Introduction to OPB's Employer Portal

Manual for Ontario Shared Services and other Ministry Employers

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Contents

Contents Continued ...

Welcome to OPB's Employer Portal

We are pleased to introduce OPB's employer portal! Going forward, the employer portal will be the primary way that you interact with OPB from exchanging messages to uploading documents and reporting key member events such as enrolments, leaves and terminations as online transactions.

We've prepared this training manual to help you navigate each area of the employer portal, including step-by-step instructions for completing online transactions, using our secure messaging, our online calculators and more.

1.0 Logging into the portal and your user account

This section will show you how to log into the Portal for the first time and to give you some instructions about maintaining your account.

We've also included some direction regarding additional functionality for those of you who will be using the portal as super users.

Please use Google Chrome when using OPB's employer portal.

How do I log into the Portal?

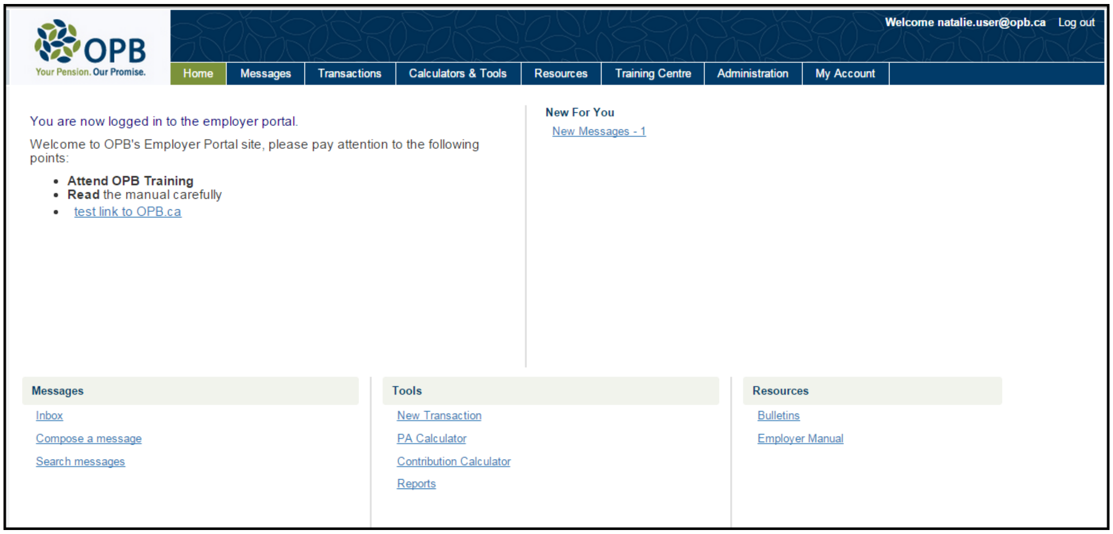
Step 1: Go to OPB's website and click **Employer Portal** in the Employer Manual's left-hand navigation menu**.**

Result: The portal's login page opens.

Step 2: Enter your username (your work email address) and your password (use your temporary password from your registration email if this is the first time you've logged into the Portal) and click **OK.**

Result: If you're logging in the first time, you'll be asked to change your temporary password and to provide answers to 3 security questions. You can use these questions to reset your password if you forget it at any time in the future. Once, you've taken care of these housekeeping activities, the home page opens.

Employer Portal Home page:



From the home page you have access to the following tools/resources:

Section	Description
Messages	You have access to OPB's secure messageing tool. Using this tool, you can read, compose, reply, and exchange messages with OPB staff. **Important:** By using this tool's search functionality, you have access to all the messages you and other users at your organization have exhanged with OPB.
Transactions	If you have either Employer User or Super User Access, you can submit the following the following transactions online: • Enrolment • Unpaid leave of absence • Service & earnings report for buybacks • Retirement/Termination of membership • Re-employment earnings
Calculators & Tools	You will have access to OPB's online contribution & PA calculators
Resources	You can review/download communications from OPB
Training Centre	You can register for OPB training sessions and download session material
My account	You can update your password, security questions, ministry portfolio

	(ministries only) and contact information

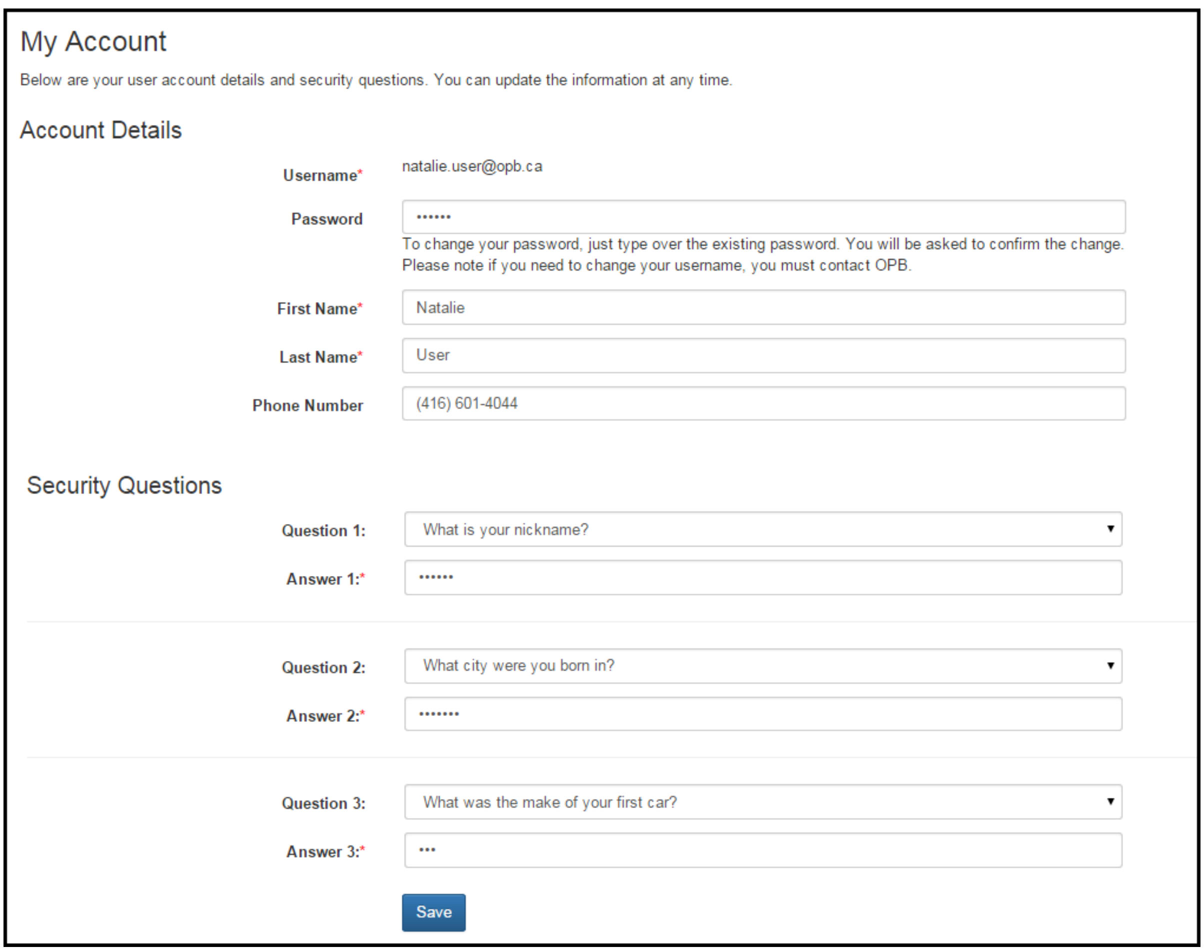
How do I change my password?

	Logging in for the first time: If you're logging for the first time, please use the temporary password you received from OPB via an email notification. After logging in, you'll have to change your password and answer three security questions before being granted access to the portal. **Please note that temporary passwords only last three days.**

To change your password:

Step 1: Once you've logged into the portal, Click on the **My Account** tab to update your password.

Result: My Account page opens


My Account

Below are your user account details and security questions. You can update the information at any time.

Account Details

Username* natalie.user@opb.ca

Password ••••••

To change your password, just type over the existing password. You will be asked to confirm the change.
Please note if you need to change your username, you must contact OPB.

First Name* Natalie

Last Name* User

Phone Number (416) 601-4044

Security Questions

Question 1: What is your nickname?

Answer 1:* ••••••

Question 2: What city were you born in?

Answer 2:* •••••••

Question 3: What was the make of your first car?

Answer 3:* •••

Save

Step 2: Click password.
Result: the change password page opens.

Step 3: Enter your temporary password, your new password, and confirm your new password in the field provided.

Step 4: Click **Save**.

Result: Your password has been updated.

Your password must be between 8-12 alphanumeric characters. Please note that the portal is also case sensitive.

What if I forget my password?

If you've forgotten your password, you can reset it without contacting OPB.

To reset your password:

Step 1: Click the *Forgot your Password?* link at the bottom of the login page.

Step 2: Enter your username (i.e., work email address) and the indicated letter sequence in the field provided and click **Continue.**

Step 3: Answer one of your security questions.

Result: The Portal generates a temporary password, which is sent to your email account.

Step 4: Log in to the portal with your temporary password and create your permanent password.

After 3 unsuccessful login attempts, your account will be locked and you'll have to contact OPB to reset your password; i.e., you won't be able to use *Forgot your password* to reset it.

How do I update my contact information?

You can update your contact information if your name or telephone number changes.

Step 1: Log into the portal and click on the My Account tab.

Result: The account page opens. You can edit most of the information on this page with the exception of your username (i.e., your work email address). If you need to change your work email address, please contact OPB.

Step 3: Update your information and click **Save**.

Result: You've updated your contact information.

Ministry Portfolio Management: Your ability to submit and search transactions is limited to your portfolio. Click on the portfolio link to add or remove ministries from your ministry portfolio.

You cannot submit transactions or view previously submitted transactions for a ministry that is not part of your portfolio. Also, you cannot remove a ministry from your portfolio until you've submitted or deleted any pending transactions for members from that ministry.

How do I delegate my access to another user? (Super Users only)

If you need to delegate your user rights while you're on a leave of absence or on vacation, please contact OPB. We can provide other users with Super User access for a specified period.

How do I suspend another user's account? (Super Users Only)

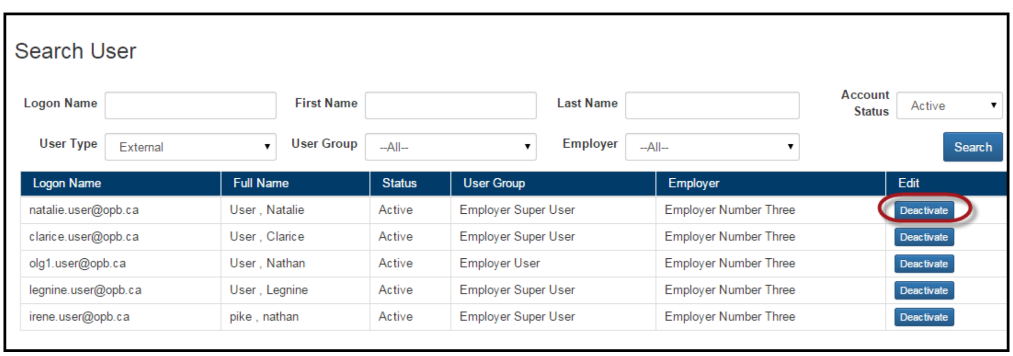
If a user leaves your organization or just goes on a leave, you must suspend their account.
To suspend a user account:

Step 1: Click on the **Administration** tab.

Result: The Search User page opens

Step 2: Use the fields provided to locate the user whose access needs to be suspended.

Step 3: Once you've located the user, click **deactivate**.



Logon Name	Full Name	Status	User Group	Employer	Edit
natalie.user@opb.ca	User , Natalie	Active	Employer Super User	Employer Number Three	Deactivate
clarice.user@opb.ca	User , Clarice	Active	Employer Super User	Employer Number Three	Deactivate
olg1.user@opb.ca	User , Nathan	Active	Employer User	Employer Number Three	Deactivate
legnine.user@opb.ca	User , Legnine	Active	Employer Super User	Employer Number Three	Deactivate
irene.user@opb.ca	pike , nathan	Active	Employer Super User	Employer Number Three	Deactivate

Result: the account is suspended until OPB is contacted to reset the user's password.

2.0 Secure messaging

OPB’s employer portal includes a secure messaging tool, which allows users to exchange messages and documents with OPB, replacing the need for employers to e-mail, mail or fax documents, in most cases.

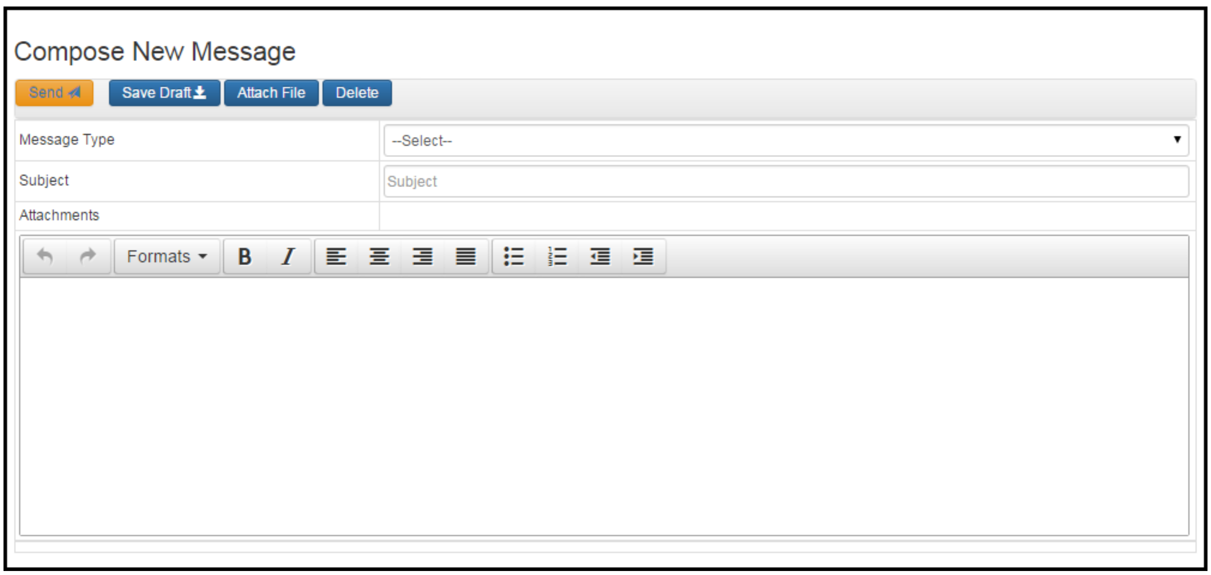
What can I do with OPB’s Secure message Tool?

You can

- get answers to your questions;
- send documents to OPB; and
- search all messages exchanged between your organization and OPB.

All users at your organization can search all secure messages exchanged between your organization and OPB. Any confidential or highly sensitive information should be communicated outside the portal using regular email and/or by telephone.

How to compose a secure message



To compose a message:

Step 1: Log into the portal

Step 2: Click on the message tab.

Result: The inbox page opens.

Step 3: Click **Compose New Message**.

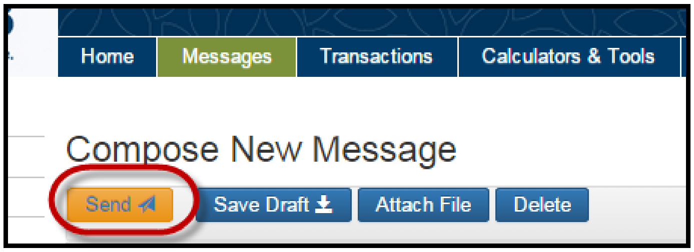
Result: the message screen options

Step 4: Select the message type. The selected message type determines where your message will be routed for review and response at OPB. You can select from the following message types:

- General Process Inquiry
- Pension Impact question
- Question about an invoice/payment made
- Question about pension data/contributions
- Requesting a call for a member to explain options/process
- Requesting a status update on behalf of a member
- Pension File (Only Employer Data Supplier and Employer Super User must see this message type)
- Escalate issue/complaint
- **Termination of Optional Membership (OPB 1057)**
- Technical support
- Other

Step 5: Compose your message. You can enter a customized subject.

Step 6: If you need to attach a file, click **Attach file** (located at the top of the page) and select the document you want to attach.



Step 7: When you're ready to send the message, click **Send.**

Results:

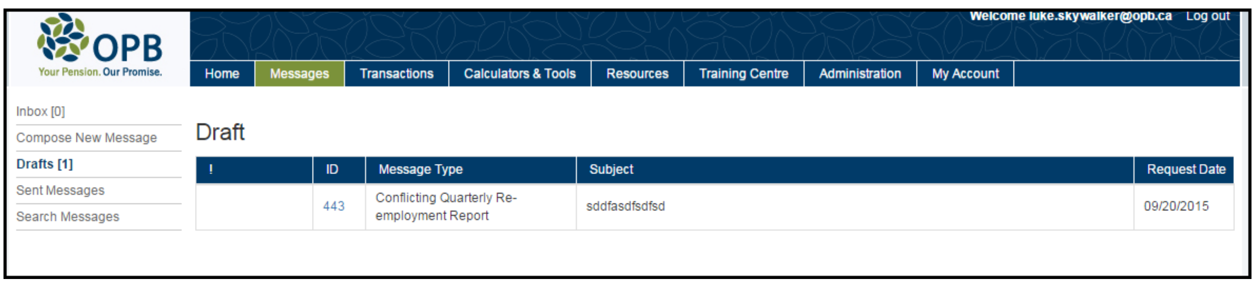
- The message is sent to OPB and routed to the appropriate OPB unit.
- You will see a confirmation message that includes the message ID.
- The message will appear in your Sent Messages.
- You will be taken back to your inbox.

Additional message functionality:

- Click **Save Draft** when you don't want to send the message immediately. You can complete the message later by going to the **Drafts** page.
- Click **Delete** to cancel the message if you don't want to send a message or save it as a draft.

Drafts Page

This page opens when you click **Drafts** on the left-hand navigation menu. Once you select a message, you can edit, send, or delete the message.



Your Inbox/Reply to a message

The Inbox page is your homepage when using the secure message tool. This page displays the following information for each message:

- ID
- Message Type
- From (the OPB employee who sent or replied to the message)
- Subject
- Request date (i.e., the date the message was originally created)

- When you receive a new message in your inbox, the portal sends you an email notification.
- A reminder about the unread message will also appear on the home page.
- Unread messages are bolded until you open them.

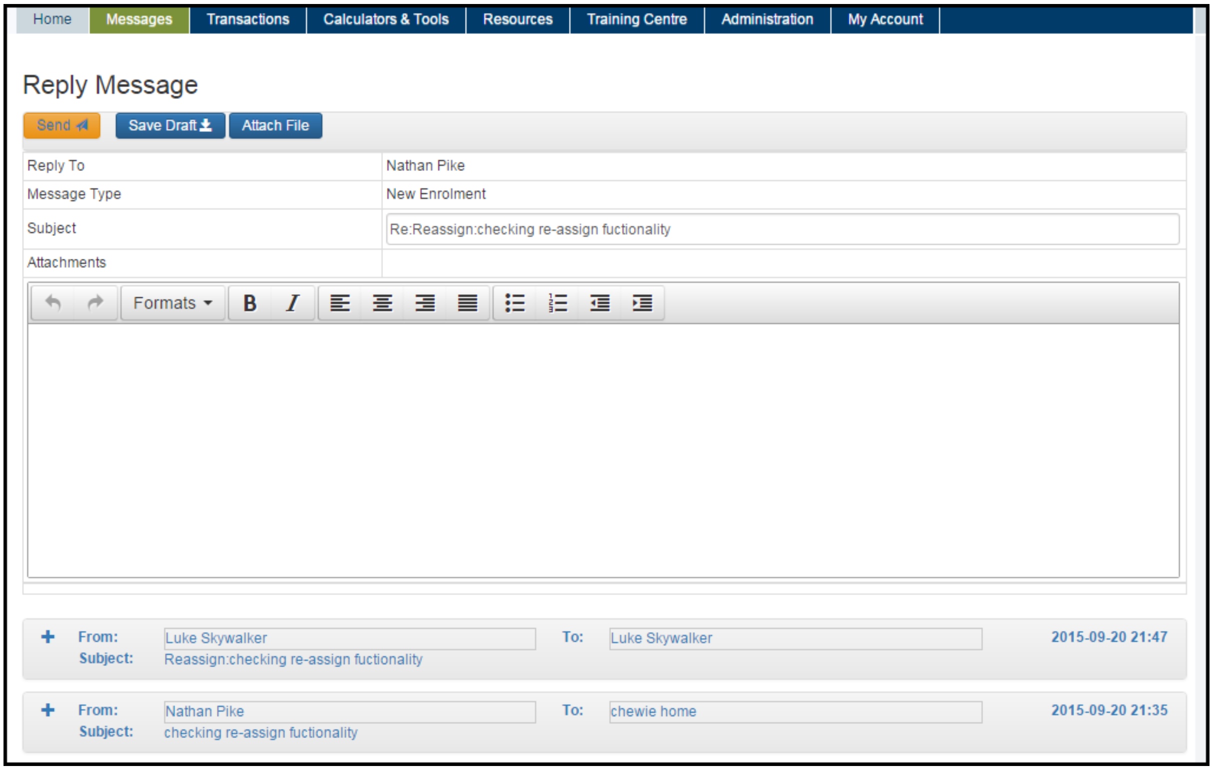
To reply to a message:

Step 1: when you receive a message, click on the link in the email notification or log into the portal and click the **Messages** tab.

Result: The portal's log in page opens.

Step 2: Click on the unopened message's ID (i.e., the bolded message).

Result: The **Reply** page opens.



Step 3: Compose your reply. You can:

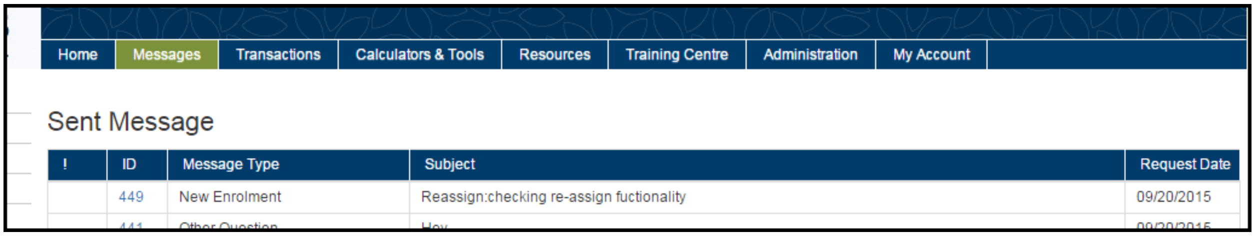
- attach documents;
- save the reply as a draft if you need to confirm/gather additional information; and
- review the message chain if the message is part of a longer conversation.

Step 4: Click **Send.**

Result: The recipient will receive an email notification that you've replied to their message. You can still view the message by going to the **Sent Messages** page or by using the **Search Message** functionality.

Sent Messages

The Sent Messages page opens when you click the **Sent Messages** link on the left hand navigation menu. You can view all the messages you've sent on this page.



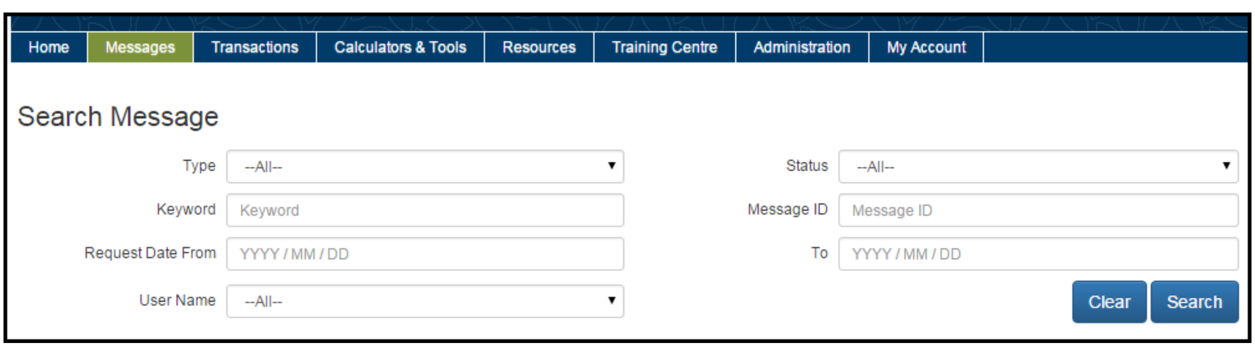
Your sent messages page provides the following information:

- ! (OPB has indicated that this is an urgent message)
- Message ID (each message is assigned a unique ID)
- Message type
- Subject
- Request date (The date that the original message was created)

- The Sent Messages page will only show messages that are still open; i.e., the status is pending or in progress. Use the search message functionality to review resolved messages.

Secure Message Search

You can use the Search Message functionality to find resolved messages. Once an OPB user has updated a message's status to 'Resolved', you can still view the message, but the reply button is no longer available. If you have a follow-up question, you will need to send a new message.



You can use the below search criteria indicated to find any message you or another user at your organization has exchanged with OPB in the portal:

- Type (Message type)
- Message Status
- Keyword (searches subject and body)
- Message ID (unique ID number)
- From and To Date (the date range you want to search)
- Username

Step 1: To find a message, enter the search criteria that gives you the best chance of finding the message. Once, you've entered the search criteria, click **Search**.

Result: All messages that meet your criteria are shown.

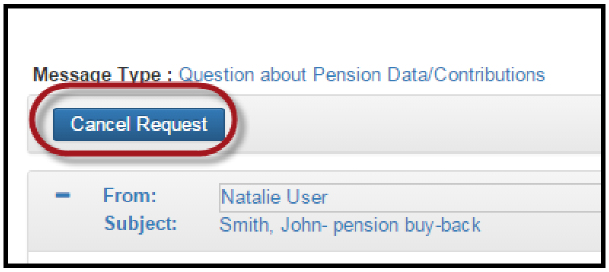
Cancel a message

You can cancel any message you've sent as long as the recipient hasn't opened the message.

To cancel a message:

Step 1: Find the message either by going to your Sent Messages page or using the Search Message functionality.

Step 2: Once you've found the message, open it, and click **Cancel Request**.



Result: After confirming that you want to cancel the transaction, the message is deleted.

Tip: If the message has already been opened the **Cancel Request** button won't be available

Assign a Message (Super Users only)

Employer Super Users can re-assign messages to other users within their organization.

To re-assign a message:

Step 1: Open/find the message that you want to re-assign (*the message can be in your inbox or in another user's inbox located using the secure message search functionality*).

Step 2: Click on the **Assign** button.

Result: The portal allows you to select the user you want to re-assign the message to.

Step 3: Click **Send** to move the message to the selected user's inbox.

Result: The message will appear in the selected user's inbox.

3.0 Online Transactions

We've prepared this section to introduce you to our suite of online transactions that will be replacing our most commonly used employer forms. We've designed our transactions to be as user friendly as possible using field validations to minimize common data entry errors and auto-population of data we already have on file to minimize the data you need to enter.

Introduction - what's changing?

OPB's employer portal includes 5 online transactions, which are replacing the following forms:

1. OPB1005 – Membership Enrolment
2. OPB1025 – Leaves of absence without pay for more than one month
3. OPB1035 – Service report for buybacks
4. OPB1012 – Retirement notice or termination of membership notice
5. OPB1008 – Retired member's quarterly re-employment earnings and calculations report

*These forms will no longer be available on our website. These forms will now be submitted as online transactions.

The following OPB employer forms will remain in use:

1. OPB1057 – Termination of optional membership (needs both member and employer signatures)
2. OPB1016 – Payment authorization
3. OPB1086 – Annual per diem earnings report for retired justices of the peace

Please submit transactions as soon as possible. Going forward, OPB will not be picking up information related to the online transactions from your pension file. Submitting transactions is the only way to let OPB know that a member has enrolled, gone on an unpaid leave of absence, terminated or retired.

Things to keep in mind when initiating a transaction

Our suite of online transactions will use the same fields as the forms, plus:

1. Where possible, fields will auto-populate with information from our systems (e.g., address and employer user information).
2. Field validations to improve the quality of information submitted through the portal and reduce follow-up work; e.g., users will not be able to submit leaves of absence are less than 31 days.
3. You don't have to submit a transaction as soon as you've initiated it. If you're missing a piece of information, you can save a transaction and submit once you have the missing information.
4. You can search for, amend, and revoke transactions that you or a colleague has submitted.

5. If applicable, you can attach supporting documents to transactions. If you don’t have them at the time the transaction was submitted, they can be uploaded at a future date using the portal’s document upload tool (except for the involuntary termination letter).

3.1 The Enrolment transaction

This transaction replaces the OPB1005 – membership enrolment form. I.*e. We will not accept the enrolment form going forward; all enrolments must be completed as an online transaction in the portal.*

This section contains instructions for submitting an enrolment transaction as well as direction for clearing any error messages you may encounter while submitting an enrolment transaction.

An enrolment transaction is considered late if it's submitted more than **14** calendar days after the plan membership date.

Step 1: Gather supporting documentation to submit with the enrolment transaction.

Please have the following information ready before you process an enrolment transaction:

- Member's address
- Member's birthdate
- Member's SIN number
- Member's marital status
- Member's contact number and email address

Please also gather the below supporting documents if possible:
- Proof of SIN
- Copy of the member's proof of age for member; e.g. birth certificate, passport, citizenship card
- Declaration of Spousal Status form (OPB3007)
- Proof of marriage (including common-law support letters), if applicable
- Beneficiary Designation Form OPB1015 (**Note:** Members can also designate their beneficiaries online through their e-services account if they prefer – it's much easier)
- Proof of age for eligible children or spouse

Important: Please submit an enrolment transaction on time even if you don't have all the member's supporting documents. They can be sent afterwards.

If you're submitting the documents with the enrolment, you should scan them in together and submit it as one scanned PDF file.

If you're submitting the documents after enrolment has already been submitted, you'll need to upload each file individually.

Step 2: Start the enrolment transaction

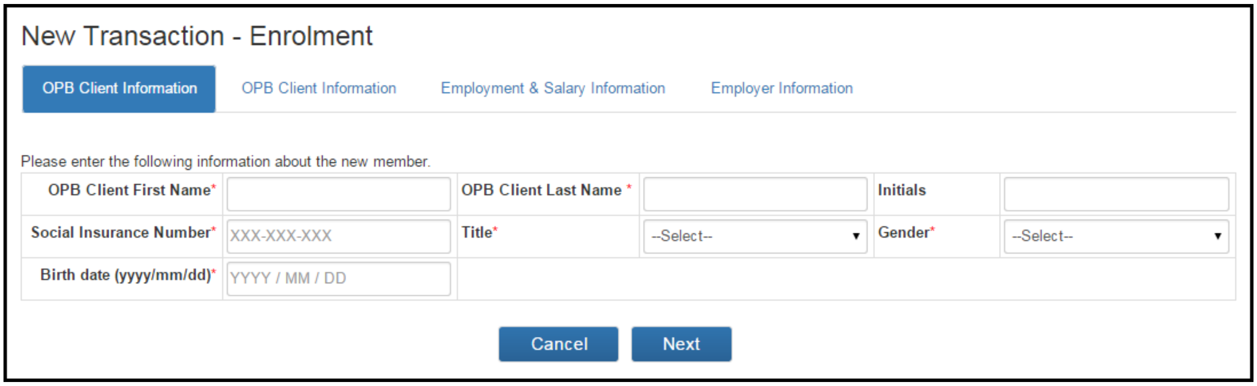
2.1. Click on the **Transactions** tab

2.2. Click the New transaction from the left-hand navigation menu.

2.3. Select **Enrolment** from the drop-down menu

Result: the Enrolment transaction – client information screen opens

Step 3: Complete the OPB Client Information page 1.



New Transaction - Enrolment

OPB Client Information | OPB Client Information | Employment & Salary Information | Employer Information

Please enter the following information about the new member.

OPB Client First Name*		OPB Client Last Name *		Initials	
Social Insurance Number*	XXX-XXX-XXX	Title*	--Select--	Gender*	--Select--
Birth date (yyyy/mm/dd)*	YYYY / MM / DD				

Cancel Next

3.1. Enter the following member information:

*OPB Client Name (first, last, initial)	*Social Insurance Number	*Title (drop down list)
*Gender	*WIN ID (Ministries only)	*Birth date

* indicates a mandatory field

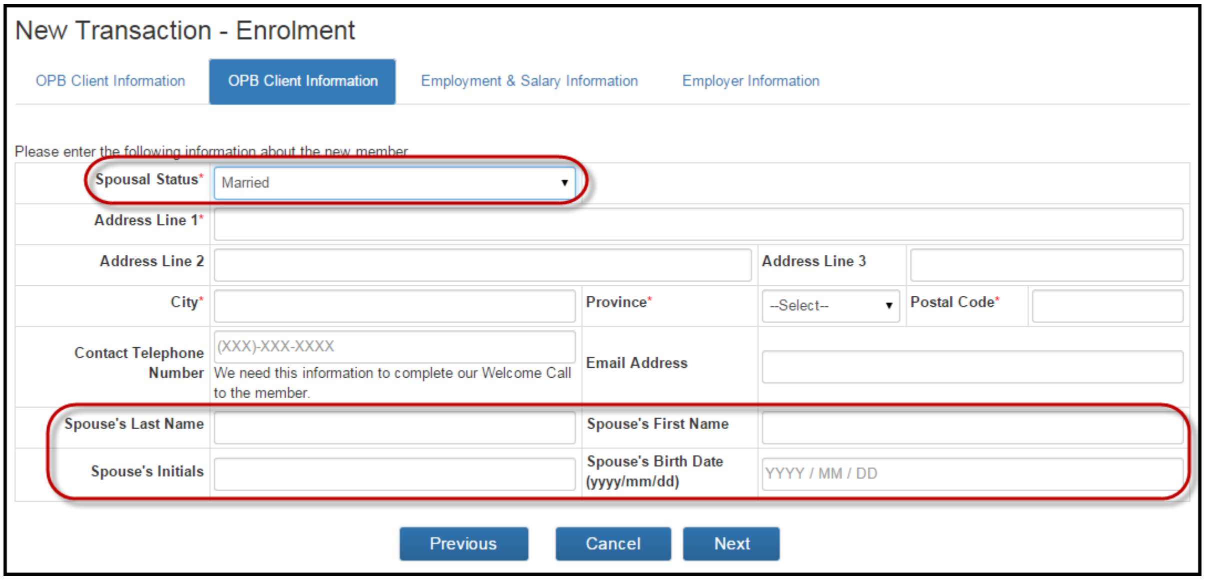
3.2 Once you've completed all the fields, click **Next,**

Result: Client Information page 2 opens.

There are several buttons at the bottom of each page which are common across most transaction pages:

- Use the **Next** and **Previous** buttons to move between pages within the transaction. Do not try to use the Browser **Back** button to navigate between pages.
- Any information you've entered on a page is saved as soon as you click **Next and pass the validations for that screen.**
- To put a transaction in pending status, simply leave the transaction page. The transaction will save all information up to the last time you clicked **Next**. You can complete the transaction at any time by going to your pending transactions (accessed on the left-hand navigation menu)
- The **Cancel** button allows you to exit without saving any of the information you've entered on a page.
- To delete a transaction, go to your pending transactions page and delete it.

Step 4: Complete the OPB Client Information page 2.



4.1. Enter the following information:

*Spousal Status (Drop down list)	*Address (3 lines available)	*City
*Province	*Postal Code	Contact telephone number
Email		

* indicates a mandatory field

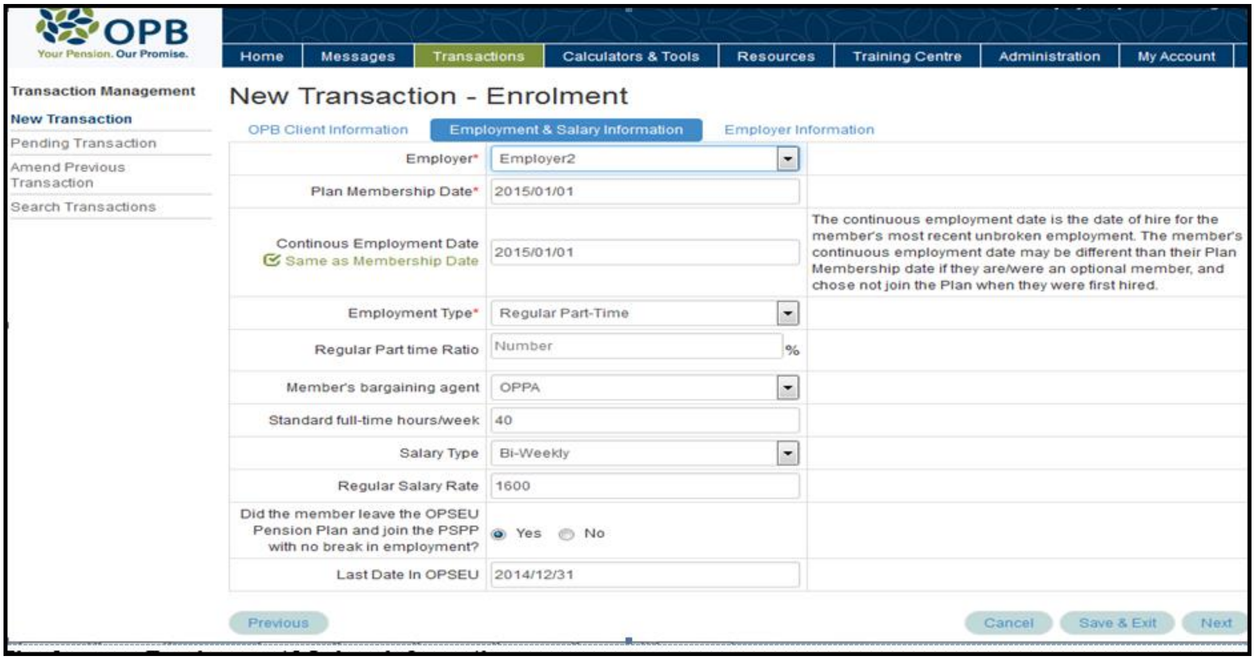
The following optional fields activate if the member's spousal status is married or common-law (see image):

- Spouse's name (first, last, initials)
- Spouse's date of Birth

4.2. Once you've completed all the fields, click **Next.**

Result: The Employment & Salary information page opens.

Step 4: Complete the Employment & Salary Information page.



4.1 Enter the following information:

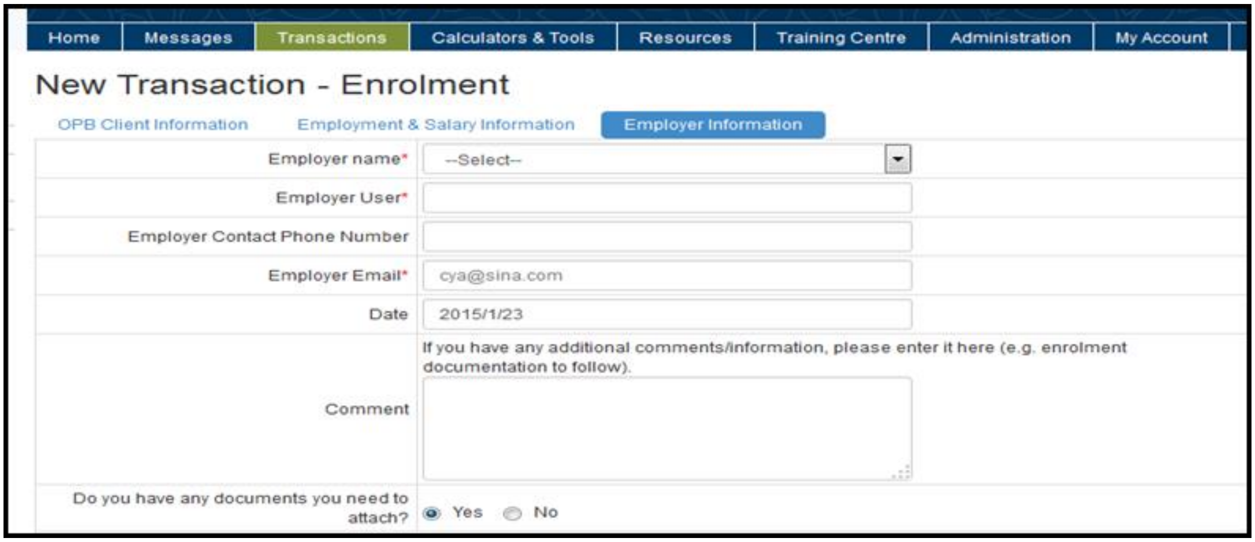
- *Employer: You can select from your portfolio of ministries
- *Plan membership date: The date the member joined the Plan. If they're a mandatory member, this should be their date of hire.
- *Continuous employment date: The member's date of hire
- Employment type: Select the employment type from the drop-down
- *Regular part-time ratio: Field only displays when you indicate that member is a regular part-time employee.
- Benefit Group Code: Please select from the options listed in the dropdown (the default is Excluded)
- Classification Code: Please complete if the member's benefit group is JP-Justice of the Peace
- Standard full-time hours per week: Select the applicable figure from the dropdown
- Salary type: Indicate the member's salary type
- Regular Salary Rate: Indicate the member's rate of pay
- Member left OPSEU Plan and Joined the PSPP without a break in service? (Y/N): Indicate if the member is enrolling in the Plan as a result of a promotion, transfer, or reclassification
- Last Date in OPSEU: This field auto populates if you indicated that the member left OPSEU and joined the PSPP without a break in service

* Indicates a mandatory field

4.2 Click **Next**.

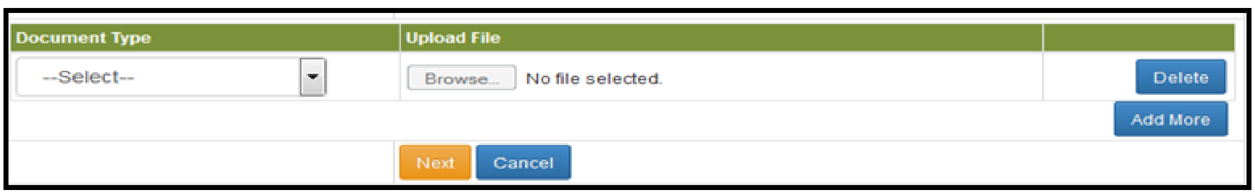
Result: The Employer Information screen opens.

Step 5: Review the Employer information page.



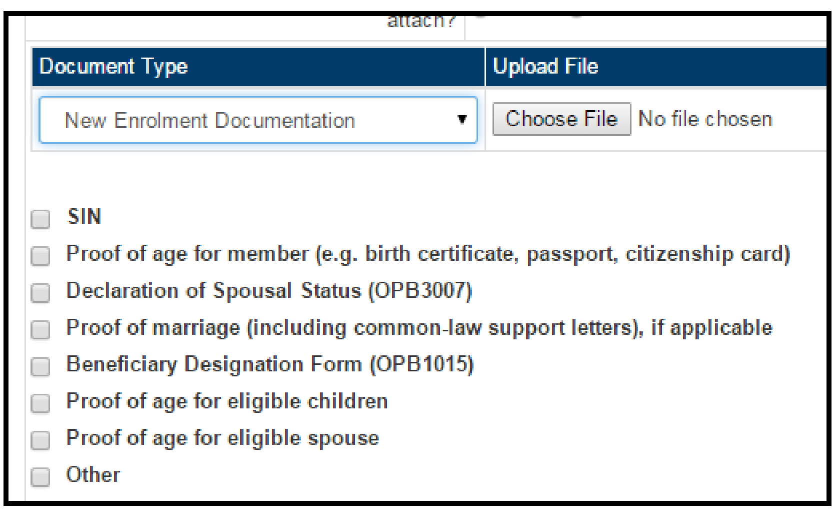
5.1. Review your contact information. Click on My Account if you need to update your information. Contact OPB to change your email address.

5.2. Indicate whether you have any documents to attach (yes/no). When you select **Yes**, the document upload functionality is activated. All documents must be in PDF format.



5.3. Click on the document type dropdown and select *New Enrolment Documentation.*

Result: A checklist opens; please indicate the supporting documents you're uploading with the enrolment transaction (i.e., the documentation you gathered before initiating the transaction).



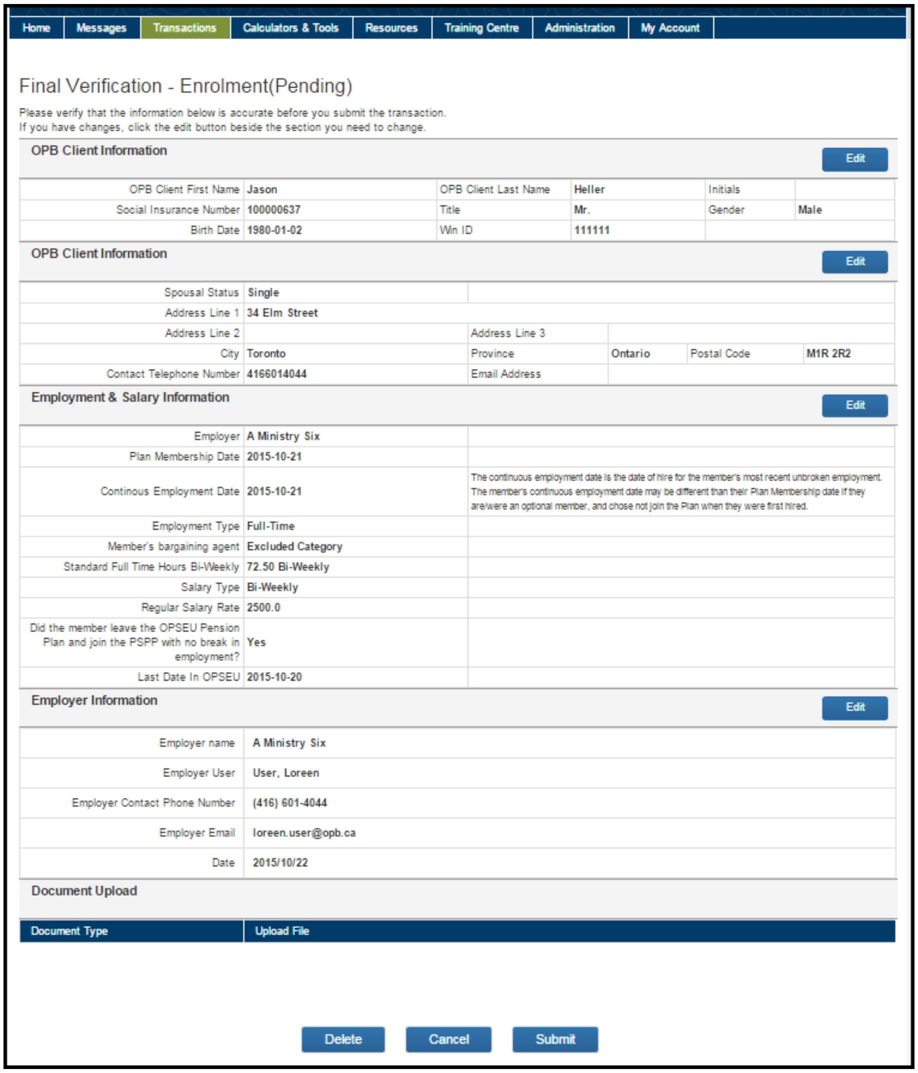
You can also select OPB 1043- Buyback Application from the list if the member wants to send in an application with the enrolment transaction, or select other if you're attaching a document that isn't indicated on the list.

5.4. Click **Choose File** to find the PDF document of supporting documentation you prepared before initiating the transaction. Once you've located the document, click **OK** to upload it.

5.5. Once you've added all the required documentation, click **Next**.

Result: The Final Verification page opens.

Step 6: Review the Final Verification page – Enrolment.



Home | Messages | Transactions | Calculators & Tools | Resources | Training Centre | Administration | My Account

Final Verification - Enrolment(Pending)

Please verify that the information below is accurate before you submit the transaction.
If you have changes, click the edit button beside the section you need to change.

OPB Client Information Edit

OPB Client First Name	Jason	OPB Client Last Name	Heller	Initials	
Social Insurance Number	100000637	Title	Mr.	Gender	Male
Birth Date	1980-01-02	Win ID	111111		

OPB Client Information Edit

Spousal Status	Single				
Address Line 1	34 Elm Street				
Address Line 2		Address Line 3			
City	Toronto	Province	Ontario	Postal Code	M1R 2R2
Contact Telephone Number	4166014044	Email Address			

Employment & Salary Information Edit

Employer	A Ministry Six	
Plan Membership Date	2015-10-21	
Continous Employment Date	2015-10-21	The continuous employment date is the date of hire for the member's most recent unbroken employment. The member's continuous employment date may be different than their Plan Membership date if they are/were an optional member, and chose not join the Plan when they were first hired.
Employment Type	Full-Time	
Member's bargaining agent	Excluded Category	
Standard Full Time Hours Bi-Weekly	72.50 Bi-Weekly	
Salary Type	Bi-Weekly	
Regular Salary Rate	2500.0	
Did the member leave the OPSEU Pension Plan and join the PSPP with no break in employment?	Yes	
Last Date In OPSEU	2015-10-20	

Employer Information Edit

Employer name	A Ministry Six
Employer User	User, Loreen
Employer Contact Phone Number	(416) 601-4044
Employer Email	loreen.user@opb.ca
Date	2015/10/22

Document Upload

Document Type	Upload File

Delete | Cancel | Submit

6.1. Please carefully review all the information for accuracy. *You cannot amend an enrolment after it's submitted.*

If you need to edit any sections, click **Edit** beside the section, this will take you back to the page where changes are needed. Click **Next** to navigate back through the transaction to return to the Final Verification page once all changes have been made.

6.2. Once you're satisfied that all the information is correct, click **Submit** at the bottom of the page. Click **Delete** if the transaction is no longer required. Click **Cancel** if you want to submit the transaction later.

Result: If you clicked **Submit**, the portal will attempt to submit the transaction. There are three possible outcomes:

1. **Successful submission:** The portal generates a transaction number and assigns the member's client number to the transaction record. If you need the client number, you can search for the enrolment transaction using the member's name or the transaction number as search criteria.
2. **Submission successful but follow-up may be required:** A client number is generated, but a portal message indicates an error occurred and that OPB will be reaching out to you shortly.
3. **Unsuccessful submission:** The portal couldn't assign a client number or submit the transaction. The portal will generate an error message to explain why submission failed.

6.3. Once the transaction has been successfully submitted, click **Print**.

Result: you will have a paper copy of the transaction to add to the member's corporate file or to give to the member.

Error message summary – Enrolment transaction

The following table lists the possible error messages you may encounter while completing an Enrolment transaction, what's causing the error, and instructions on how to clear it.

Transaction Page	Error Message	Cause	How to clear it
All pages	This is a required field	You didn't complete a mandatory field (*indicates a mandatory field)	Enter the missing information
Client Information page 1	You have entered an invalid SIN	The SIN number entered isn't correct.	Verify the member's SIN and re-enter into the field
Client Information page 1	Age cannot be less than 16	You may have entered an incorrect birth date.	Verify the member's date of birth and enter the correct date.
Client Information page 2	Client's age is over age 71 years old as of the plan membership date.	You may have entered an incorrect birth date or you're trying to enroll a member who can't be enrolled in the PSPP. **Note:** The *Income Tax Act* doesn't allow employees to contribute in registered pension plans past November 30th in the year they turn 71.	Verify the member's birth date. If the member is past the maximum age to participate in PSPP, cancel the transaction and inform the member.
Client Information page 2	Please enter a valid email address.	You have entered an incorrect email address.	Verify the member's email address format and re-enter
Employment & Salary Information page	The Continuous Employment Date cannot be after the Plan Membership Date	You may have entered an incorrect date.	Verify the member's continuous employment date and enter the correct date.

Transaction Page	Error Message	Cause	How to clear it
Employment & Salary Information	The plan membership date cannot be in the future	You may have entered an incorrect date or attempting to enroll the member in the Plan prior to their first day of work.	Please refrain from submitting the transaction until the member's first day of work.
Failed submission message	Duplicate enrolment - An enrolment transaction has already been submitted for this member	You may be attempting to enroll a member who has already been enrolled in the Plan.	Please search for any other Enrolment transactions that may have been submitted for this member or contact OPB for more information.

3.2. The Unpaid Leave of Absence (LOA) Transaction

This transaction replaces the Leaves of absence without pay for more than one month (OPB1025) form. I.*e. We will not accept the Unpaid Leave of Absence form going forward; all unpaid leaves of absence (31 days or more) must be completed as an online transaction in the portal.*

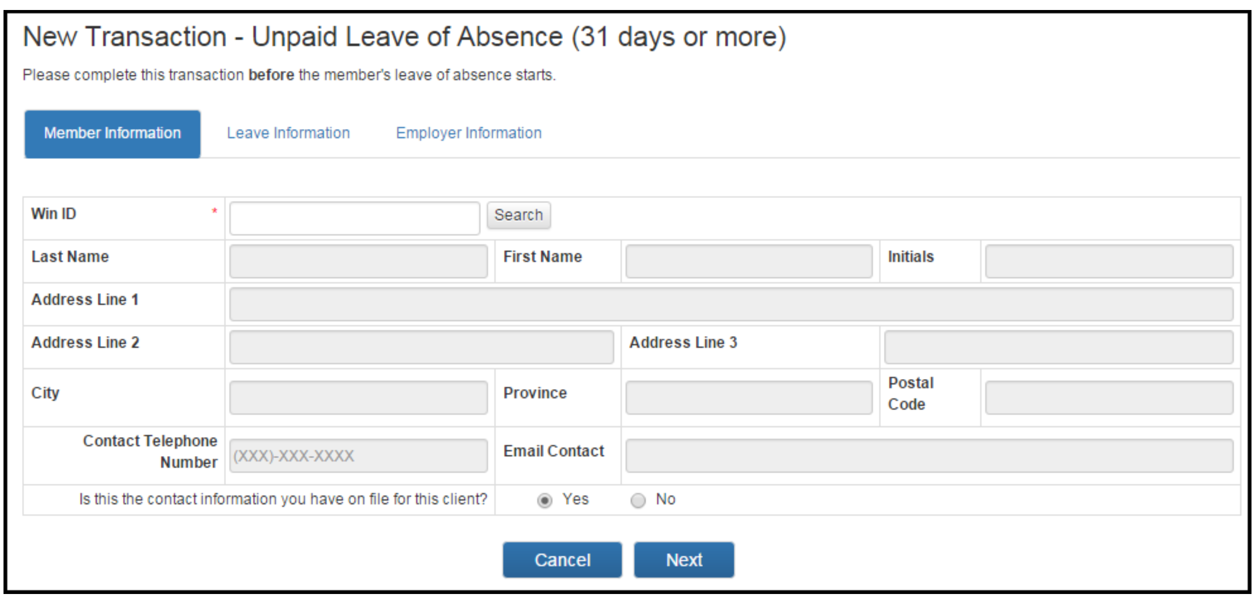
We've prepared this section to show you how to submit this transaction through the portal and to provide direction about clearing any error messages you may trigger while preparing a transaction.

- Only unpaid leaves of absence 31 days or greater should be reported
- An unpaid leave of absence transaction is considered late if it's submitted more than **30** calendar days after the leave start date.
- Your current business process related to members going on LTIP/LTD remains unchanged. Do not report a member going on LTIP as an unpaid leave of absence.
- If you are submitting a leave of absence for a member for whom you've already submitted a termination/retirement transaction, please contact OPB via a secure message for direction **BEFORE** attempting to submit the LOA transaction.

Step 1: Initiate the LOA transaction.

1.1. Click on the transaction tab.
1.2. Click **New Transaction** on the left-hand navigation menu.
1.3. Select **Unpaid Leave of Absence** from the drop-down.
Result: The Member information page opens.

Step 2: Complete the Member Information page.


New Transaction - Unpaid Leave of Absence (31 days or more)

Please complete this transaction **before** the member's leave of absence starts.

Member Information | Leave Information | Employer Information

Win ID *	Search				
Last Name		First Name		Initials	
Address Line 1					
Address Line 2		Address Line 3			
City		Province		Postal Code	
Contact Telephone Number	(XXX)-XXX-XXXX	Email Contact			
Is this the contact information you have on file for this client?		Yes	No		

Cancel | Next

2.1. Enter the member's WIN and click **Search.**

Result: if an exact match is found, the member's contact information will auto-populate.

2.2. If the member's contact information doesn't match what you have on file, click **No** at the bottom of the page.

Result: Additional fields will activate to ensure that you can provide OPB with up-to-date contact information.

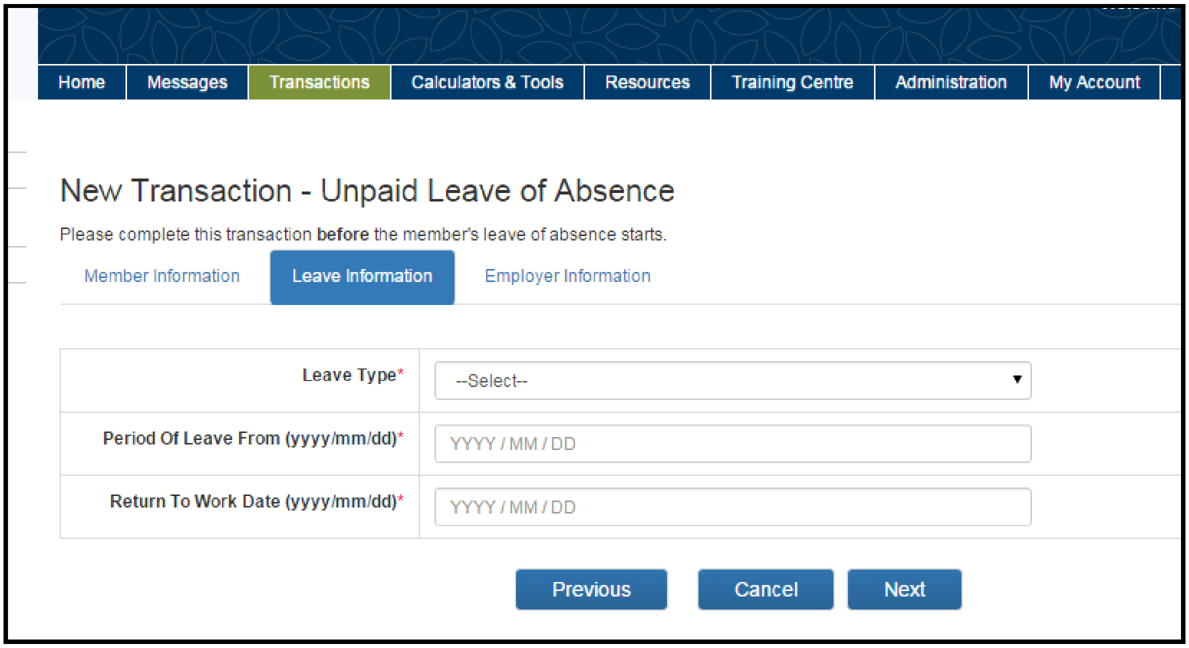
2.3. Once you've finished entering all the information required on this page, click **Next**.

Result: The Leave Information page opens.

There are buttons at the bottom of each page which are common across most transaction pages:

- Click **Next** and **Previous** to move between pages within the transaction. Do not try to use the Browser **Back** button to navigate between pages.
- Any information you've entered on a page is saved as soon as you click **Next .**
- To put a transaction in pending status, simply leave the transaction page. The transaction will save all information up to the last time you clicked **Next**. You can complete the transaction at any time by clicking the Pending Transaction link at the side of the New Transaction page
- The **Cancel** button allows you to exit without saving any of the information you've entered on a page. To delete a transaction, go to your pending transactions page and delete it.

Step 3: Complete the Leave Information page.



3.1. Select the Leave type.

- Please report discretionary leaves and self-funded leaves as Special/Education leaves.
- If you select Illness/WSIB leave, the leave end date will default to the end of the current year.

3.2. Enter the leave start date; i.e., the first day that the member is absent from work.

3.3. Enter the return to work date; i.e., the date that the member returns to work - not the last day of the leave.

3.4. If the member is going on a parental/pregnancy/adoption leave, indicate whether they'll continuing paying contributions from their SUB allowance benefit **(Yes/No**) and indicate the duration of the SUB period if contributions are going to continue.

Leave Extensions:

If you enter a leave period that is greater than the legislated maximum allowed for the selected leave type, a pop-up opens asking you if you want to proceed.

- If you made a typo, click **Cancel** and you can correct the leave period.
- If the period is correct, click **OK**, the portal will allow you to proceed and will automatically create a second leave for the excess period.
  - The first LOA transaction will cover the period up to the maximum; the second transaction will cover the period above the maximum.

The default leave type selected for the extension period is Special/Educational. You can change the leave type if needed.

3.5. Click **Next**.

Result: the Employer Information page opens.

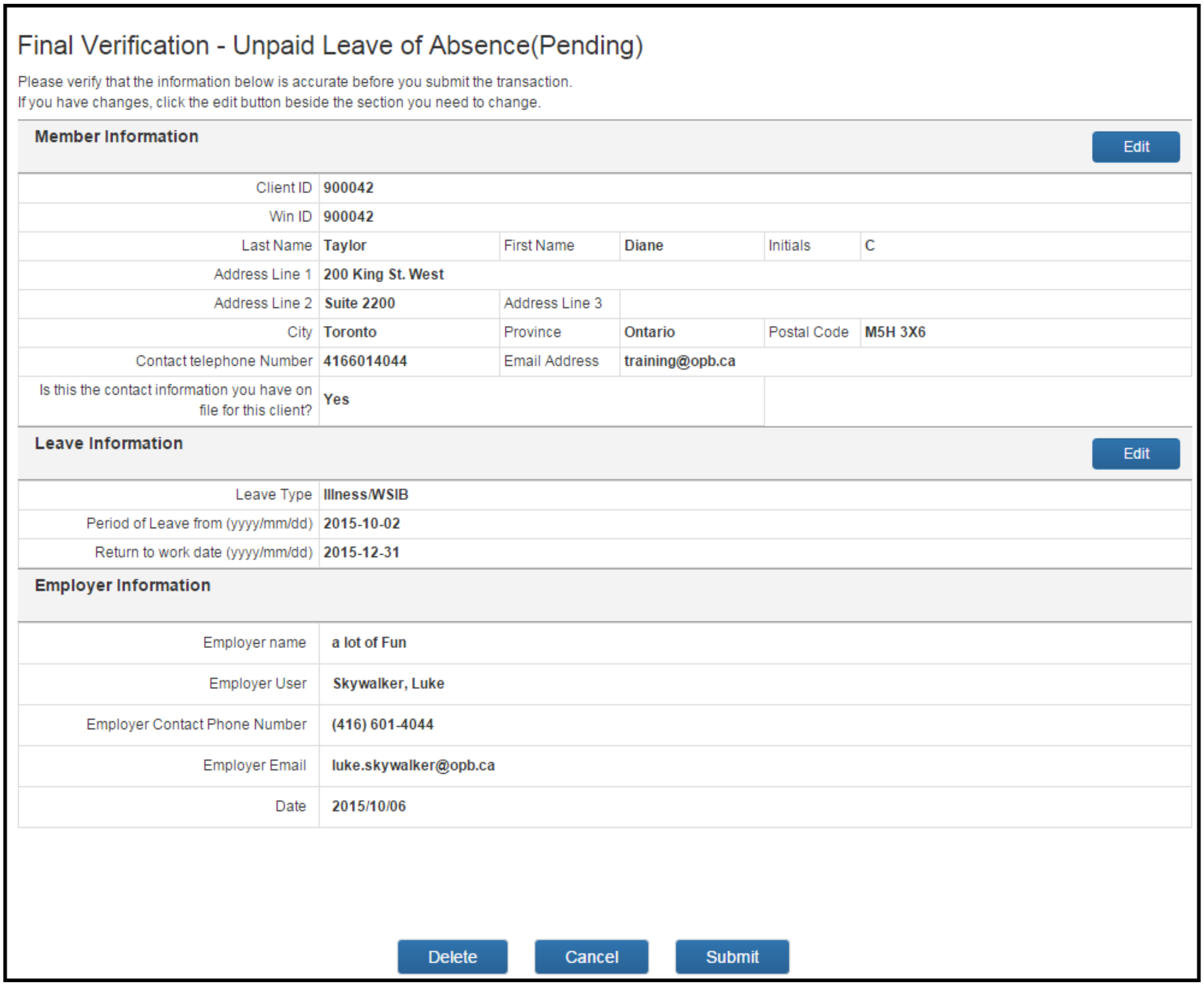
Step 4: Review the Employer information page.

4.1. Review your contact information. Click on the **My Accounts** tab to make updates. Contact OPB to change your email address.

4.2. Once you've confirmed your contact information is up-to-date, click **Next**.

Result: the Final Verification page opens.

Step 5: Review the Final Verification page.



Final Verification - Unpaid Leave of Absence(Pending)

Please verify that the information below is accurate before you submit the transaction.
If you have changes, click the edit button beside the section you need to change.

Member Information Edit

Client ID	900042				
Win ID	900042				
Last Name	Taylor	First Name	Diane	Initials	C
Address Line 1	200 King St. West				
Address Line 2	Suite 2200	Address Line 3			
City	Toronto	Province	Ontario	Postal Code	M5H 3X6
Contact telephone Number	4166014044	Email Address	training@opb.ca		
Is this the contact information you have on file for this client?	Yes				

Leave Information Edit

Leave Type	Illness/WSIB
Period of Leave from (yyyy/mm/dd)	2015-10-02
Return to work date (yyyy/mm/dd)	2015-12-31

Employer Information

Employer name	a lot of Fun
Employer User	Skywalker, Luke
Employer Contact Phone Number	(416) 601-4044
Employer Email	luke.skywalker@opb.ca
Date	2015/10/06

Delete Cancel Submit

5.1. Please carefully review all the information for accuracy. If you need to edit any sections, click **Edit** beside the section, this will take you back to the page where you need to make changes. Click **Next** to navigate back through the transaction to return to the Final Edit pages once all changes have been made.

5.2. Once you're satisfied that all the information is correct, click **Submit** at the bottom of the page. Click **Delete** if the transaction is no longer required. Click **Cancel** if you want to submit the transaction later.

Result: The transaction is submitted to OPB. At this point, additional validations may be triggered which could prevent the transaction's submission; e.g., we already have a leave reported for this period or there's an overlap with a previously reported leave– *see the following error message summary for more information*.

5.3. Once the transaction has been submitted successfully, click **Print.**

Result: you will have a paper copy of the transaction for the member's corporate file.

Leave Extensions:

- If you're reporting a leave period that exceeds the legislative maximum for the selected leave type, you will see the full leave period on the Final Verification page.
- Once you click submit, the leave period will be split into two periods. A transaction for the period up to the legislated maximum will be submitted and a second transaction for the excess period will be generated.
- The portal will automatically select Special/Educational as the leave type for the second leave transaction but you can change it, if necessary.
- If no changes are required, click **Submit** and the second LOA transaction will be sent through the portal. When using search functionality in the future, this leave will appear as two separate transactions.

Error Message Summary – Leaves of Absence

Below is a list of the possible error messages you may encounter while completing a leave of absence transaction, what's causing the error, and instructions on how to clear it.

Transaction Page	Error message Displayed	What Caused the error	How to clear it
All pages	This field is required.	You have left a mandatory field blank (Mandatory fields have an * beside them)	Complete any mandatory fields that have been left blank.
Member information	There is no member with the WIN you've entered enrolled in the PSPP at your organization. Please enter a valid WIN ID.	The WIN entered doesn't match the WIN for any current member employed at the ministry you selected.	Confirm the member's correct WIN ID and re-enter.
Member Information	You've either entered an invalid WIN ID or this employee's PSPP membership has been terminated.	You may have entered the WIN ID for a member who has already terminated their membership in the Plan or you've entered a WIN ID that doesn't exist in our system.	Please confirm the member's WIN and re-enter. If the number is correct, please contact OPB.
Leave Information	A leave transaction cannot be submitted for a period when the member was not enrolled in the PSPP. Please enter valid dates.	You may have entered incorrect leave dates	Please verify the dates of the leave you're trying to submit, and re-enter.
Leave Information	We already have a leave on file for this period. If you are trying to amend the leave, use the amendment transaction	OPB's records indicate that the leave you're trying to submit conflicts with an existing leave (e.g., a different leave has already been reported for this period).	Please refer to your records to confirm the correct leave period/type or amend the previously reported leave.

Transaction Page	Error message Displayed	What Caused the error	How to clear it
Leave Information	We already have a leave on file for this period. Please contact OPB for more information.	A leave for this period was reported to OPB before the portal was deployed.	If you need to amend the leave, please contact OPB.
Leave Information	The LOA return to work date cannot be before the LOA start date.	You may have reversed the leave dates.	Verify the dates you entered into the transaction.
Leave Information	We already have a leave on file for this period. If you are trying to amend the leave, please use the amendment transaction.	You're trying to submit a leave that overlaps with a previously submitted leave.	Please review the previously submitted leaves and make any necessary adjustments.
Submission Failure	The LOA period cannot be before the member's plan membership date.	You cannot submit a leave transaction for a period before the member was enrolled in the Plan.	Please correct the leave dates.

3.3 The Service Report for Buybacks Transaction

This transaction replaces the *Service Report for Buybacks (OPB 1035) form*. I.*e. We will not accept the Service Report for Buybacks form (OPB 1035) going forward; they must be reported through the portal.*

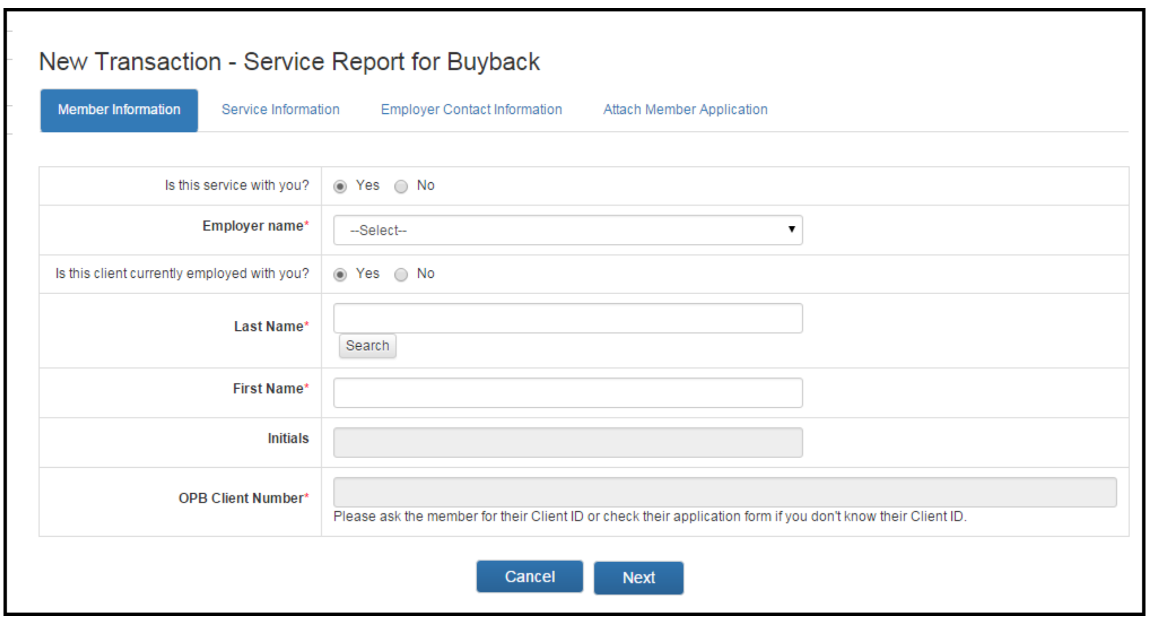
This subsection contains instructions for submitting a service report for buybacks transaction as well as information about clearing any error messages you may encounter when preparing a transaction.

> Please ensure you submit this transaction in a timely fashion. Not doing so can lead to an increased cost for the member and you as the employer, if the buyback is employer-matched (i.e. within 24 months of joining the Plan).

Step 1: Initiate the transaction.

1.1. Click on the transaction tab.
1.2. Click the **New transaction** on the left-hand navigation menu.
1.3. Select *service report for buybacks* from the drop down menu.
Result: the Service Report for Buyback transaction opens on the Member Information page.

Step 2: Complete the membership information page.



2.1. Indicate whether the prior period of service was with your organization (default is set to Yes).

> If the service was not with your organization, you won't be able to complete the transaction. Please direct the member to contact their previous employer to submit the information.

2.2. Select the ministry the member was employed with during the period they're applying to buy back.

2.3. Indicate whether the member is currently employed with you.

If your answer is Yes (i.e., the default):

Enter the member's first and last name and click **Search**.

Result: The portal will search the members from the employer indicated and display the member's Client ID. If more than one member with that name exists in your organization, the system will display a list for you to choose from. The date of birth for each member will also be displayed to help you select the correct member.

If your answer is No:

Enter the member's first and last name and client number. Error messages will be triggered if you didn't enter valid information.

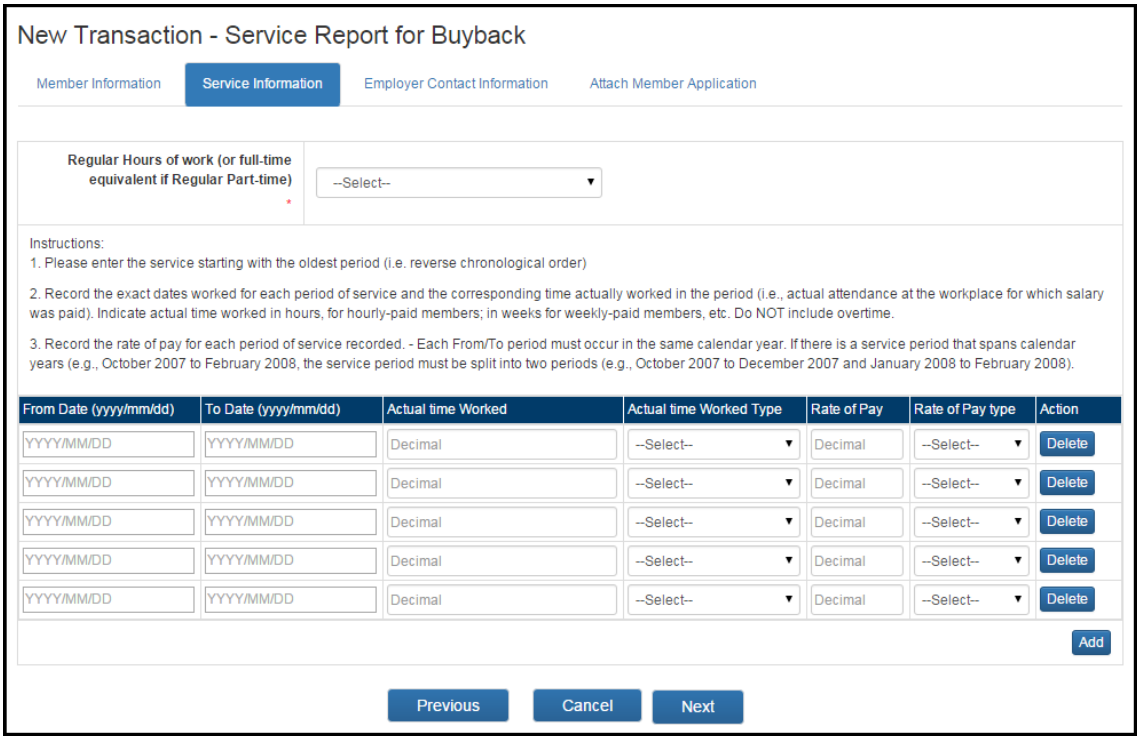
Click **Next**.

Result: Service Information page opens.

There are buttons at the bottom of each page which are common across most transaction pages:

- Click **Next** and **Previous** to move between pages within the transaction. Do not try to use the Browser **Back** button to navigate between pages.
- Any information you've entered on a page is saved as soon as you click **Next .**
- To put a transaction in pending status, simply leave the transaction page. The transaction will save all information up to the last time you clicked Next. You can complete the transaction at any time by clicking the Pending Transaction link at the side of the New Transaction page
- The **Cancel** button allows you to exit without saving any of the information you've entered on a page.
- To delete a transaction, go to your pending transactions page and delete it.

Step 3: Complete the service information page.



New Transaction - Service Report for Buyback

Member Information | Service Information | Employer Contact Information | Attach Member Application

Regular Hours of work (or full-time equivalent if Regular Part-time) * --Select--

Instructions:
1. Please enter the service starting with the oldest period (i.e. reverse chronological order)

2. Record the exact dates worked for each period of service and the corresponding time actually worked in the period (i.e., actual attendance at the workplace for which salary was paid). Indicate actual time worked in hours, for hourly-paid members; in weeks for weekly-paid members, etc. Do NOT include overtime.

3. Record the rate of pay for each period of service recorded. - Each From/To period must occur in the same calendar year. If there is a service period that spans calendar years (e.g., October 2007 to February 2008, the service period must be split into two periods (e.g., October 2007 to December 2007 and January 2008 to February 2008).

From Date (yyyy/mm/dd)	To Date (yyyy/mm/dd)	Actual time Worked	Actual time Worked Type	Rate of Pay	Rate of Pay type	Action
YYYY/MM/DD	YYYY/MM/DD	Decimal	--Select--	Decimal	--Select--	Delete
YYYY/MM/DD	YYYY/MM/DD	Decimal	--Select--	Decimal	--Select--	Delete
YYYY/MM/DD	YYYY/MM/DD	Decimal	--Select--	Decimal	--Select--	Delete
YYYY/MM/DD	YYYY/MM/DD	Decimal	--Select--	Decimal	--Select--	Delete
YYYY/MM/DD	YYYY/MM/DD	Decimal	--Select--	Decimal	--Select--	Delete

Add

Previous Cancel Next

3.1. Enter the salary information related to the prior period of non-contributory service according to the instructions provided at the top of the page. You can enter up to 50 separate salary periods.

3.2. Click **Add** if you need to enter additional salary periods for the service the member is buying back. Click **Delete** if you want to remove an entry.

3.3. Once you've entered all the required salary information, Click **Next**.

Result: The Employer Contact Information page opens.

The portal will not allow you to proceed until all error messages are cleared – see the error message summary for this transaction for more information.

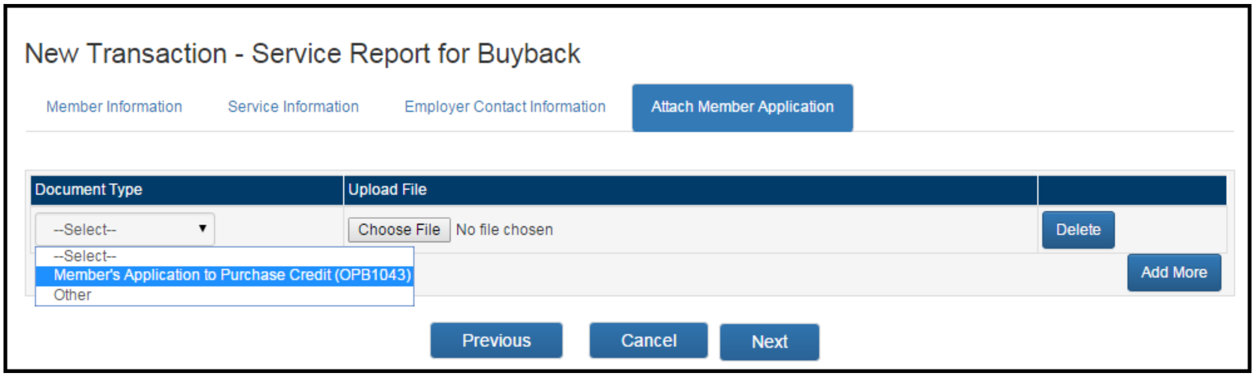
Step 4: Review the Employer information screen.

4.1 Review your contact information. You can update most of your contact information on the My Accounts page. Contact OPB to change your email address.

4.2 If no changes are required, click **Next**.

Result: The Attach Member Application page opens.

Step 5: Attach the member's buyback application.



Attaching the member's buyback application form; i.e., the OPB 1043:

If the member has provided you with a copy of their buyback application form (OPB1043), please convert it into a PDF document and upload it to the transaction for submission. **Attaching the member's application to the transaction is optional. However, we would prefer it if the transaction and application were submitted together because submitting them separately causes an error in our workflow and will delay the costing to the member.**

5.1. If you need to attach an *OPB1043*, click on the document type drop down menu and select ***Member's Application to Purchase Pension Credit*** **(OPB 1043)** from the options provided.

5.2. Click **Browse** to find the PDF document on your computer. Once you've located the application, click **OK** to upload it to the transaction.

5.3. Once you've uploaded the required documentation, Click **Next**.

Result: The Final Verification page opens.

Step 6: Review the Final Verification page– Service Report for Buybacks

6.1. Please carefully review all the information for accuracy. If you need to edit any sections, click **Edit** beside the section, this will take you back to the page where changes are needed. Click **Next** to navigate back through the transaction to return to the Final Edit screen once all changes have been made.

6.2. Once you're satisfied that all the information is correct, click **Submit** at the bottom of the page. You can also click **Delete** if the transaction is no longer required, or you can click **Cancel** if you want to submit the transaction later.

Result: The transaction is submitted to OPB. At this point, additional validations may be triggered which could prevent the transaction's submission – *see the following error message summary for more information*.

6.3. Once the transaction has been submitted successfully, click **Print.**

Result: you will have a paper copy of the transaction for the member's corporate file.

Error message summary – Service Report of Buybacks

Below is a list of the possible error messages you may encounter while completing a service report for buybacks transaction and tips on how to clear them.

Transaction page	Error message	What caused the error	How to clear it
All pages	This field is required.	You have left a mandatory field blank (Mandatory fields have a * beside them)	Complete any mandatory fields that have been left blank.
Member Information	You don't have the authority to complete this. Please ask the member to get the employer they worked with during this period to complete this report.	You indicated that the prior non-contributory service wasn't earned with your organization	Please revise your response or cancel the transaction and direct the member to contact their previous employer.
Member information	This is a required field	You tried to use the search functionality without entering the member's name.	Enter the member's name into the transaction.
Member Information	Please verify the name you entered is correct or contact OPB to get this member's client number.	(where you indicated that the member was currently employed with you) You have entered a first and last name that doesn't match any member we have on record who is employed with your organization or covered under your portfolio of ministries.	Verify the member's name.

Transaction page	Error message	What caused the error	How to clear it
Member Information	Please verify if you've entered the correct name and/or client number or contact OPB to get the correct client number.	(where you indicated that the member is NOT currently employed with you) You have entered a name and client number that doesn't match any member we have on record.	Verify the member's name and client ID.
Service Information	Date ranges entered in "From Date" and "To Date" must be within the same calendar year.	The dates you've entered for a salary period fall in different calendar years.	Please verify that salary period you've entered fall within the same calendar year.
Service Information	The "From Date" must be on or before the" To date".	You may have reversed the leave dates.	Verify the dates you entered into the transaction.
Service Information	Error: Overlapping salary/service periods have been entered.	You've entered a salary period that overlaps with another period.	Verify the dates associated with the salary periods where the overlap occurred.
Service Information	A duplicate salary/service period has been entered.	You've entered a salary period twice.	Delete the duplicate salary period.
Document Attachment	Please attach the document once the document type is selected.	You've indicated that you're going to attach a document, but clicked **Next** before attaching it.	Attach the document or indicate that no document is going to be attached to the transaction.
Submission failure	Submission failed. This member has already terminated their membership in the PSPP.	You cannot submit a Service Report for Buybacks transaction for a member who has terminated their membership in the Plan.	Please verify that you're submitting this transaction for the correct member or contact OPB for more information.

3.4 The Termination/Retirement Transaction

This transaction replaces the OPB 1012 – Retirement Notice or Termination of Membership Notice. I.*e. We will not accept the Retirement or Termination of Membership notice form going forward; all terminations and retirements must be reported through the portal.*

This section shows you how to submit a termination or retirement transaction through the portal and provides direction on how to clear any error messages you may encounter.

> Please don't use this transaction for an optional member who's terminating their membership in the PSPP without terminating their employment - continue to use the OPB1057-Termination of Optional membership form. There is a secure message type for submitting the form through the portal as a secure message attachment.

The portal will apply the following rules to identify whether a termination/retirement transaction has been submitted late:

Transaction type	Is considered late if:
Regular PSPP termination	The transaction is submitted more than **15** calendar days after the termination date.
PSPP termination due to death	The transaction is submitted more than **15** calendar days after the member's date of death.
A PSPP termination due to a mandatory transfer to OPT	The transaction is submitted more than **30** calendar days after the termination date.
Retirement/disability pension	The transaction is submitted more than **30** days after the termination date.

Step 1: Initiate the Termination/Retirement transaction.

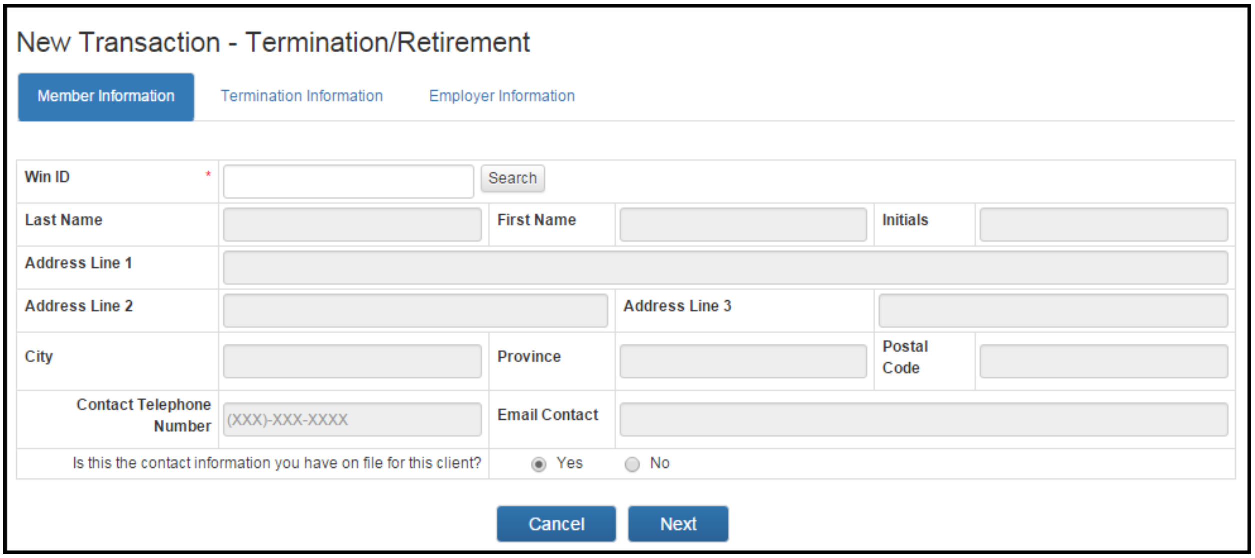
1.1. Click on the transaction tab

1.2. Click the **New transaction** on the left-hand navigation menu

1.3. Select Termination/Retirement from the drop-down menu

Result: The Member information page opens.

Step 2: Complete the Member Information page



2.1. Enter the member's **WIN** and click **Search.**

Result: if an exact match is found, the member's contact information will auto-populate.

2.2. If the member's contact information needs to be updated, click **No** at the bottom of the page.

Result: Additional fields will activate to ensure that you can provide OPB with up-to-date contact information.

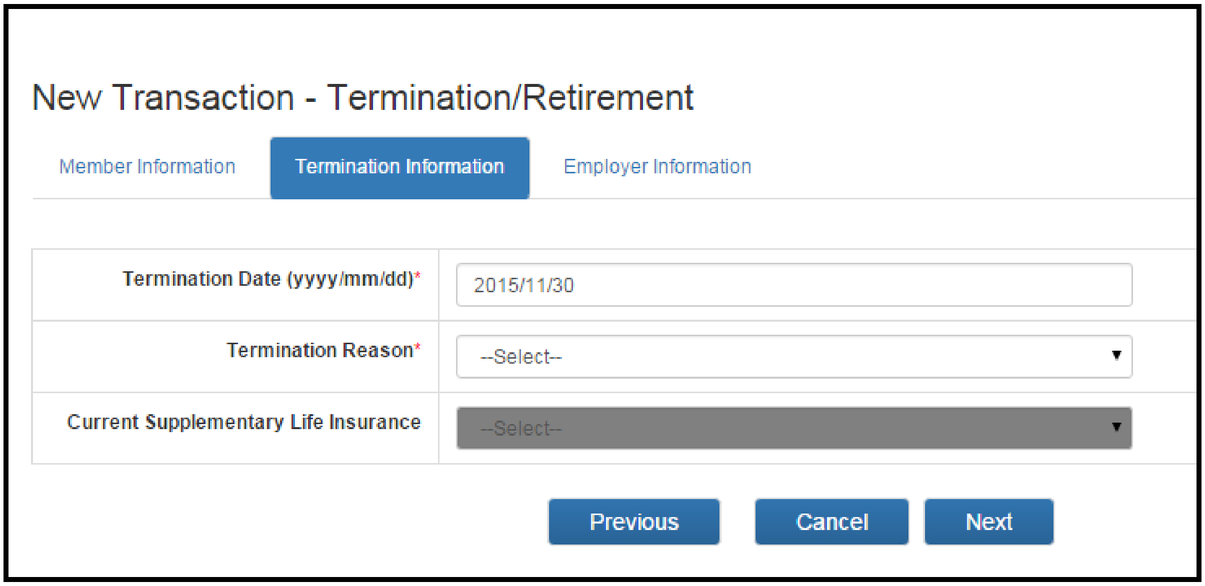
2.3. Once you've finished entering all the information required on this page, click **Next**.

Result: The Termination Information page opens.

There are several buttons at the bottom of each page which are common across most transaction pages:

- Click **Next** and **Previous** to move between pages within the transaction. Do not try to use the Browser **Back** button to navigate between pages.
- Any information you've entered on a page is saved as soon as you click **Next .**
- To put a transaction in pending status, simply leave the transaction page. The transaction will save all information entered into the portal up to the last time you clicked **Next**. You can complete the transaction at any time by clicking the Pending Transaction link at the side of the New Transaction page.
- The **Cancel** button allows you to exit without saving any of the information you've entered on a page. To delete a partially complete transaction, go to your pending transactions page and delete it.

Step 3: Complete the Termination Information Page



3.1. Enter the termination date. The termination date is the last day for which pension contributions were deducted from the member's pay.

3.2. Enter the Termination Reason.

Additional information regarding termination reasons:

- If the member does not meet the minimum retirement age for PSPP members (i.e., age 50 or OPP Officers and age 55 for others), you can't select the Immediate Pension from the termination reason dropdown.
- The Plan Name field will only display if Mandatory Transfer is selected as the termination reason – the default is OPTrust.

3.3. Indicate whether the member was involuntarily terminated.

Result: If you've indicated that the member was involuntarily terminated, you cannot submit the transaction unless you attach a copy of the notice of involuntary termination letter signed by the designated signatory.

3.4. If the member is retiring, please indicate their current level of SLI coverage. This field is disabled unless the member is retiring.

Note: if the member is retiring at age 65 or later, please select **0** as the member's level of SLI coverage.

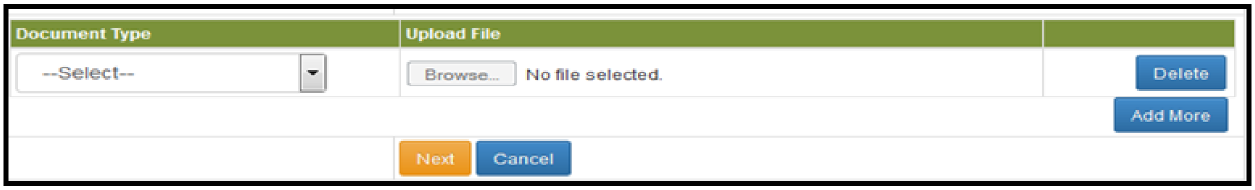
3.5. Click **Next**.

Result: The Employer Information page opens.

Step 4: Review the Employer information screen/upload supporting documentation page.

4.1. Review your contact information. Click on **My Accounts** to make updates. Contact OPB to change your email address.

4.2. Indicate whether you have any documents to attach (yes/no). When you select **Yes**, the upload functionality is activated.



4.3. Click on **the document type** drop-down list.

Result: A document list opens; you must indicate which documentation is being uploaded with the transaction.

4.4. Click **Browse** to locate the attachment and upload it to the transaction.

Warning: Please do not upload Group Application Forms, Void Cheques, or the Old OPB Retirement Checklists. We will contact the member if we need any additional documentation.

4.5. Once you've added all the required attachments, Click **Next**.

Result: The Final Verification page opens.

Step 5: Final Verification page – Termination/Retirement

Final Verification - Termination/Retirement(Pending)

Please verify that the information below is accurate before you submit the transaction.
If you have changes, click the edit button beside the section you need to change.

Please send in other transactions (e.g. SR for BB, LOA) before submitting Retirement Transaction.

Member Information Edit

Client ID	900519				
Last Name	Keith	First Name	Ronald	Initials	C
Address Line 1	200 King St. West				
Address Line 2	Suite 2200	Address Line 3			
City	Toronto	Province	Ontario	Postal Code	M5H 3X6
Contact telephone Number	4166014044	Email Address	training@opb.ca		
Is this the contact information you have on file for this client?	Yes				

Termination Information Edit

Termination Reason	Immediate Pension
Termination Date	2015-10-09
Is an Involuntary Termination?	No
Current Supplementary Life Insurance	0

Employer Information Edit

Employer name	Employer Number One
Employer User	pike October ninth, nathan
Employer Contact Phone Number	(416) 601-4044
Employer Email	nathan.user@opb.ca
Date	2015/10/14

Document Upload

Document Type	Upload File

5.1. Please carefully review all the information for accuracy. If you need to edit any sections, click **Edit** beside the section, this will take you back to the page where changes are needed. Click **Next** to navigate back through the transaction to return to the Final Verification page once all changes have been made.

5.2. Once you're satisfied that all the information is correct, click **Submit** at the bottom of the page. You can also click **Delete** if the transaction is no longer required or you can click **Cancel** if you want to submit the transaction later.

Result: The transaction is submitted to OPB. At this point, additional validations may be triggered which could prevent the transaction's submission – see the following error message summary for more information.

5.3. Once the transaction has been submitted successfully, click **Print.**

Result: You will have a paper copy of the transaction form the member's corporate file.

Reporting changes after the transaction has been submitted

- If a member goes on a leave of absence after you've submitted a future-dated termination/retirement transaction, please send a secure message via the portal. Select *Question about pension data/payment* as the message type.
- You will not be able to use the portal to amend a member's termination date if you submitted a future dated OPB 1012 before the portal's launch. If this situation arises, please report the change via secure message. Select *Question about pension data/payment* as the message type.

Error message summary- retirement/termination transaction

Below is a list of the possible error messages you may encounter while completing a retirement/termination transaction and tips on how to clear them.

Transaction Page	Error Message	Cause	How to clear it
All pages	This field is required.	You have left a mandatory field blank (Mandatory fields have a * beside them)	Complete any mandatory fields that have been left blank.
Member information	There is no member with the WIN you've entered enrolled in the PSPP at your organization. Please enter a valid WIN ID.	The WIN entered doesn't match the WIN for any current member employed at the ministry you selected.	Confirm the member's correct WIN ID and re-enter.
Member Information	You've either entered an invalid WIN ID or this employee's PSPP membership has been terminated.	You may have entered the WIN ID for a member who has already terminated their membership in the Plan or you've entered a WIN ID that doesn't exist in our system.	Please confirm the member's WIN and re-enter. If the number is correct, please contact OPB.
Member Information	A termination transaction has already been submitted for this member. Do you want to amend the previous transaction?	You may have wanted to amend a previously submitted transaction	When you click **OK**, the portal will open the previous transaction for you to amend. If you click **NO**, you will return to the New Transaction Page.
Termination Information	**Tip:** Please note that the member will not receive their first pension payment until the 22nd of the month after their termination date. Please confirm with the member if they want to retire	You've entered a pension termination date (i.e., from the 1st to 15th of the month) which, means that the member (if they're retiring) will have to wait longer for their first	If possible, direct the member to OPB so that we can help them understand the impact of retiring at the beginning of the month

Transaction Page	Error Message	Cause	How to clear it
	sooner or later to reduce the lag between their last pay and their first pension payment.	pension payment.	
Termination	To complete this transaction, you must submit the involuntary termination letter signed by the applicable designated signatory or their approved delegate.	Remember to upload a copy of the letter to the transaction	Upload the involuntary termination letter. If you don't have it. Pend the transaction and complete it later.
Termination Information	You have indicated that this is an involuntary termination. Please include the involuntary termination letter as an attachment.	The transaction cannot be submitted until you upload a copy of the notice of involuntary termination	Upload the notice of involuntary termination signed by your organization's designated signatory.
Termination Information	**Tip:** Based on the member's age, please check with them to see if they're eligible to retire with an unreduced pension and are intending to start their pension. If they do want to retire, please select immediate pension instead.	You've indicated that the member is terminating their membership in the Plan, but they may be eligible to start their pension.	This is a soft warning; i.e., you can continue with the transaction. Though, we do recommend that you contact the member and confirm whether they're terminating their membership or retiring before submitting the transaction.

3.5 The Retired Member’s Quarterly Re-employment Earnings Transaction

This transaction replaces the *Retired Member’s Quarterly Re-employment Earnings and Calculations Report (OPB1008)*.

We’ve prepared this section to show you how to submit this transaction through the portal and to provide direction for clearing any error messages you may trigger when preparing a transaction.

> A retired member’s quarterly re-employment earnings transaction is considered late if it’s submitted more than **45** calendar days after the end of the previous calendar quarter.

Step 1: Initiate the Retired Member’s Quarterly Re-employment Earnings transaction.

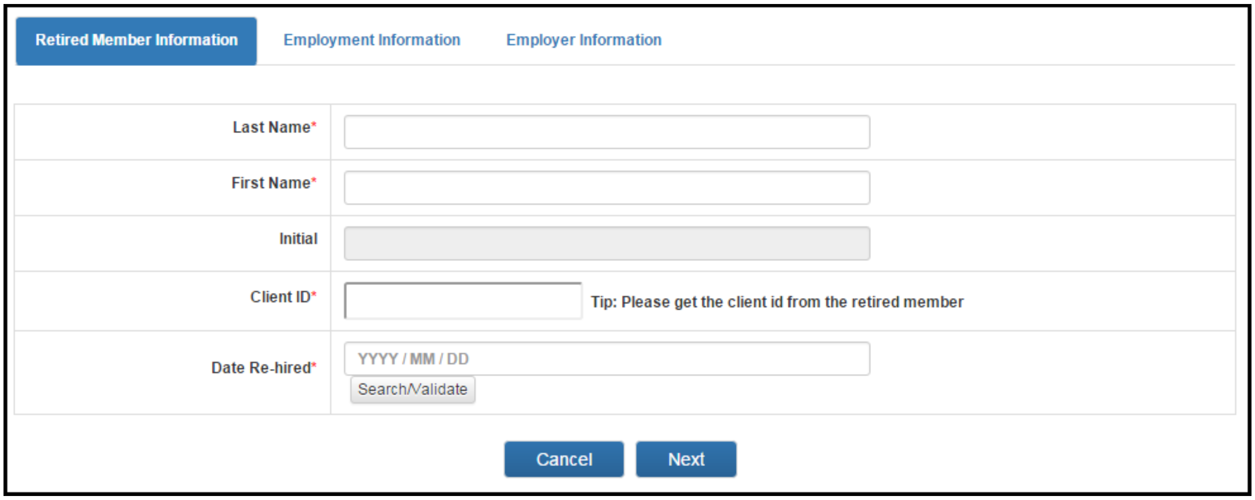
1.1. Click on the transaction tab.

1.2. Click **New Transaction** on the left-hand navigation menu.

1.3. Select **Retired Member’s Quarterly Re-employment Earnings** from the drop-down menu.

Result: The Retired Member Information page opens.

Step 2: Complete the Retired Member Information Page.



2.1. Enter the following information (* indicates a mandatory field):

- *Member’s first and last name
- Initial
- *Client ID
- *Date Rehired

Search functionality (re-employment transaction only):

1. If you don't know the member's client ID, enter their name and date of re-hire in the fields provided and click **Search**. If you or a colleague has submitted a transaction for a previous quarter, the portal will auto-populate the client number field and you can then click **Next** to proceed to the next page.

2. If a re-employment earnings transaction hasn't been previously submitted for this member, enter the member's name, client number and date of re-hire in the fields provided. If we have a member with that client number on record, you can proceed to the next page.

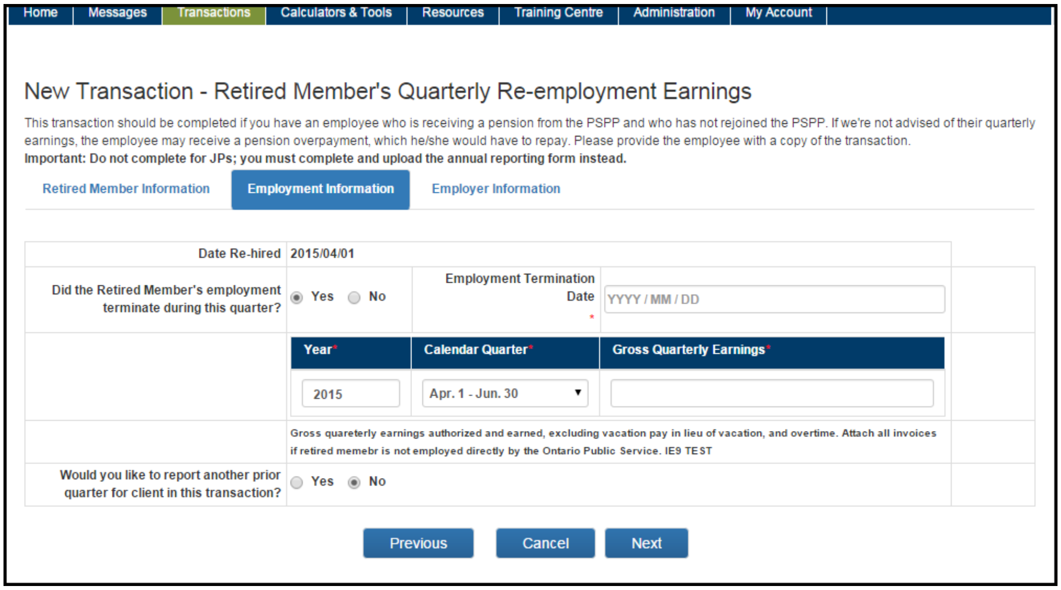
2.2. Once you've entered all the information on this page, click **Search/Validate** to ensure the information you've entered is for an active pensioner. If an error message isn't triggered, click **Next**.

Result: The Employment Information page opens.

There are several buttons at the bottom of each page which are common across most transaction pages:

- Click **Next** and **Previous** to move between pages within the transaction. Do not try to use the Browser **Back** button to navigate between pages.
- Any information you've entered on a page is saved as soon as you click **Next .**
- To put a transaction in pending status, simply leave the transaction page. The transaction will save all information up to the last time you clicked Next. You can complete the transaction at any time by clicking the Pending Transaction link at the side of the New Transaction page
- The **Cancel** button allows you to exit without saving any of the information you've entered on a page. To delete a partially completed transaction, go to your pending transactions page and delete it.

Step 3: Complete the Employment Information page.



* The *Date Re-hired* field will auto-populate with the date entered in the previous page.

3.1. Enter the **employment termination** date if employment ended during most recently ended calendar quarter. If the pensioner's employment did not end, click **No**.

Result: The Employment Termination Date field is de-activated.

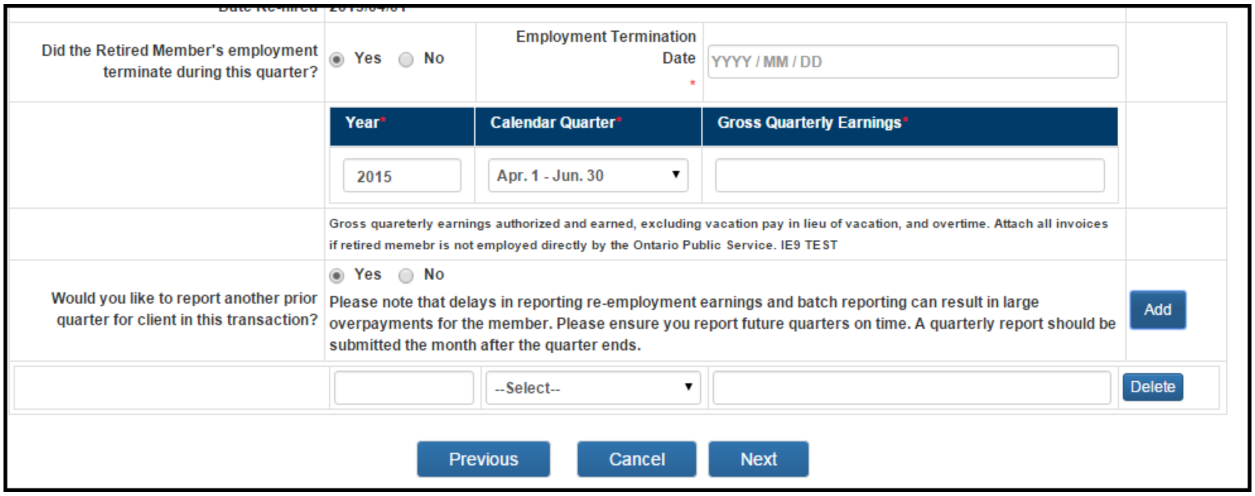
Don't forget to report the date the member's employment ended. Otherwise, you'll receive a reminder from OPB regarding the re-employment earnings for the subsequent quarter and will have to amend the member's last re-employment earnings transaction. The default setting for many of the fields on this page is for the most recently ended quarter, so less data entry is required if earnings are reported on time.

3.2. Report the retired member's earnings as follows:

- enter the year in which they were earned;
- enter the calendar quarter in which they were earned (from the dropdown) and;
- enter the gross quarterly earnings.

3.3. If you need to report earnings for additional quarters, click **Yes.**

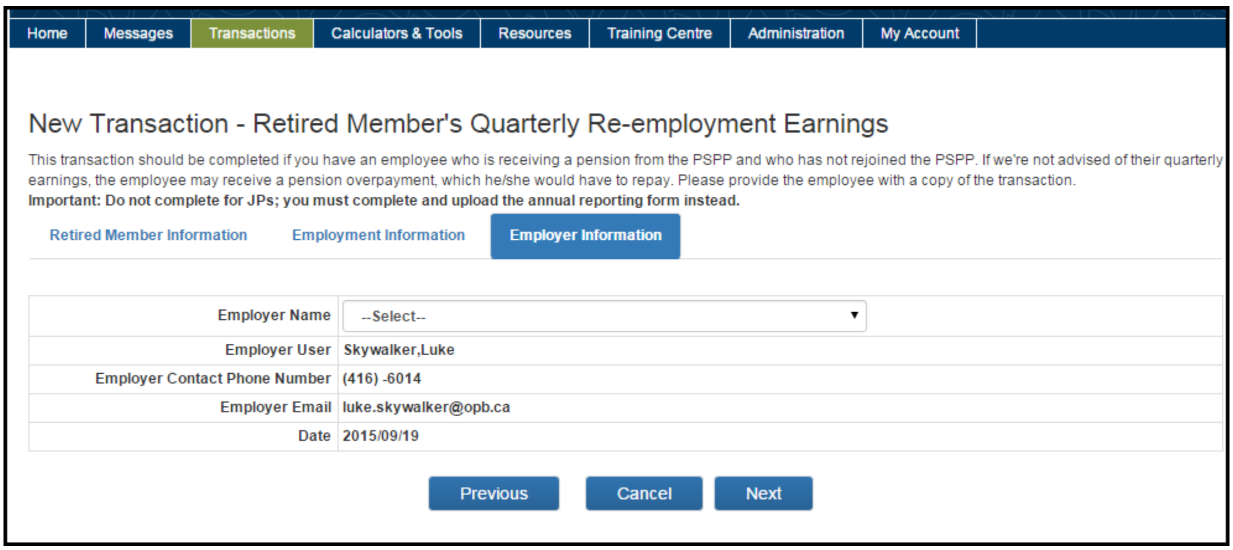
Result: The portal will allow you report re-employment earnings for additional quarters. Click **Add** for each additional quarter you need to report.



3.4. Once you've finished entering re-employment earnings, click **Next**.

Result: The Employer Information page opens.

Step 4: Review the Employer information page.



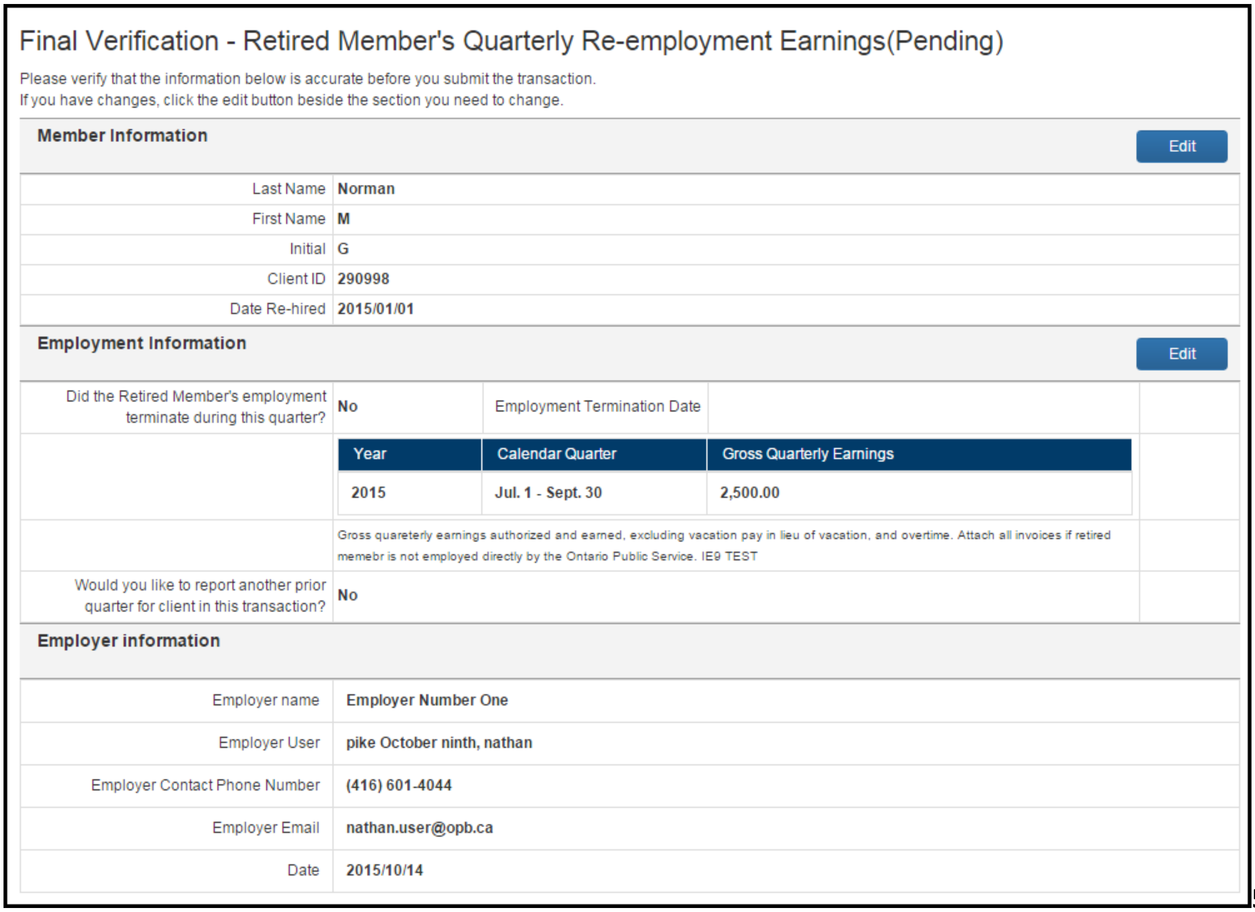
4.1. Select the pensioner's employer for your portfolio of ministries.

4.2. Review your contact information. Click **My Accounts** to make updates. Contact OPB to change your email address.

4.3. Once you've confirmed your contact information is up-to-date, click **Next**.

Result: the Final Verification page opens.

Step 5: Final Verification screen – Retired Member's Quarterly Re-employment Earnings



Final Verification - Retired Member's Quarterly Re-employment Earnings(Pending)

Please verify that the information below is accurate before you submit the transaction.
If you have changes, click the edit button beside the section you need to change.

Member Information Edit

Last Name	Norman
First Name	M
Initial	G
Client ID	290998
Date Re-hired	2015/01/01

Employment Information Edit

Did the Retired Member's employment terminate during this quarter?	No	Employment Termination Date	

Year	Calendar Quarter	Gross Quarterly Earnings
2015	Jul. 1 - Sept. 30	2,500.00

Gross quareterly earnings authorized and earned, excluding vacation pay in lieu of vacation, and overtime. Attach all invoices if retired memebr is not employed directly by the Ontario Public Service. IE9 TEST

Would you like to report another prior quarter for client in this transaction?	No

Employer information

Employer name	Employer Number One
Employer User	pike October ninth, nathan
Employer Contact Phone Number	(416) 601-4044
Employer Email	nathan.user@opb.ca
Date	2015/10/14

5.1.

5.1. Please carefully review all the information for accuracy. If you need to edit any sections, click **Edit** beside the section, this will take you back to the page where changes are needed. Click **Next** to navigate back through the transaction to return to the Final Verification page once all changes have been made.

5.2. Once you're satisfied that all the information is correct, click **Submit** at the bottom of the page. You can also click **Delete** if the transaction is no longer required or you can click **Cancel** if you want to submit the transaction later.

Result: The transaction is submitted to OPB. At this point, additional validations may be triggered which could prevent the transaction's submission – *see the following error message summary for more information*.

5.3. Once the transaction has been submitted successfully, click **Print.**

Result: you will have a paper copy of the transaction for the member's corporate file.

Error Message Summary – Retired Member’s Quarterly Re-employment Earnings

Below is a list of the possible error messages you may encounter while completing a Retired Member’s Quarterly Re-employment Earnings transaction and tips on how to clear them.

Page	Error Message	Cause	How to clear the error
Retired Member Information	Please contact OPB to request the member’s client number.	(You only searched using the member’s name) This is the first time a re-employment report has been submitted for this member.	Get the client number from the member or contact OPB.
Retired Member Information	Please contact OPB to request the member’s client number.	The name and client number you’ve entered don’t match any of our active pensioners.	Please contact OPB to request the member’s client number.
All pages	This is a required field	You’ve left a mandatory field blank (denoted with a *)	Enter the required information.
Employment Information	(Soft warning) Please note that delays in reporting re-employment earnings can result in large overpayments for the member. Please ensure you report future quarters on time. A quarterly report should be submitted the month after the quarter ends.	You’re reporting earnings for a quarter prior to the most recently ended one.	You should try to report re-employment earnings the month following the end of a calendar quarter.
Employment Information	Please report quarterly earnings in descending order; i.e., the first quarter reported must be the most recent and the last quarter reported must be the oldest.	You aren’t entering earnings in chronological order.	Report earnings starting with the most recent quarter to the oldest quarter.

Page	Error Message	Cause	How to clear the error
Employment Information	Re-employment earnings have already been submitted for this quarter.	Earnings have already been submitted for the quarter you’re trying to report.	Verify if a transaction has already been submitted for that quarter. If you can’t locate it, contact OPB.
Employment Information	Please submit the transaction after the calendar quarter has ended.	You may be trying to submit earnings for the current calendar quarter.	Review your information. If you made a typo, please correct it. If you’re trying to report for the current quarter, please wait until the quarter has ended.

3.6 The Document Upload Transaction

You can upload and submit member documentation through the portal independent of a transaction or a secure message. For example, you would use the document upload tool to submit supporting documentation that the member wasn't able to provide when you submitted their enrolment transaction.

You can upload up to three separate attachments using this tool. The maximum size of each attachment is 700kb. You can upload the following types of files:

- Word documents;
- Excel documents;
- PDF documents; and
- and CSV documents.

Step 1: Initiate document upload.

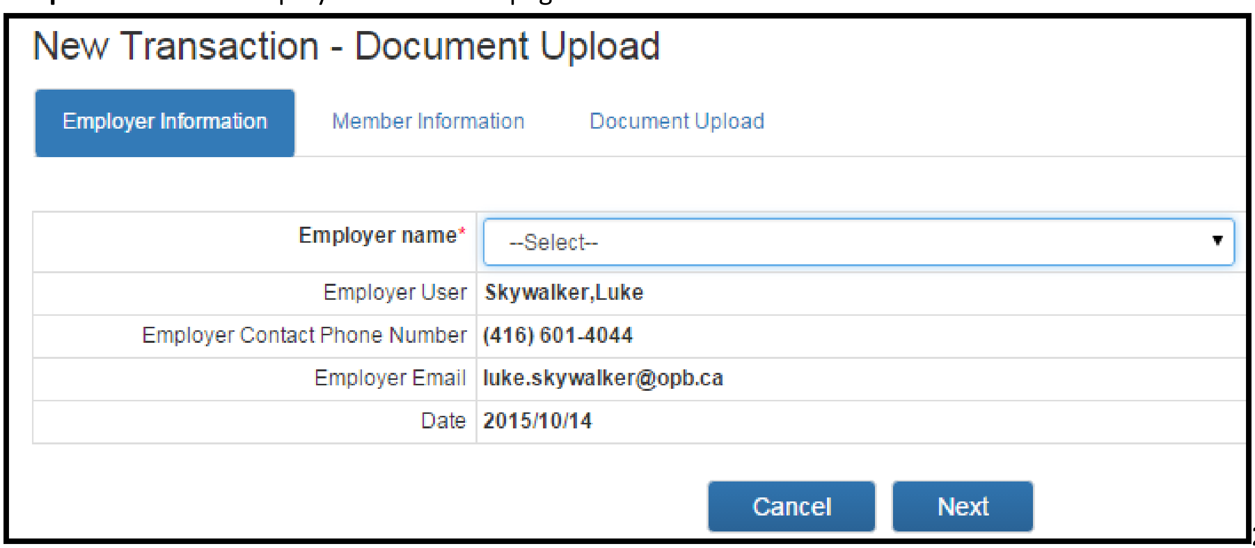
1.1. Click on the transaction tab

1.2. Click the New transaction on the left-hand navigation menu

1.3. Select **Document Upload** from the dropdown menu

Result: The Employer Information page opens.

Step 2: Review the Employer Information page



2.1.

2.2. Select the member's ministry.

2.2. Review your contact information and go to My Account if any updates are required. Please contact OPB if you need to change your email address.

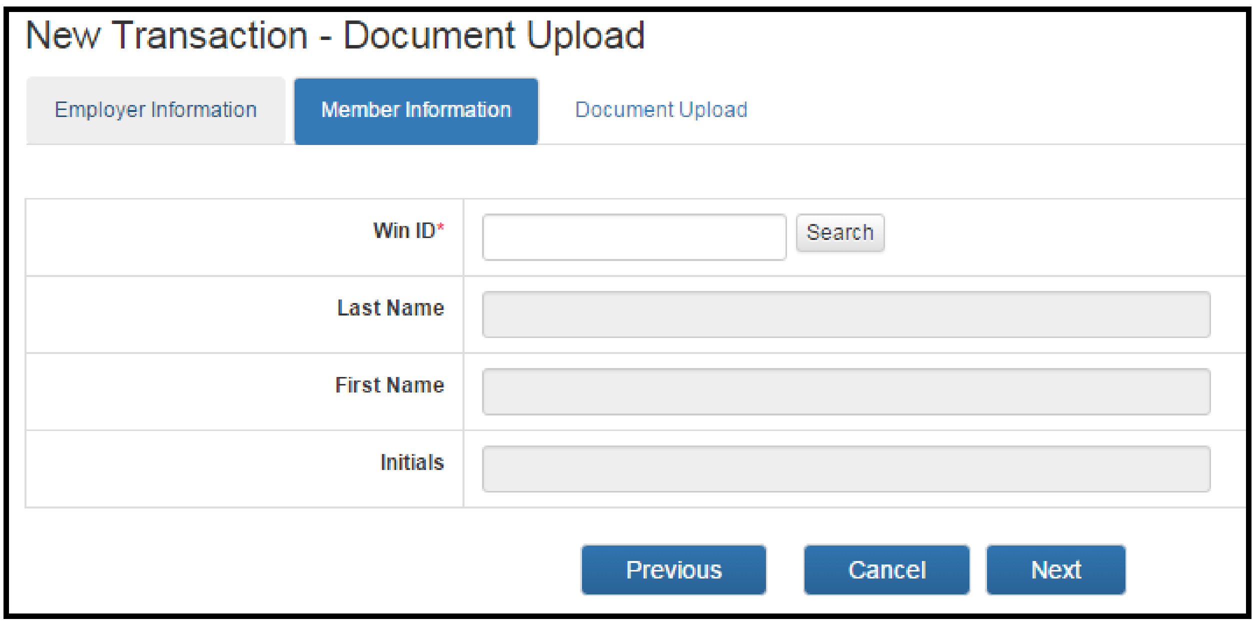
2.3. Once you've verified that your information is up-to-date, click **Next**.

There are several buttons at the bottom of each page which are common across most transaction pages:

- Click **Next** and **Previous** to move between pages within the transaction. Do not use the Browser **Back** button to navigate between pages.
- Any information you've entered on a page is saved as soon as you click **Next**.
- To put a transaction in pended status, simply leave the transaction page. The transaction will save all information up to the last time you clicked **Next**. You can complete the transaction at any time by clicking the **Pending Transaction** on the left-hand navigation menu. To delete a partially complete transaction, go to your pending transactions page and delete it.
- The **Cancel** button allows you to exit without saving any of the information you've entered on a page.

Result: The Member Information page opens.

Step 3: Complete the Member Information page.



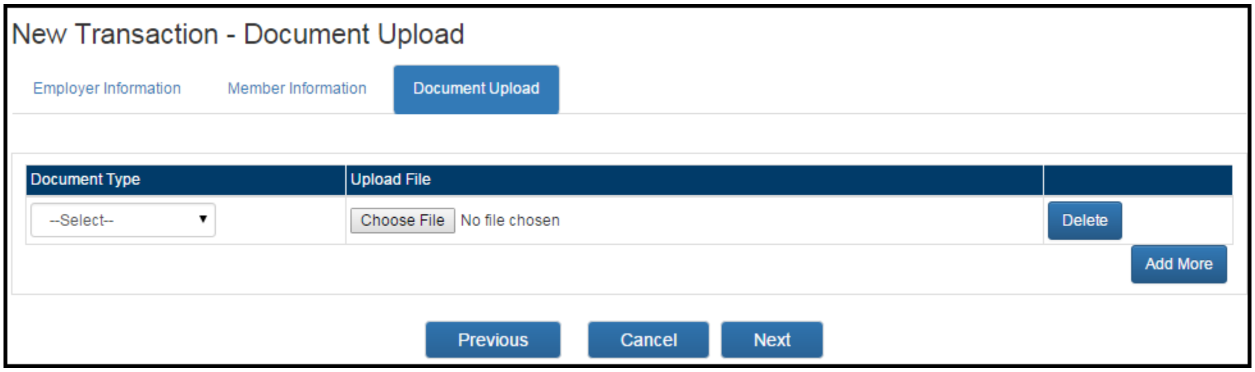
3.1. Enter the member's WIN and click **Search.**

Result: The member's name will auto-populate.

3.2. Click **Next**.

Result: The Upload page opens.

Step 4: Upload the documentation



4.1. Select the document type you want to upload. You can select from the following options:

- SIN
- Proof of age for member
- Proof of age for eligible children
- Proof of age for spouse
- Declaration of Spousal Status (OPB3007)
- Proof of marriage (including common-law support letters), if applicable
- Beneficiary Designation Form (OPB1015)
- Death Certificate for Member
- Death Certificate for Spouse
- Surplus letter
- Pre-Retirement Part-time Employment Participation letter
- TD1 Forms - Federal and Provincial
- Beneficiary Designation Form (OPB1015)
- Other

Please don’t use document upload to send us the Termination of Optional Membership form (OPB1057), Please attached a scanned copy of the form to a secure message and select the termination of optional membership as the message type.

4.2. Click **Browse** to locate the file you want to upload. Click **OK**.

4.3. Click **Add** if you want to attach additional documents. You can upload up to 3 documents in one transaction.

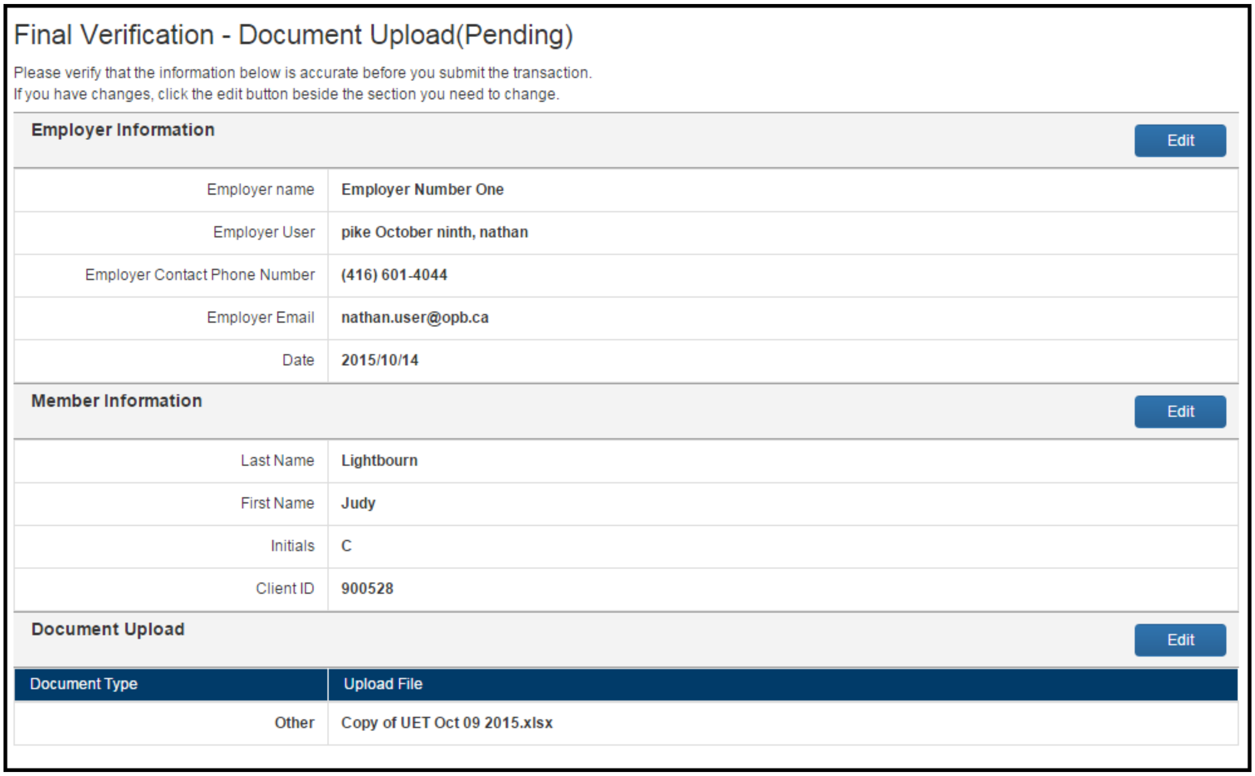
Note: you can click delete if you add a document in error

4.4. Once you’ve added all the documents you want to submit, Click **Next**.

Result: The final verification page opens.

Step 5: Submit the documents.

5.1. Review the Final Verification page.



Final Verification - Document Upload(Pending)

Please verify that the information below is accurate before you submit the transaction.
If you have changes, click the edit button beside the section you need to change.

Employer Information Edit

Employer name	Employer Number One
Employer User	pike October ninth, nathan
Employer Contact Phone Number	(416) 601-4044
Employer Email	nathan.user@opb.ca
Date	2015/10/14

Member Information Edit

Last Name	Lightbourn
First Name	Judy
Initials	C
Client ID	900528

Document Upload Edit

Document Type	Upload File
Other	Copy of UET Oct 09 2015.xlsx

You cannot view the attachment once you've uploaded it. So, please verify that you have the correct document before uploading it to the transaction.

5.2. Once you've verified that all the information is correct, click **Submit**.

Result: The documents are submitted through the portal. The portal will indicate whether the submission was successful or whether additional action is required.

Error Message Summary – Document upload

Transaction Page	Error Message	Cause	How to clear it
All pages	This is a required field	You didn't complete a mandatory field (*indicates a mandatory field),	Enter the missing information
Member Information	There is no member with that WIN enrolled in the PSPP at your organization. Please enter a valid WIN ID.	You've either entered an invalid WIN, entered a WIN for a member who isn't employed at the ministry you've selected, or the member is no longer a contributing to the PSPP	Verify the member's WIN and Ministry and enter the correct information.
Document Upload	Please attach the document once the document type is selected.	You clicked **Next** before attaching a document	Attach the document.
Document Upload	You are allowed to upload no more than 3 documents	You've exceeded the maximum attachments allowed in one transaction.	Please initiate a second document upload transaction for the excess attachments.

3.7 Online Transactions: Other Functionality

We’ve created additional functionality that enables users to save partially completed transactions, search for transactions, amend previously submitted transactions, and even revoke transactions that were submitted in error.

How do I search for transactions?

You can search for any transaction that has been initiated in the portal, including those that have been initiated but not submitted.

To search for a transaction:

Step 1: Click **Search Transactions** on the left side of the transaction page, and enter the relevant search criteria on the resulting page.

You can use the following criteria:

- Transaction type
- Employer: You can select from your portfolio of ministries
- Member’s name
- From and To dates
- Transaction ID

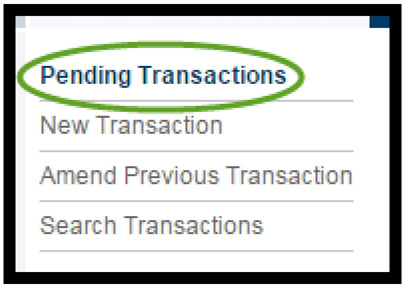
Step 2: Click **Search**.

Result: The transaction you need to locate is shown.

Step 3: Select the transaction and click **View**.

Result: the portal opens to the transaction’s final verification page - you cannot take any action on this page. If you need to make changes, click **Amend Previous Transactions** on the left-hand navigation menu.

What are pending transactions?



The portal will automatically save partially completed transactions. However it only saves the current page when you click **Next** and pass all the validations on that page. You can't save partially completed pages.

When you go to the pending transactions page, all the transactions you've initiated but haven't submitted or cancelled are listed.

To submit a pending transaction:

Step 1: On the Pending Transactions page, Click **View** beside to the transaction you want to submit or edit.

Result: The transaction opens to the Final Verification page.

Step 2: Once you've made any necessary changes, Click **Submit**.

Result: The portal will submit the transaction.

To delete a pending transaction

Step 1: On the Pending Transactions page, Click the **View** button beside the transaction you want to delete

Result: The transaction opens to the Final Verification page.

Step 2: Click **Delete**.

Result: The portal will ask you if you're sure you want to delete the transaction.

Step 3: Click **OK.**

Result: The transaction has been deleted.

How do I amend a transaction?

You can amend most transactions after they've been submitted *except for enrolments*.

To amend a transaction:

Step 1: Click **Amend Previous Transaction** from the left-hand navigation menu, and enter the relevant search criteria:

- Transaction type (Mandatory)
- Employer : You can select from your portfolio of ministries
- Member's name (this is mandatory)
- From and To dates
- Transaction ID

Step 2: Click **Search**.

Result: The previously submitted transaction is shown

Step 3: Select the transaction and click **View**.

Result: the portal opens to the transaction final verification page.

Once the original transaction has been amended, it can only be viewed.

Only the most recently submitted transaction (i.e., the amended transaction) can be changed. The portal will allow you to toggle between the original transaction and any subsequent amendments that have been submitted.

Step 4: Click **Amend** at the bottom of the page.

Result: You can now amend the transaction.

Step 5: Once you've made the necessary changes, click **Submit** at the bottom of the page.

Result: OPB is notified that a transaction has been amended.

How do I revoke a transaction? (i.e., cancel a transaction that has been submitted)

If a transaction was submitted in error, or the member has reversed their election, you can revoke a previously submitted transaction. While the revocation doesn't remove the record of the transaction, it will alert us to review and take appropriate action.

Once a transaction is revoked, the portal will not prevent you from submitting a subsequent transaction of the same type in the future.

You cannot revoke either Service Report for Buybacks or Quarterly Re-employment Earnings transactions.

To revoke a transaction:

Step 1: Click **Amend Previous Transaction** from the left-hand navigation menu, and enter the relevant search criteria:

- Transaction type (Mandatory)
- Employer : You can select from your portfolio of ministries
- Member's name (this is mandatory)
- From and To dates
- Transaction ID
-

Step 2: Click **Search**.

Result: The previously submitted transaction is shown

Step 3: Select the transaction and click **View**.

Result: the portal opens to the transaction final verification page.

Step 4: Click **Revoke** at the bottom of the page.

Result: After confirming that you want to proceed with the revocation, the transaction's status will be changed to Revoked and it will not impact any future transaction submissions of the same type.

4.0 Online Calculators

We've developed two online calculators to assist you in your work; a contribution calculator and a PA calculator.

4.1 OPB's Online Contribution Calculator

We know manual calculations can be difficult, especially if they require pro-rating, which is why we've launched our contribution calculator. ***Please ensure you use the calculator when you need to do a manual contribution calculation.***

Using the contribution calculator helps:

- ensure you know the correct contribution amount to deduct; and
- reduce contribution variances and the extra work they create

How our calculator works

We've designed our calculator to run contribution deduction calculations for 4 common scenarios. So, before using the calculator**,** identify why you need to run the calculation. This will determine which calculation scenario you need to use.

For example:

- If the member had a salary change in the middle of a pay period, you would use Scenario 2.
- If the member was hired or terminated during a pay period, you would use Scenario 3.

How to use the calculator:

Step 1: Click on the **Calculators & Tools** tab from the top navigation menu.

Result: The contribution calculator opens.

Step 2: Choose the contribution scenario you want to use from the **I want to** dropdown.

Result: The calculator will display the fields you need to complete for the calculation scenario you chose.

Here’s a chart to help you identify which scenario to use.

Scenario	When to select this scenario	Scenario rules
1. Calculate the contribution deduction for a future pay period	When you want to know what the contribution deduction is at specified salary rate for full pay period.	Use this scenario to determine the contribution deduction for full-time or regular part-time members only.
2. Calculate the contribution deduction for a pay period with a salary change in it	• When a member’s rate of pay changes during a pay period. • When a member’s employment status changes (e.g., full-time to part-time) during a pay period. • The member’s benefit group code (OPPA, OPPC) changes during the pay period.	You can only calculate the contribution deduction for one full payroll period. The calculator will also display a projected contribution for the next pay. • Please note that the projection assumes the member will work full-time on the next pay, unless you’ve indicated in the scenario that they’re regular part-time and have an RPT ratio. • This means that it will not correctly project the calculation for unclassified or seasonal members, unless they happen to work full-time on the next pay.
3. Calculate the contribution deduction for a partial pay period	• A member was hired or terminated during a payroll period. • A member is going on unpaid leave of absence in the middle of pay period. • A member returned from unpaid leave of absence in the middle of the pay period.	You can only calculate the contribution deduction for a period that is less than one full payroll cycle.
4. Calculate the total contributions for a specific period within the same payroll year	You need to calculate the contribution deduction for a period up to one payroll year.	The period you’ve selected must be within the same payroll year, with no breaks between each salary periods.

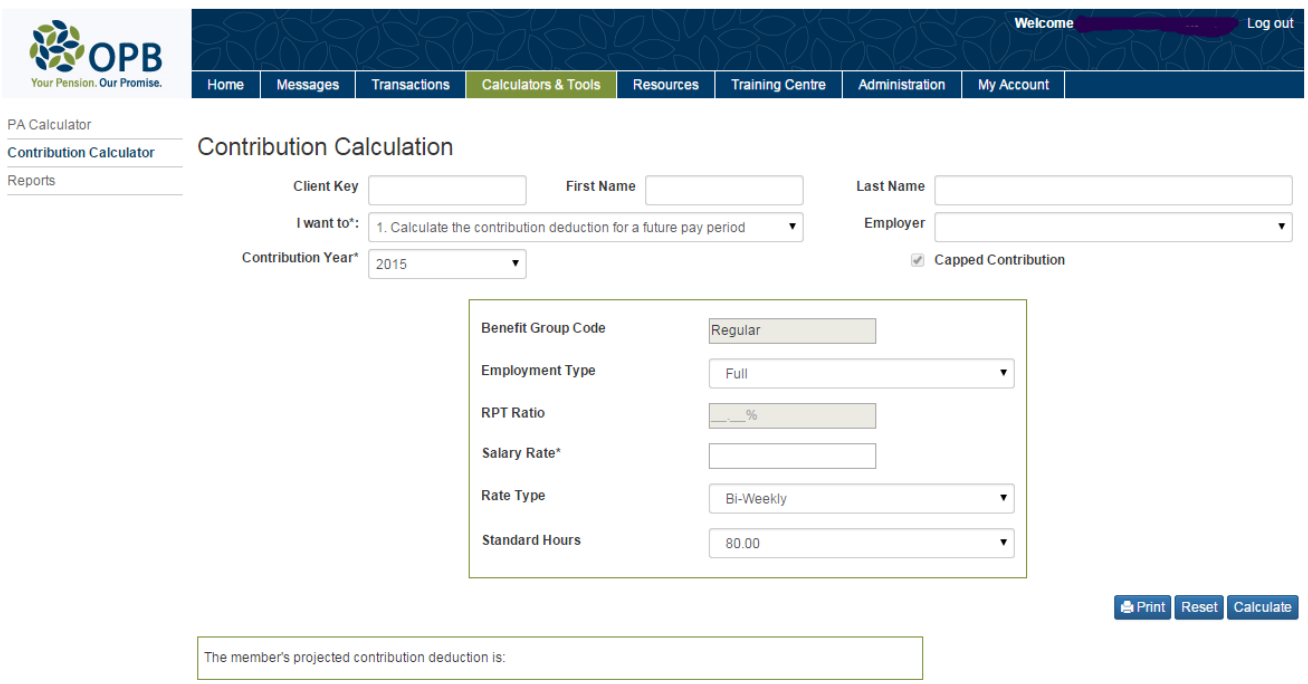
Step 3: Complete the basic member information section. Regardless of which scenario you choose, you will always need to complete the following member information fields.

Field name	Description
Client Key / WIN ID	OPB Client Number / OSS WIN Number (This field is not mandatory)
First Name	Member's first name (This field is not mandatory)
Last Name	Member's last name (This field is not mandatory)
Employer (s)	You can select from your portfolio of ministries.
Contribution Year (mandatory field):	Enter the current year or either of the 2 prior years.

Step 4: Complete the scenario specific fields. In the next section we'll take you through how to run a calculation for Scenario 1, followed by Scenarios 2-4.

Contribution Calculator - Scenario 1

If you chose scenario 1, the calculator looks like this:



How to complete the fields in this scenario

After completing the basic member information fields that apply for each scenario, you'll start completing the scenario-specific fields.

Field	Field description
Employment Type	Indicate the member's employment type for the salary period (e.g., full-time) **Note:** For Scenario 1, you can only choose between full-time and regular part-time (RPT) employment.
RPT Ratio	If you indicated that the member's employment type is RPT, please indicate their RPT ratio (up to 100%).
Rate Type	Select the member's rate of pay type; i.e., Hourly (H), Bi-weekly (Bi)
Salary Rate	Enter the member's salary rate. **Please note:** If you're entering bi-weekly salary information for a member who is employed on a RPT basis, enter their bi-weekly part-time salary rate
Standard Hours	Select the member's standard hours. For regular part-time members, please remember to select full time equivalent hours.
Benefit Group Code – dropdown	If you don't have the Ministry of Community Safety in your portfolio, this field will be auto-populated with Regular. If you have the Ministry of Community Safety in your portfolio, you can select from the following options (This will determine applicable contribution rates): • Regular (the default option) • Ontario Provincial Police Association i.e., Officers (OPPA) • Ontario Provincial Police Civilian (OPPC) • Ontario Provincial Police Commissioners/Deputy Commissioners (OPPD)
Number of Days	This field will be auto-populate to indicate the number of calendar days in the period you've entered.

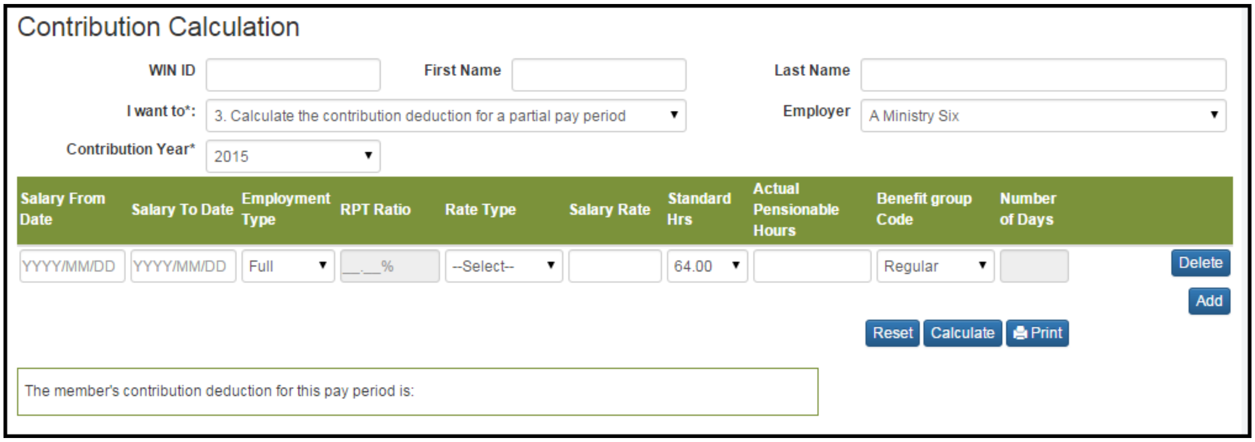
Step 5: Once you've completed all the fields, click **Calculate**.

Result: The contribution deduction is displayed.

Step 6: Click **Print** to print a copy of the calculation or click **Reset** to clear the fields if you want to run another calculation.

Contribution Calculator - Scenarios 2-4

If you chose scenario 2-4, the calculator looks like this:



How to complete the fields in Scenarios 2-4

After completing the basic member information fields that apply for each scenario, you'll start completing the scenario-specific fields.

Note: For Scenario 2, the calculator will also display a projected contribution for the next pay.

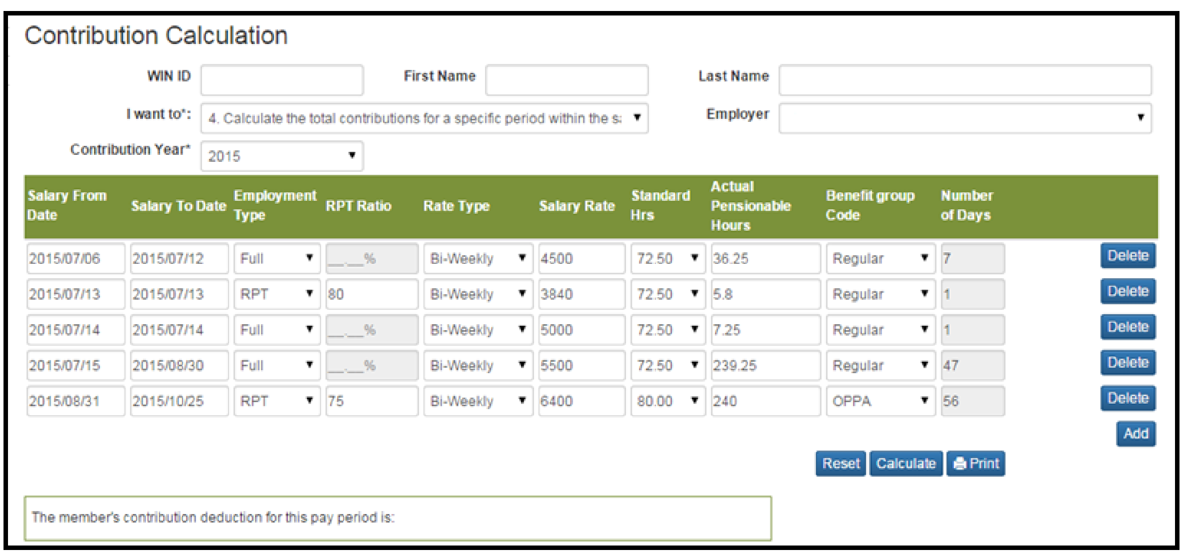
However, the projection assumes the member will work full-time on the next pay, unless you've indicated in the scenario that they're regular part-time and have an RPT ratio. *This means that it will not correctly project the calculation for unclassified or seasonal members, unless they happen to work full-time on the next pay.*

Field	Field description
Salary From Date	Depending on the scenario you've selected, this could be • the first day of the payroll period • the first day that the member was paid at a new salary rate • the date the member was enrolled in the Plan, or • the date member returned from unpaid leave of absence or LTIP. **Note:** This information is not required if you chose Scenario 1.
Salary To Date	Depending on the scenario you've selected, this could be • the last day of the payroll period • the last day the member was paid at a particular salary rate before it changed • last day the member contributed to the Plan, or • last day the member worked before they went on unpaid leave of absence or LTIP.
RPT Ratio	If you indicated that the member's employment type is RPT, please indicate their RPT ratio (up to 100%).

Field	Field description
Rate Type	Select the member's rate of pay type; i.e., Hourly (H), Bi-weekly (Bi), or
Salary Rate	Enter the member's salary rate. **Please note:** If you're entering bi-weekly salary information for a member who is employed on a RPT basis, enter their bi-weekly part-time salary rate
Standard Hours	Select the member's standard hours. Note: For regular part-time members, please remember to select full time equivalent hours.
Actual Pensionable Hours	Refers to the number of pensionable hours the member actually earned during the salary from date and salary to date you entered.
Benefit Group Code – drop down menu	If you don't have the Ministry of Community Safety in your portfolio, this field will be auto-populated with Regular. If you have the Ministry of Community Safety in your portfolio, you can select from the following options (This will determine applicable contribution rates): • Regular (the default option) • Ontario Provincial Police Association i.e., Officers (OPPA) • Ontario Provincial Police Civilian (OPPC) • Ontario Provincial Police Commissioners/Deputy Commissioners (OPPD)
Number of Days	This field will be auto-populate to indicate the number of calendar days in the period you've entered.

Step 5: If the member's rate of pay or employment type changed during the period you're calculating the contribution deduction for, click **Add.**

Result: The calculator adds another row where you can enter salary and employment information. You can add up to 5 rows.


Contribution Calculation

WIN ID | First Name | Last Name

I want to*: 4. Calculate the total contributions for a specific period within the s | Employer

Contribution Year* 2015

Salary From Date	Salary To Date	Employment Type	RPT Ratio	Rate Type	Salary Rate	Standard Hrs	Actual Pensionable Hours	Benefit group Code	Number of Days	
2015/07/06	2015/07/12	Full	___%	Bi-Weekly	4500	72.50	36.25	Regular	7	Delete
2015/07/13	2015/07/13	RPT	80	Bi-Weekly	3840	72.50	5.8	Regular	1	Delete
2015/07/14	2015/07/14	Full	___%	Bi-Weekly	5000	72.50	7.25	Regular	1	Delete
2015/07/15	2015/08/30	Full	___%	Bi-Weekly	5500	72.50	239.25	Regular	47	Delete
2015/08/31	2015/10/25	RPT	75	Bi-Weekly	6400	80.00	240	OPPA	56	Delete

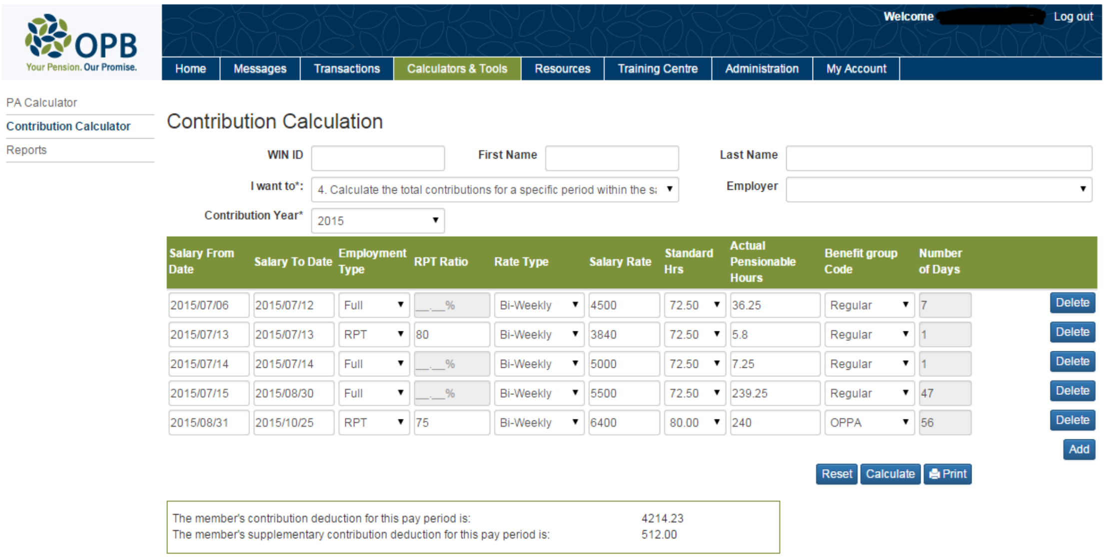
Add

Reset Calculate Print

The member's contribution deduction for this pay period is:

Step 6: Once you've finished entering salary information, click **Calculate**.

Result: The contribution deduction is displayed.



Step 7: Click **Print** to print a copy of the calculation or click **Reset** to clear the fields in order to perform your next calculation.

4.2 OPB's Online Pension Adjustment (PA) calculator

We prepared this section to introduce you to our online pension adjustment (PA) calculator.

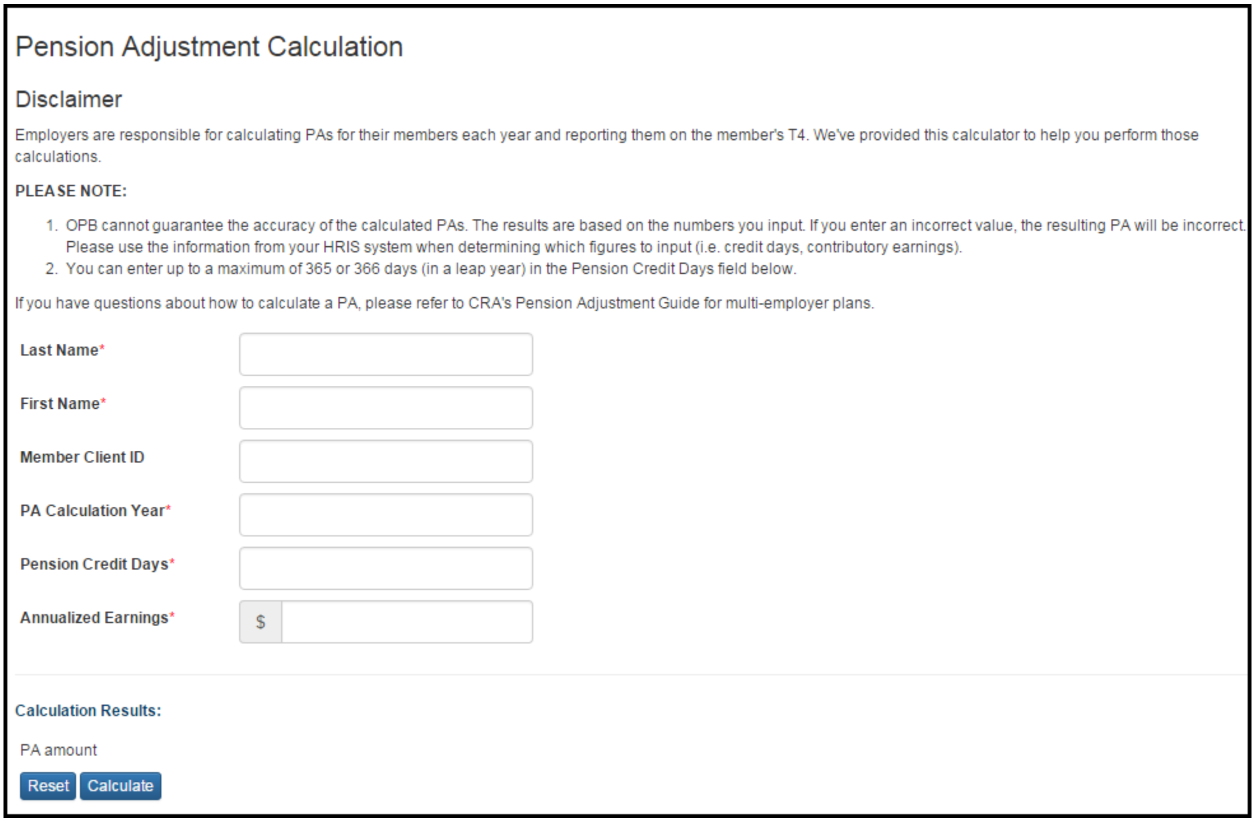
How to open the PA calculator

Step 1: Log into the portal.

Step 2: Click on the **Calculator & Tools** tab.

Step 3: Click **PA Calculator** on the left –hand navigation menu.

Result: The PA calculator opens.



Pension Adjustment Calculation

Disclaimer

Employers are responsible for calculating PAs for their members each year and reporting them on the member's T4. We've provided this calculator to help you perform those calculations.

PLEASE NOTE:

1. OPB cannot guarantee the accuracy of the calculated PAs. The results are based on the numbers you input. If you enter an incorrect value, the resulting PA will be incorrect. Please use the information from your HRIS system when determining which figures to input (i.e. credit days, contributory earnings).
2. You can enter up to a maximum of 365 or 366 days (in a leap year) in the Pension Credit Days field below.

If you have questions about how to calculate a PA, please refer to CRA's Pension Adjustment Guide for multi-employer plans.

Last Name*

First Name*

Member Client ID

PA Calculation Year*

Pension Credit Days*

Annualized Earnings* $

Calculation Results:

PA amount

Reset Calculate

How to calculate a PA

Step 1: Once you've opened the PA calculator, enter the following information:

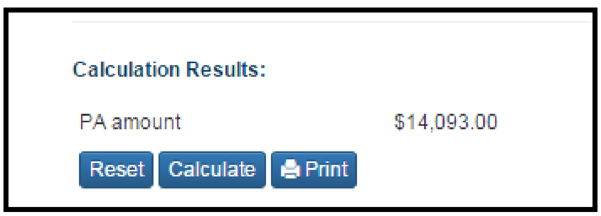
Field name (s)	Description
Last Name, First Name,	The member's name
Client Number	The member's client ID
*PA Calculation Year	The year you are calculating the member's PA for. You can use the current, or the two prior years.

Field name (s)	Description
	Note: Once you've selected the year, the calculator will apply the relevant annual figures (i.e., YMPE and ITA prescribed PA maximum) needed to calculate the PA.
*Pension Credit Days	The number of days of pension credit the member has earned in the PSPP from your records.
*Annualized Earnings	The member's annual earnings on which you deducted PSPP contributions. **Note:** if the member was employed on a part-time basis or was only enrolled in the PSPP for a partial year, you must annualize their earnings before calculating their PA. **Use the following formula to annualize earnings:** Earnings on which contributions were deducted x (365 days or 366 days) ÷ The number of days of pension credit the member earned in the PSPP

* indicates a mandatory field

Step 2: Click **Calculate**.

Result: The calculator displays the member's PA based on the information you input.



Step 3: Click **Print** to generate a record. Click **Reset** to clear the fields to calculate another PA.

5.0 Employer Reports

You can use the portal to run a number of reports regarding the number, type, and status for both secure messages and transactions submitted through the portal.

Types of Reports

Super users can run the following reports based on their portfolio of ministries:

Report Name	Description
Messages in progress	Run this report to find out how many secure messages are currently in progress at your organization. You can tailor the report to track messages by type or username (i.e., the user who initiated the message) for any period you specify. The report will also indicate how much time as elapsed since a user initiated the message.
Messages resolved	Run this report to determine how many secure messages (by type) have been resolved and how long it took to close the message. Like messages in progress, you can tailor the report to track messages by type or username (i.e., the user who initiated the message) for any period you specify.
Missing re-employment earnings transactions	Use this report to identify how many quarterly re-employment earnings transactions are missing/outstanding for the most recently ended quarter. A transaction is considered missing if a report was submitted the previous quarter with no employment termination date listed, and the employer fails to submit a re-employment transaction within 45 days of the subsequent quarter ending. E.g. If your organization submitted 5 re-employment transactions last quarter and indicated that nobody's employment terminated, we would expect at least 5 transactions the next quarter. If we only received 4 transactions, the report would identify 1 missing quarterly re-employment report.
Transaction activities	Run this report to find out how many transactions users with a specific portfolio of ministries submitted for any period you specify.
Late transactions	Use this report to determine how many transactions were submitted late by users with a selected portfolio of ministries. You use this report to determine which transactions were late, the user who submitted the transaction and the number of days it was late. For more information about late transactions, see the following table, when are transactions considered late?
On-time transactions	Similar to the late transaction report, this report shows how many transactions that users submitted on-time.

When are transactions considered late?

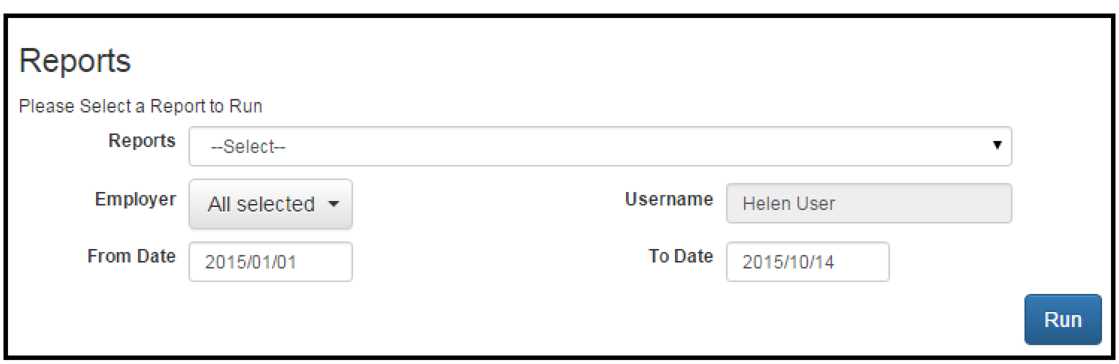
It is very important that you submit transactions in a timely fashion. Late reporting can have a significant impact on the member. It can impact our ability to provide the member with information and options in a timely fashion and can cost the member financially.

The following table outlines when a transaction is considered late:

Transaction type	Is considered late if:
Enrolments	The transaction is submitted more than **14** calendar days after the plan membership date.
Unpaid Leaves of Absence	The transaction is submitted more than **30** calendar days after the leave start date
Service report for buybacks	N/A. However, please ensure you submit this report in a timely fashion. Not doing so can lead to an increased cost for the member, and you as the employer, if the buyback is employer-matched (i.e. within 24 months of joining the Plan)
Regular PSPP termination	The transaction is submitted more than **15** calendar days after the termination date.
PSPP termination due to death	The transaction is submitted more than **15** calendar days after the member's date of death.
A PSPP termination due to a mandatory transfer to OPT	The transaction is submitted more than **30** calendar days after the termination date.
Retirement/disability pension	The transaction is submitted more than **30** days after the termination date.
Re-employment Quarterly earnings	The transaction has not been received more than **45** calendar days after the end of the previous calendar quarter.

How to run a report:

Step 1: Log into the portal.
Step 2: Click on the **Calculator & Tools tab**.
Step 3: Click on the **Reports** link on the left-hand navigation menu.
Result: The reports page opens



Step 4: Enter the following information to run the report:

Field	Description
Report type	Select the report you want to run
Employer	You can adjust the report parameters according to your portfolio of ministries.
User Name	Field auto-populates with your user name
From start	The start date of the period for which you want the report based
To Date	The end date of the period for which you want the report based

Step 5: Click **Run**.
Result: The portal generates the reported using the criteria you selected.

From Date 2015/01/01 To Date 2015/10/14 Transaction Type All
Employer 7979 Username un one

Export to Excel

Employer Name	User Name	Transaction ID	Client ID	Transaction Type	Transaction Date	Number of Days Late
Employer Number One	Four, OLG	1433	900241	Termination/Retirement	2015/10/07	7
Employer Number One	User, Merle	1321	900220	Termination/Retirement	2015/10/05	35
Employer Number One	User, Merle	1277	413472	New Enrolment	2015/10/05	70
Employer Number One	User, Merle	1283	900210	Leave of Absence	2015/10/05	278
Employer Number One	User, Merle	1507	900431	Leave of Absence	2015/10/09	251
Employer Number One	User, Merle	1532	900435	Termination/Retirement	2015/10/09	25
Employer Number One	User, Patricia	1326	900216	Termination/Retirement	2015/10/05	2
Employer Number One	User, Patricia	1327	900221	Termination/Retirement	2015/10/05	82
Employer Number One	four, un	1529	900343	Termination/Retirement	2015/10/09	8

Click **Export to Excel** if you want to convert the report into MS Excel for further analysis.

6.0 OPB training sessions

You can use the portal to sign up for OPB's employer training sessions (notifications come though the portal). After you've attended the session, the material related to the session is also available through the portal.

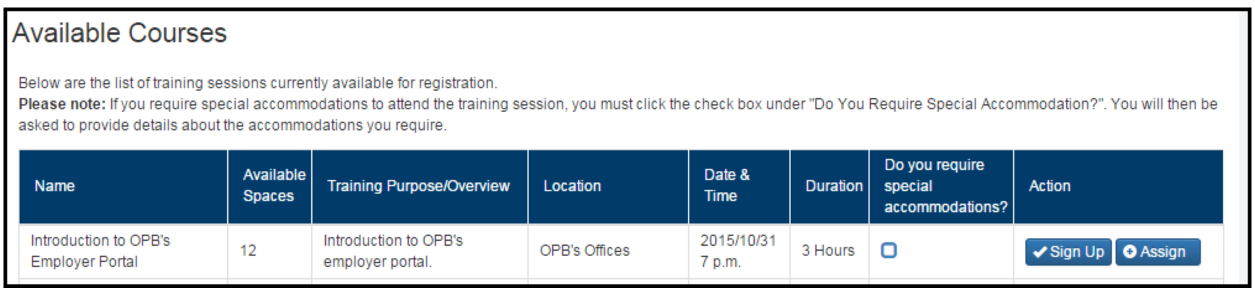
How to register for a training session

When OPB schedules a training session for your organization, we will broadcast the upcoming sessions as a news item available in the portal's *What's New* section.

Steps to register:

Step 1: Once you receive our training invitation, either click on the link provided in our invitation and click on **My Training**.

Result: The Available Courses page opens.


Available Courses

Below are the list of training sessions currently available for registration.
Please note: If you require special accommodations to attend the training session, you must click the check box under "Do You Require Special Accommodation?". You will then be asked to provide details about the accommodations you require.

Name	Available Spaces	Training Purpose/Overview	Location	Date & Time	Duration	Do you require special accommodations?	Action
Introduction to OPB's Employer Portal	12	Introduction to OPB's employer portal.	OPB's Offices	2015/10/31 7 p.m.	3 Hours		Sign Up Assign

Step 2: If the session has available spaces, you'll be able to sign up by clicking **Sign Up**. If the session is full, the sign up button will not display.

Note: If you require an accommodation to be able to fully participate in the session, please let us know by clicking the "requires special accommodation" checkbox. A pop-up window will appear and allow you to provide us with information on your accommodation needs.

Step 3: Click **Yes** to confirm your registration.

Result: You've been registered for the session. Your name is added to the attendee list and the session information will now be listed on your **Upcoming Training** page.

(Super Users only) You can register other employer users (who share the same portfolio) for sessions using the **Assign** button.

How to cancel your registration

Steps to cancel your registration:

Step 1: Click on the **Training Centre** tab and click on **Upcoming Training** on the left-hand navigation menu.

Result: The Upcoming Training page opens.

Upcoming Training

Session Name	Course Description	Training Date & Time	Duration	Action
Introduction to OPB's Employer Portal	Introduction to OPB's employer portal.	Oct 31 7 p.m.	3 Hours	Cancel View

Step 2: Click **Cancel** to cancel your registration.

Result: You've cancelled your registration and the session is no longer listed on your Upcoming Training page.

How to download training material

Once you've attended a training session, the training material will be available for download through the portal.

Steps to download material:

Step 1: Click on the **Training Centre** tab and Click on the Past Training link on the left-hand navigation menu.

Result: The **Past Training** page opens. The past training page will list all the OPB training sessions you've attended

Step 2: Click on the links for training documentation related to the session you just attended.

Result: The document is downloaded to your personal desktop and is available for viewing.

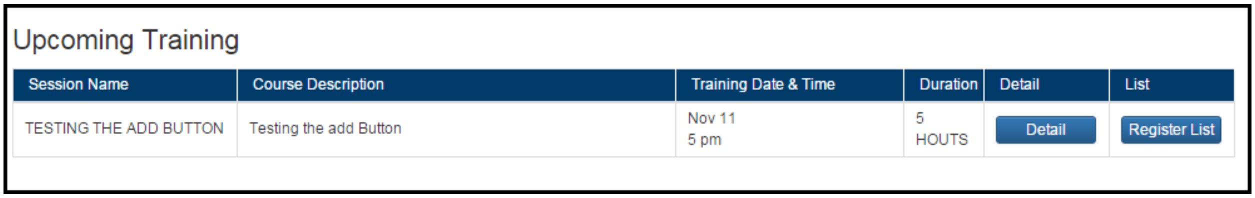
How to print the training registration list (super users only)

Super Users can view/print the list of users who've signed up for a training session.

Steps to view registration list:

Step 1: Click on the Training Centre tab and select the upcoming training option on the left-hand navigation menu.

Result: The **Upcoming Training Session** page opens.

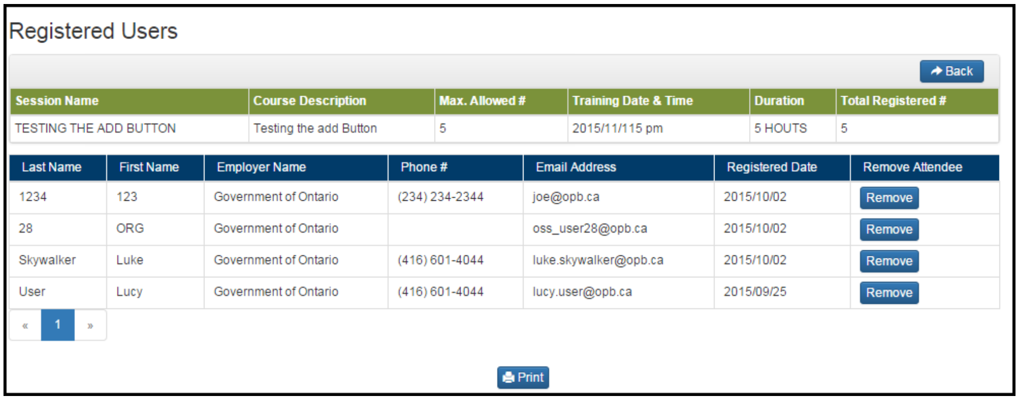


Upcoming Training

Session Name	Course Description	Training Date & Time	Duration	Detail	List
TESTING THE ADD BUTTON	Testing the add Button	Nov 11 5 pm	5 HOUTS	Detail	Register List

Step 2: Click **Register List**.

Result: The portal lists the users who've already registered for the course.



Registered Users

Back

Session Name	Course Description	Max. Allowed #	Training Date & Time	Duration	Total Registered #
TESTING THE ADD BUTTON	Testing the add Button	5	2015/11/115 pm	5 HOUTS	5

Last Name	First Name	Employer Name	Phone #	Email Address	Registered Date	Remove Attendee
1234	123	Government of Ontario	(234) 234-2344	joe@opb.ca	2015/10/02	Remove
28	ORG	Government of Ontario		oss_user28@opb.ca	2015/10/02	Remove
Skywalker	Luke	Government of Ontario	(416) 601-4044	luke.skywalker@opb.ca	2015/10/02	Remove
User	Lucy	Government of Ontario	(416) 601-4044	lucy.user@opb.ca	2015/09/25	Remove

« 1 »

Print

Step 3: Click **Print** if you need a copy of the registration list. Click **Remove** if you need to cancel a user's registration.

Step 4: To register additional employer users for the session, you can use the search functionality available through the **Available Courses** page to locate users who haven't registered and register them (see how to sign up for training for more information).