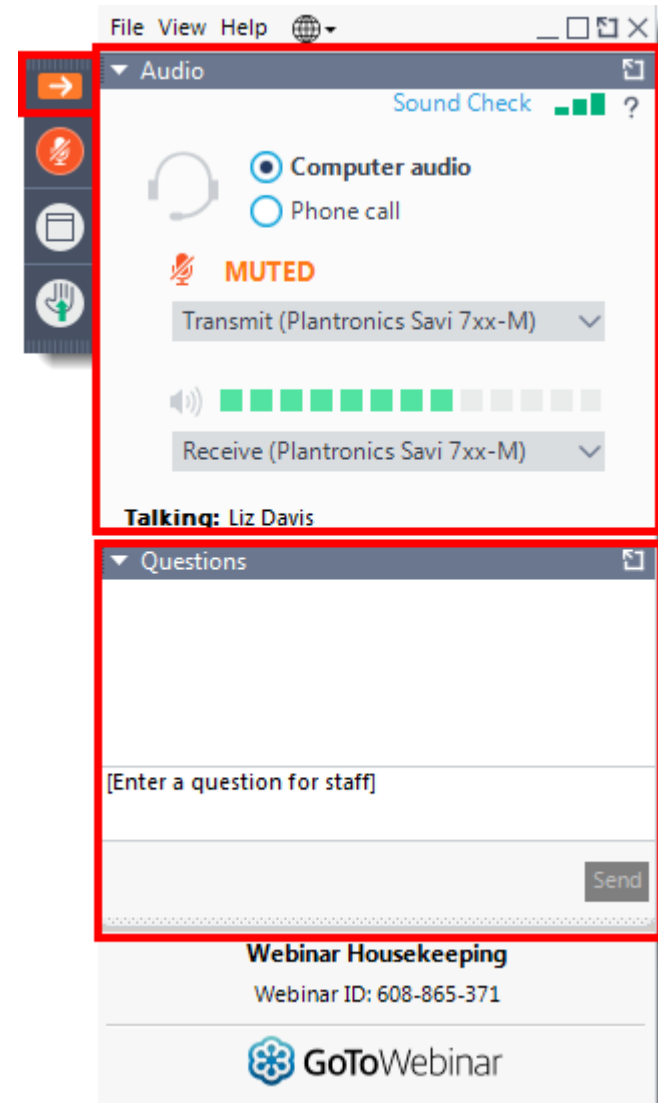


# While we wait – audio instructions

- 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 Training: Questions & Feedback

January 28, 2021



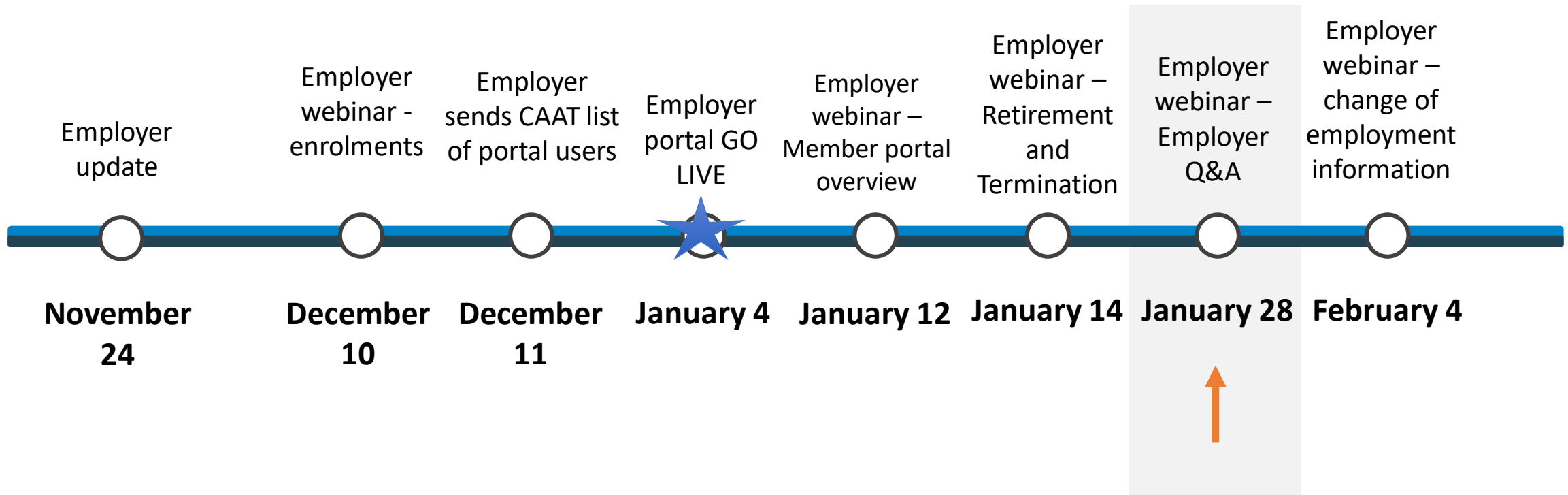
# Agenda

1. Portal timelines
2. Why portals?
3. Common Questions
  - General questions
  - Enrolment process
  - Termination and retirement process
  - Member portal
4. Feedback
5. Live Q&A session

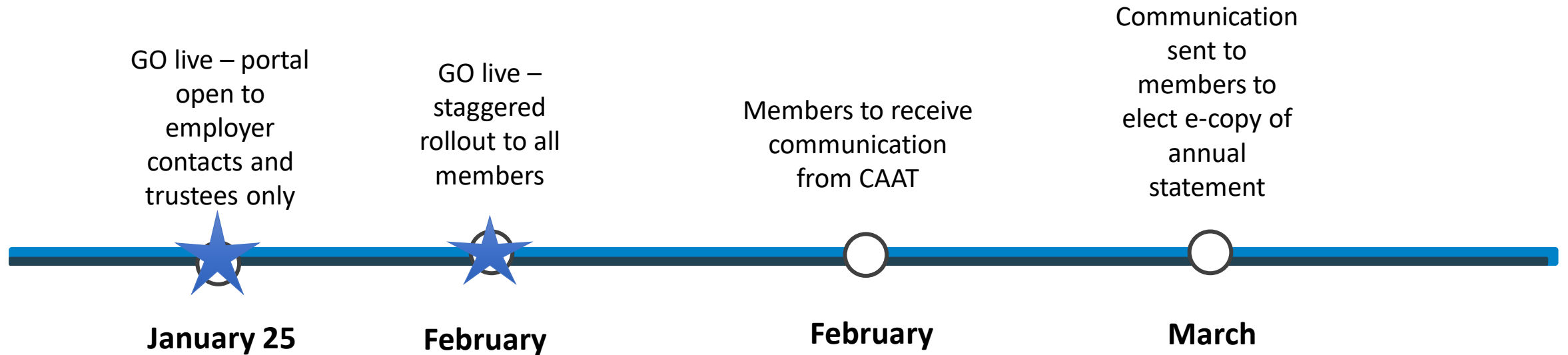
A photograph of a diverse group of people's hands stacked in a circle, symbolizing teamwork and collaboration. The image is overlaid with a semi-transparent blue rectangle. A solid green diagonal line runs across the bottom right corner of the blue rectangle.

# Portal timelines

# Portal timelines – Employers



# Portal timelines – Members



A photograph of a diverse group of people's hands stacked in a circle, symbolizing teamwork and collaboration. The image is overlaid with a semi-transparent blue rectangle. A green diagonal line runs across the bottom right corner of the blue rectangle.

# Why portals?

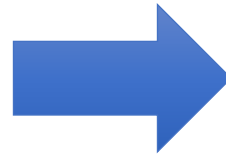
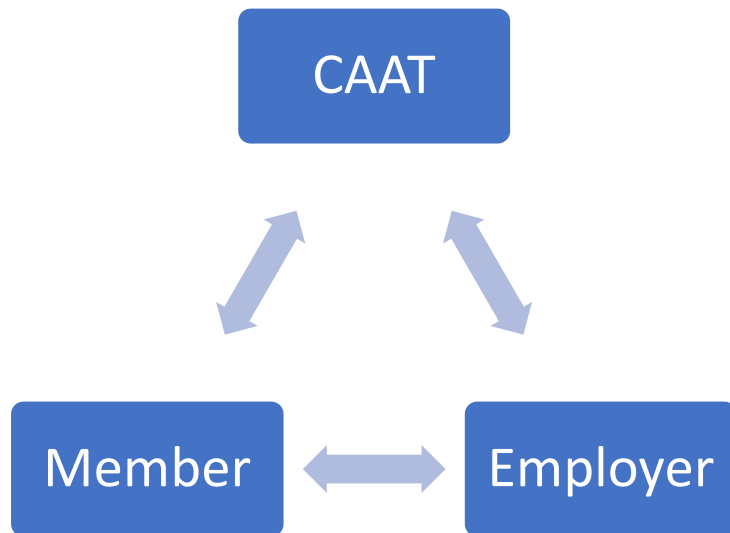
# Why portals?

- Self-service tools
  - Initiate events with CAAT electronically rather than paper based
  - Reduces administration effort
- Administration benefits
  - Streamline interactions between employers, members and CAAT
- New channel to communicate and interact
  - Education & notification
- Meet expectations and industry standards
  - Employer and member portals are used by peer plans



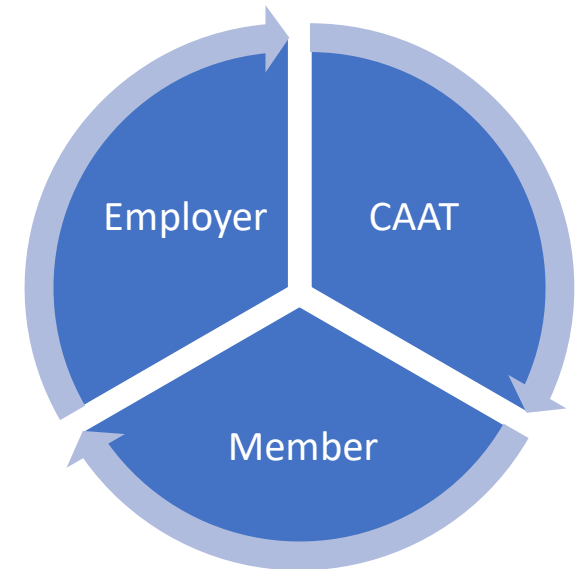
# Administration direction - Ideal state

## Paper Administration



## Electronic Administration

- Streamline event reporting
- Automated/Integrated Communication





# Employer Portal (PAL) General questions

## Employer portal – General questions

**Question:**

Do I have to use the portal? Will the portal replace forms?

**Answer:**

- The portals are available for employers as an alternative to the paper forms
- Employers are encouraged to use the portal but can still submit paper forms

## Employer portal – General questions

**Question:**

If we do not have a direct line for the two-step authentication, can the code be sent to us via email or our extension number?

**Answer:**

- Alternate options to receive the access code will be available in a future release of the portal

## Employer portal – General questions

### **Question:**

The portal is not providing correct dates. The portal isn't working correctly when I enter information.

### **Answer:**

- The portal is not supported by Internet Explorer
- Recommended browsers:
  - Firefox
  - Google Chrome
  - Microsoft Edge



# Common questions Enrolments

## Employer portal – Enrolment process

### **Question:**

If we use the portal for enrolments, do we still need to have the member sign the form?

### **Answer:**

- Enrolments processed through the portal are recorded and authorized and are on record with the Plan
- CAAT does not require a signed enrolment form

## Employer portal – Enrolment process

**Question:**

If we still want to have a signed form, can we use the paper form?

**Answer:**

- Yes. The paper enrolment form will still be available



## Employer portal – Enrolment process

**Question:**

Are we required to keep a copy of the enrolment form?

**Answer:**

- Follow your recordkeeping procedures
- Form available in the Portal

## Employer portal – Enrolment process

**Question:**

Do we need to collect and provide marital status, spouse and beneficiary data?

**Answer:**

- This information is optional for employers
- If you have this information, please provide it during enrolment
- Enrolments can be submitted without this information

## Employer portal – Enrolment process

### **Question:**

How will we know if a member has submitted or updated their marital status, spouse and beneficiary with the Plan?

### **Answer:**

- Member is responsible for updating employers
- You can see this information on the annual statement
- Consistent with our paper process


## Employer portal – Enrolment process

### **Comment:**

The current portal process doesn't work with how we onboard and enrol members

### **Answer:**

- You can still enrol the member using paper form and send via S-Doc
- Future enhancements to the portals may work better with this process



# Common questions

## Terminations and retirements

## Employer portal – Retirement and termination

**Question:**

Does the portal have the same functionality as the smart forms?

**Answer:**

- The functionality to calculate contributions, service and pension adjustments will be available

## Employer portal – Retirement and termination

### **Question:**

How long do transactions remain on the portal?

Can I print copies of documents later if I need a copy?

### **Answer:**

- Transactions will remain on the portal indefinitely
- They can be accessed and printed any time after they have been submitted

## Employer portal – Retirement and termination


### **Question:**

How can we complete a part of a form and then have someone else on the team complete and send to CAAT?

### **Answer:**

- Yes, you can complete part of a transaction, save it, and someone else will be able to complete it
- Accessible from the “Transactions in Process”





# Common questions

## Member portal

## Member portal – General questions

**Question:**

If a member updates the Plan with spousal data, and the employer cannot see this, how will we know who the spouse is upon a pre-retirement death?

**Answer:**

- You can contact your Employer PA to confirm spousal information on file with the Plan

## Member portal – General questions

### **Question:**

If the member updates their address with the Plan, how will we know which address they have and if it matches our records?

### **Answer:**

- The member address is available on the employer portal for review
- We will add an effective date to the address to show the date of the last update on the address



# Feedback

# Feedback from employers

- "It's easy to navigate and user-friendly."
- "Happy the members will have statements available via the member portal."
- "We appreciate the amount of work that has gone into the portals and enjoyed watching the demos."
- "I like that I can view member data for my pension adjustment processing."

