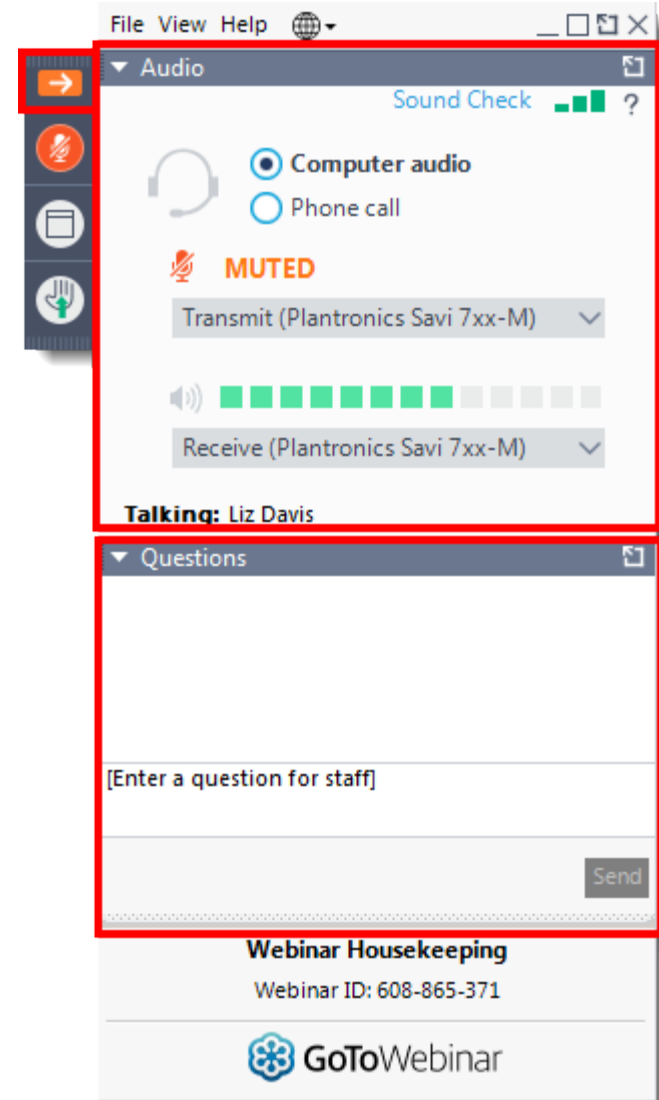


While we wait – audio instructions

- 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.





Employer Update

July 26, 2022





Agenda

1. Growth at the Plan
2. Annual Surveys
3. Employer Recruitment Tool
4. Member Presentations
5. Service Standards
6. Portal roadmaps
7. Annual Termination Project
8. Upcoming Events

CAAT Plan is one of Canada's fastest growing plans

Growth in 2022

- 27 new employers from March 1 – August 1
- 21 employers through affinity agreement with Canadian Bar Insurance Association
- Now have 250 employers with the CAAT Pension Plan



New member of the Employer Services team



- Pruthvi Shah joined on April 18
- Pension Analyst with Employer Services

New member of the Employer Services team



- Nana Owusua Bediako joined on June 20
- Pension Analyst with Employer Services



Complete the Employer Annual Survey before August 19, 2022

Link is in your email inbox.

Encourage your employees to complete the Member Annual Survey by August 16, 2022

Link and passcode to the survey is in their inbox.



Employer recruitment toolkit

- Currently in pilot phase – targeting a fall launch
- Toolkit will feature:
 - A badge to add to your own website and job postings to show that you offer the CAAT Pension Plan
 - Language about the Plan that you can easily incorporate into your existing recruitment efforts
 - Resources to share with your candidates like videos, fact sheets and booklets
 - A web page your recruiters can use to access all of these resources
 - A web page to share with candidates so they can learn more about the Plan at their own pace.

Member Presentations

- Webinar Topics
 - Plan overview
 - DBprime service purchases
 - DBplus pension purchases
 - Planning for retirement



Book a member webinar today



presentations@caatpension.ca

Contributors Podcast

- Featuring Canadian business leaders whose organizations are taking action today to create a better tomorrow
- Each episode provides tangible takeaways for leaders, like you!
- Over 53,000 downloads in season 1
- ContributorsPodcast.ca



Service standards – Q2 2022

Process	Volume	Target turnaround	Attainment	Average turnaround
Retirements	674	30 days	92%	17 days
New pension starts	524	2 days	94%	2 days
Deaths	128	30 days	99%	6 days
Service purchase quotes	186	30 days	95%	14 days
Pension estimates	459	10 days	98%	3 days
Terminations	482	30 days	93%	17 days
Enrolments	1,548	10 days	99%	1 day

Poll Question

How we work with you

Tools and processes for administrative excellence



Attestation

Learn more about our administrative compliance program

Employer attestation



Service Level Standards

Service Level standards enable us to complete each transaction at our desired service level.

Service level standards

USE S-DOC



Send files via S-Doc

Use S-Doc to share files securely with the CAAT Pension Plan. (You will leave the CAAT site)

Launch S-Doc now



Rates at a glance

Current and historical government of Canada and CAAT rates

Rates at a glance



Service level standards



Employer newsroom

Employer Education Guide

Employee enrolment

Contributions

Data reporting

Publications/resources

Employer Update Sessions

Employer attestation

Service level standards

S-Doc How-to Guide

Rates at a glance

Compliance reports

Service Level standards enable us to complete each transaction at our desired service level. In addition, they:

- Support compliance with pension legislation
- Promote the delivery of quality service to members and employers
- Ensure mutual understanding of service expectations

Service Level Standards took effect **January 1, 2015**.

[Read our Service Level Standards.](#)

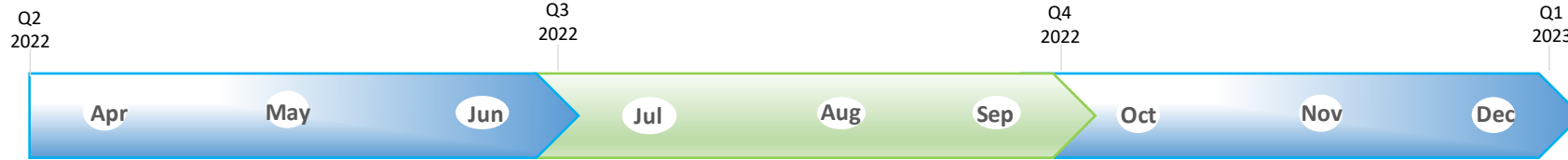
Quarterly results by year

2022 quarterly results

Current year

[Download the Q1 2022 results](#)

Portal Enhancements for Members & Employers



Members

- Annual Statement Available on Portal
- Pension Estimation Access for Deferred Members
- Pension Estimate – Full Serve
- Member portal - Username reset

- Initial Purchase Quote
- ROM\YSB conversion
 - Member Access
- Payment History

- Annual COLA Letter + Tax Slips - Electronic Access
- Review Case / Transaction Progress

Employers



- ER Administration
- Leave Reporting
- Initial Purchase Quote

- ER Contribution Remittance
 - Process
 - Invoicing
 - Reconciliation
- Data Collection Tool (DCT) Single Sign-On

Poll Question

Portal statistics

My Pension

- **25,600+** member registered for My Pension
- Over 35,000 member transactions since launch
- Members have done over 332,000 self serve estimates in My Pension
- 4,492 out of 18,019 registered active members have opened their statement in My Pension

PAL

- **11,470+** transactions in 2022 in PAL
- Enrolments most transacted using PAL with over 55% of total transactions
- Retirements and Terminations tied with 18.3% each
- Please use PAL to submit your enrolments, retirements and terminations

Annual Termination Project – College sector employers

- Termination or Retirement packages sent to members who have 2 years since last day worked
- 751 packages processed
- 65% project completed
- Completion by August 31



Annual Termination Project – College sector employers

- Reviewing the current annual process
- Want to receive these more frequently via PAL
- More details to be provided on future process for OTRFT members who are not contributing and still active in the Plan

Upcoming events

- Employer education sessions
 - October 6 – Leaves and Pension Purchases
 - November 3 – Pensionable Earnings, Contributions and Pension Adjustments





Questions



caat

PENSION PLAN