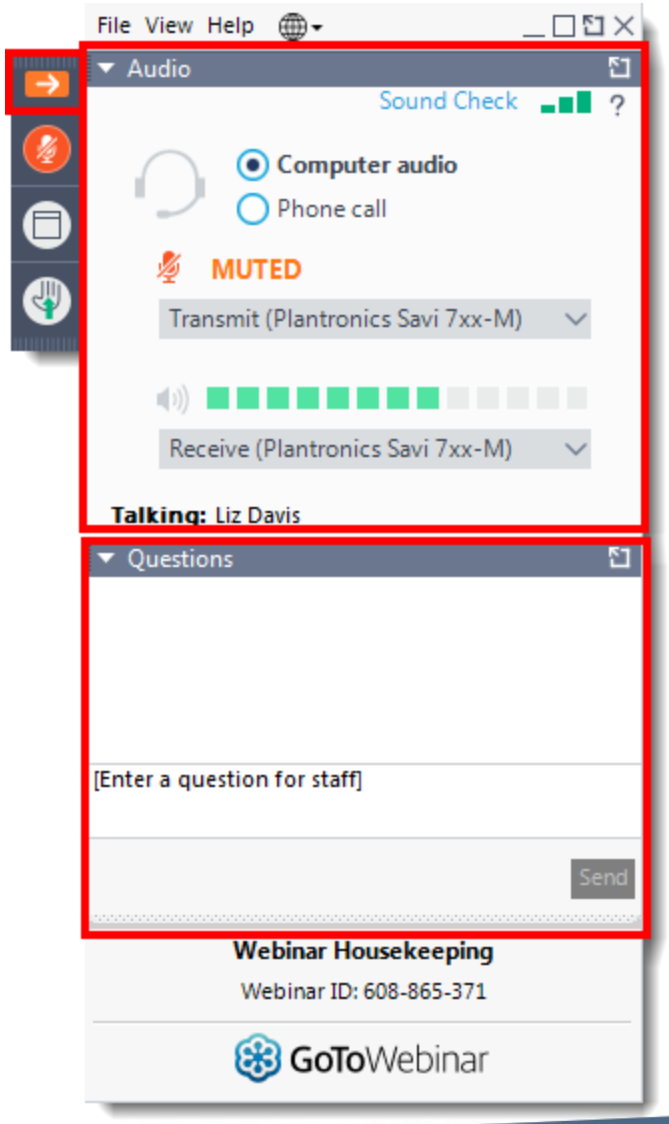
While we wait – audio instructions

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



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PENSION PLAN

Payroll Based Reporting

Pension Administration Link

February 17, 2022

Agenda

1. Recap
2. Using PBR on Pension Administration Link
3. Demo

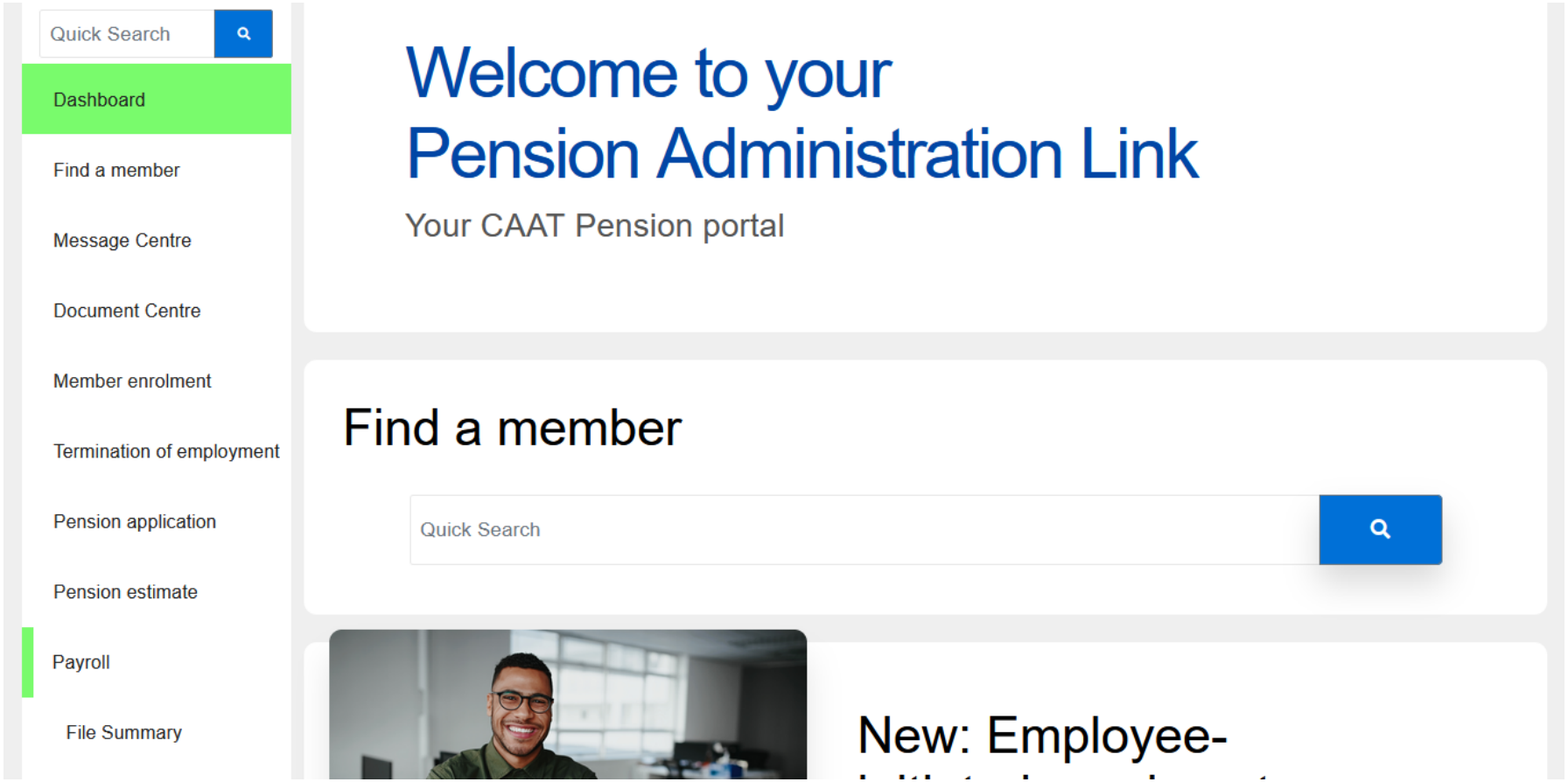
Payroll Based Reporting (PBR) – Recap from December

- PBR will be available in Pension Administration Link (PAL)
  - Expected to be available March 2022
  - Data prior to March 2022 must have been submitted and finalized prior to using PAL
- PBR files loaded in PAL will be accessible for review at any time
- CAAT employer pension analysts available for support

Benefits of using PBR online

- Remove dependency on multiple platforms to submit files
- Easily make updates to payroll file before final submission
- Employees will be able to view data immediately
- Report Pension Adjustments online

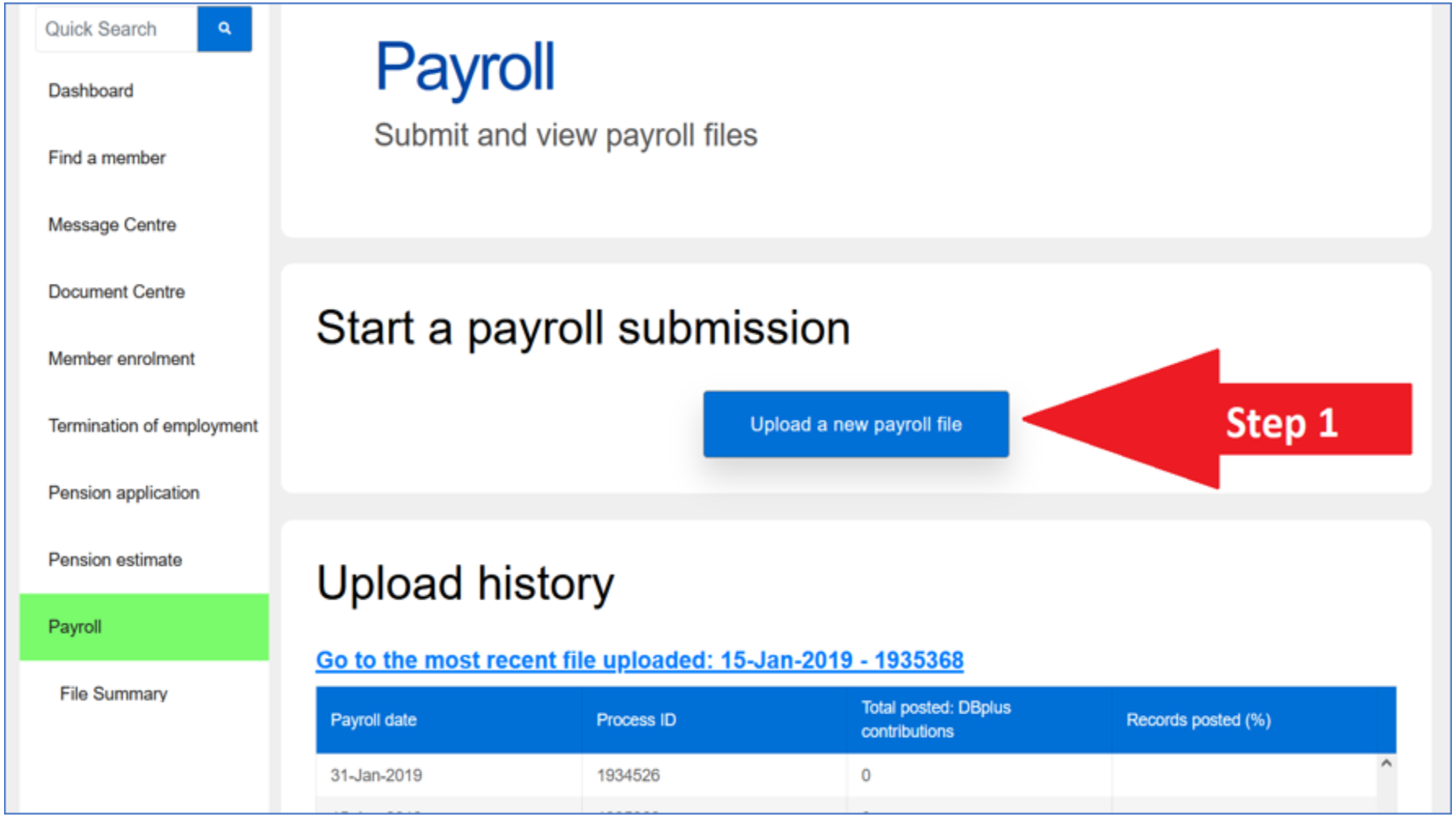
Payroll Based Reporting – New Menu Feature



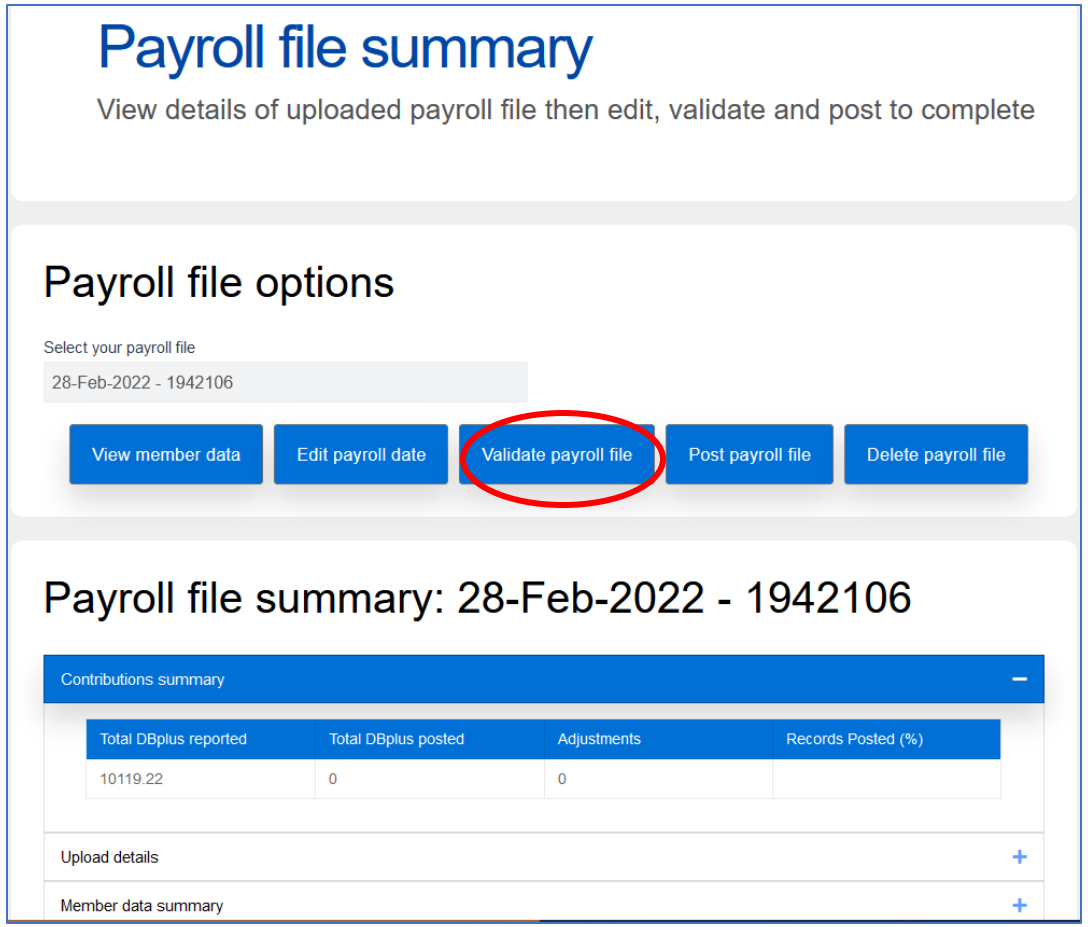
PBR in PAL – Process Steps

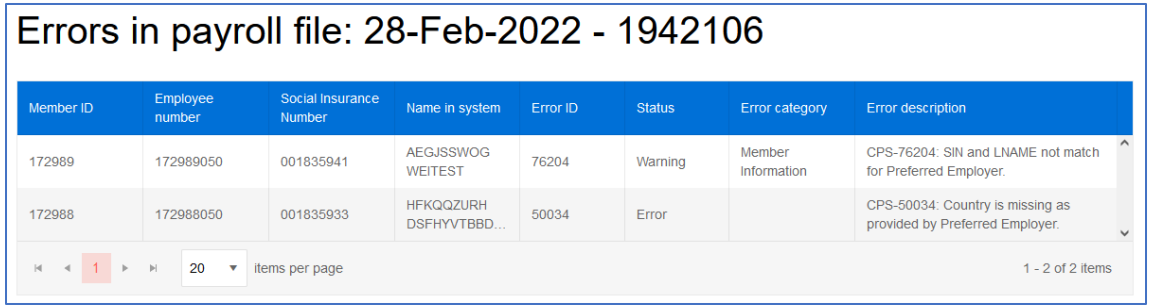
- Step 1 – Upload your PBR load file
- Step 2 – Validate and Review
- Step 3 – Edit records, if necessary
- Step 4 – Post data

Step 1 – Upload

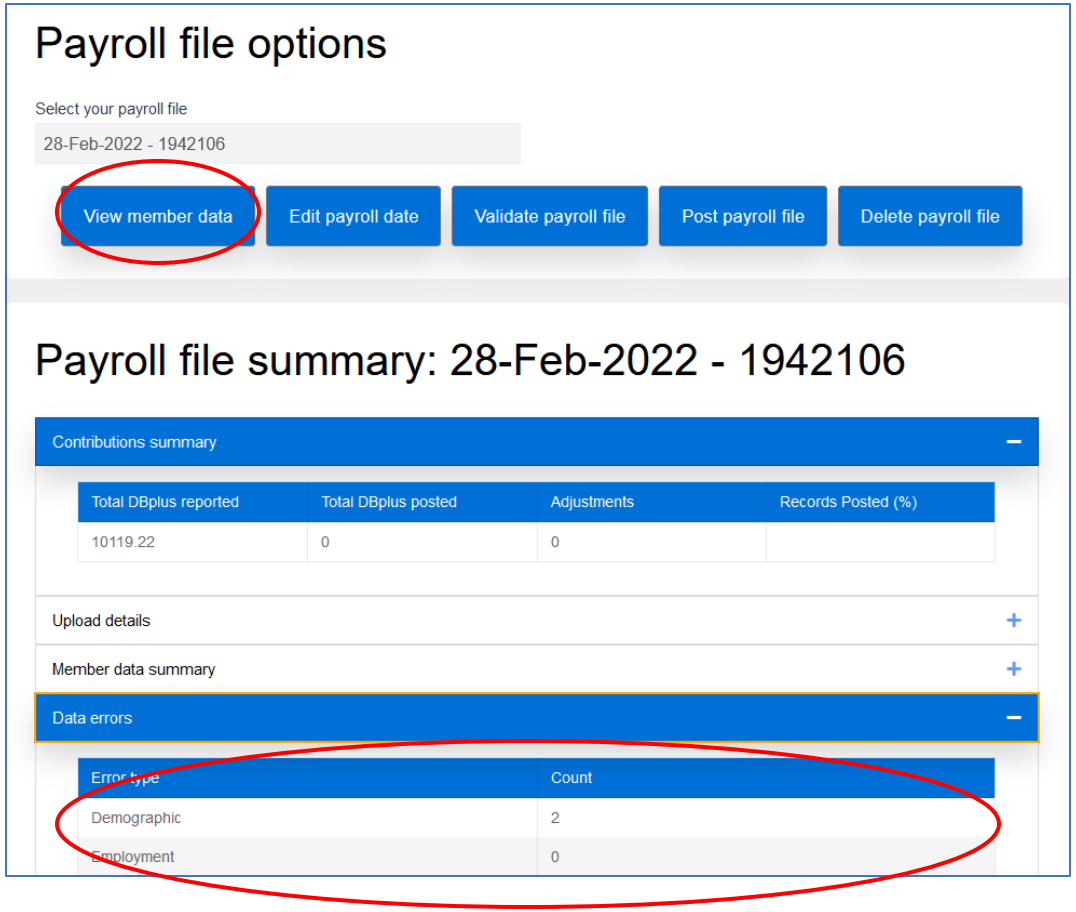


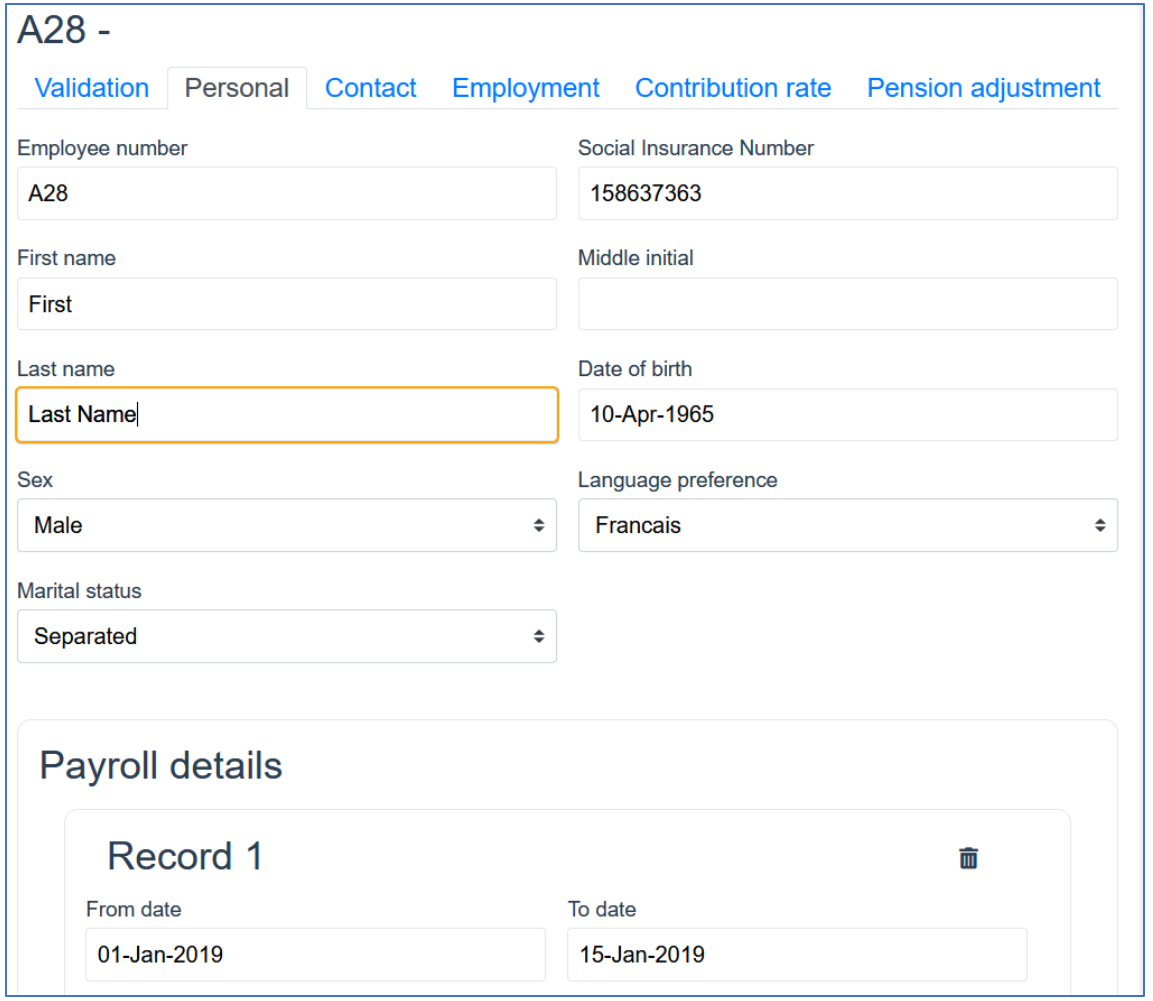
Step 2 – Validate and Review Errors



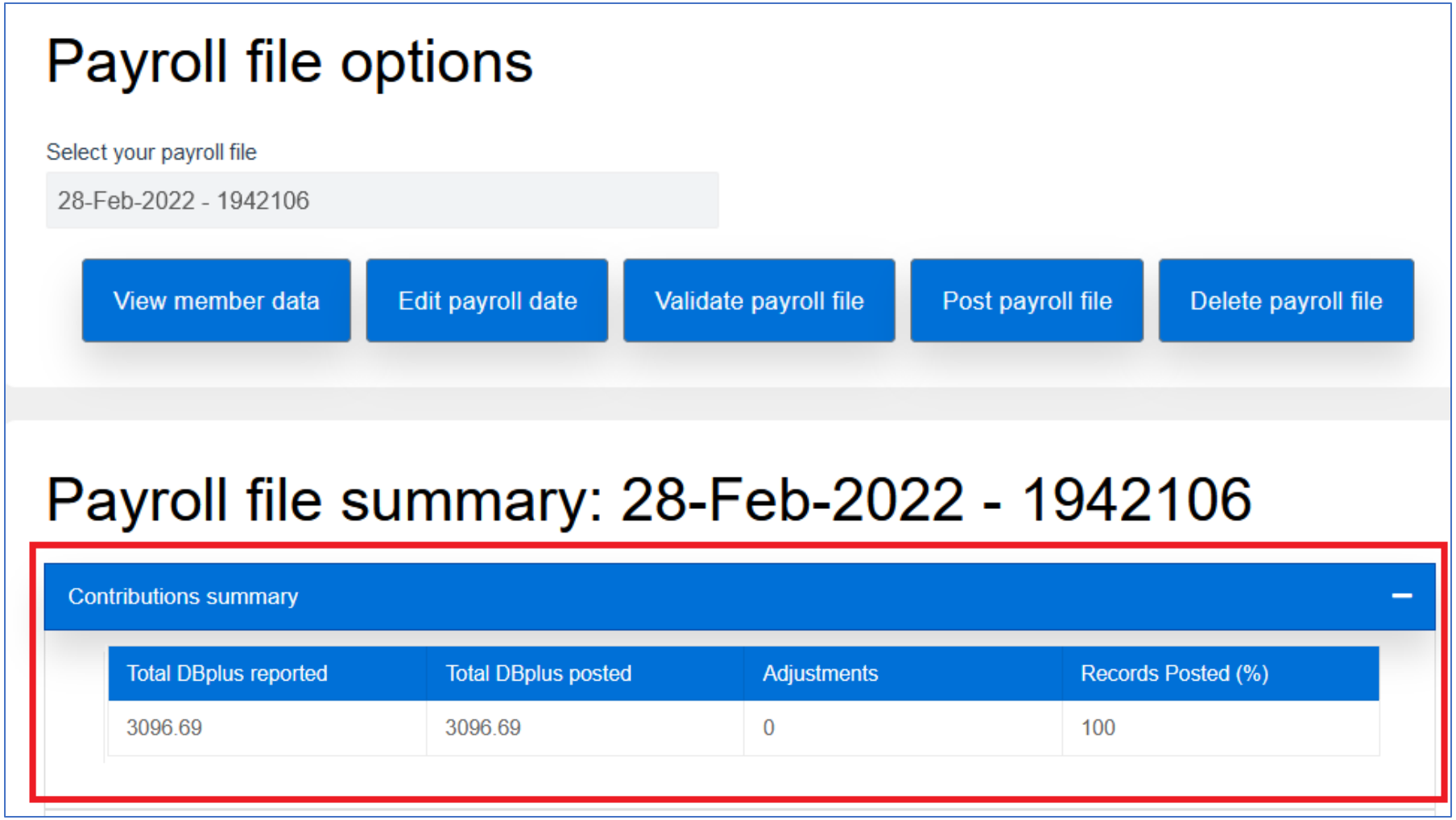


Step 3 - View and Edit Data if necessary





Step 4 – Re-validate and Post



PBR – Next Steps

- PBR in PAL User Guide will be shared and made available on the Employer Manual
- Reporting features to come
  - Earnings and Contribution YTD reports
- Feedback is welcome and appreciated

Payroll Demo

1. PBR file for smaller employers (less than 5 members)
2. PBR file for larger employers

Questions?

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