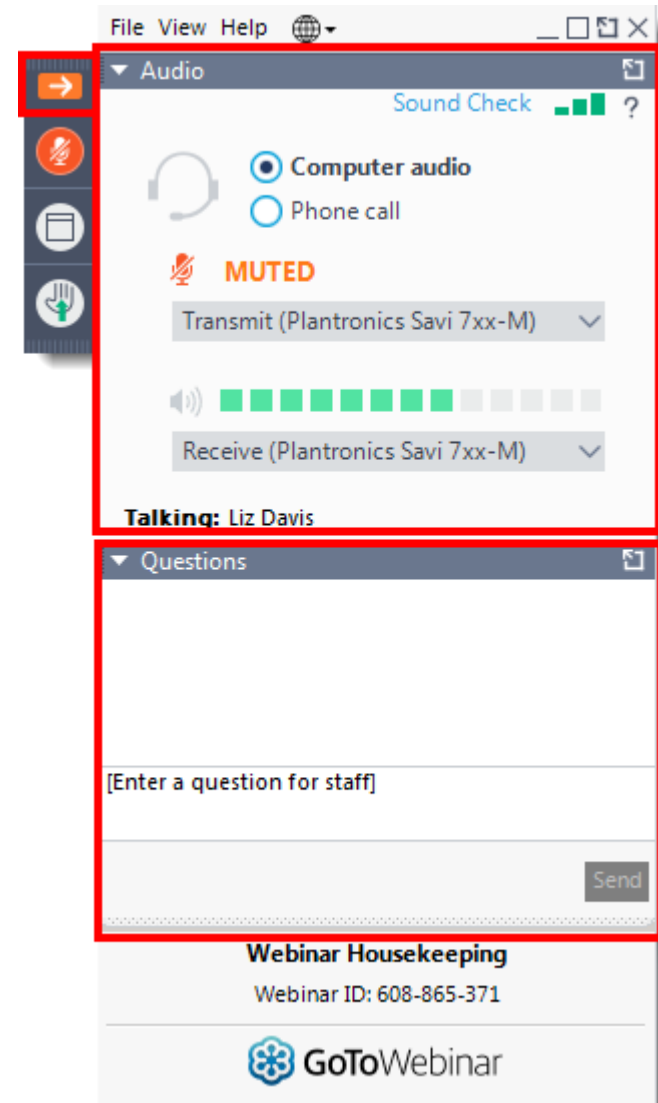


# While we wait – audio instructions

- 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: Change of Employment Process

February 4, 2021

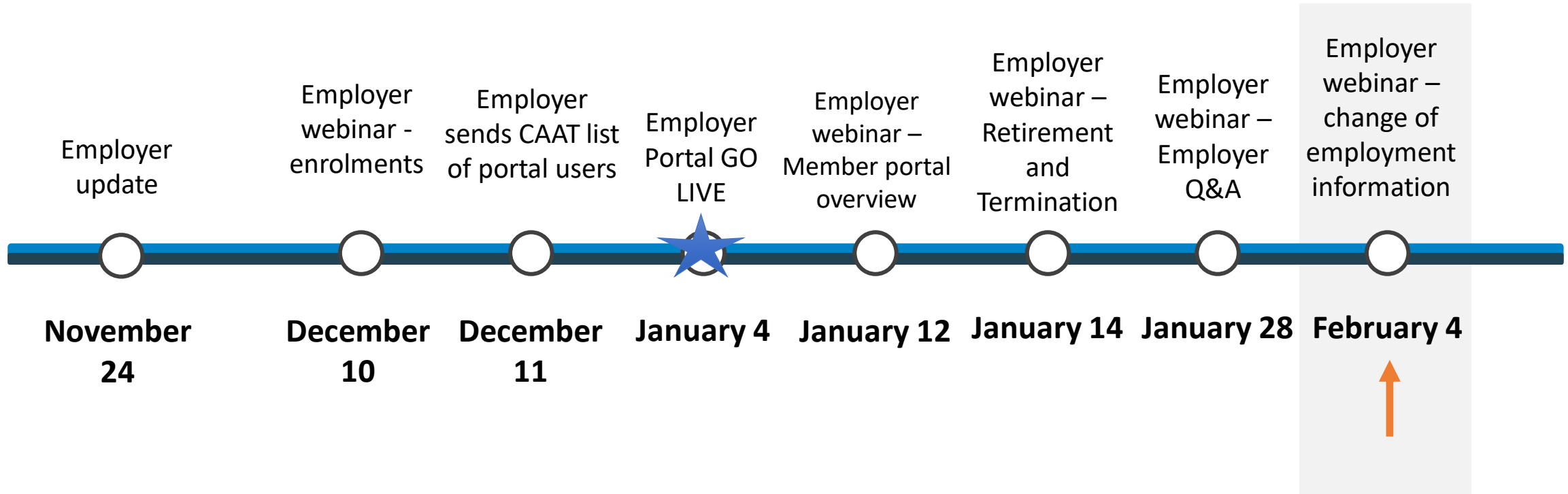




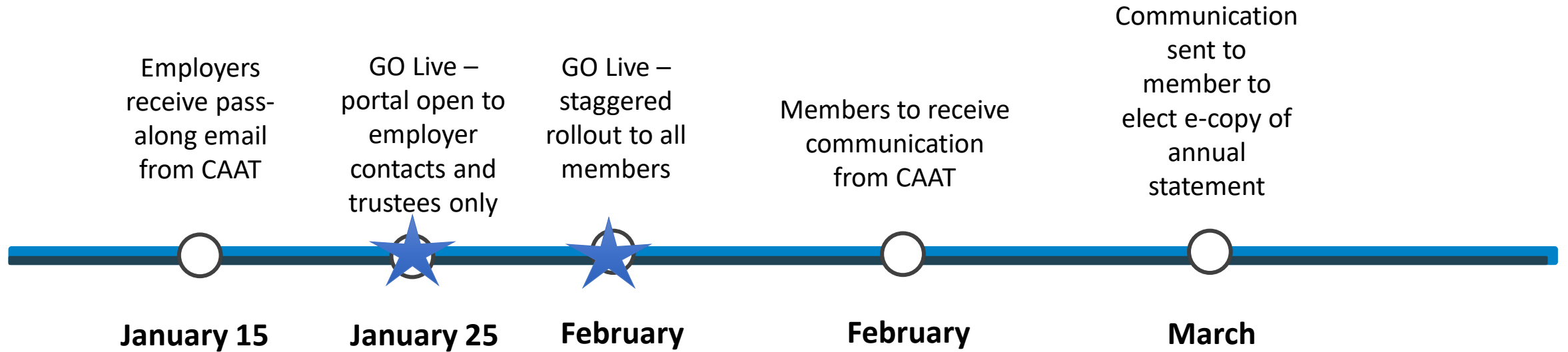
# Training agenda

1. Portal timelines
2. Change of employment 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 and collaboration. The hands are of various skin tones and are wearing different colored shirts. A semi-transparent blue rectangle is overlaid on the image, and a green diagonal line runs across the bottom right corner.

# Change of employment process

# Change of employment


- Select “Change 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: 'Determined Rainbow' (with a dropdown arrow), 'Quick Search' (with a search icon), 'Dashboard', 'Find a member', 'Message centre', 'Document centre', 'Member enrolment', and 'Change of employment' (highlighted in green). The main content area is divided into two sections. The top section has the heading 'Start a change of employment' in large blue text, followed by the subtitle 'Report a change or correction to a member's employment'. 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.

# Change of employment

- 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:



# Change of employment

- 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	001196799	07-Feb-1984	131925	Active

# Change of employment

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

## Change of Employment

Change or correct employment information.

---

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="001196799"/>
Date of birth	
<input type="text" value="07-Feb-1984"/>	

# Change of employment – Member personal information

- Confirm that the intended member has been selected

## Member personal information

First name	Middle initial
FNAME	
Last name	Social Insurance Number
LNAME	001196799
Date of birth	
07-Feb-1984	

# Change of employment – Information changes

## Change to the member's employment

- When changing the Plan design, “New employment type” will automatically default
- Dates entered cannot be in the future
- Can change employee group to: Administration, Faculty or Support

### Information changes

Change to the member's employment

New Plan design	
DBplus ✓ ↕	
End date of previous Plan design	Start date of new Plan design
31-Dec-2020 ✓	01-Jan-2021 ✓
New employment type	
OTRFT/Contract ✓ ↕	
End date of previous employment type	Start date of new employment type
31-Dec-2020	01-Jan-2021
Change of employee group	Date of change
Administration ✓ ↕	01-Jan-2021 ✓



# Change of employment – Information changes

## Change to member's jurisdiction of employment

- The member's jurisdiction may be updated if required

### Change to the member's jurisdiction of employment

Jurisdiction of employment	New jurisdiction effective date
<input type="text" value="Ontario"/>	<input type="text" value="03-Sep-2007"/>

# Change of employment – Information changes

## Corrections to the member's date of hire or enrolment date

- Update the member's date of hire and/or enrolment date if required.

### Corrections to the member's date of hire or enrolment date

Hire date on file	Revised hire date
02-Jan-2006	DD-MMM-YYYY
Enrolment date on file	Revised enrolment date
03-Sep-2007	DD-MMM-YYYY
Date of change	
29-Jan-2021	

# Change of employment – Earnings, contributions and service for DBprime

- Complete this section if there were any changes to the member's employment information.
- Provide the information up to the date before the effective date of the employment change.
- If a change in the member's pensionable earnings is required, update the earnings without any lump sum payments.
- If the DCT has been submitted for the previous year, select 'Yes' otherwise select 'No'.

### Earnings, contributions and service for DBprime

Complete this section if there has been any change to the member's employment information.

Provide the basic contributions and earnings information for the period from this January 1 to the workday before the employment change.

If you are reporting a change in pensionable earnings for a DBprime member, report basic pensionable earnings excluding any lump sum payments.

Refer to the Employer Manual for additional information regarding pensionable earnings.

#### Current year

From	To
<input type="text" value="01-Jan-2020"/> ✓	<input type="text" value="31-Dec-2020"/> ✓
Pensionable service	Pensionable earnings (\$)
<input type="text" value="1.00000"/> ✓	<input type="text" value="62,000.00"/> ✓
Lump sum (\$)	Annual salary rate (\$)
<input type="text" value="850.00"/> ✓	<input type="text" value="62,850.00"/> ✓
Basic contributions (\$)	CAAT RCA contributions (\$)
<input type="text" value="7,028.89"/> ✓	<input type="text" value="###"/>
Pension adjustment (\$)	
<input type="text" value="6,882"/> ✓	

Has the DCT for the previous year been submitted?

Yes  No

# Change of employment – Earnings, contributions and pensionable service for DBprime

- If you selected "No" complete the required fields

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	Pensionable earnings (\$)
<input type="text" value="#.#####"/>	<input type="text" value="#.##"/>
Lump sum (\$)	Annual salary rate (\$)
<input type="text" value="#.##"/>	<input type="text" value="#.##"/>
Basic contributions (\$)	CAAT RCA contributions (\$)
<input type="text" value="#.##"/>	<input type="text" value="#.##"/>
Pension adjustment (\$)	
<input type="text" value="#"/>	



# Change of employment – Earnings and contributions for DBplus

- Only complete if there was a change to the member's employment information.
- Enter the 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

Current year

From	To
<input type="text" value="01-Jan-2020"/> ✓	<input type="text" value="31-Dec-2020"/> ✓
Eligible earnings (\$)	Member contributions (\$)
<input type="text" value="9,000.00"/> ✓	<input type="text" value="810.00"/> ✓
Employer contributions (\$)	
<input type="text" value="810.00"/> ✓	

Has the DCT for the previous year been submitted?

Yes  No

# Change of employment – 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

Marsha Patterson

Date

29-Jan-2021

Assign to

Save Validate Send to CAAT Cancel

# Change 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

# Change 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: 'Determined Rainbow', 'Quick Search', 'Dashboard', 'Find a member', 'Message centre' (highlighted in green), '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 are 'Submit' and 'Reset' buttons. The 'Search results' section shows a table with two rows. The first row is highlighted with an orange box and contains the following data:

Process ID	Reference ID	Subject	Date
		Change of Employment task has been assigned to Marsha marshauattest - 1820 - KAISUL SIMFROPVECZTDF	29-Jan-2021
		Change of Employment task has been assigned to Marsha mpattest1 - 1817 - FNAME LNAME	29-Jan-2021



# Change of employment – Dashboard

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

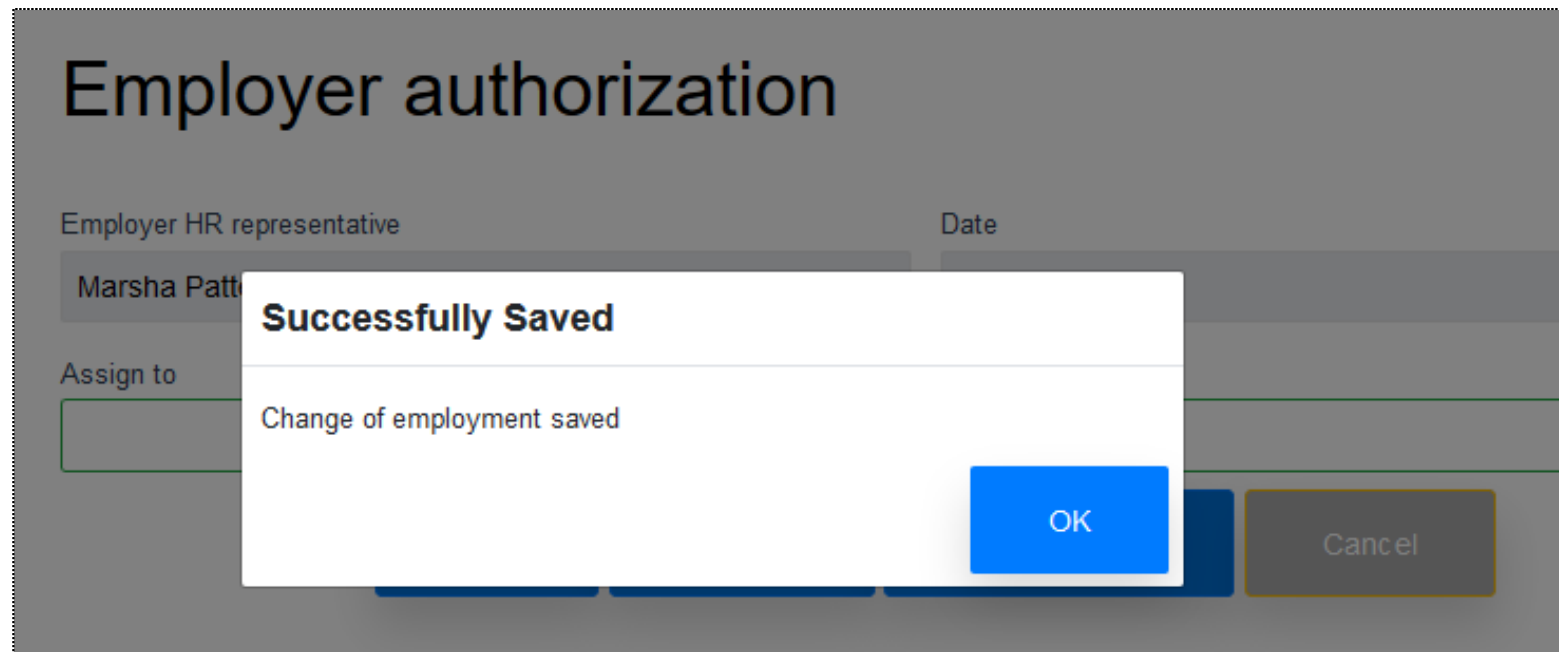
## Transactions in process

In progress	Member name	Type of transaction
1820	SIMFROPVECZTDF KAISUL	Change of Employment
1817	LNAME FNAME	Change of Employment
1117	sdkhgfsdkagfdk sgfsjkfghf	Enrolment

[View all in process](#)

# Change of employment - Save

- When complete, save the process
- A pop-up box will be displayed if it was successfully saved
- If it is not successful, the pop-up box will state: “Failed to save the new change of employment process!”



# Change of employment - Save

- Once successfully saved, you will be redirected to the dashboard
- You can view the process in both the “Recent activity” and “Transactions in process” logs
- You can also retrieve the change of employment transaction form from the “Transactions in process” log

## Recent activity

Start time	Activity
29-Jan-2021 11:59 AM	131925 - FBPJUUQQB AEK- Change of Employment Assigned to Marsha Patterson
29-Jan-2021 11:00 AM	131928 - SIMFROPVECZTDF KAISUL- Change of Employment Assigned to Marsha marshauattest
22-Jan-2021 04:43 PM	#DBplus member: 1929554 - LNAME FNAME - DBplus Enrolment Form Assigned to CAAT
22-Jan-2021 04:01 PM	#DBprime member: 1929553 - LNAME FNAME - DBprime Enrolment Form Assigned to CAAT
21-Jan-2021 12:37 PM	143738 - NAPHORG TLLTW- Pension Application Form Assigned to CAAT

[View all activities](#)

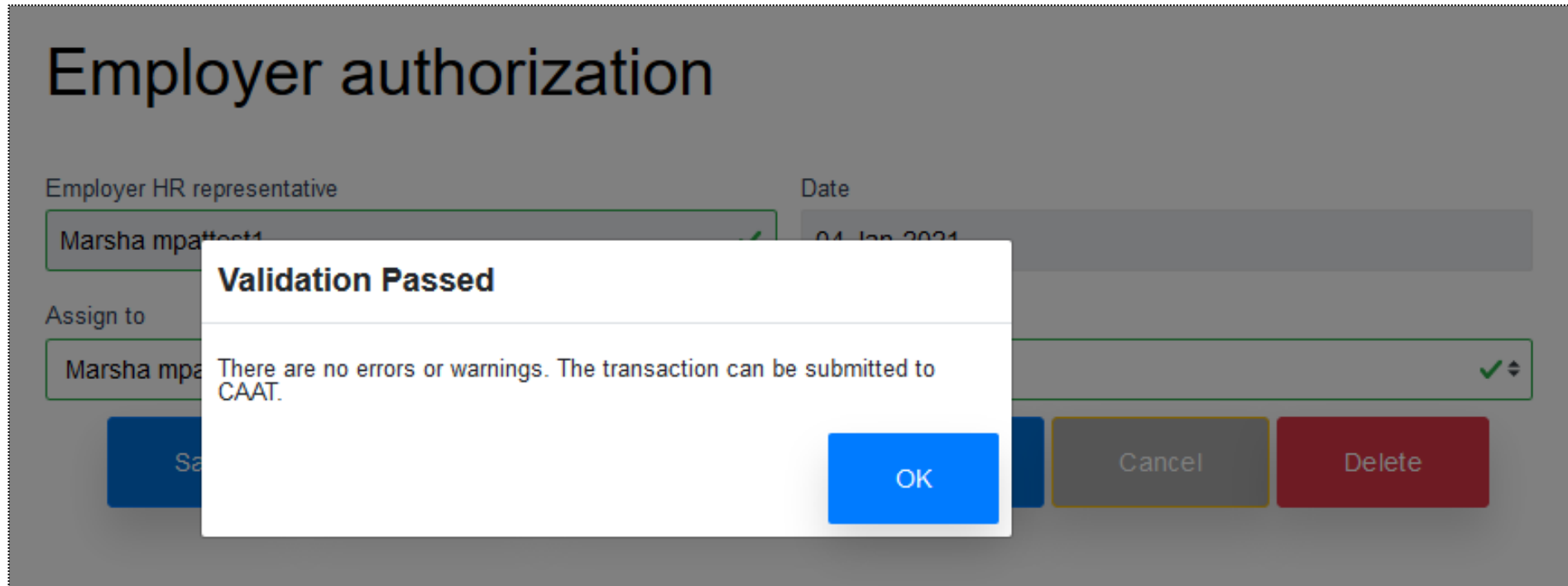
## Transactions in process

In progress	Member name	Type of transaction
1823	FBPJUUQQB AEK	Change of Employment
1820	SIMFROPVECZTDF KAISUL	Change of Employment
1817	LNAME FNAME	Change of Employment

[View all in process](#)

# Change of employment - Validate

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

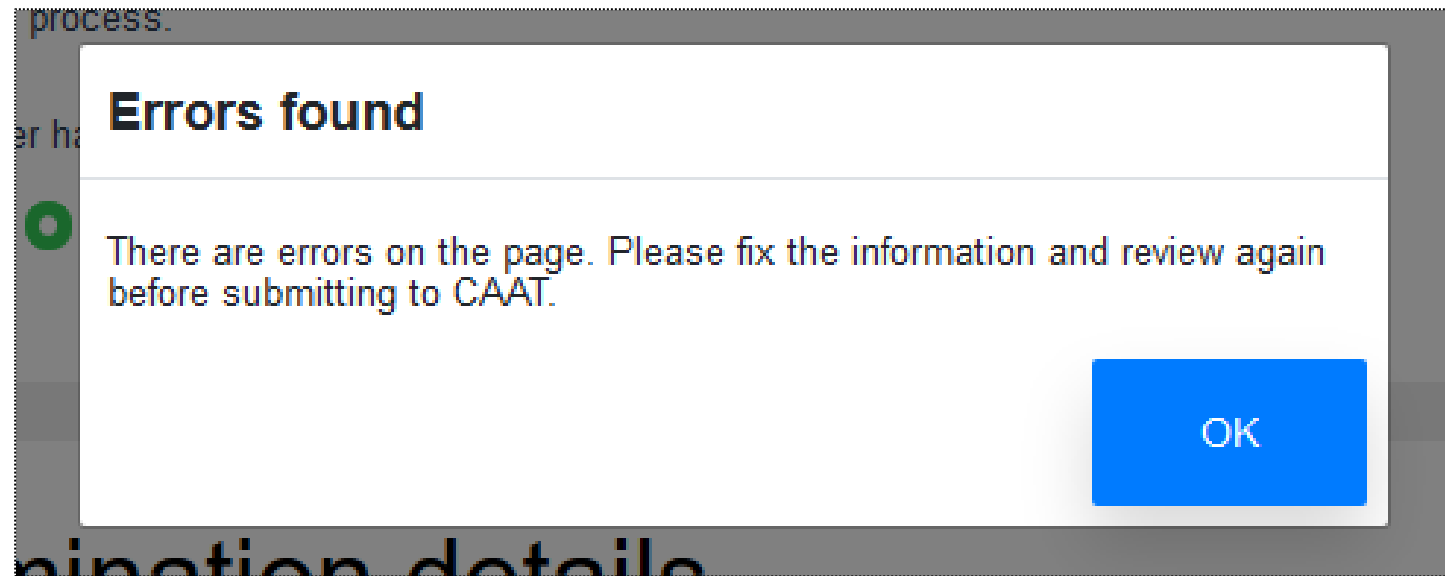


The screenshot shows a web form titled "Employer authorization". The form has several fields: "Employer HR representative" with the value "Marsha mpattest1", "Date" with the value "04 Jan 2021", and "Assign to" with the value "Marsha mpattest1". A blue "Save" button is visible. A white pop-up box titled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



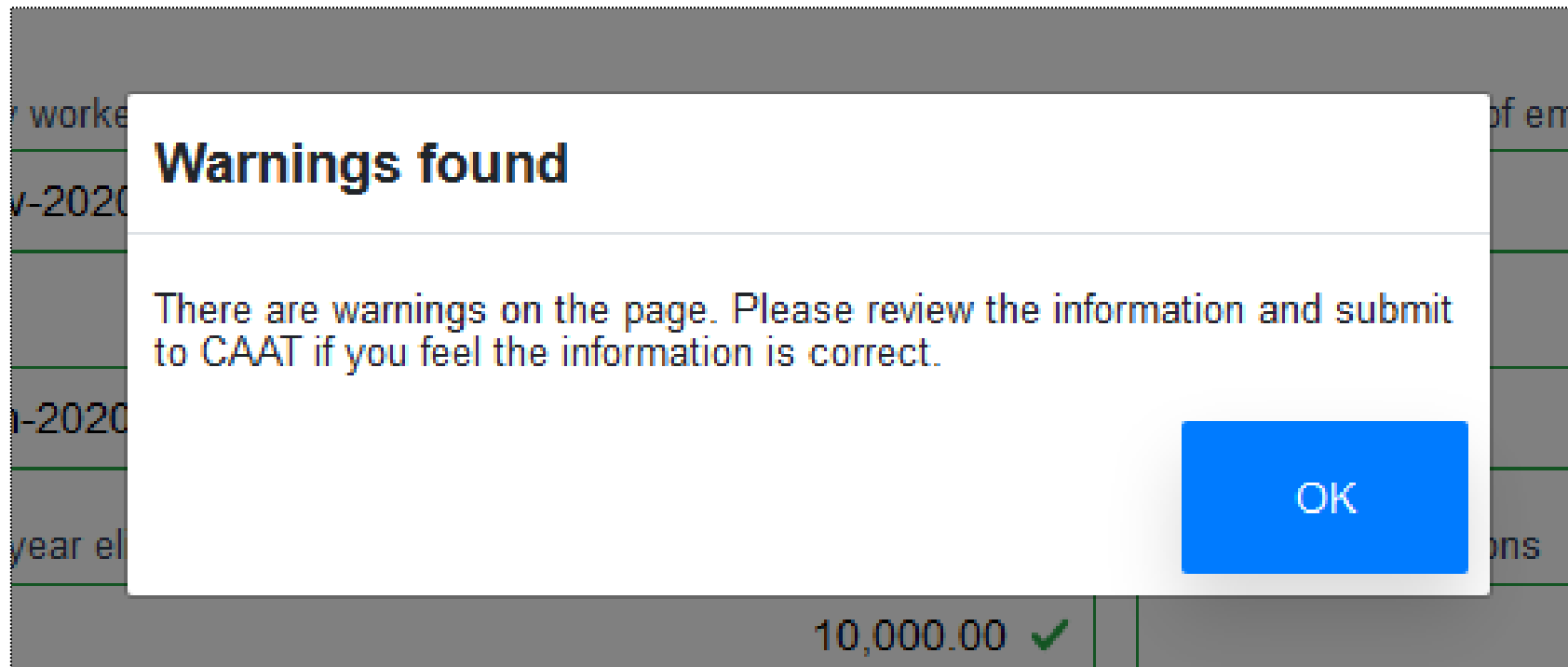
# Change of employment – Validation error

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



# Change of employment – Validation warning

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



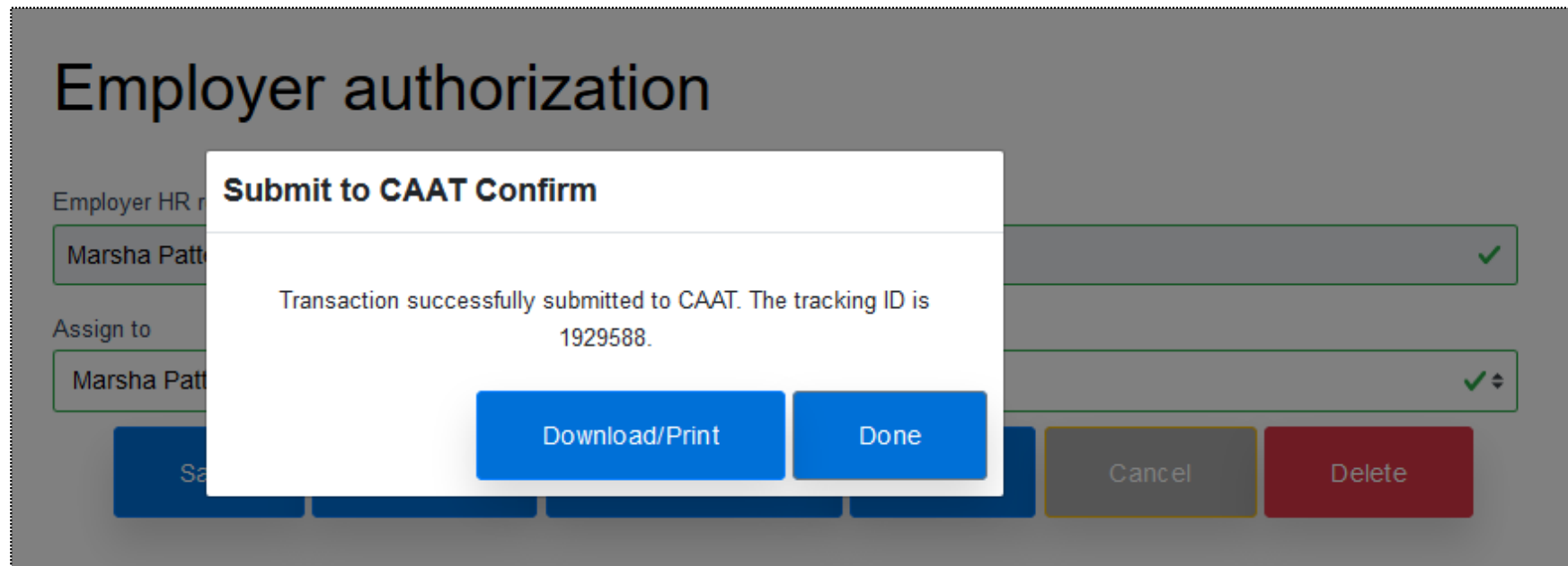
# Change of employment – Submit to CAAT

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

The screenshot shows a web interface for 'Employer authorization'. The background form has fields for 'Employer HR representative' (Marsha mpa) and 'Date'. Below these are 'Assign to' and 'Assign to' (Marsha mpa) fields. A blue 'Save' button is visible. A white pop-up dialog box is centered on the screen with the title 'Submit to CAAT Confirm'. The dialog contains the text 'By continuing, you indicate your acceptance of the Terms of Use.' and a checked checkbox with the text 'I accept the [Terms of Use](#)'. At the bottom of the dialog are 'OK' and 'Cancel' buttons. In the background, a 'Cancel' button and a red 'Delete' button are also visible.

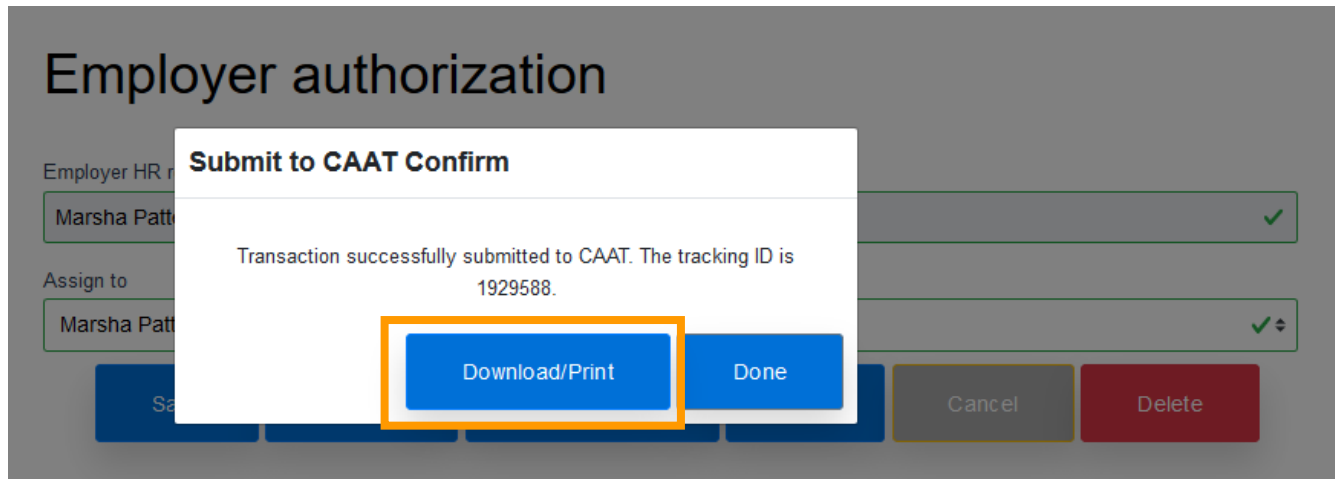
# Change of employment – Send to CAAT

- Another pop-up box will appear upon successful creation of the *Change of Employment*
- Note the tracking ID number



# Change of employment

- View the *Change of Employment form* by selecting the “Download/Print” button



#R1823#T#283227#F#1929588  
Submitted via 2021-01-29 via employer portal

**Change of Employment**

Please complete all applicable sections of this form

Employer name:

Member is currently earning a pension under:  DBprime  DBplus

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

**A Member information**

Last name	First name	Initial	Social Insurance Number	Date of birth
LNAME	FNAME		001198799	07-Feb-1984

**B Change of plan design**

Member's plan design has changed

New plan design:	End date of previous plan design	Start date of new plan design
<input type="checkbox"/> DBprime <input checked="" type="checkbox"/> DBplus	31-Dec-2020	01-Jan-2021

**C Change of employment information**

Member's employment type has changed

New employment type:	End date of previous type	Start date of new type	Member's jurisdiction of employment has changed
<input type="checkbox"/> Full-time <input checked="" type="checkbox"/> OTRFT	31-Dec-2020	01-Jan-2021	Jurisdiction of employment: ON Effective date: 03-Sep-2007

Member's employee group has changed

Change of employee group	Date of change
<input checked="" type="checkbox"/> Administration <input type="checkbox"/> Faculty <input type="checkbox"/> Support	01-Jan-2021

Corrections to Members' date of hire or enrolment date

Hire date on file	Revised hire date	Enrolment date on file	Revised enrolment date	Date of change
02-Jan-2008		03-Sep-2007		29-Jan-2021

**D Earnings, contributions and service for DBprime**

Complete if there has been any change to employment information.  
Provide the basic contributions and earnings information below for the period from January 1st to the workday before the employment change. If you are reporting a change in pensionable earnings for DBprime members, report basic pensionable earnings, excluding any lump sum payments. Refer to the Employer Manual for additional information regarding pensionable earnings.

	Current year		Previous year (If OCT has not been submitted)
	From: 01-Jan-2020	To: 31-Dec-2020	
Pensionable earnings (excluding any lump sum payments)	\$ 62,000.00		\$ 0.00
Lump sum	\$ 850.00		\$ 0.00
Annual salary rate (immediately prior to change)	\$ 62,850.00		\$ 0.00
Basic contributions (does not include purchased leaves)	\$ 7,028.89		\$ 0.00
CAAT RCA contributions	\$ 0.00		\$ 0.00
Pensionable service (total service, excluding purchased service, used for PA calculation) (\$ decimals)	1.00000		0.00000
Pension adjustment	\$ 6,882.00		\$ 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  
CHG-102-09-2020-E  
Employer: Please send a copy of this form to the CAAT Plan via S-DCC



# Change of employment 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
29-Jan-2021 12:12 PM	FBPJJUQQB AEK - Change of Employment Assigned to CAAT
29-Jan-2021 12:12 PM	FBPJJUQQB AEK - Change of Employment Assigned to CAAT
29-Jan-2021 12:12 PM	FBPJJUQQB AEK - Change of Employment Assigned to CAAT
29-Jan-2021 12:12 PM	FBPJJUQQB AEK - Change of Employment Assigned to CAAT

[View all activities](#)

## Transactions sent to CAAT

Submitted	Case number	Tracking ID	Member name	Type of transaction
1823	CA0002924	1929588	FBPJJUQQB AEK	Change of Employment
1823	CA0002924	1929588	FBPJJUQQB AEK	Change of Employment
1823	CA0002924	1929588	FBPJJUQQB AEK	Change of Employment

[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**

