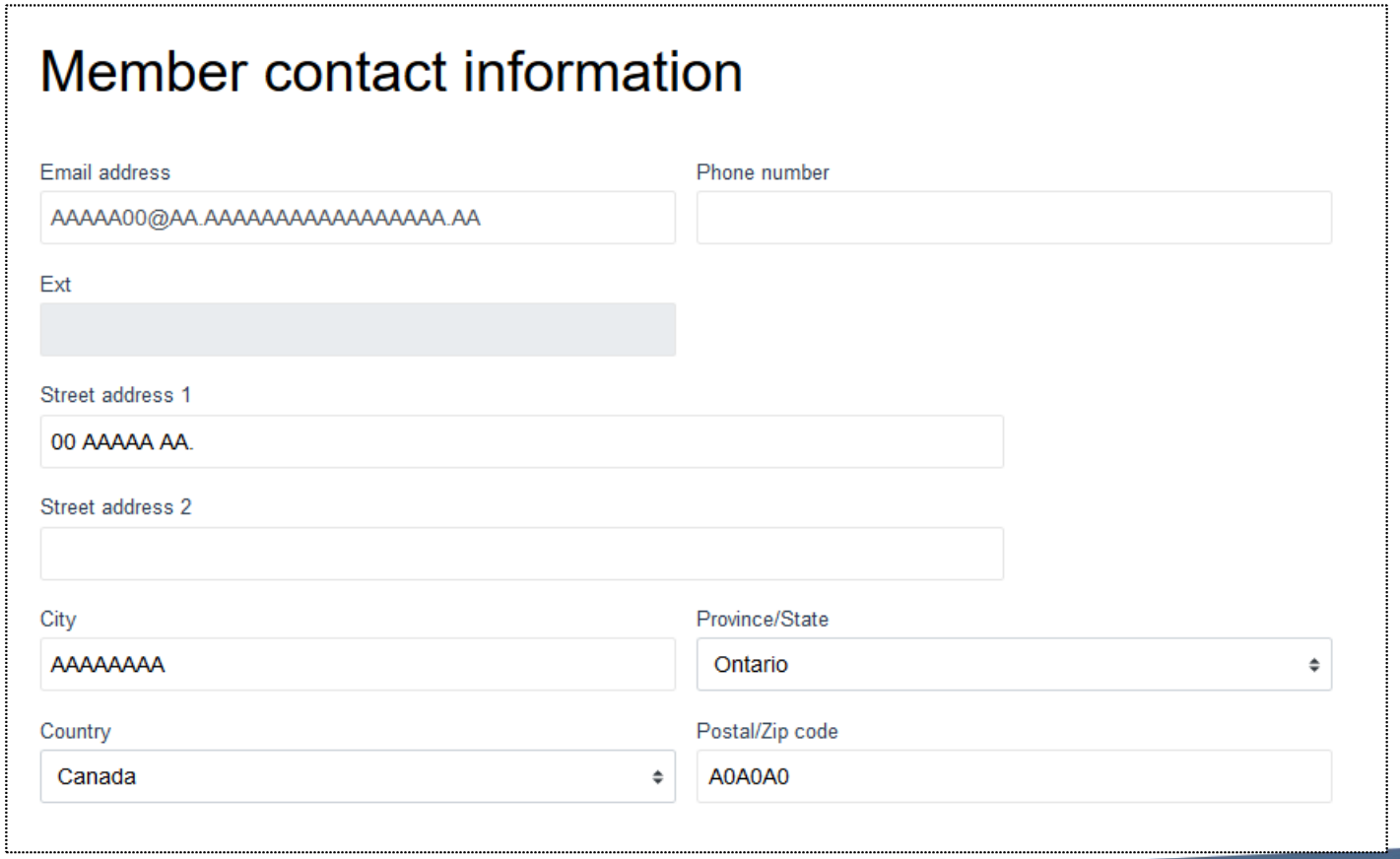
Termination of employment – Member personal information

- Confirm that the correct member has been selected



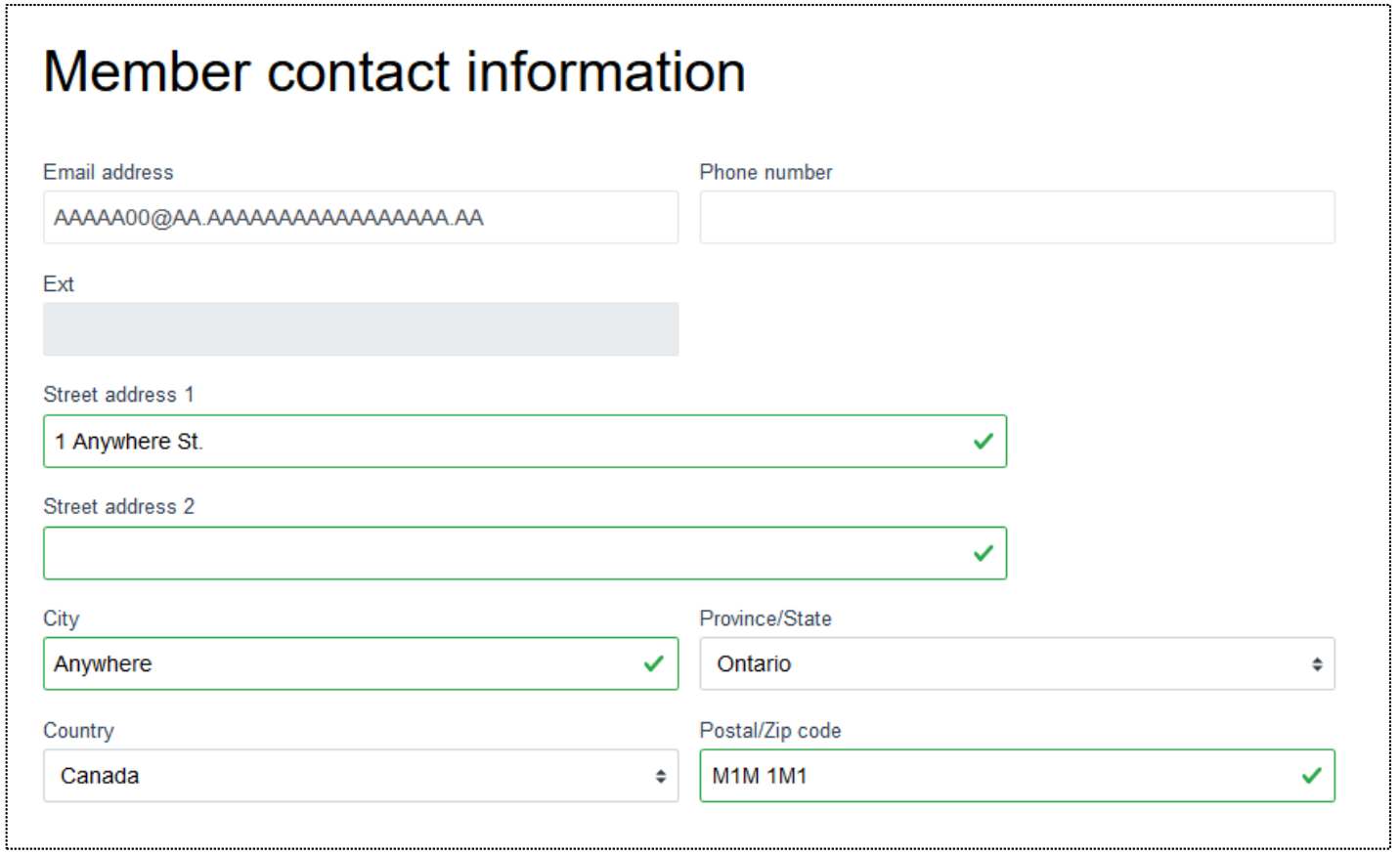
Termination of employment process – Member contact information

- You can review the current information for the member



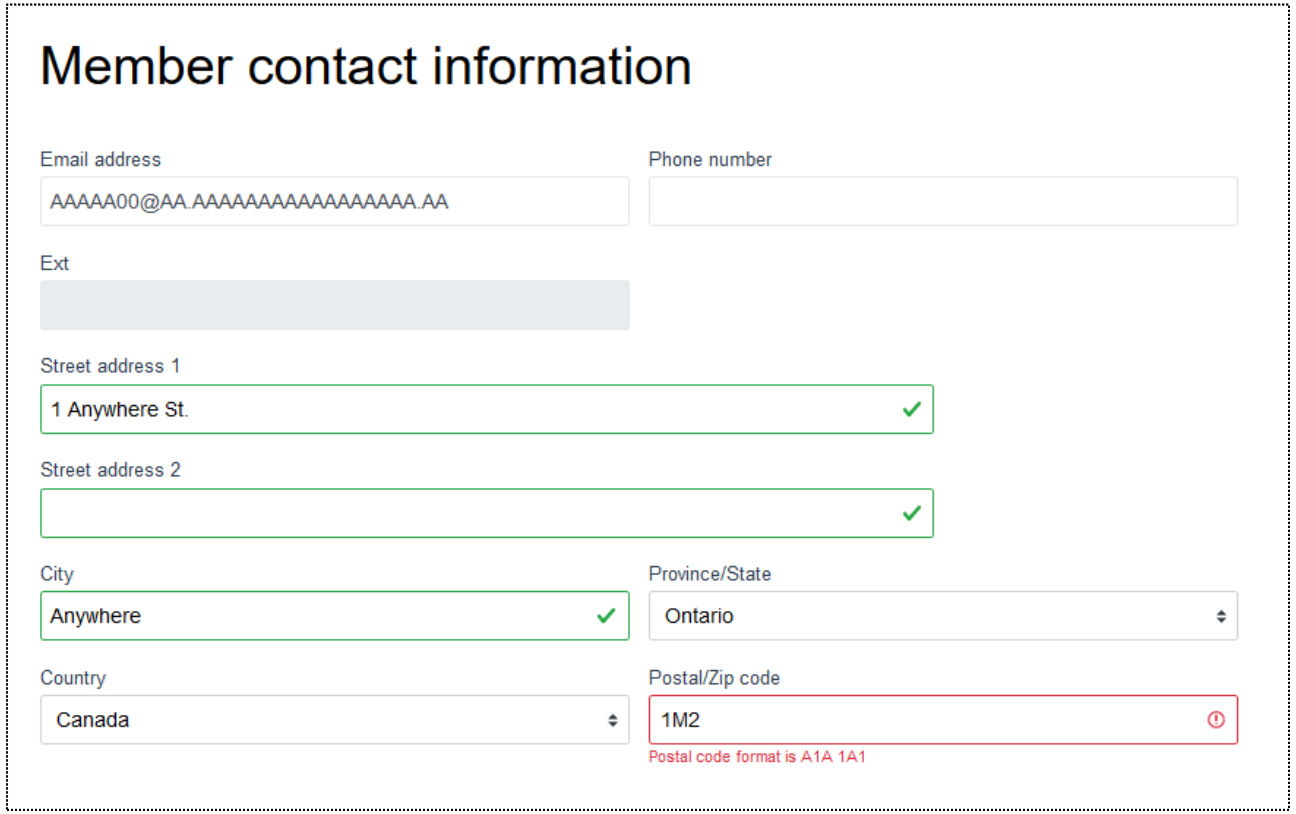
Termination of employment process – Member contact information

- The information can be updated if changes are required



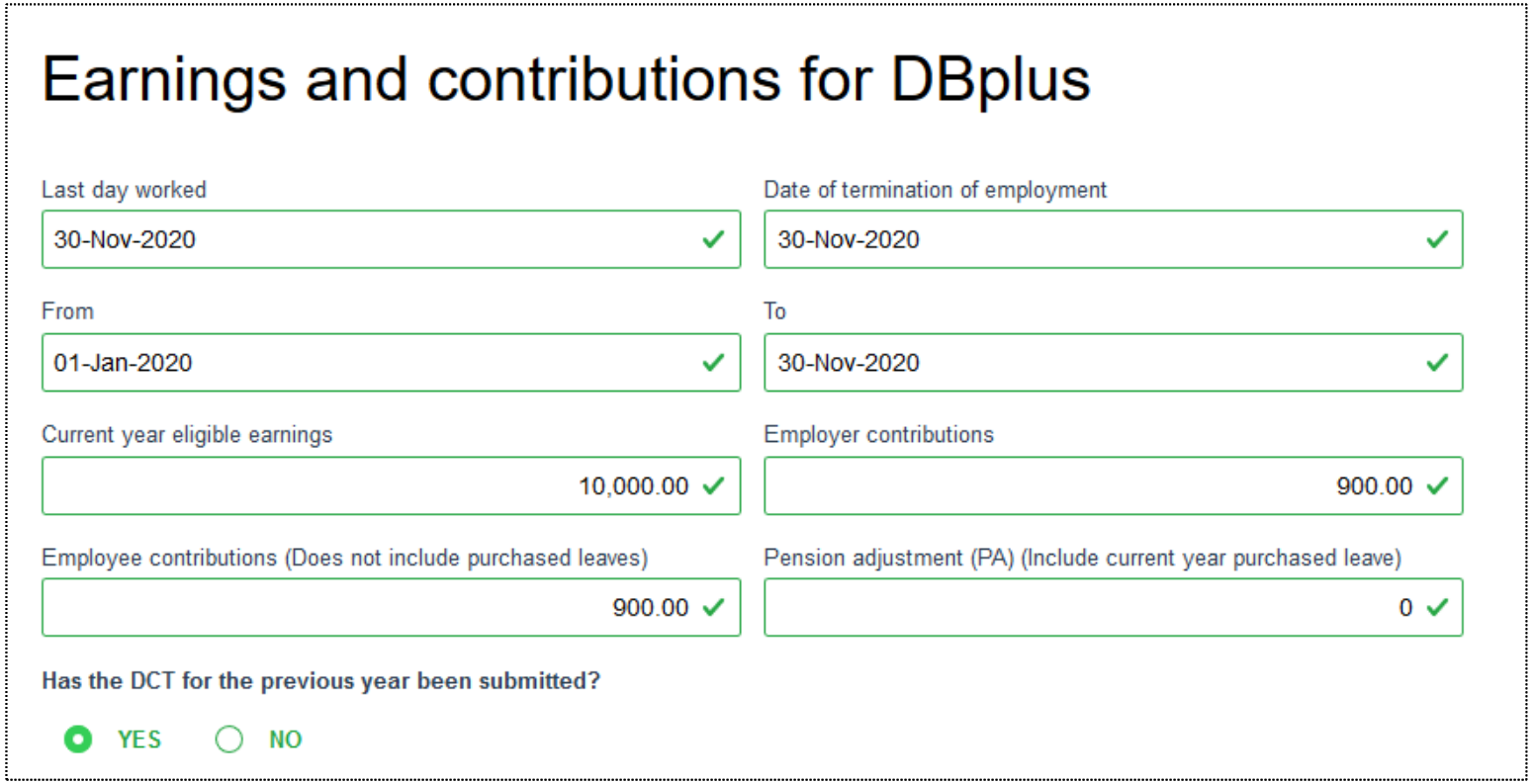
Termination of employment process – Wrong format error

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



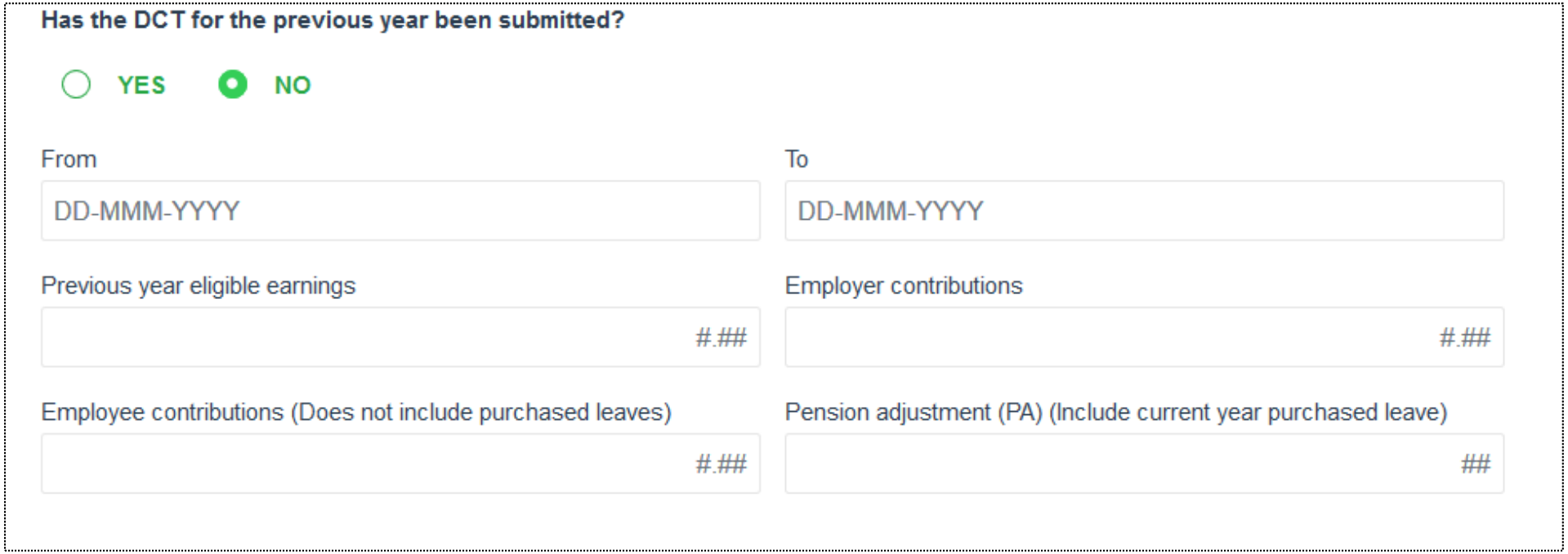
Termination of employment process – Earnings and contributions for DBplus

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



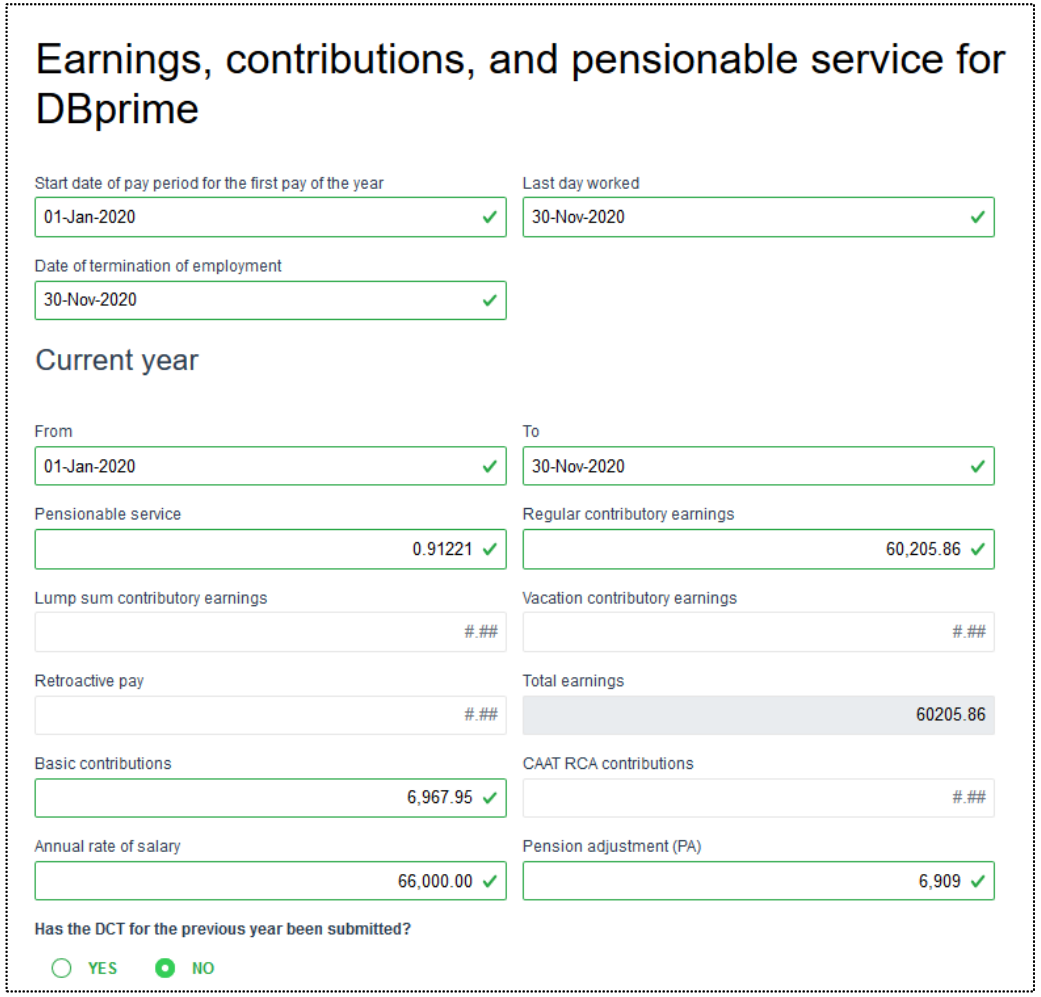
Termination of employment process – Earnings and contributions for DBplus

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



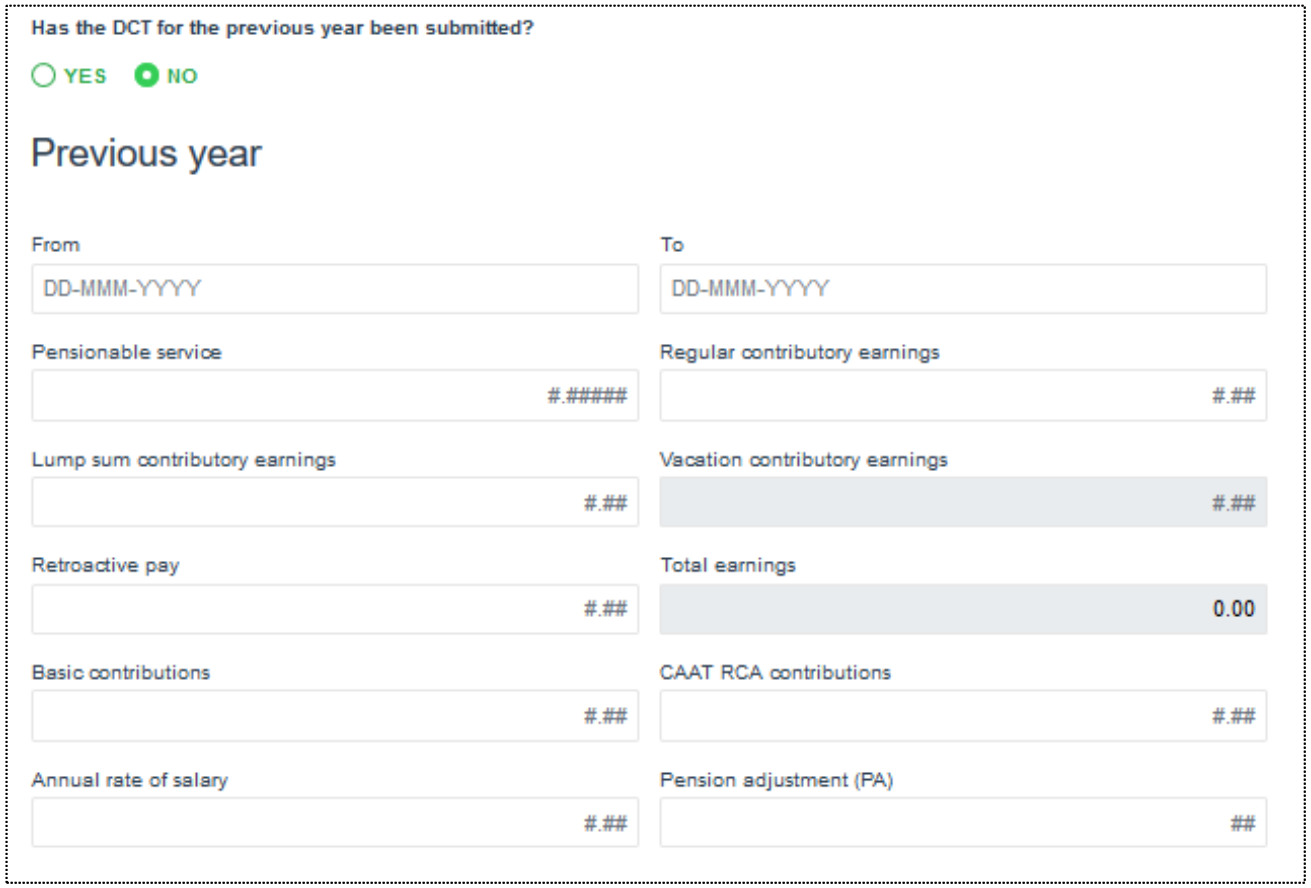
Termination of employment process – Earnings, contributions and pensionable service for DBprime

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



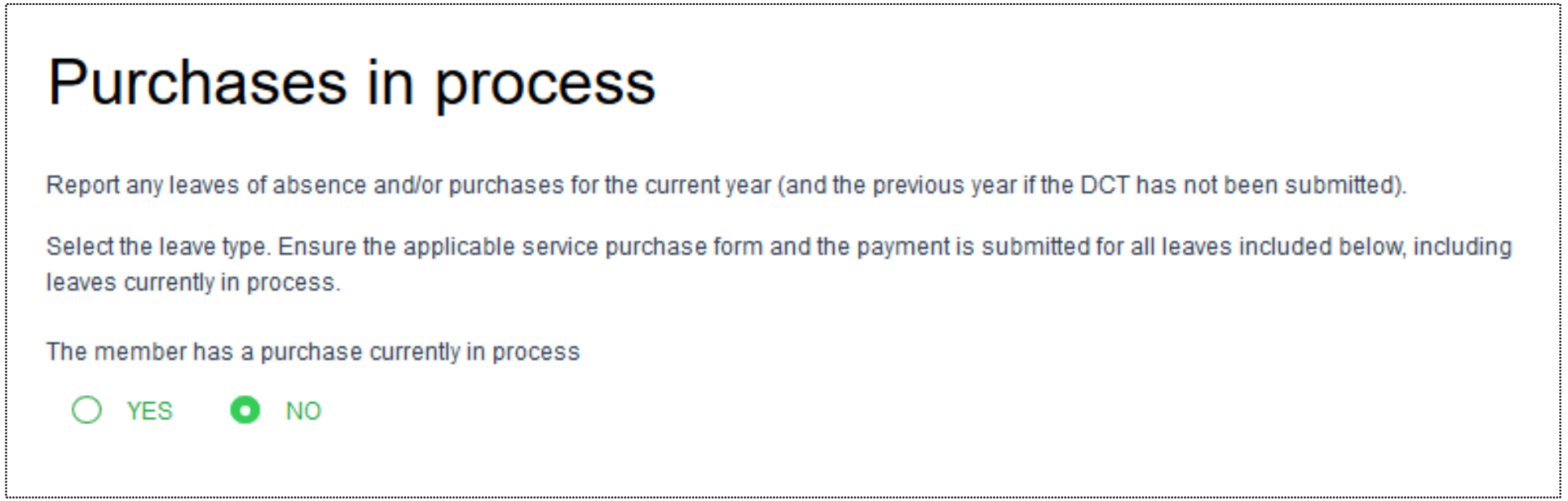
Termination of employment process – Earnings, contributions and pensionable service for DBprime

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



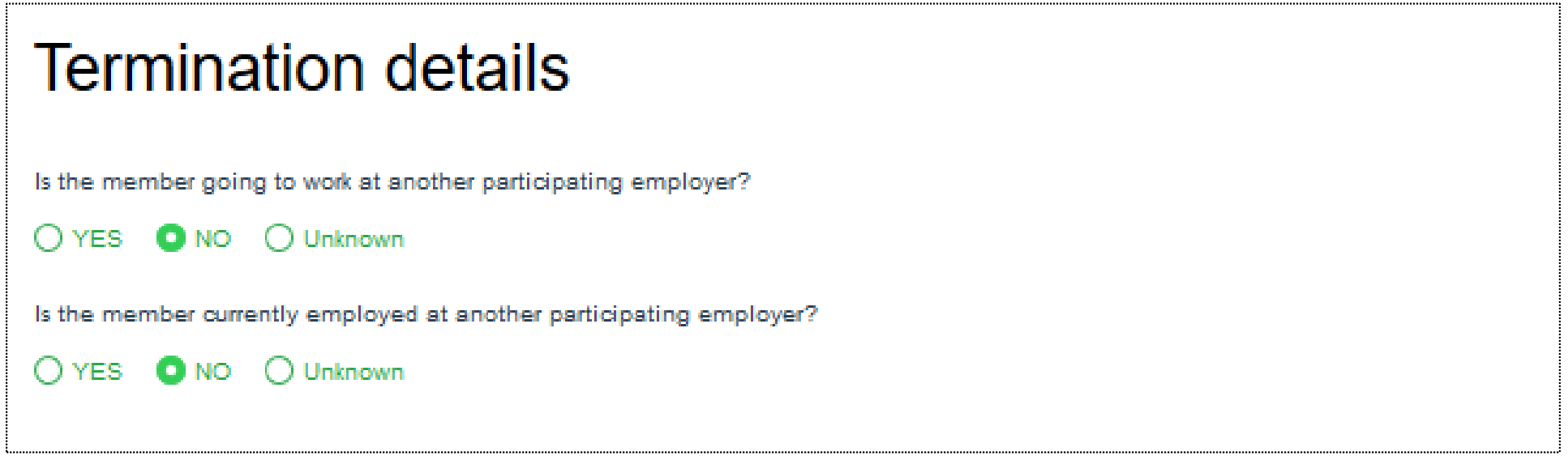
Termination of employment process – Purchases in process

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



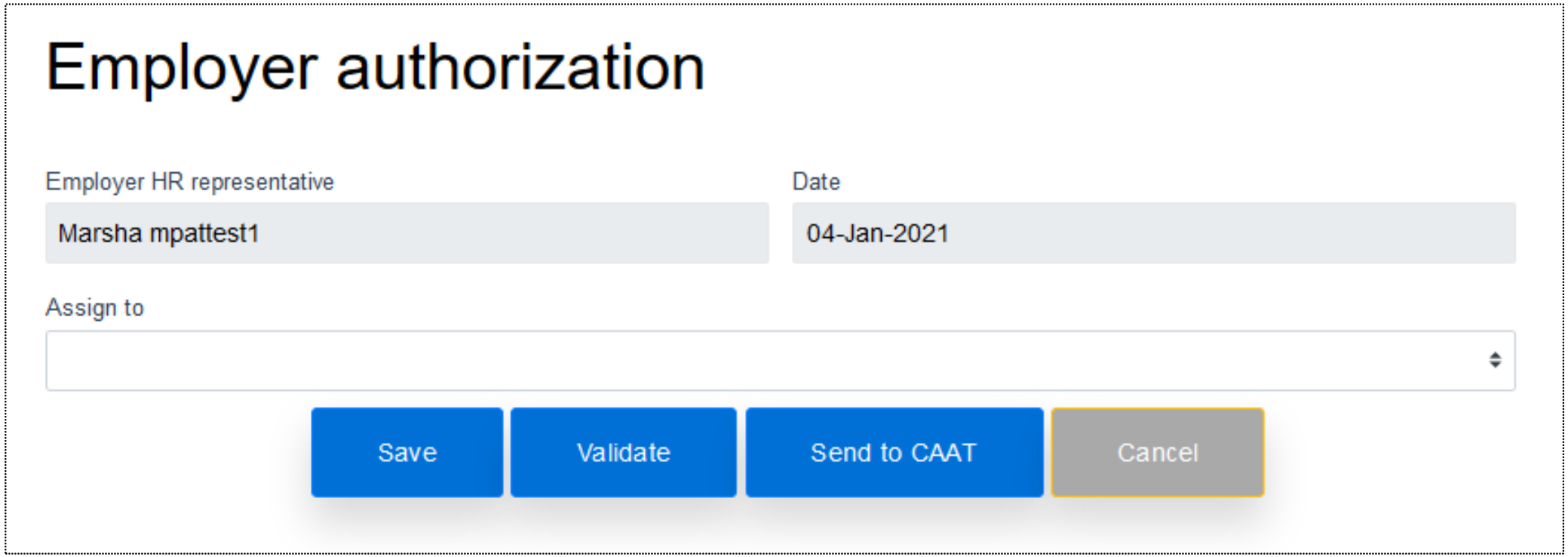
Termination of employment process – Termination details

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



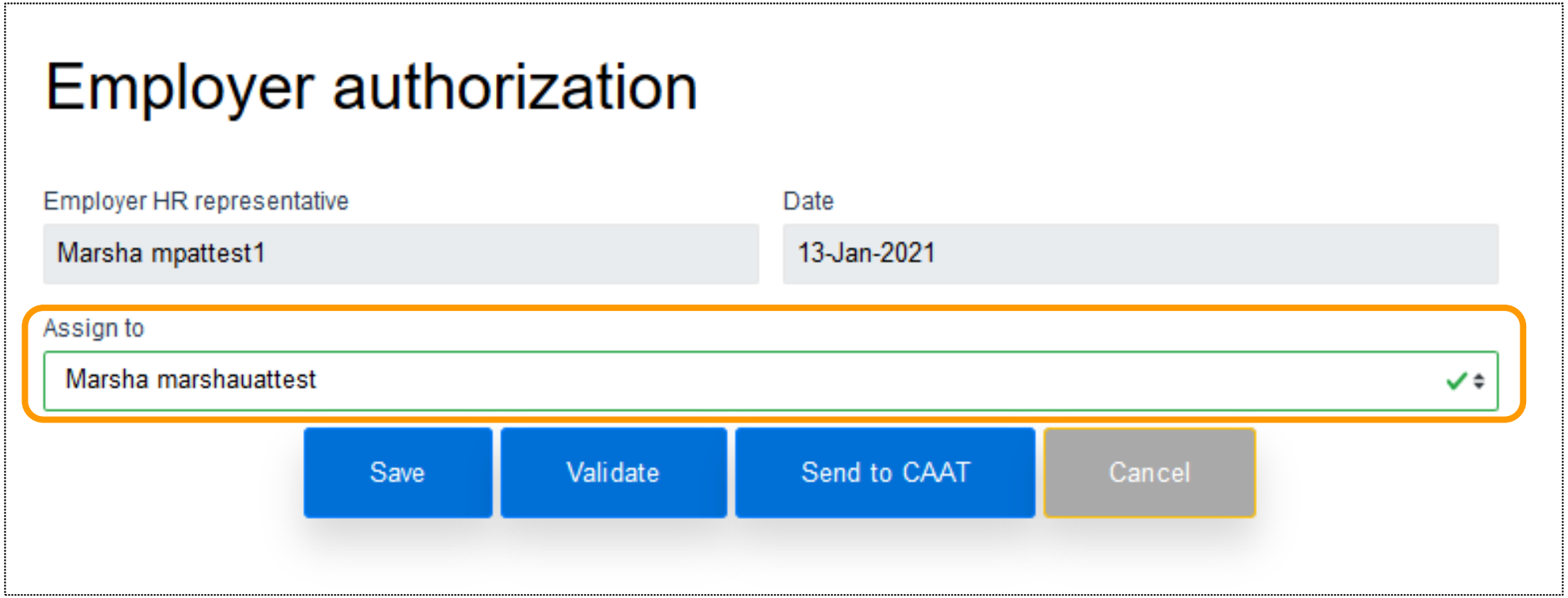
Termination of employment process – Employer authorization

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



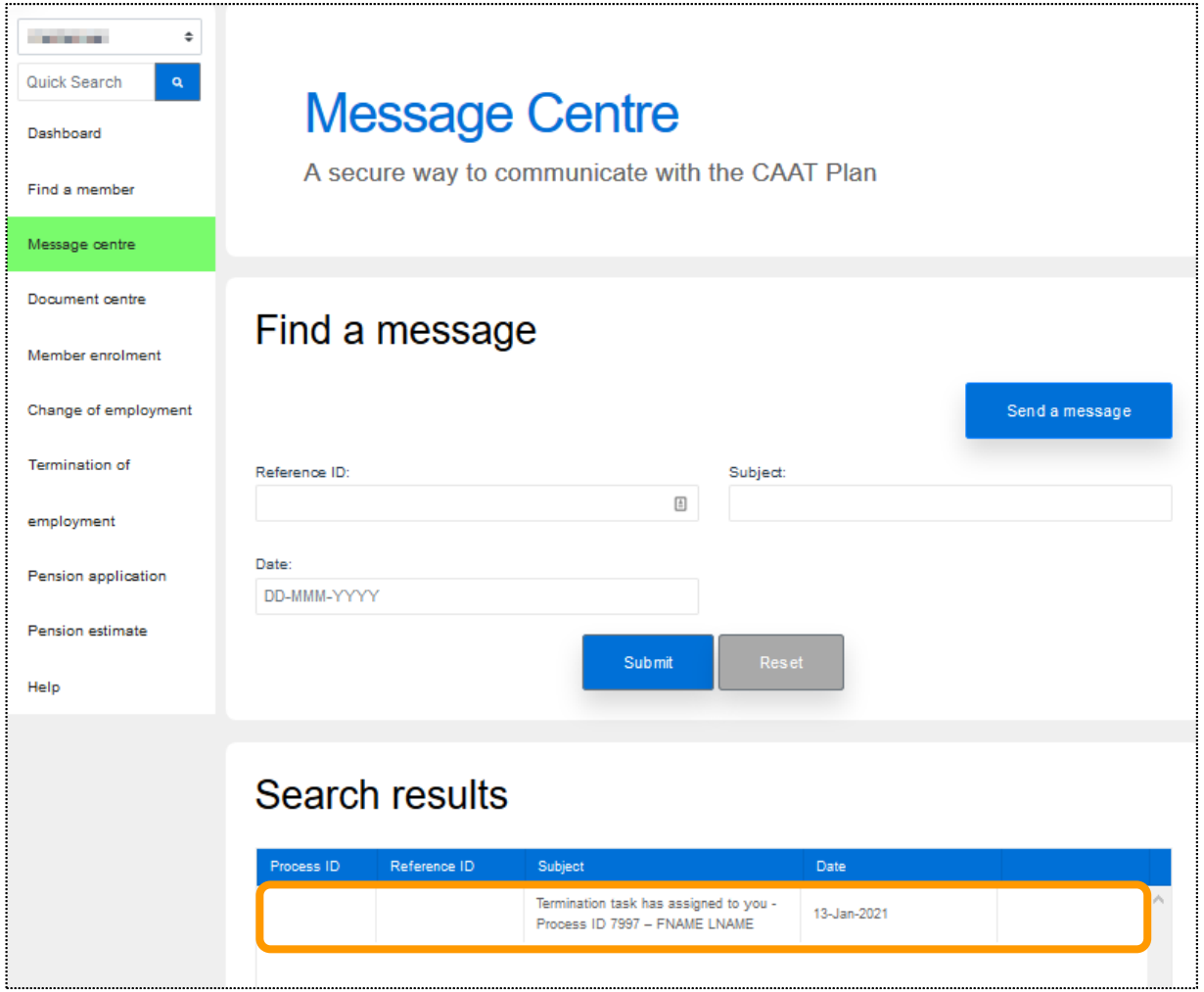
Termination of employment process – Employer authorization

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



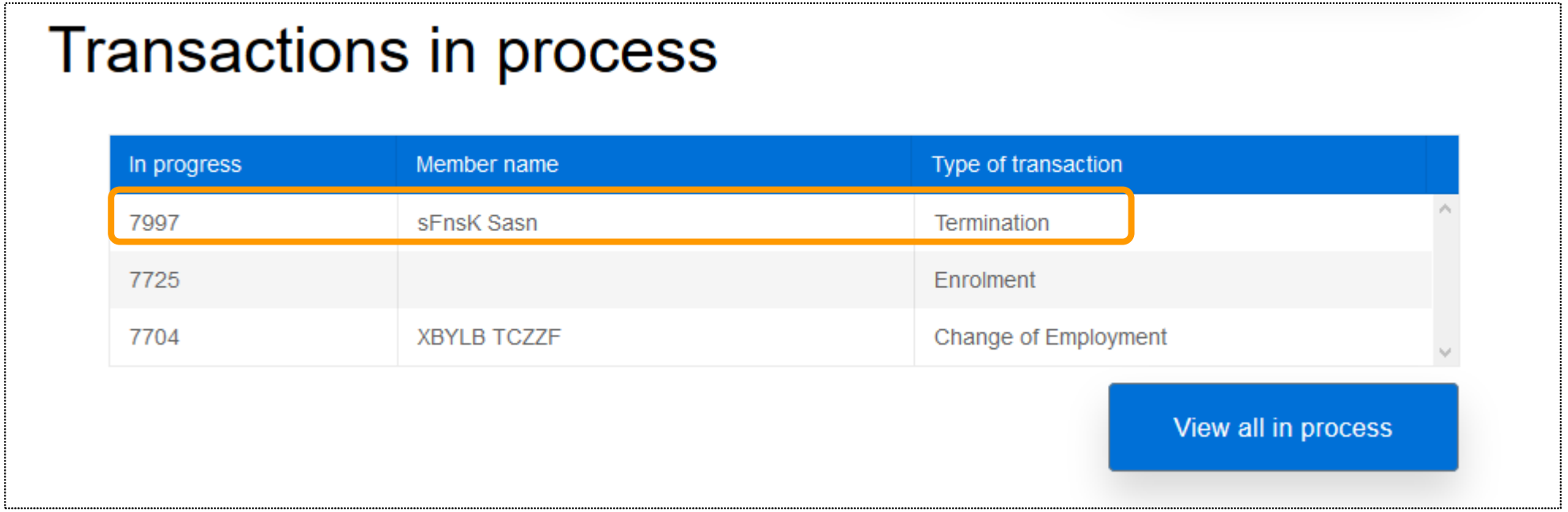
Termination of employment process – Message Centre

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



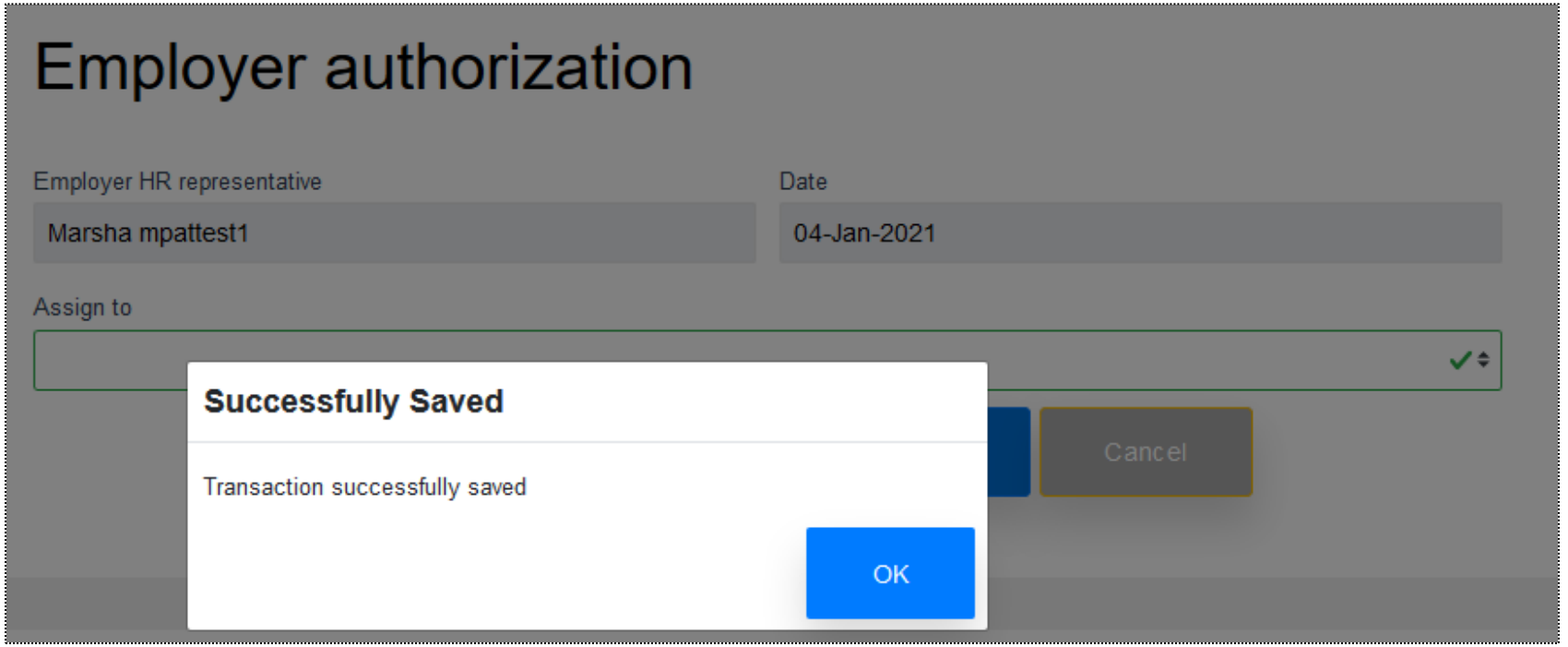
Termination of employment process – Dashboard

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



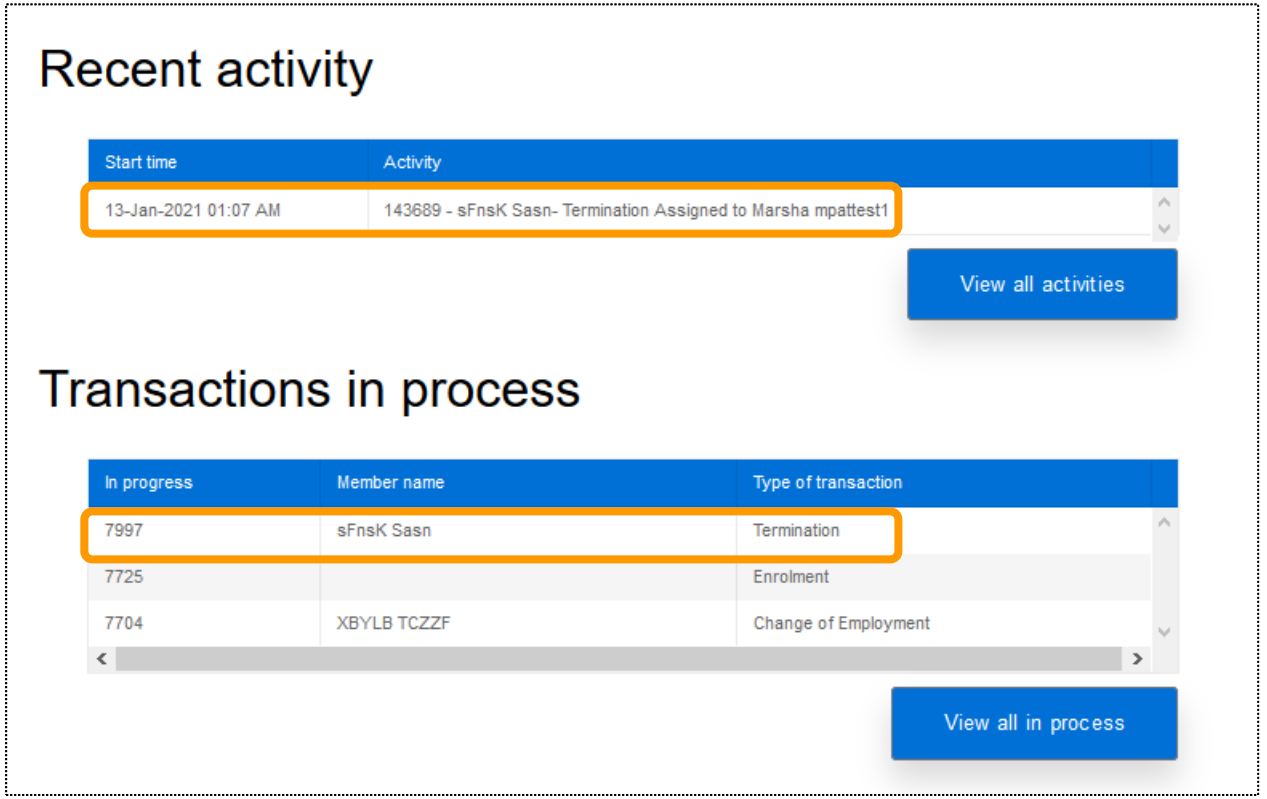
Termination of employment process - Save

- 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



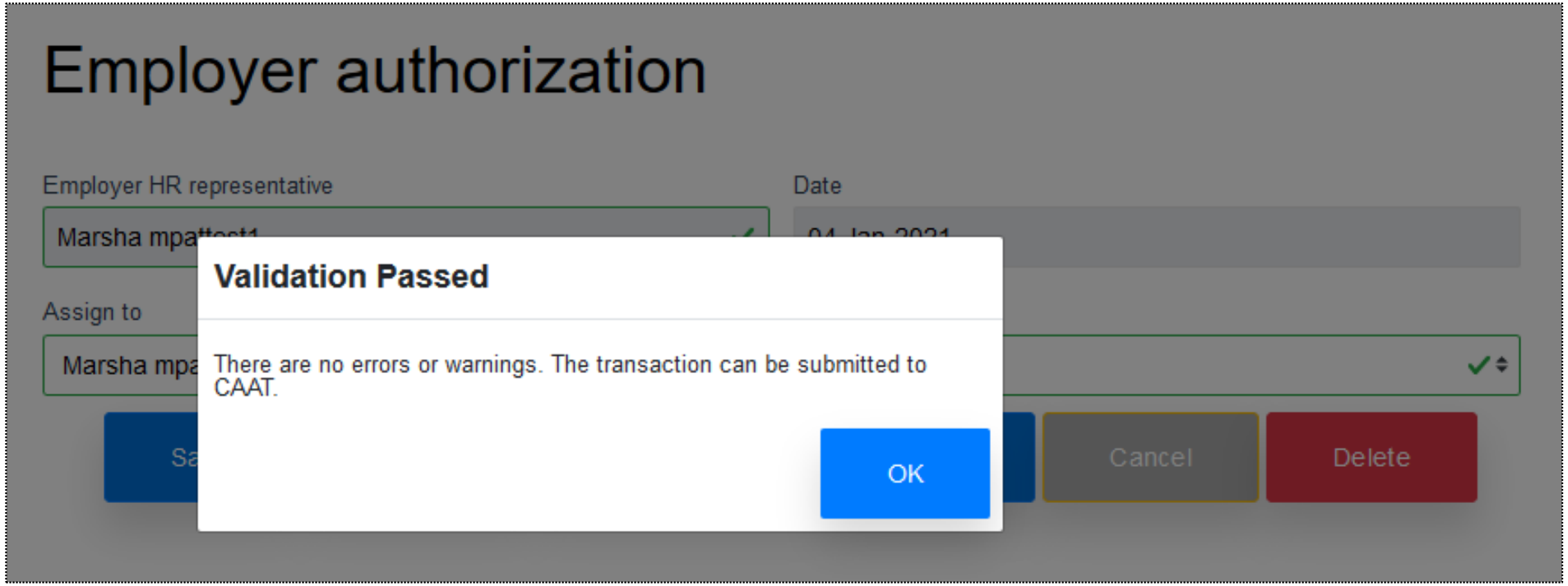
Termination of employment process - Save

- 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



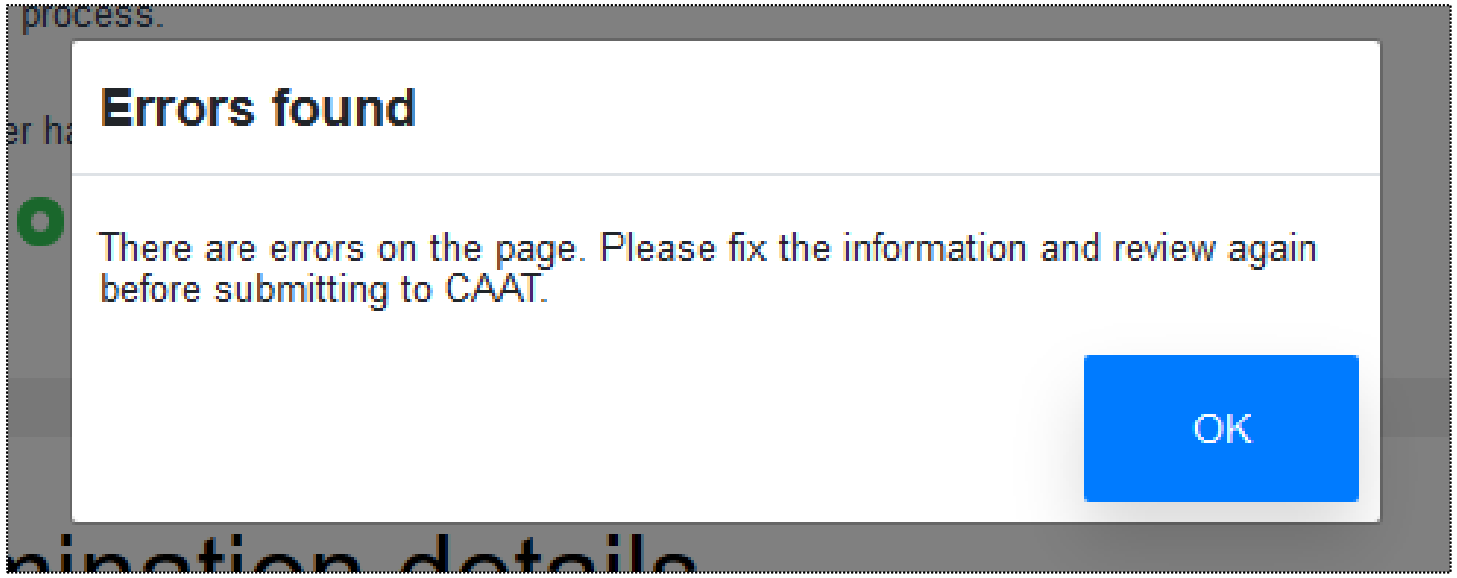
Termination of employment process - Validate

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



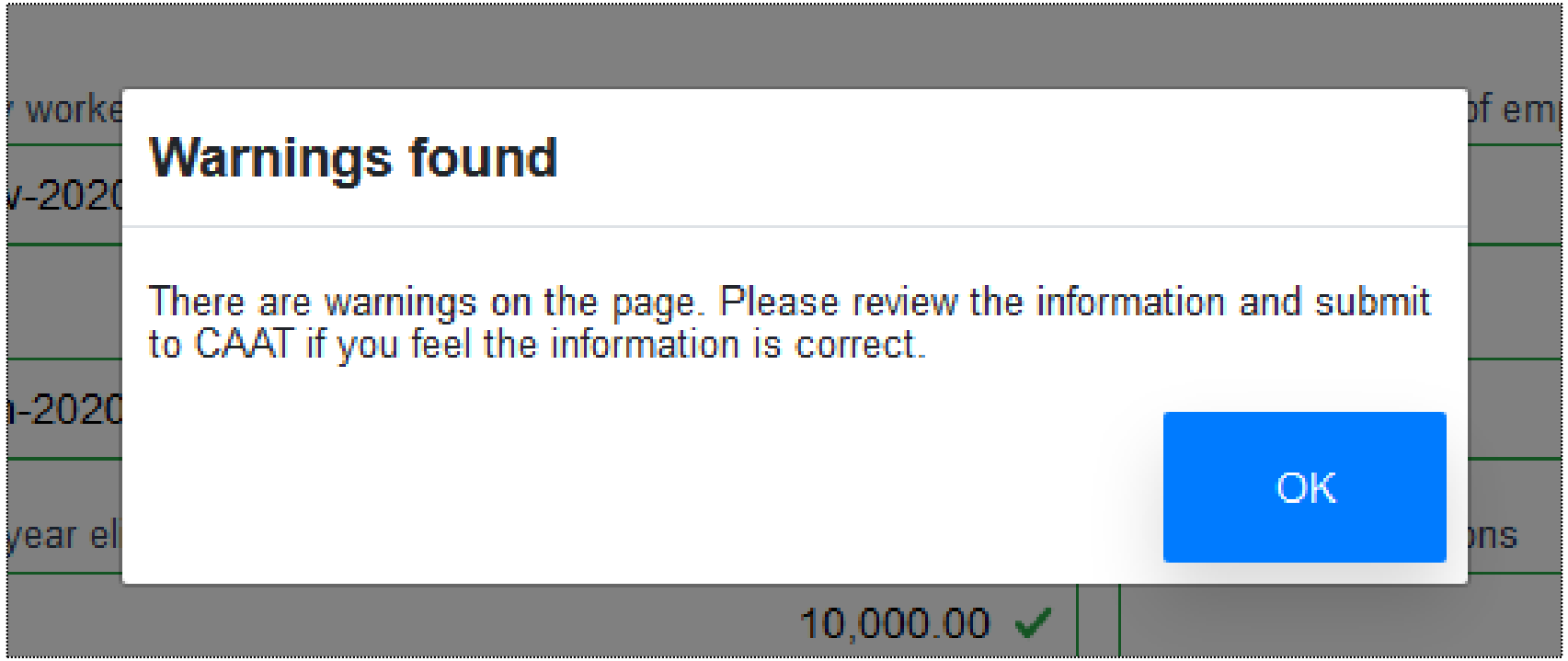
Termination of employment process – Validation error

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



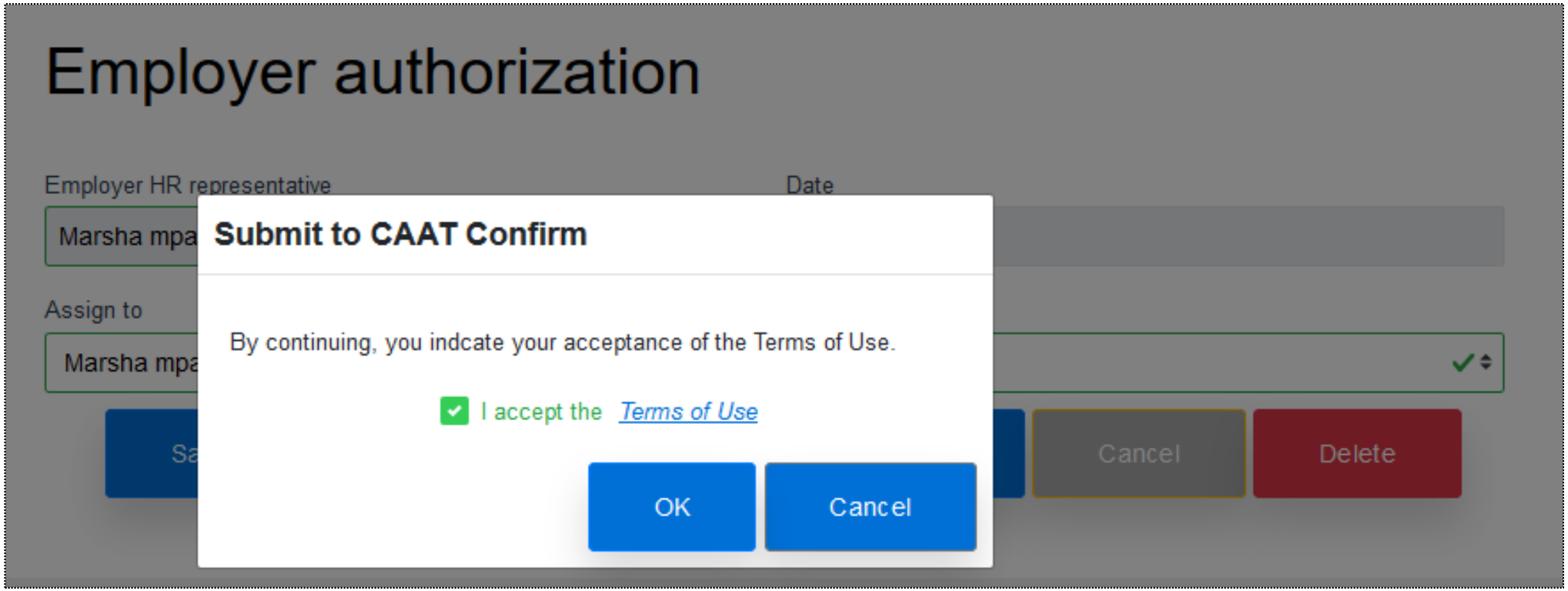
Termination of employment process – Validation warning

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



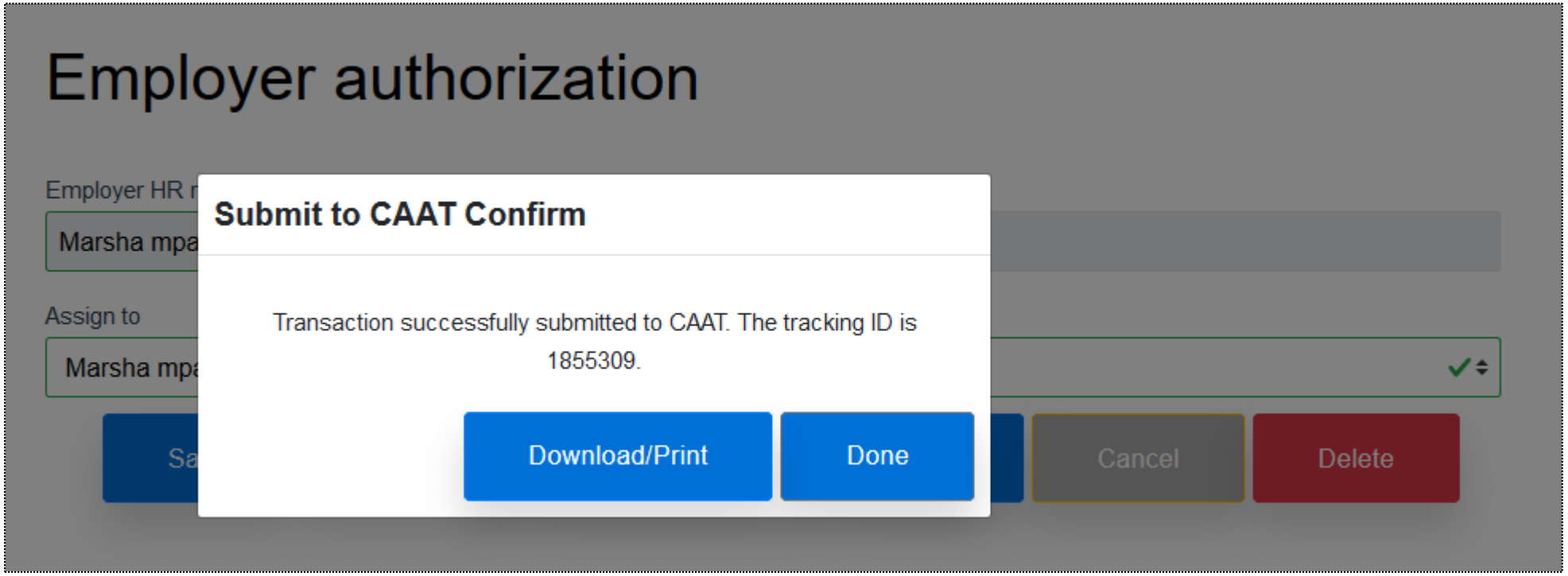
Termination of employment process – Submit to CAAT

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



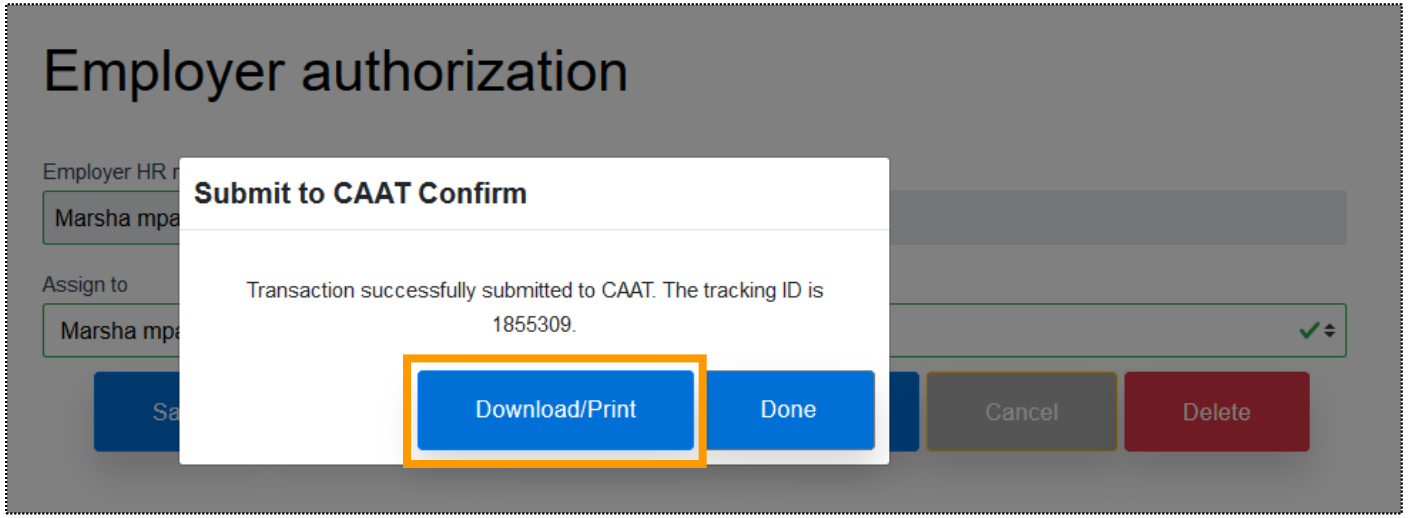
Termination of employment process – Send to CAAT

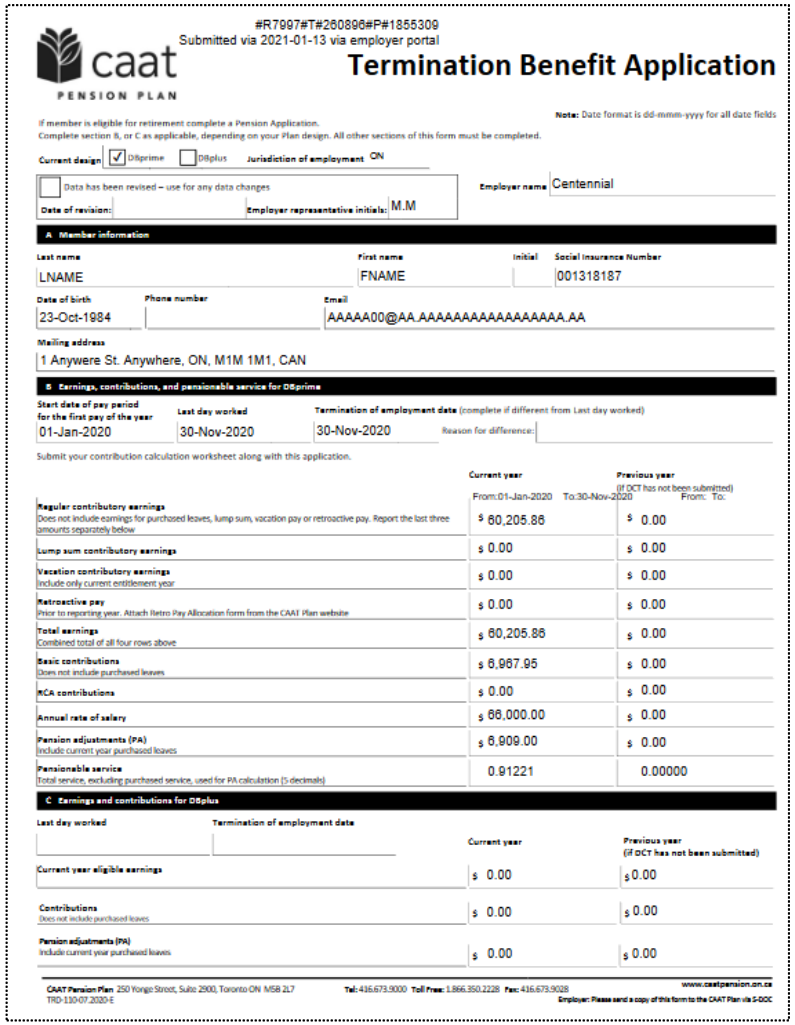
- Another pop-up box will appear upon successful creation of the *Termination Benefit Application*
- Each transaction is assigned a tracking ID



Termination of employment process

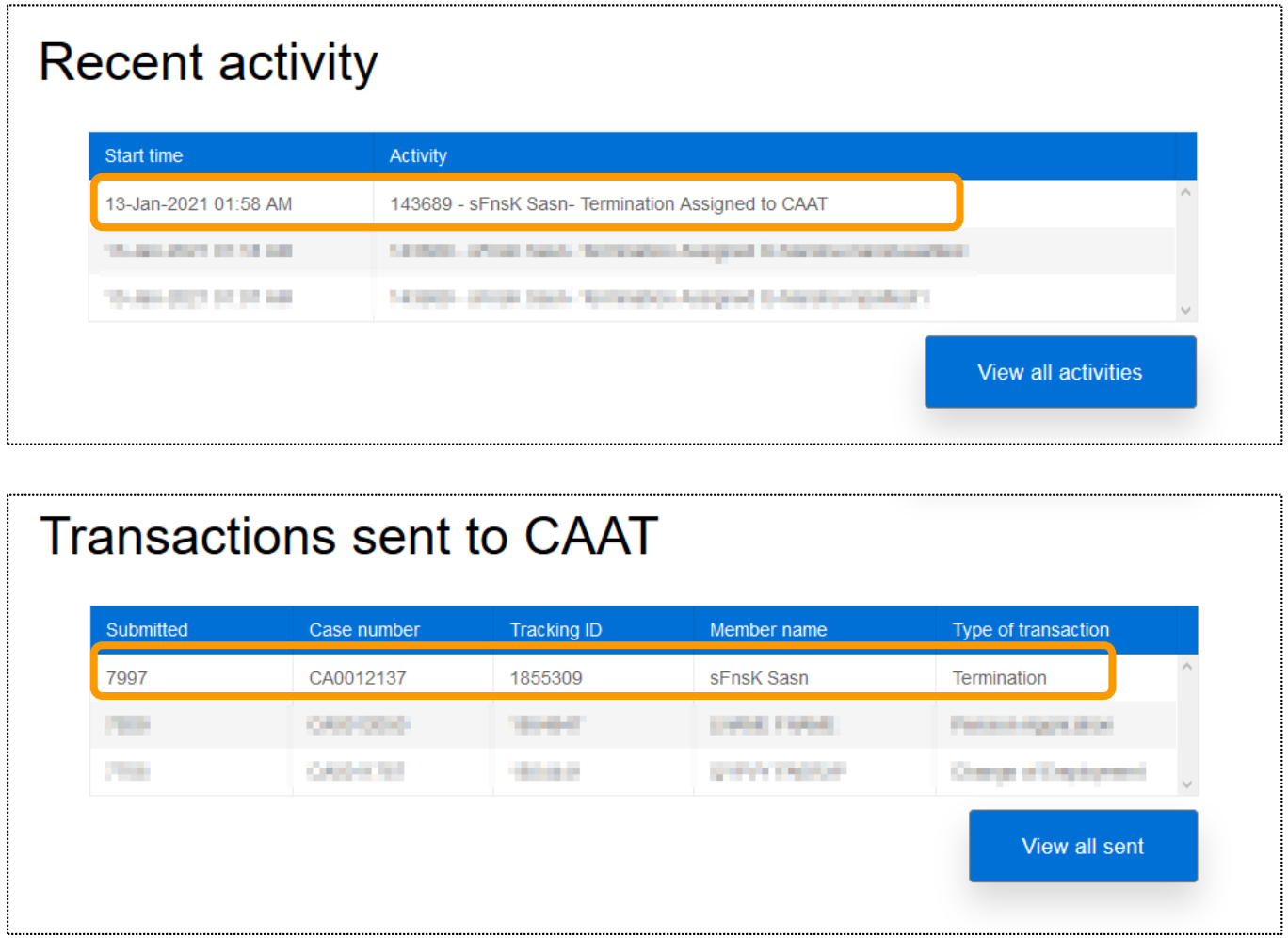
- View the *Termination Benefit Application* by selecting the “Download/Print” button





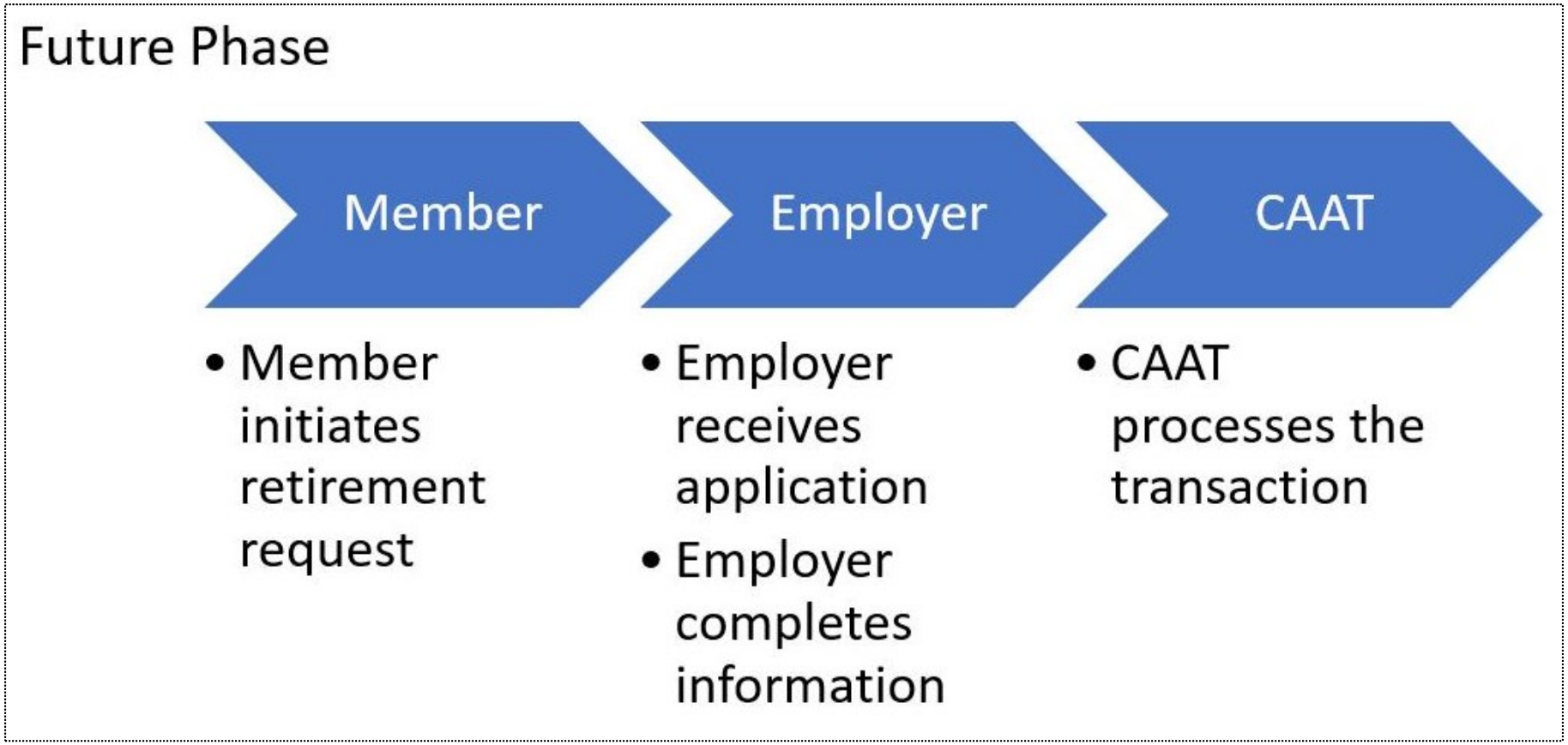
Termination of employment process

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



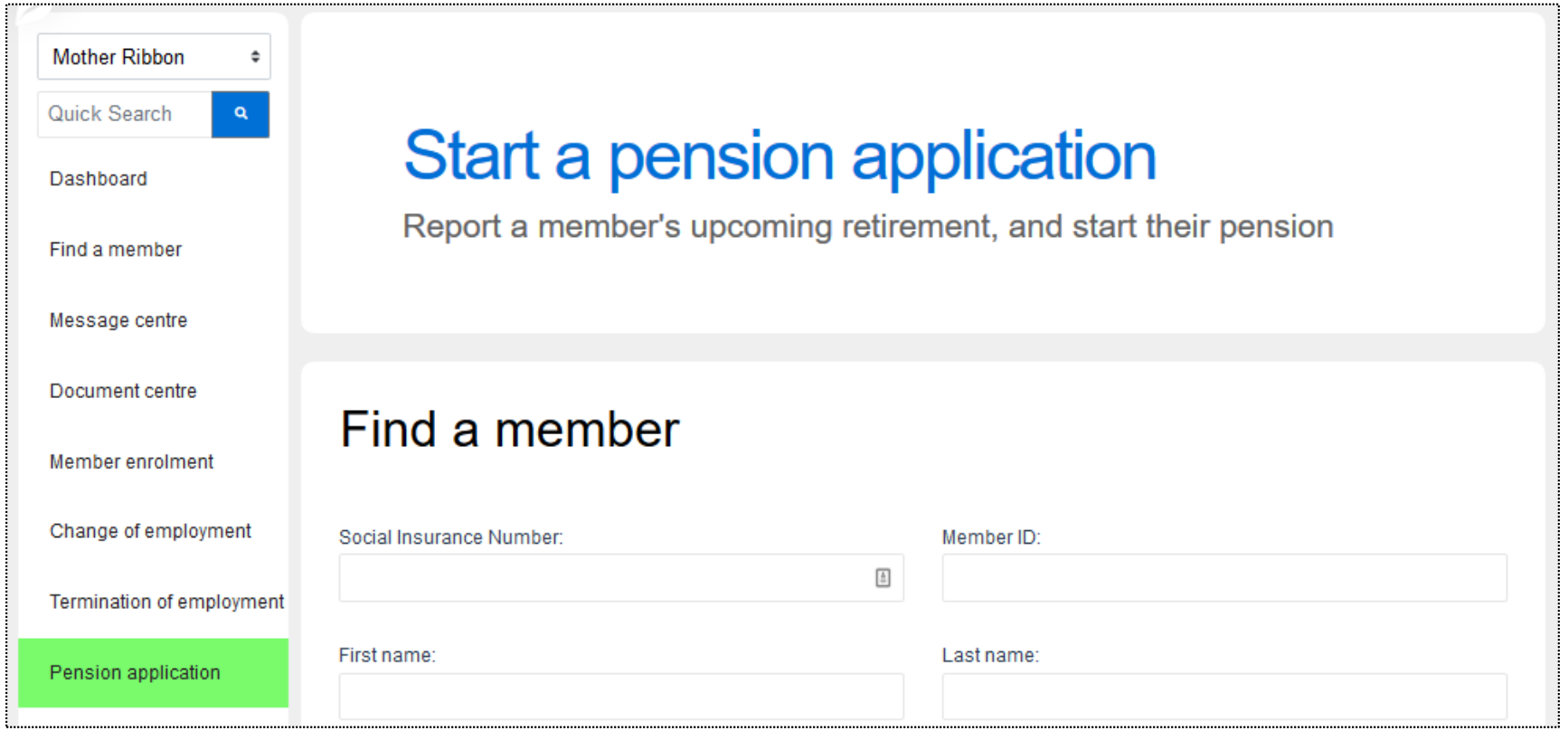
Pension application process

Pension application process – Future Phase



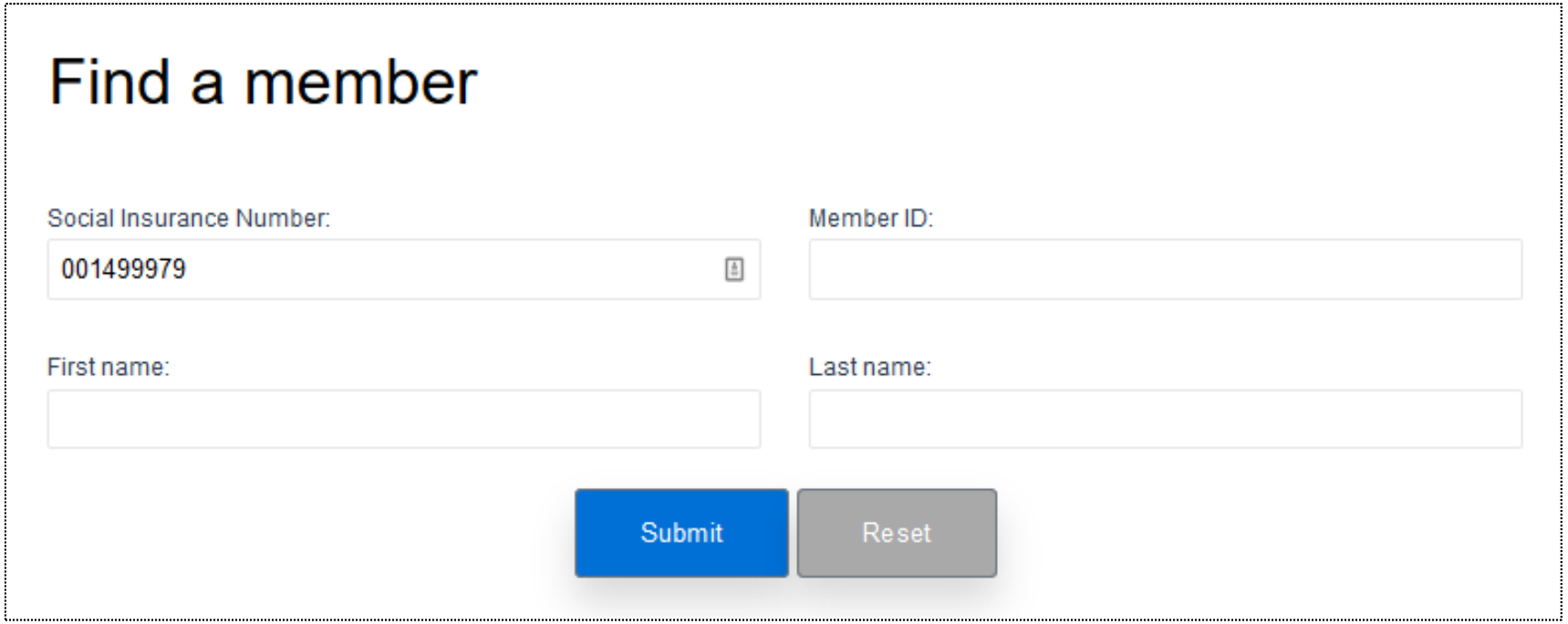
Pension application process

- Select “Pension application” to start the process



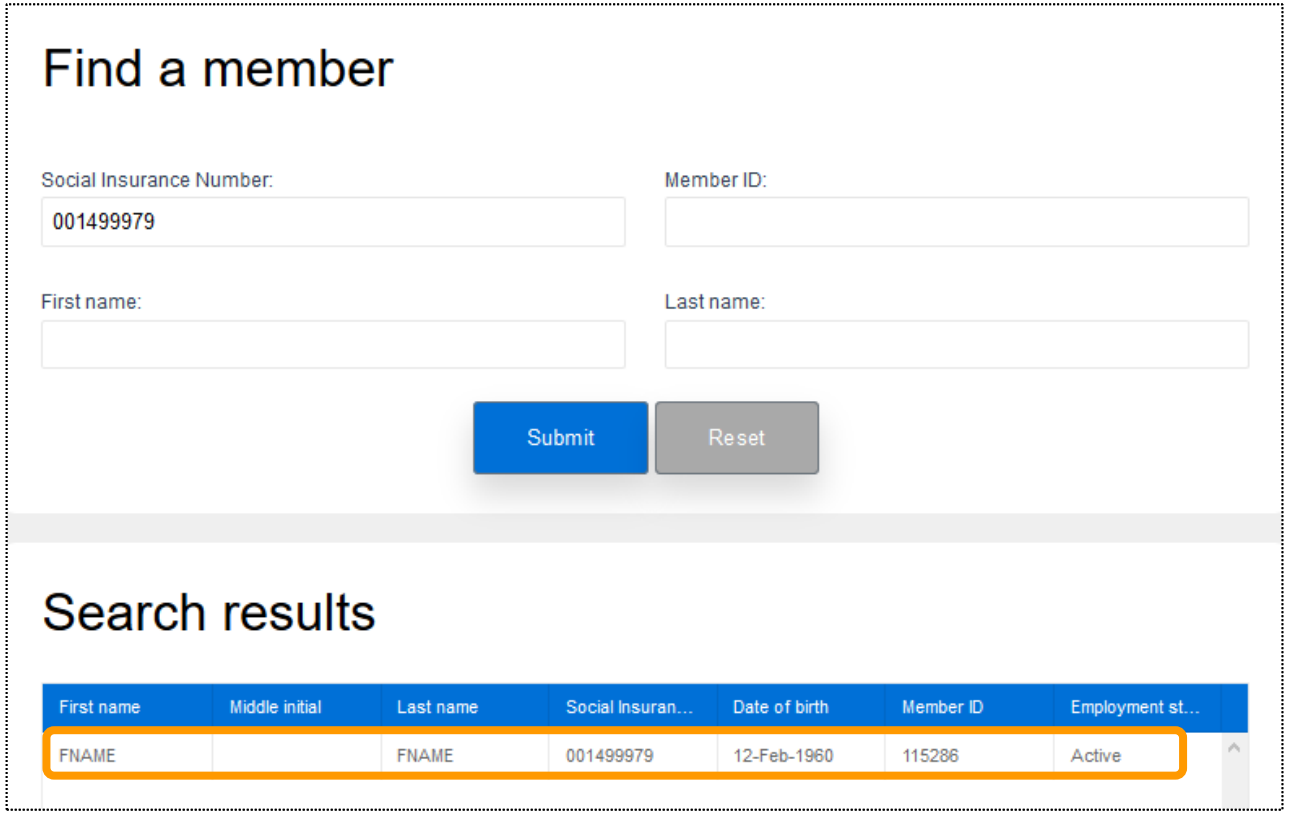
Pension application process

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



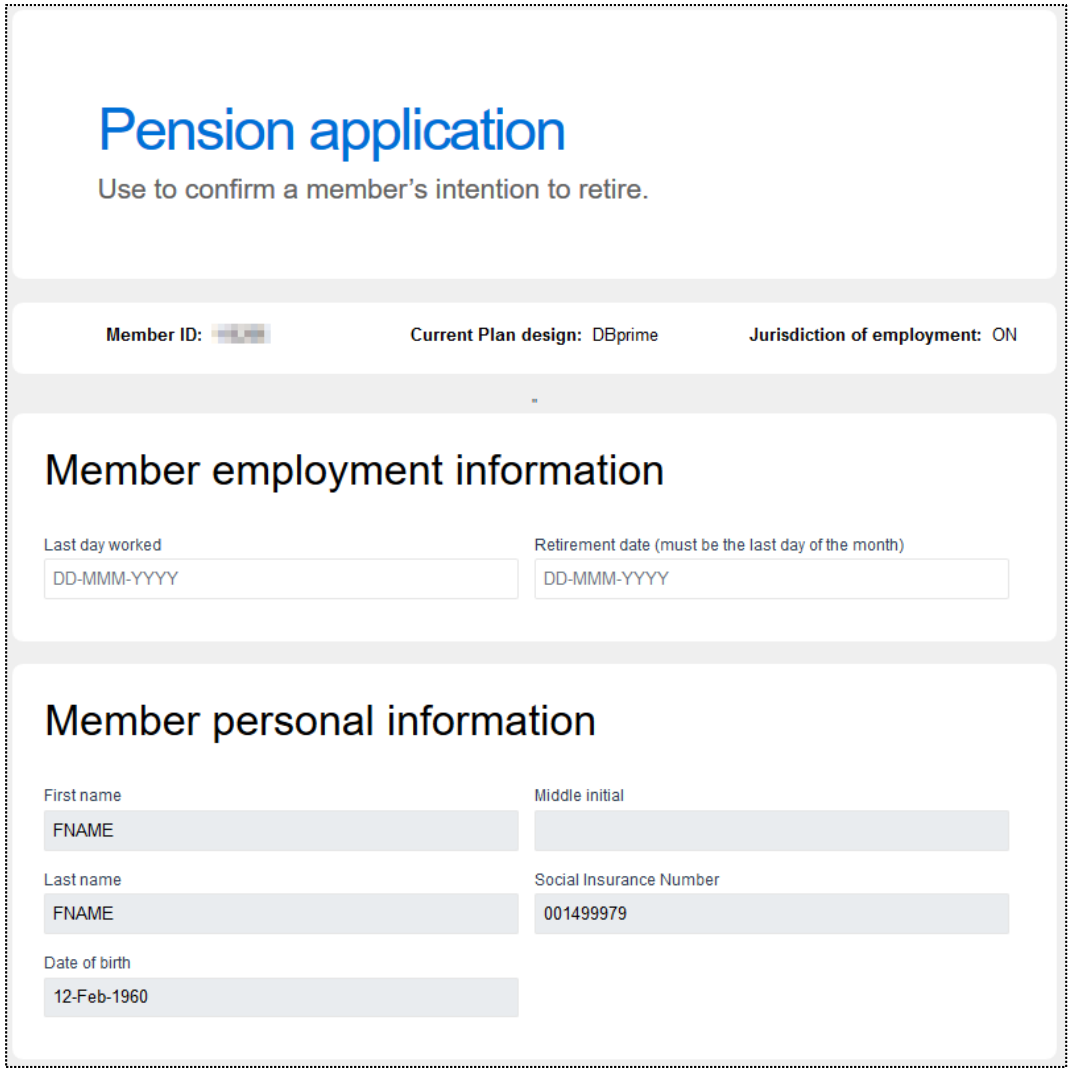
Pension application process

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



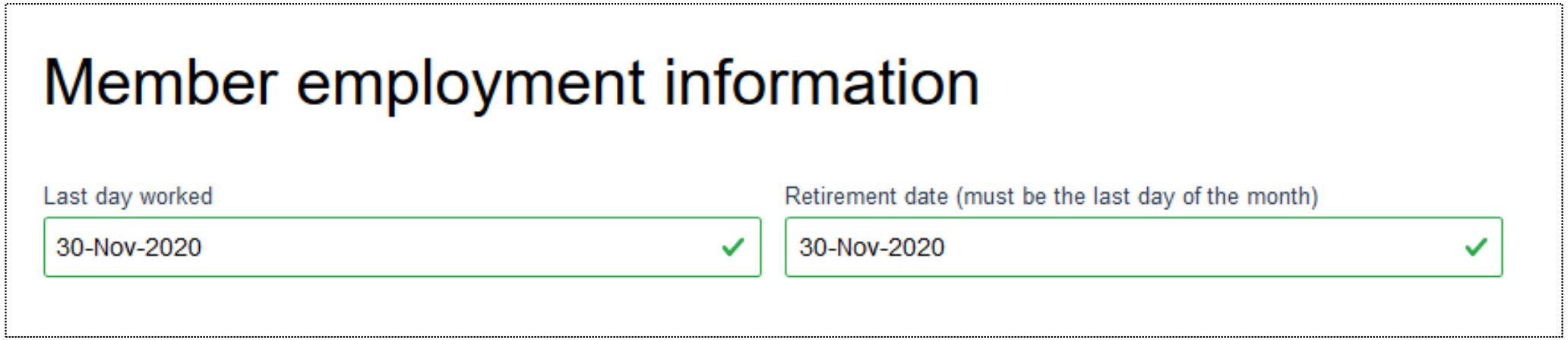
Pension application process

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



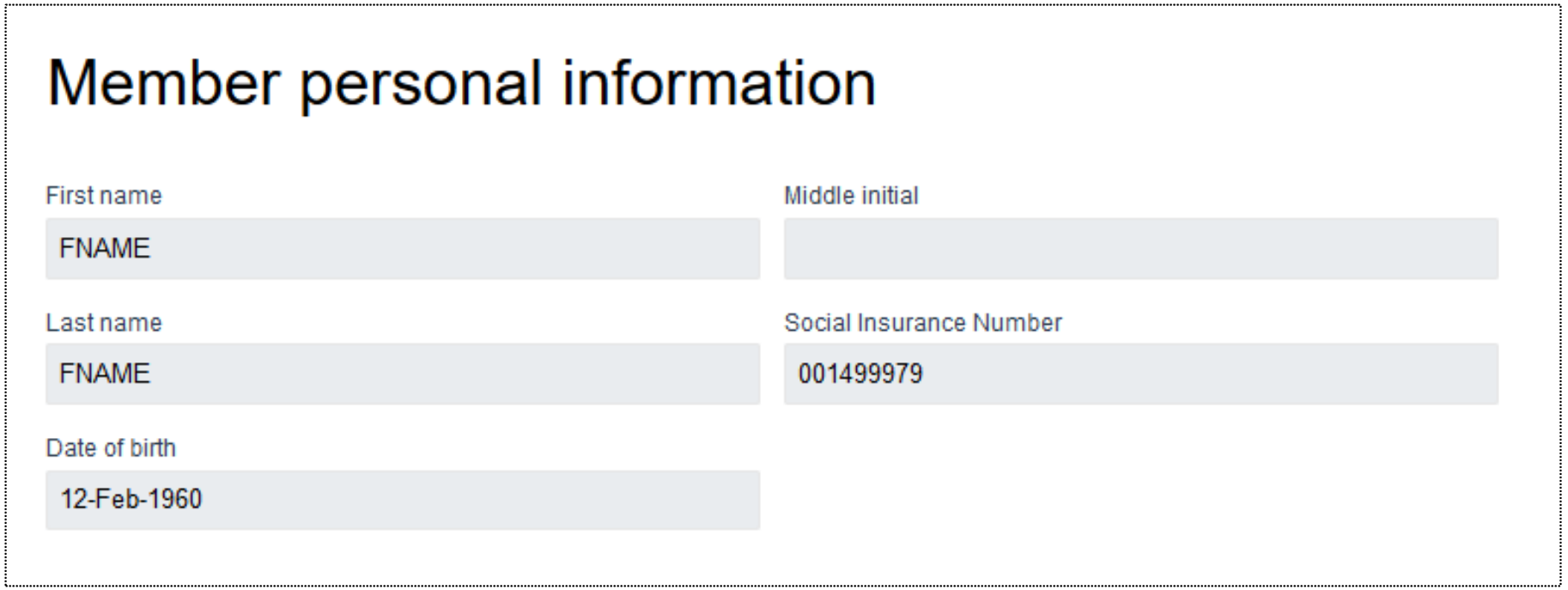
Pension application process – Member employment information

- Enter “Member employment information”



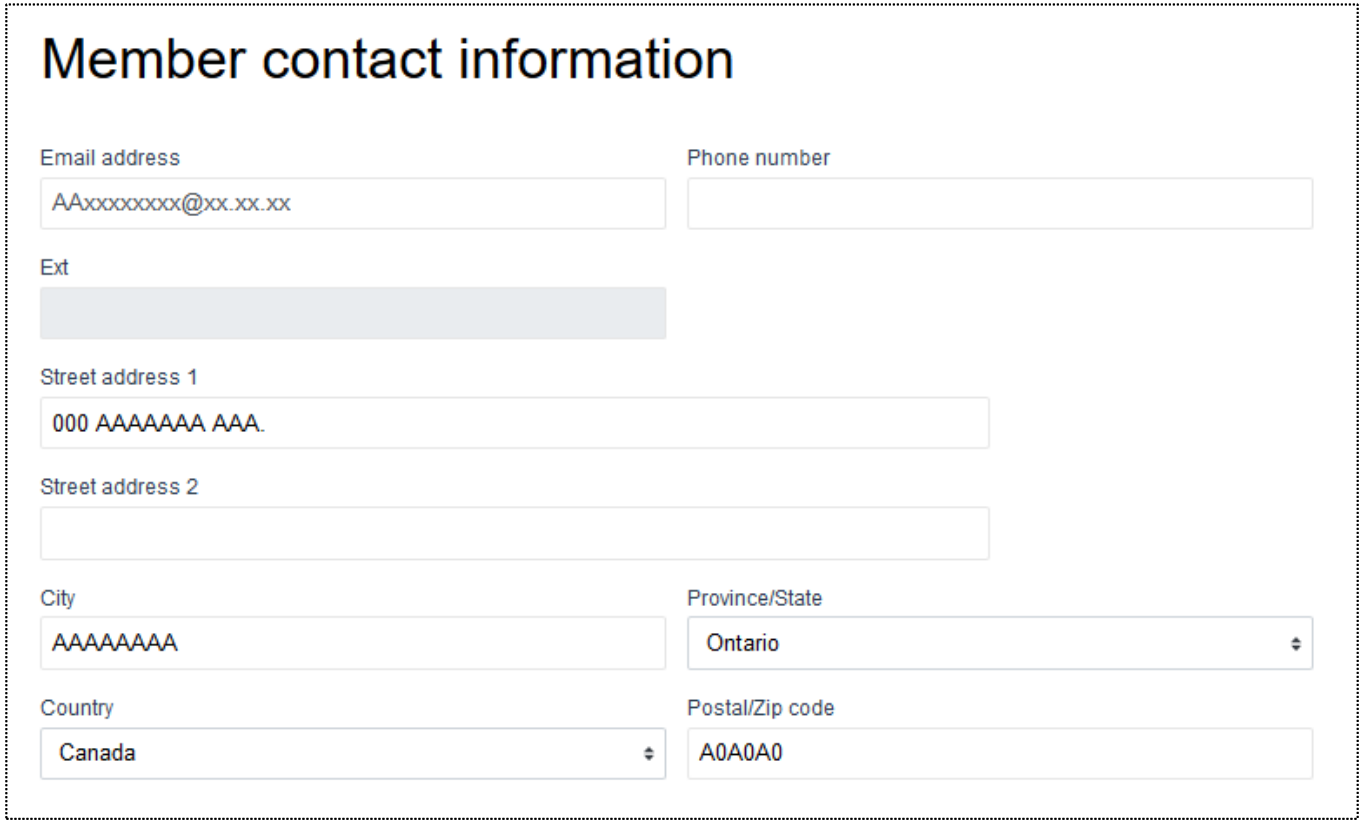
Pension application process – Member personal information

- Confirm that the correct member has been selected



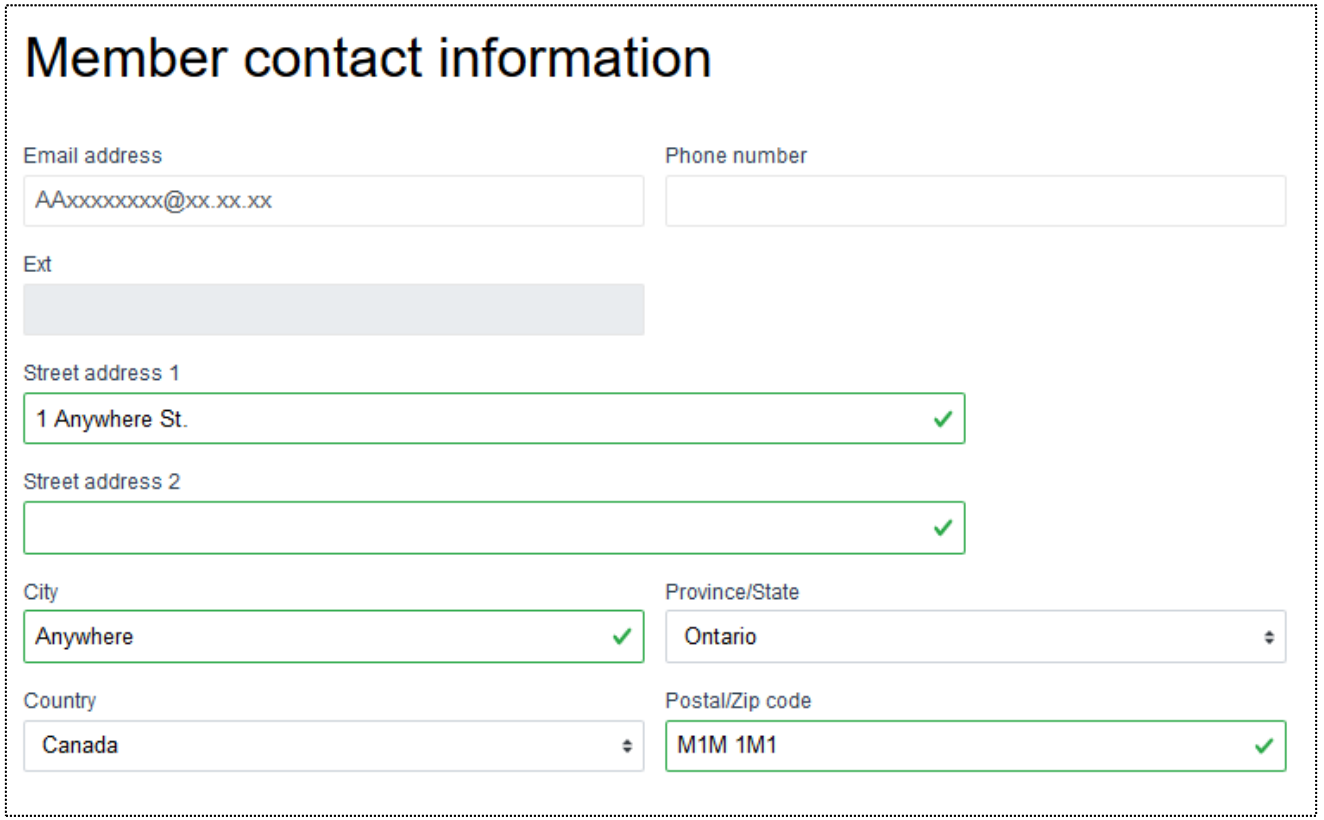
Pension application process – Member contact information

- You can review the current information for the member



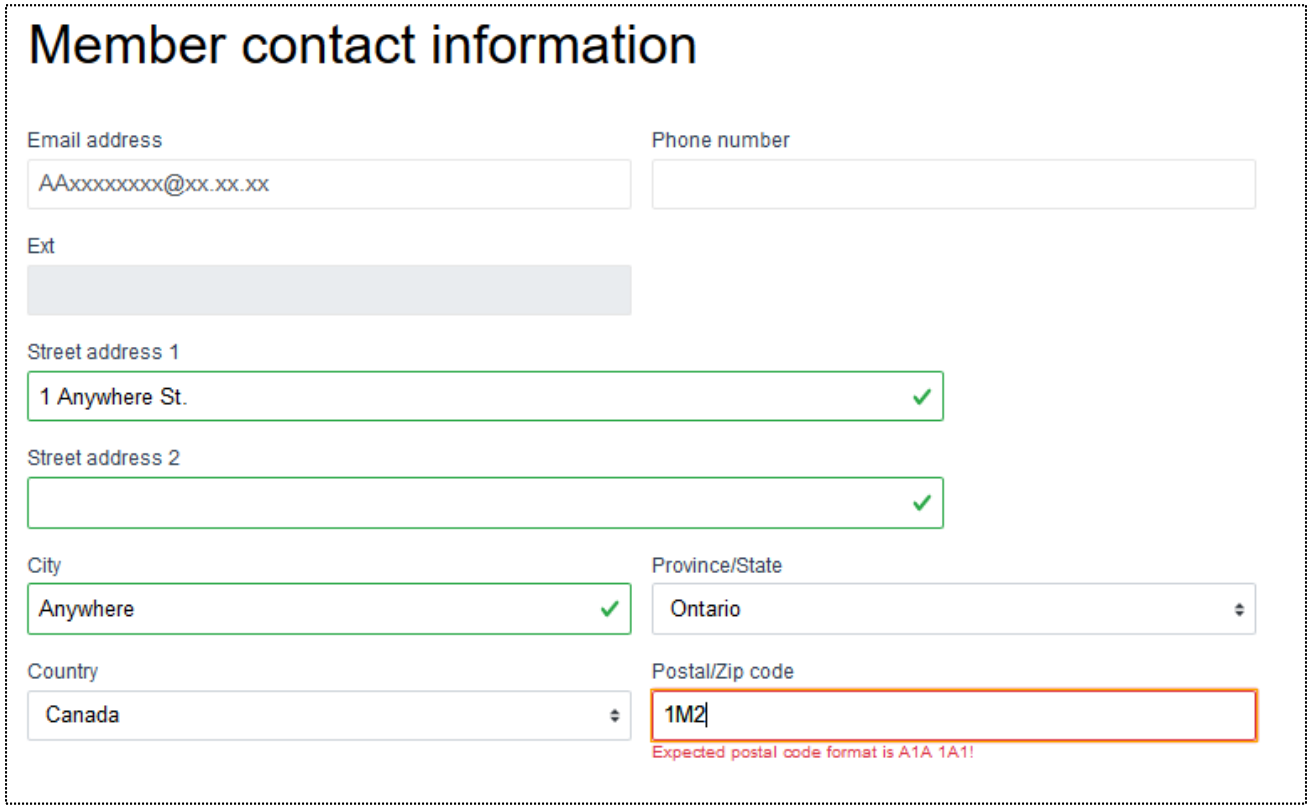
Pension application process – Member contact information

- The information can be updated if changes are required



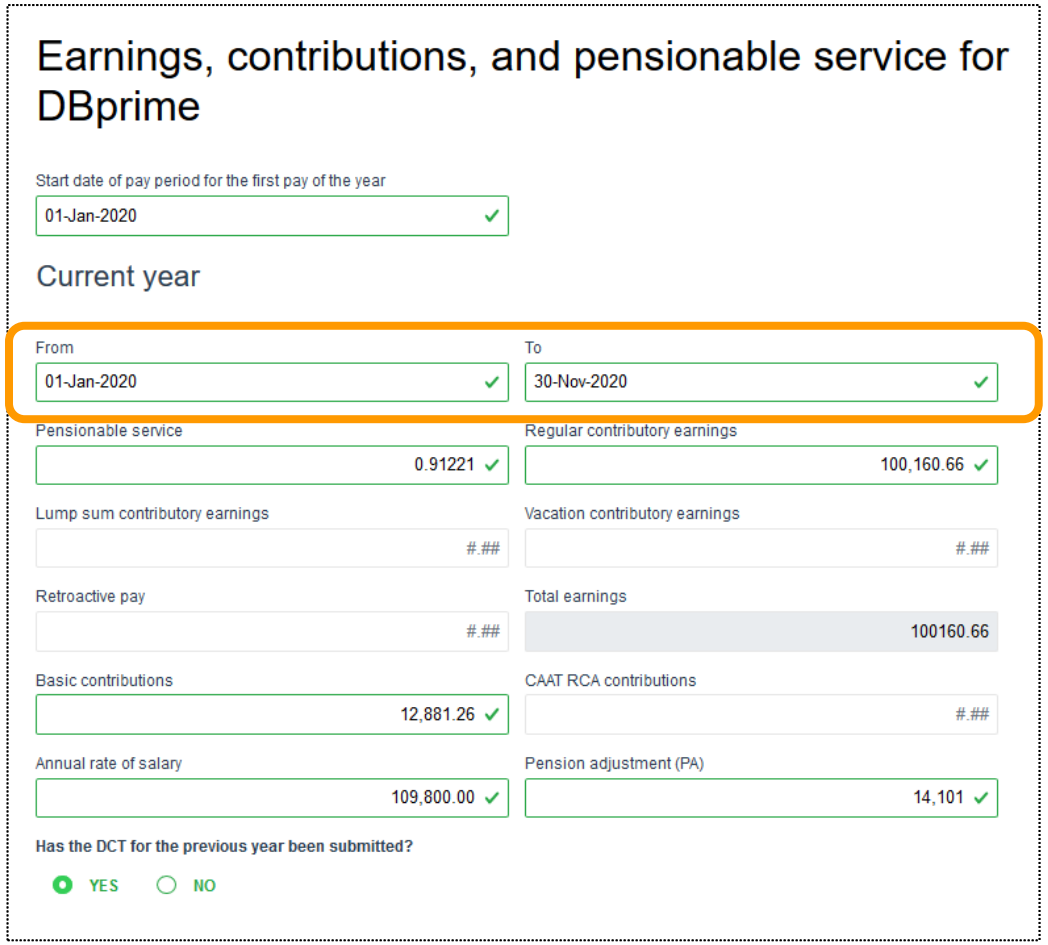
Pension application process – Wrong format error

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



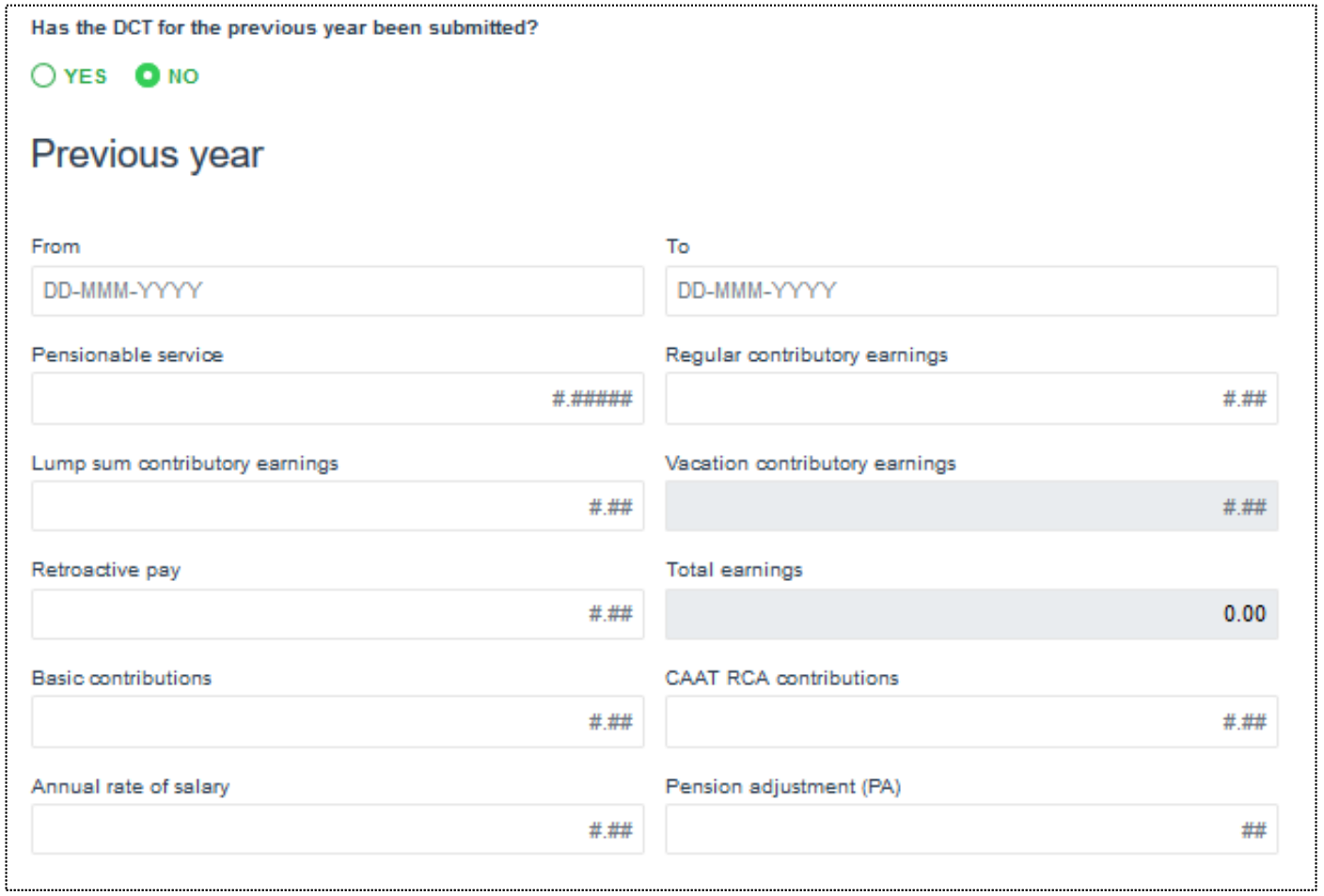
Pension application process – Earnings, contributions and pensionable service for DBprime

- 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”



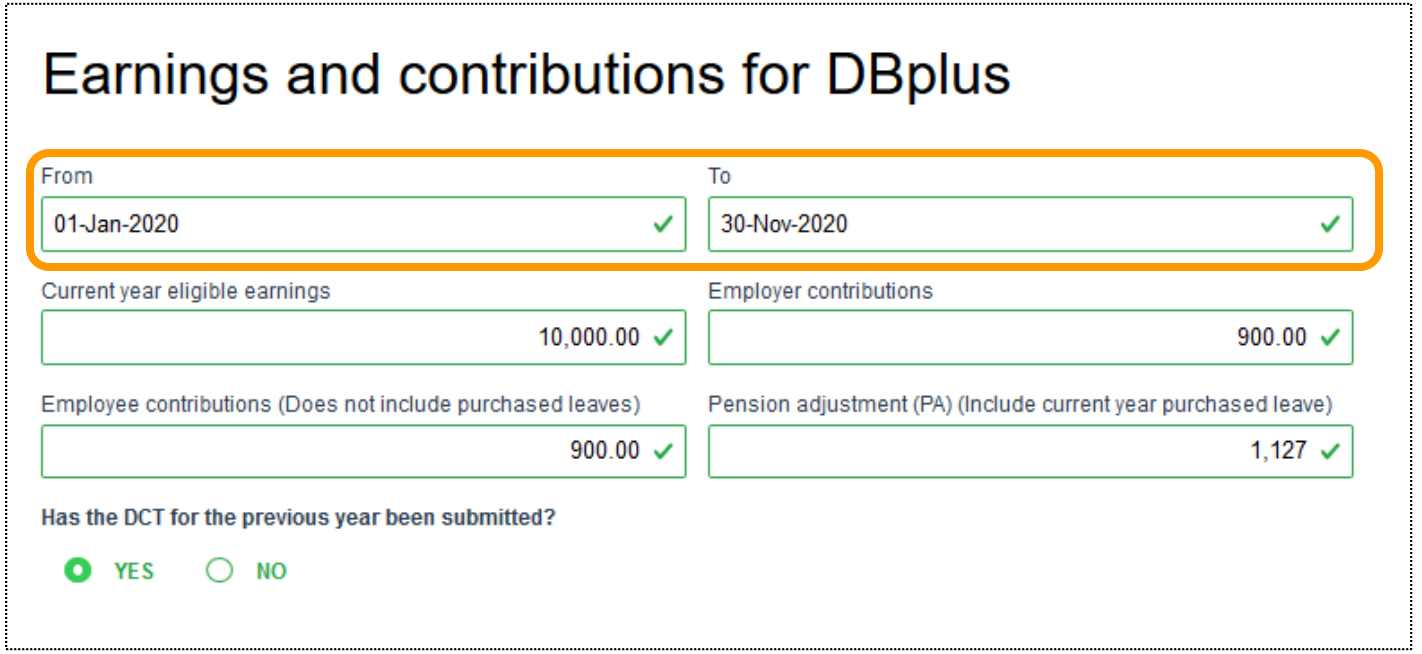
Pension application process – Earnings, contributions and pensionable service for DBprime

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



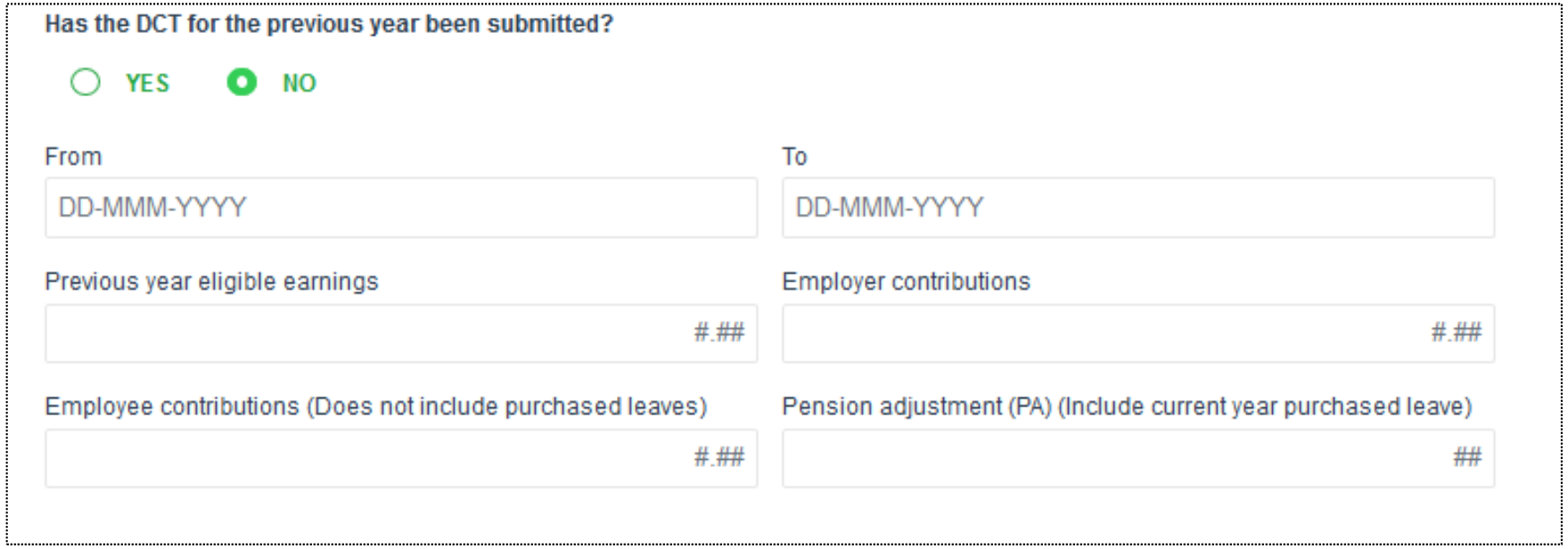
Pension application process – Earnings and contributions for DBplus

- 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”



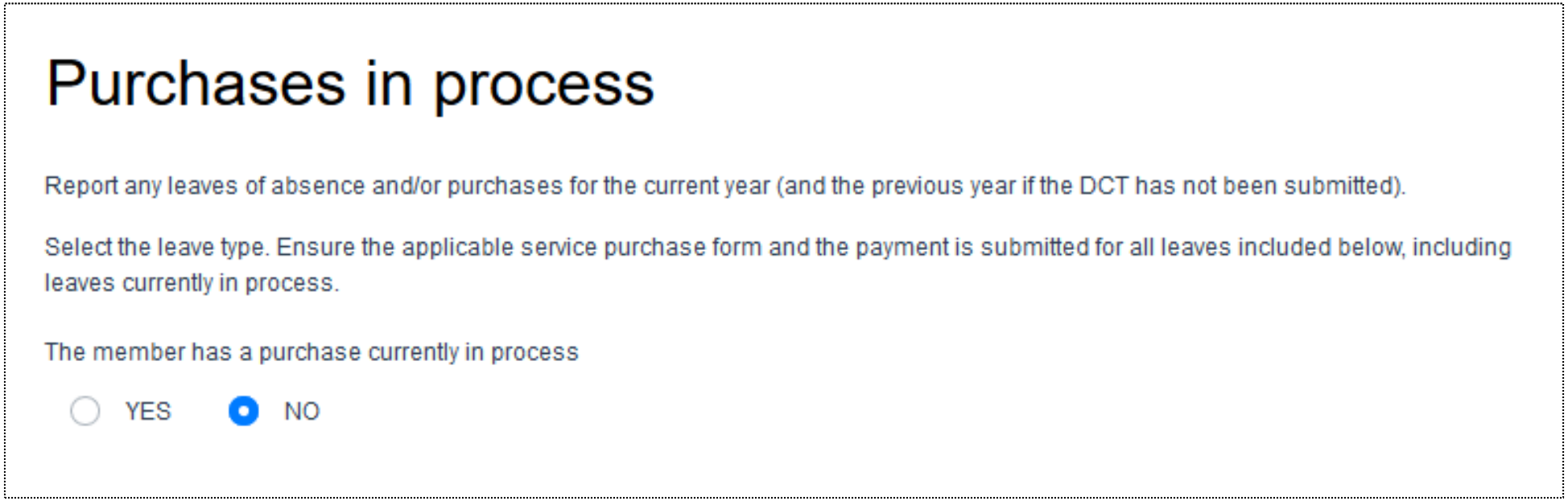
Pension application process – Earnings and contributions for DBplus

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



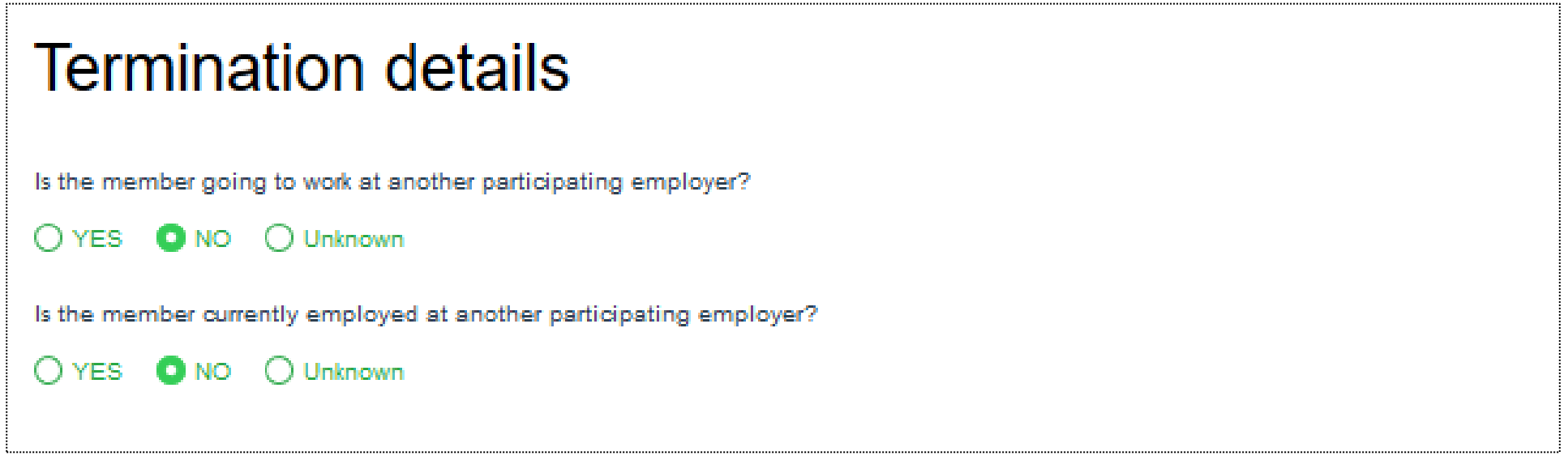
Pension application process – Purchases in process

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



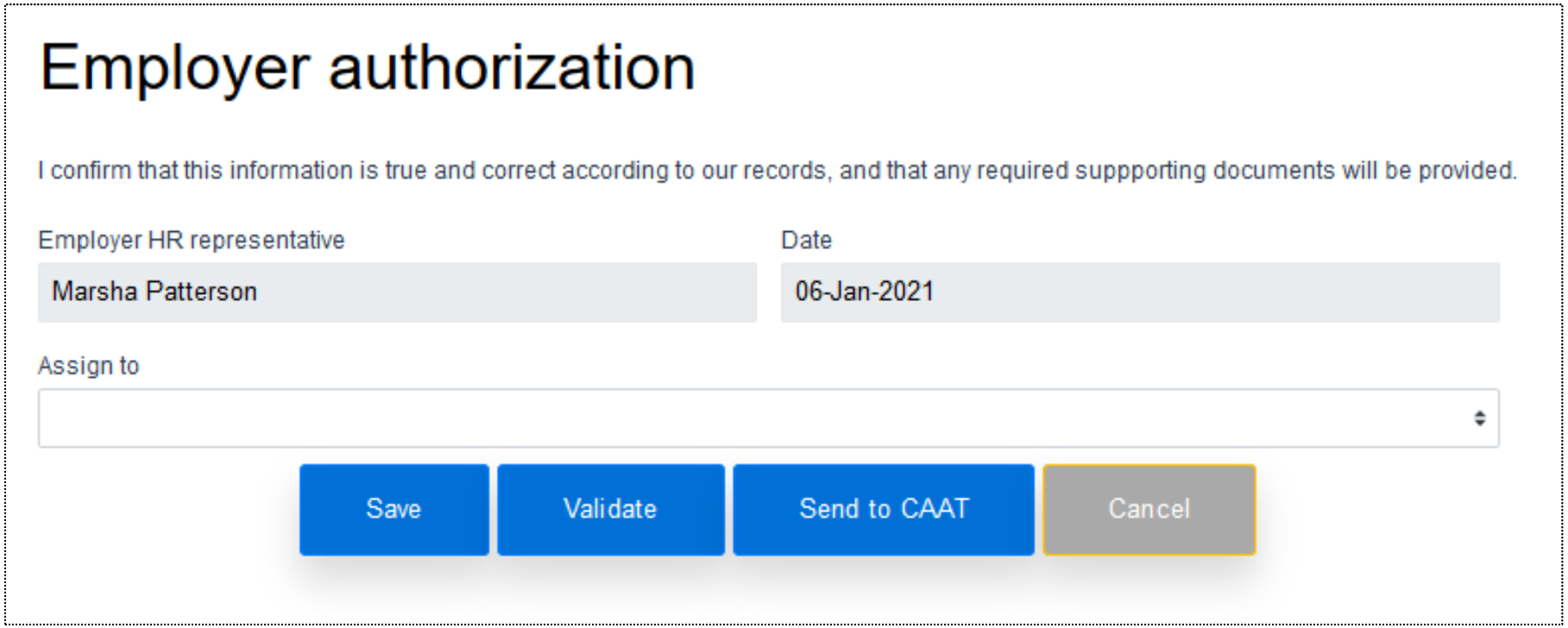
Pension application process – Termination details

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



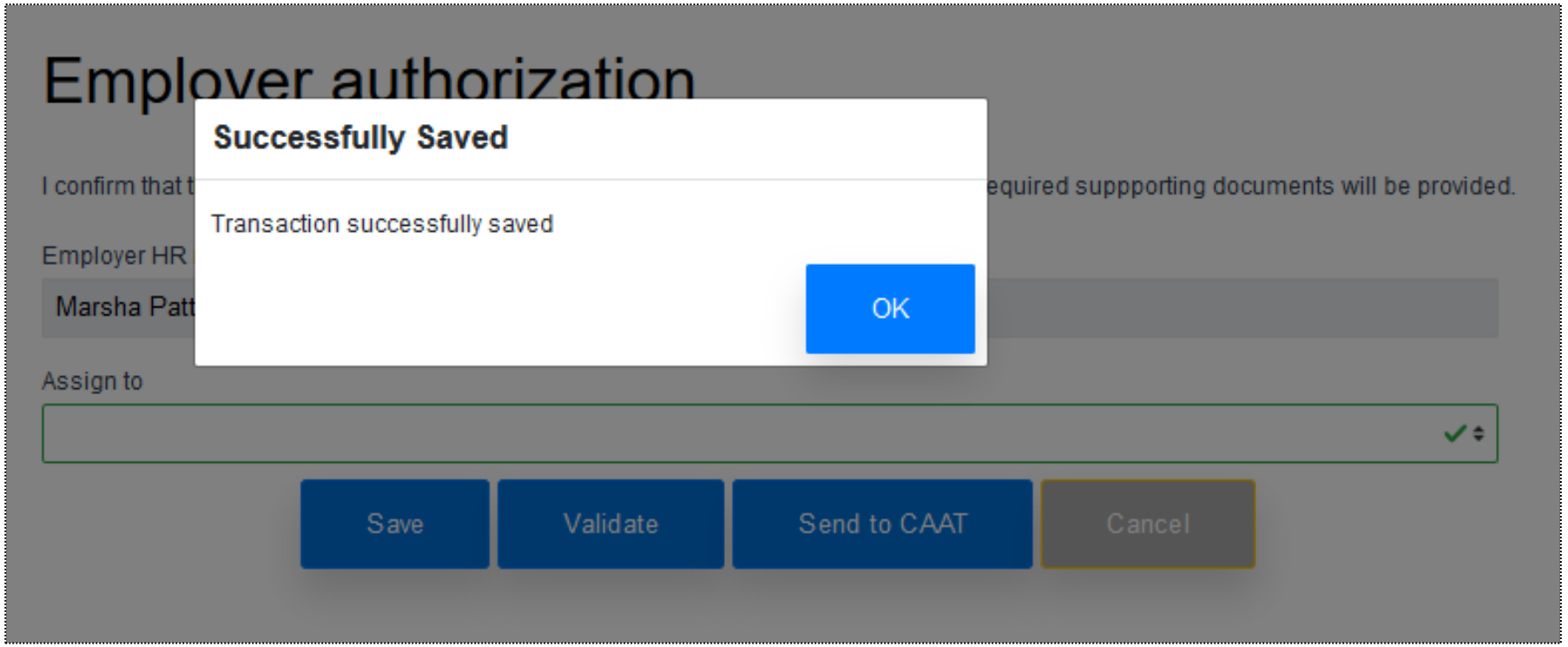
Pension application process – Employer authorization

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



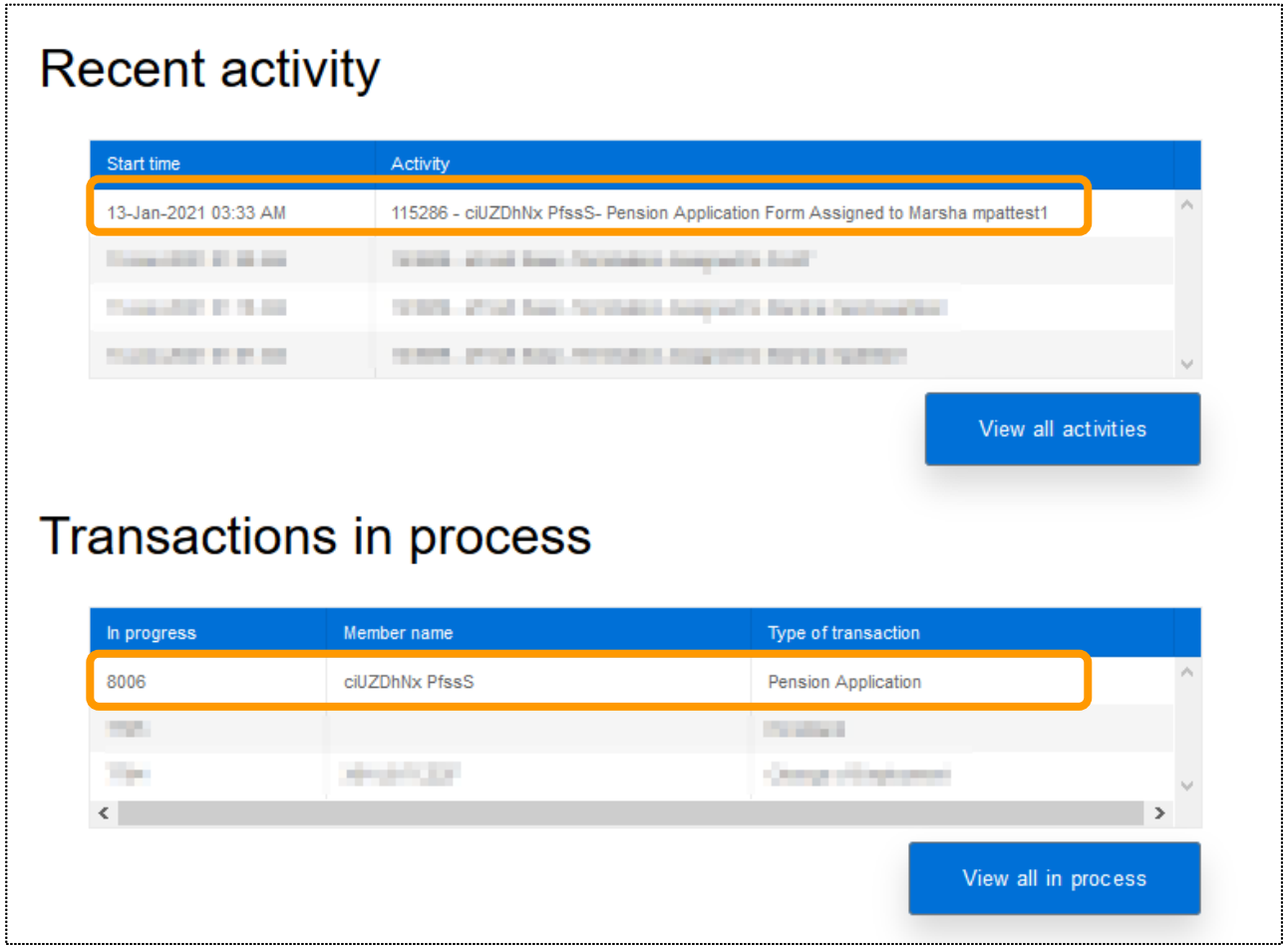
Pension application process - Save

- 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



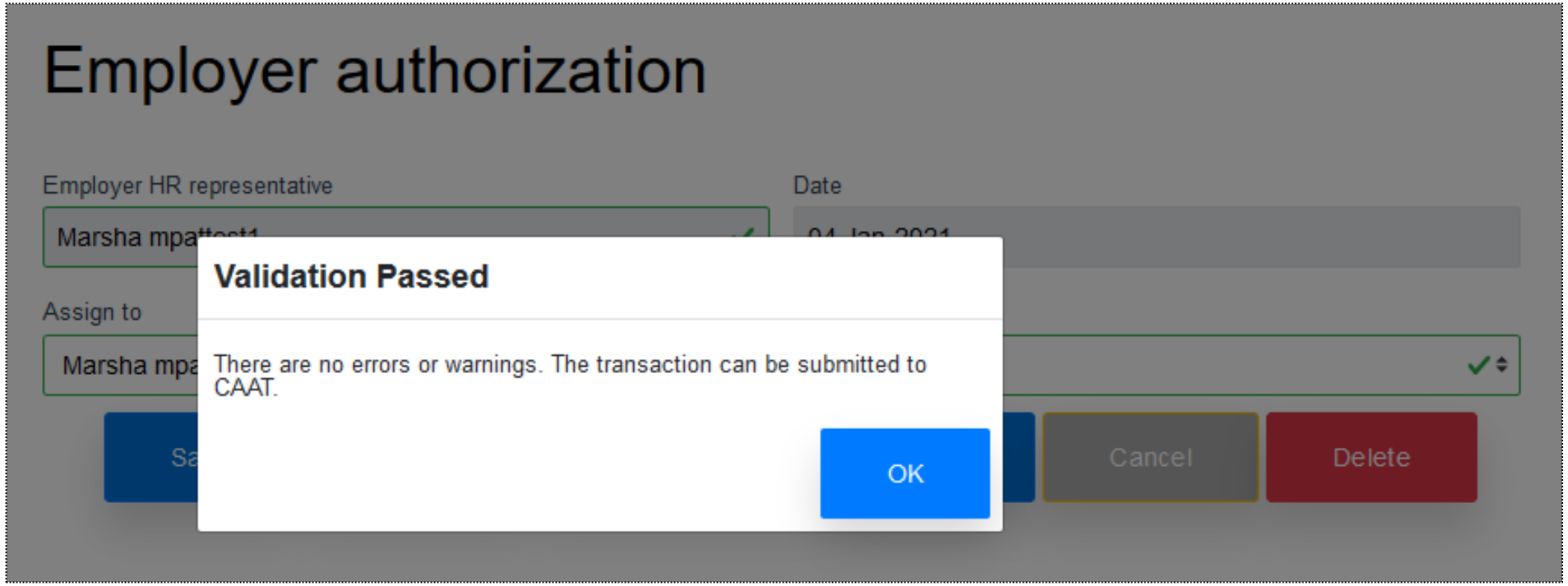
Pension application process - Save

- 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



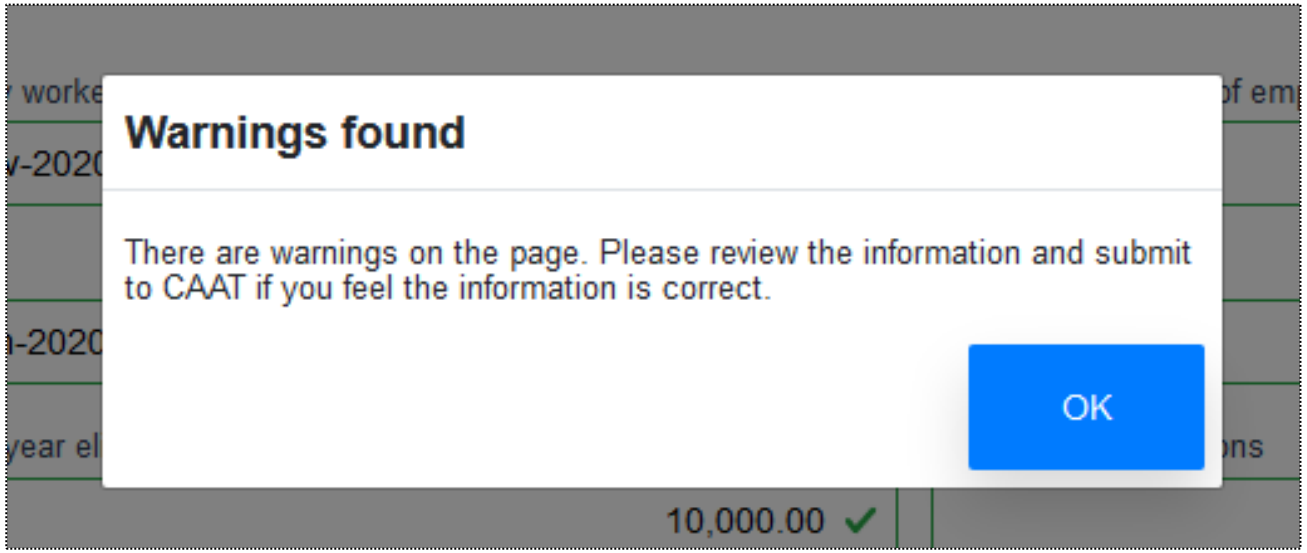
Pension application process - Validate

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



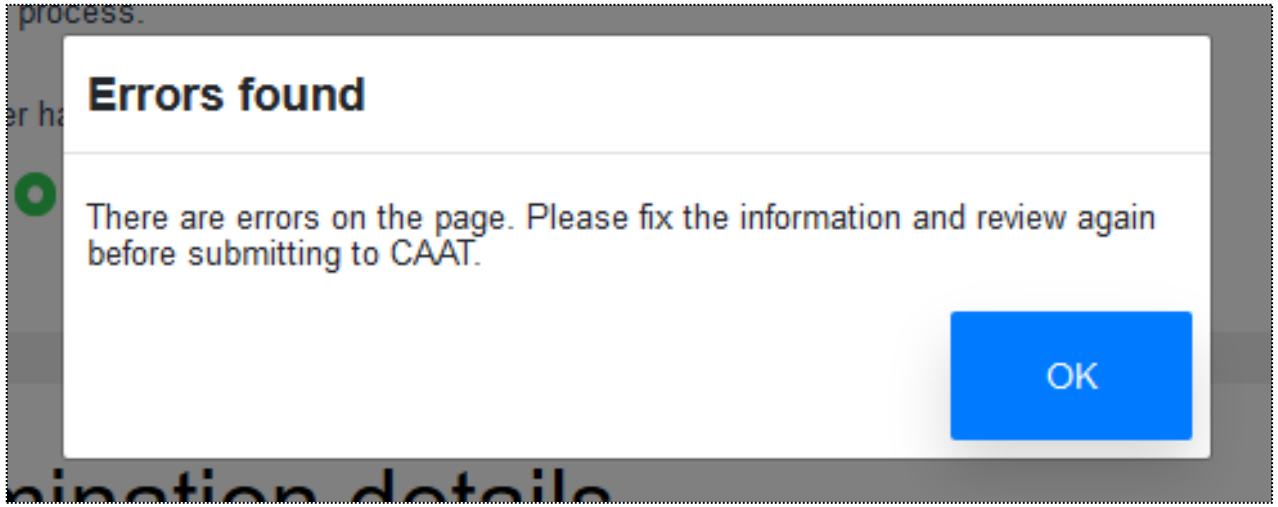
Pension application process – Validation warning

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



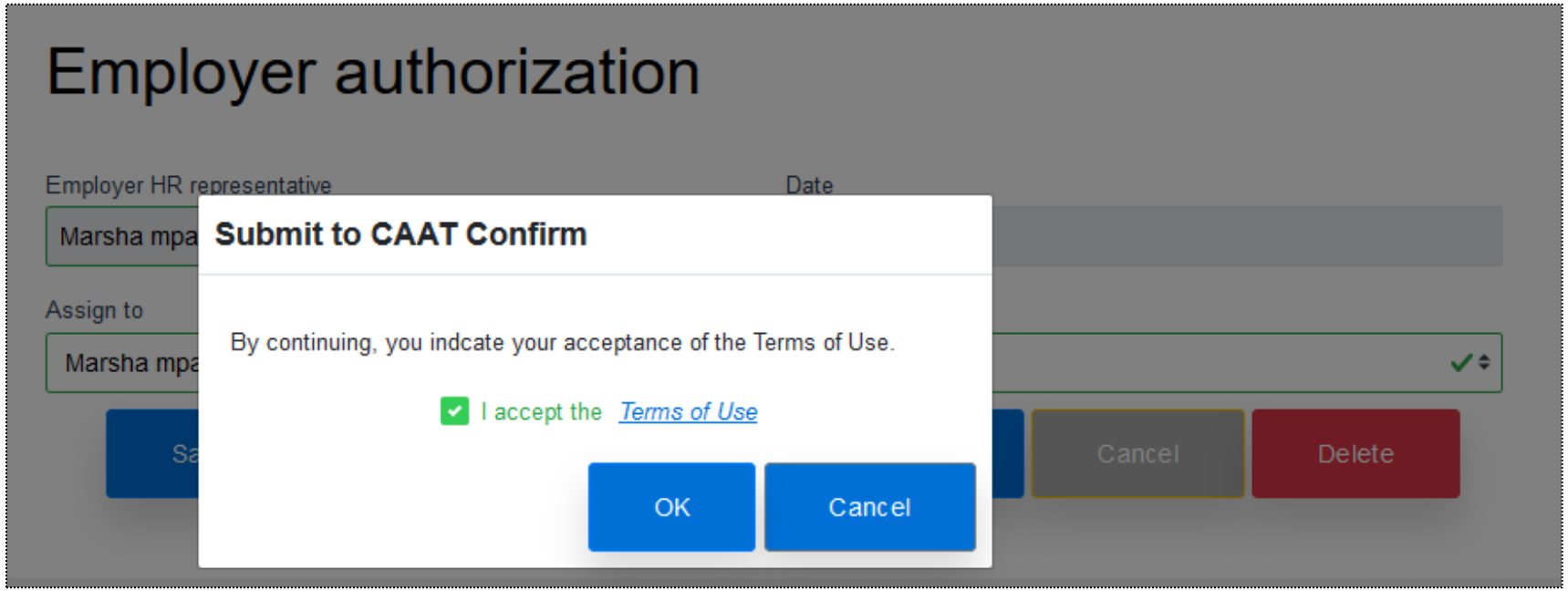
Pension application process – Validation error

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



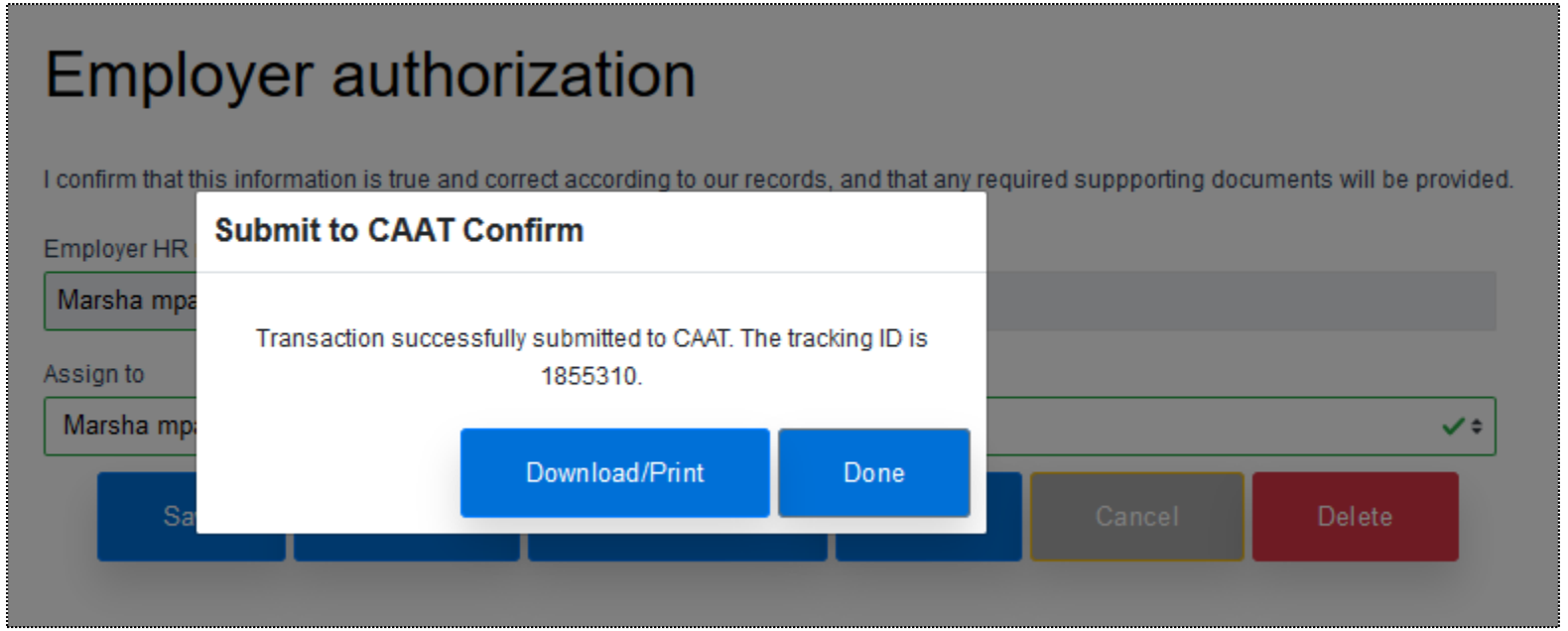
Pension application process – Send to CAAT

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



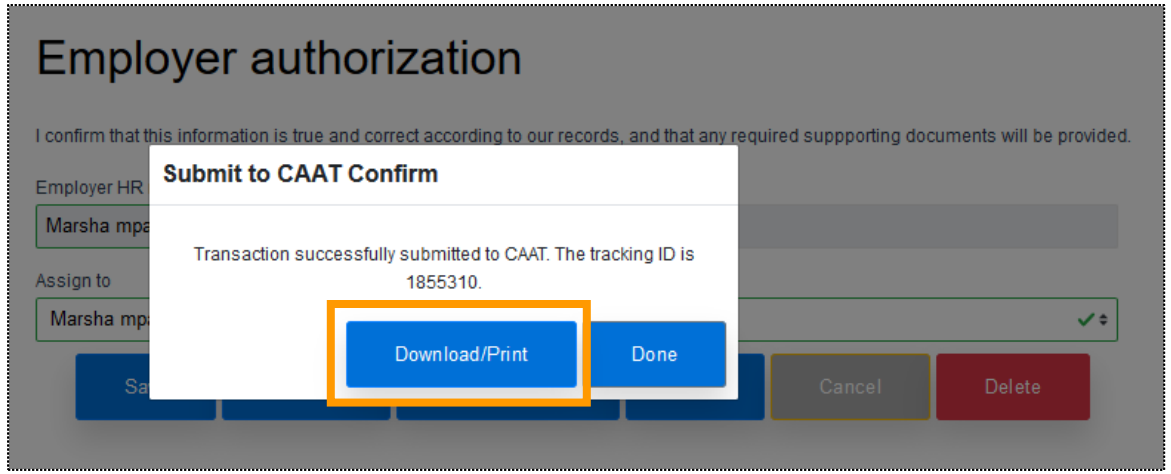
Pension application process – Send to CAAT

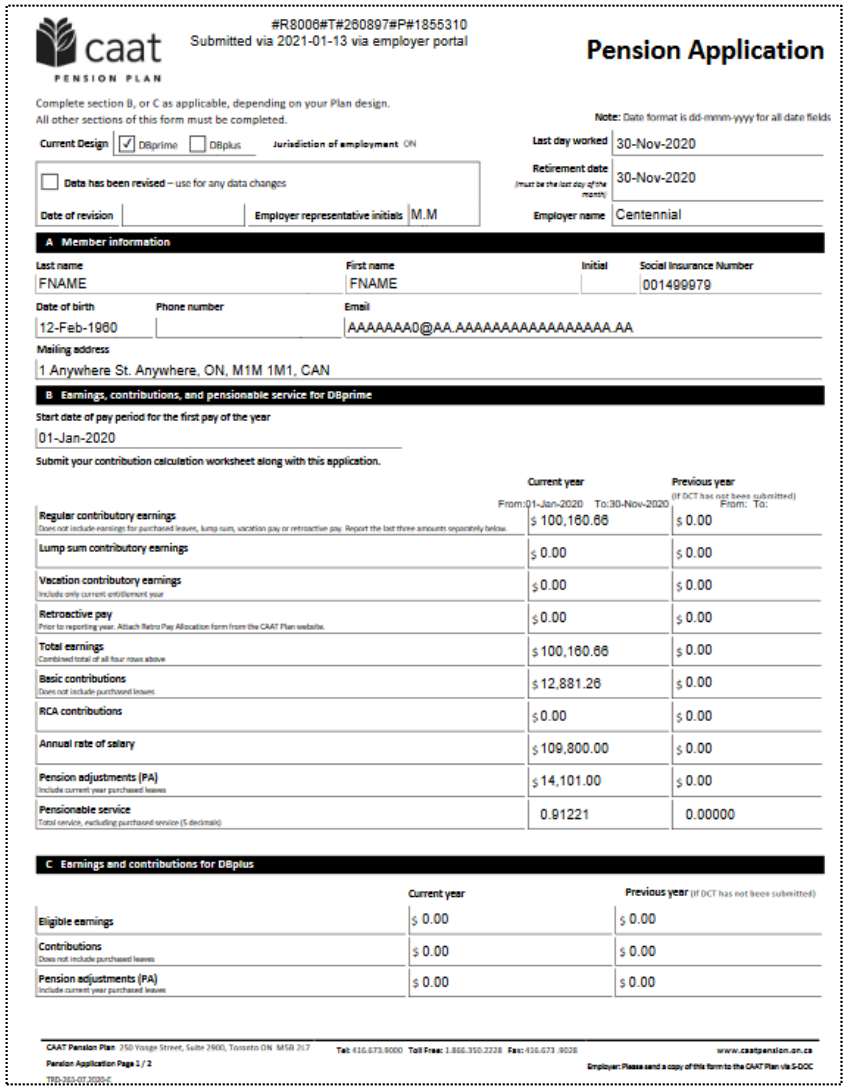
- Another pop-up box will appear upon successful creation of the *Pension Application*
- Each transaction is assigned a tracking ID



Pension application process

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





caat PENSION PLAN

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

Pension Application

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

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

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 (must be the last day of the month): 30-Nov-2020
Employer name: Centennial

A Member information

Last name	First name	Initial	Social Insurance Number
FNAME	FNAME		001499979

Date of birth	Phone number	Email
12-Feb-1960		AAAAAAA0@AA.AAAAAAAAAAAAAAAAA.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: 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 (Does not include earnings for purchased leaves, lump sum, vacation pay or retroactive pay. Report the last three amounts separately below.)	$ 100,160.66	$ 0.00
Lump sum contributory earnings	$ 0.00	$ 0.00
Vacation contributory earnings (Include only current entitlement year)	$ 0.00	$ 0.00
Retroactive pay (Prior to reporting year. Attach Retro Pay Allocation form from the CAAT Plan website.)	$ 0.00	$ 0.00
Total earnings (Combined total of all four rows above)	$ 100,160.66	$ 0.00
Basic contributions (Does not include purchased leaves)	$ 12,881.26	$ 0.00
RCA contributions	$ 0.00	$ 0.00
Annual rate of salary	$ 109,800.00	$ 0.00
Pension adjustments (PA) (Include current year purchased leaves)	$ 14,101.00	$ 0.00
Pensionable service (Total service, excluding purchased service (5 decimals))	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 (Does not include purchased leaves)	$ 0.00	$ 0.00
Pension adjustments (PA) (Include current year purchased leaves)	$ 0.00	$ 0.00

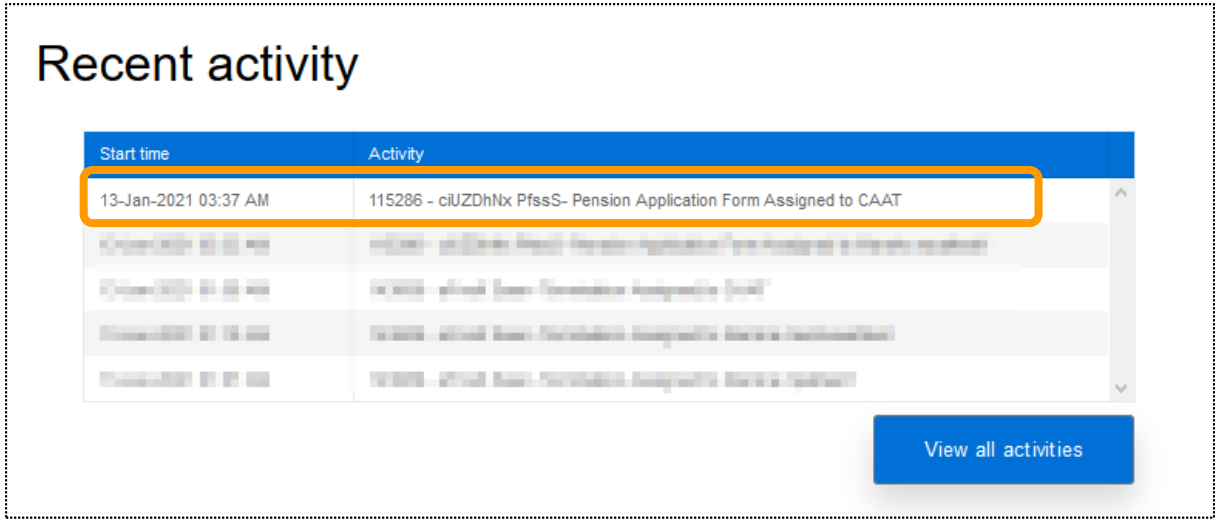
CAAT Pension Plan 250 Yonge Street, Suite 2900, Toronto ON M5B 2L7 Tel: 416.673.9000 Toll Free: 1.866.350.2228 Fax: 416.673.9028 www.caatpension.on.ca

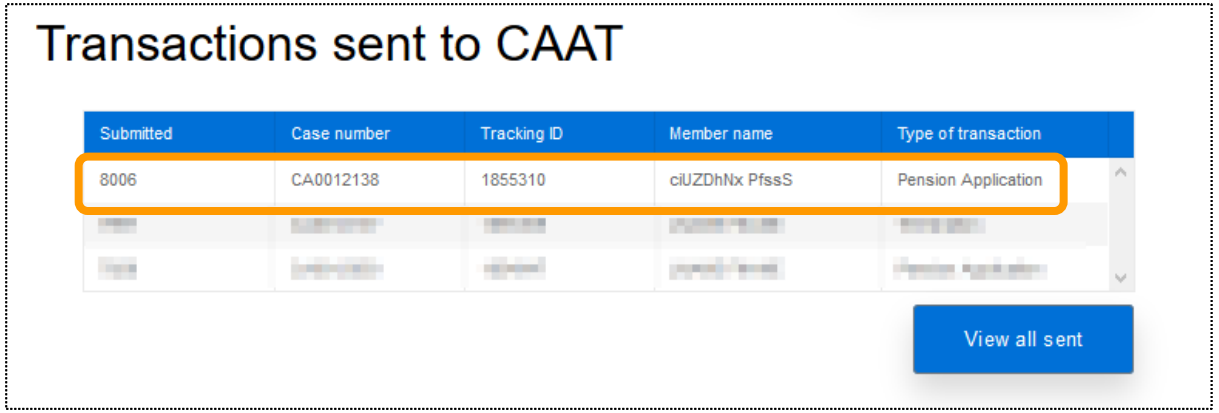
Pension Application Page 1 / 2

Employer: Please send a copy of this form to the CAAT Plan via S-DOC

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





Live demo

caat
PENSION PLAN