

HAMILTON-WENTWORTH DSB EARNS TOP HONOURS FOR 2006

With the challenges of amalgamation well behind them, Hamilton-Wentworth DSB has moved from sometimes delinquent to one of the best. We'd also like to acknowledge St. Michael's College School and Lakefield College School for becoming the "best in class" of our web-based reporting employers.



Joanne Kendall, Pension Administrator for the Hamilton-Wentworth District School Board, couldn't believe it when we called to give her the good news.

"I was aware of the spotlight feature and always thought it would be a great honour, especially since our board was targeted as very delinquent in responding to questions after amalgamation took place," said Joanne.



Joanne Kendall: "I wanted our board to be respected and TPP to know they could rely on the information that was reported."

With over 4,000 members, Hamilton-Wentworth is one of the largest employers outside of Toronto. While their Human Resources department sends payroll files and reports, Joanne is responsible for all day-to-day pension administration. She has worked at the board for 35 years, the past 10 directly with teachers' pensions.

"Payroll-based reporting and TIM has made all the difference,"

exclaimed Joanne. She often spent one week each month entering and calculating data for maternity and parental leaves – TIM now does it instantly for her.

"My goal is to have 100% of the service data we send each month reliable for use in benefit calculations," said Joanne (this monthly "Data management" statistic is found under Trends & Measures in TIM).

Other employers that have been recognized for their excellent reporting practices have cited the importance of doing work in TIM on a regular basis. Joanne couldn't

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REPORTING EXCELLENCE

- ✓ **3-DAY** average response time to requests for member information
- ✓ **96%** of data received is reliable for use in benefit calculations – no additional validation work is required
- ✓ **99%** of employees have no data issues – we can process most service requests immediately

WHAT'S INSIDE

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EMPLOYER EXCELLENCE FOR 2006

PREVIOUS SELECTIONS...

RAINBOW DSB (SUDBURY)

HASTINGS AND PRINCE EDWARD DSB (BELLEVILLE) – TWO-TIME WINNER

ALGOMA DSB (SAULT STE. MARIE)

THAMES VALLEY DSB (LONDON)

YORK REGION DSB (AURORA)

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agree more. “It is much easier to clean the issues when they happen rather than waiting until reconciliation. I never want to go through another historical clean-up!”

Joanne and her team in Employer Information Services have a great working relationship, something she cites as a key to her success.

“Joanne is always pleasant to deal with, regardless of the situation,” says Mark Greening, regional team leader (see page 3 for a profile on Mark’s team). “She works regularly in TIM, responds quickly to all inquiries and is always eager to reconcile as soon as possible. Joanne is the ideal board contact.”

Congratulations to Joanne, Paul, Stephen and Carol for their reporting excellence! ■

Joanne's Tips

- ✓ Use the tools provided by TPP – they are there to help you
- ✓ Check your Work Centre as often as possible (Joanne aims for daily)
- ✓ Clear issues as pays are run and reported to TPP

HONOURABLE MENTION: ST. MICHAEL'S AND LAKEFIELD

BEST IN CLASS

When reviewing this year’s nominations, a common theme became evident – the results for employers who have committed to web-based reporting have shown great improvement over the past few years. Two stood out: St. Michael’s College School and Lakefield College School.

Both of these designated private schools have made a smooth transition to our online reporting alternative for smaller employers (less than 150 members).



- Location - downtown Toronto
- WBR since October 2005
- Key contacts - Paul Thomson and Stephen Bailey

- Location - Lakefield, just outside Peterborough
- WBR since April 2005
- Key contact - Carol Jorgensen

Bringing Education to Life

LAKEFIELD
COLLEGE SCHOOL

While the volume of pension-related work can’t compare to the larger school boards, both schools have embraced a new reporting method and implemented our recommended best practices.

Congratulations to our key contacts at the schools: Paul Thomson at St. Michael’s and Carol Jorgensen at Lakefield.

Paul consistently provides us with more than we ask, often creating his own spreadsheets that help us reduce work and provide better service to their employees. Carol has worked extremely hard to make significant improvements in the past two years.

SPECIAL MENTION ALSO GOES TO...



Hastings and Prince Edward
District School Board

**FOR THEIR COMMITMENT AND STRONG RESULTS – THEY
CONTINUE TO SET THE BAR FOR REPORTING EXCELLENCE.**

GETTING TO KNOW...

MORE ABOUT YOUR TEAM

Our final regional team profile. We'll take a look at the EIS management team next issue.

JANET ROBINSON

Born and raised – Kleinburg (Ontario)

Which one word best describes your personality? – Understanding

Years at TPP – 19; all in EIS

“ *Building relationships with employers is very important to me. I don't think of my employers 'as a number' but more as colleagues that I would like to make happy.* ”

DIANNA VELOSO

Born and raised – Toronto

Which one word best describes your personality? – Outgoing

Years at TPP – 6; all in EIS

“ *I work with a wonderful group of people, who are diverse in character, experience and background.* ”

MARK'S TEAM AT A GLANCE

- More than 45 years of combined experience amongst 6 members
- Work with 50 employers, representing 41,000 members
- Greatest challenge – adapting to the constant change. Whether it is a new system or working with a new contact, the challenge is to seize the opportunity, share information and improve pension reporting efficiency.



Seated (l to r): Janet, Mark and Allison Kilpatrick (previously featured in July 2006 issue) Standing (l to r): Dianna, Dorine and Aurora

DORINE TIN POWE HOO

Born and raised – Mauritius (island in Indian Ocean, east of South Africa)

Which one word best describes your personality? – Friendly

Time at TPP – 5 months; all in EIS

“ *My team is always willing to explain new concepts or answer questions. I have quickly learned what is important to EIS... accurate data and board relationships.* ”

AURORA FERNANDEZ

Born and raised – Davao City, Philippines (came to Canada in '92)

Which one word best describes your personality? – Trustworthy

Years at TPP – 13; last 6 with EIS

“ *Working with employers and being able to solve their problems really makes my day.* ”

MARK GREENING

Born – Gander, Newfoundland; raised in Montreal, Quebec

Which one word best describes your personality? – Practical

Years at TPP – 3.5; all in EIS

“ *When friends ask about my job, I tell them that I work with acronyms: OTPP, EIS, EIF, TIM, LTIP, ESA, EAL... I also mention that I'm lucky enough to work with some really great people!* ”

THANKS FOR YOUR FEEDBACK

We value the information we receive through our annual survey, and also rely on your feedback throughout the year to determine where we can improve and help us set priorities.

The results are in! We were pleased to receive 90 responses to our annual survey. In addition to gathering information on our service levels, we received a lot of concrete feedback on TIM.

Considering the unique challenges we faced in 2006, the slight dip in our overall rating wasn't a surprise. With the work stoppage and refocus that followed, we were unable to deliver the same level of service, or some of the new initiatives we had planned.

We were able to identify clear differences based on the characteristics of the employer group (reporting method, number of members, organization type). Generally, larger school boards were more satisfied with reporting processes than their counterparts at designated organizations.



BEST RESPONSE RATE EVER!

2006 - 43%	2002 - 28%
2005 - 26%	2001 - 24%
2004 - 32%	2000 - 41%
2003 - 29%	1999 - 35%



MOST COMMON THEMES

1. Issue resolution
2. ESA
3. Account reconciliation
4. Search function
5. Settings (i.e., default views, report and sorting options, etc.)

TIM FEEDBACK

We expanded the 2006 survey to gather some additional feedback on specific areas of TIM.

When asked to identify satisfaction levels with six key areas, you expressed dissatisfaction with two sections: accounts/reconciliation and issue resolution.

We also asked for your suggestions on the one process or area of TIM that you would like us to improve. The majority of comments suggest that focus on issue resolution in the Work Centre would provide you with the greatest benefit.

Specifically, you would like to see:

- 1 More flexibility and/or resolution options (i.e., comment box, more reasons)
- 2 Improvement on our 48-hour response time

Other areas cited for improvement were ESA, LTIP and search functionality.

LOOKING AHEAD

We've been asking employers the same basic survey questions since introducing it in 1999.

As our services and processes have changed quite significantly over the years, we plan to change the 2007 survey to more accurately reflect our new business environment.

GENERAL COMMENTS

"We are always impressed and welcome changes made on TIM."

"The plan is overly complex and there seems to be no effort to make it more efficient to administer. It seems to find glory in complexity and detail."

"Support personnel have been the greatest assistance to me as time is so crunched."

iACCESS: YOUR EMPLOYEES' FIRST "CALL" FOR RETIREMENT

The decision to retire can be a stressful one for your employees. But applying to retire doesn't have to be thanks to iAccess Web, the secure members-only portion of our website.

SHORTER APPLICATION TIME

For years, we directed our members to apply for retirement three to six months ahead of time. There were calls to make, as well as forms to complete and return. Things sure have come a long way since then.

While we don't encourage members to wait to the last minute, we no longer need them to call us months in advance to apply for retirement. Registered iAccess Web users don't need to begin the online process before May if they plan to retire in June.

And if they don't want to shuffle paper or talk to anyone at our office, they don't have to. Thanks to iAccess Web, your employees can now retire online in four easy steps.

Once completed, employees can review their application, submit it and if they wish, print a copy for their records.

BY THE NUMBERS...

95,300

MEMBERS REGISTERED FOR iACCESS

40%

RETIRED ONLINE IN 2006

FOUR EASY STEPS TO RETIRE ONLINE

1 Pick a retirement date	2 Answer a few work-related questions	3 Verify personal information	4 Tell us where to deposit the pension
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If employees get stuck while online, help is only a phone call away. They can click a button while using iAccess Web and request an immediate or future call back from one of our pension benefits specialists.

As we head into the height of pension season, please encourage your retiring employees to visit iAccess Web. To register for the service, they can call us at 416-226-2700 or 1-800-668-0105.

RETIREMENT CENTRE ON iACCESS WEB

Encourage your employees to register for iAccess Web and visit their one-stop Retirement Centre.

They can:

- create and compare pension estimates based on various what-if scenarios;
- track the processing of their pension application;
- select survivor benefit options;
- link into a buy-back calculator; and
- verify personal information.



IN THE NAME OF SECURITY

As a consumer, you were justifiably alarmed when news broke earlier this year about the theft of credit card information from a major retailer. This was one of the highest profile privacy thefts in the past few years.

Protecting the privacy of our members' personal information remains one of our highest priorities. While we implement very stringent internal policies and procedures for all staff to follow, there are ways you can also help.

STAFFING CHANGES, TIM ACCESS

Please notify us of staffing changes when they have an impact on pension administration. This will help ensure the right people receive our information and have access to members' personal information.

For example, you must register with us to access TIM. When we sent the 2006 survey last November, we included a covering letter to confirm whether those registered for TIM still need access.

To date, we have received replies from 88 organizations and have removed dozens of individuals from our access list!

WE CAN ALL DO OUR PART

Conducting an annual review of our TIM registrants is one of the steps we are taking to protect privacy. While our society may never be able to thwart hackers completely, we can all do our part by being aware and changing some of our basic habits.

"We take the security of our computer systems and the confidentiality of members' records very seriously. Our information technology team has taken the necessary steps to ensure our members' personal information is as safe as possible."

Rosemarie McClean,
Senior Vice-President, Member Services

TIPS TO PROTECTING PRIVACY

- **Avoid e-mailing personal information (i.e., SINS, name, date of birth, etc.). Use TIM or fax instead.**
- **Don't leave documents/paper displaying personal information in open view at your office.**
- **Keep your password and user identification secure.**
- **Sign out of TIM if you plan to be away from your desk for an extended period.**

UPDATE: SIN REPLACEMENT

We continue to investigate ways to reduce the use of Social Insurance Numbers (SINs).

When we released the new remittance forms in December, you likely noticed that SINs do not appear on the pages we modified. This is part of a broader goal of moving from SIN as our primary identifier.

NEXT STEPS

This year, we will focus on removing the display of SINs throughout TIM. Generally, when we change a page as part of our regular development process, we will remove SINs from the views. Other considerations for decreasing use of SIN:

- Enhance functionality so you can search by SIN but not have SIN displayed when navigating through TIM.
- Use employee's name as primary search option (will determine a secondary option for use when name anomalies exist).
- Remove SINs from all reports – this year's reconciliation-related reports (members' earnings, ESA and deleted service) as well as future weekly faxes related to outstanding requests for information.

BRIEFLY...

TIM UPDATE: FIXES COMING SOON

Last December, we introduced new remittance pages in the Teacher Information Management (TIM) system.

The timing was not ideal – December is typically a challenging month as it relates to staffing, holiday closures, etc. Unfortunately, the project was delayed and we were not able to roll out all of the changes before the end of the year.

KEY CHANGES

- Remittance pages have current and prior year columns.
- All remittance, including ESA, is done from the remittance form.
- SIN no longer appears on the remittance pages - available by clicking employee name.
- LTIP payments need to be entered each month.
- Details for calendar years prior to 2004 are now archived - employee records continue to contain historic details.

CORRECTING DISPLAY ISSUES

Since the December release, we have encountered a number of display issues. The problems identified include:

- inconsistent contribution information for clients with ESA or LTIP service, and
- remitted funds may not be allocated in correct category in the account summary.

For those of you impacted by any of the issues we have identified above, we will send e-mail(s) to our primary contacts with more detailed information once the problems are resolved. We are working to have all the display issues resolved by the end of March.

We always appreciate your feedback and encourage you to contact us if you notice unusual behaviour while working in TIM.

GEARING UP FOR 2005

With only a few boards left to reconcile for the 2004 calendar year, we're ramping up plans for reconciling your 2005 accounts.

Your teams will be contacting you to discuss and establish some interim target dates.

TIM HELPS YOU CONTROL PROCESS

We have noticed an encouraging trend – more and more employers are regularly resolving issues through TIM. In addition to good Work Centre habits, you can obtain various reports in TIM that help you control when to start the reconciliation process.

By making the best use of TIM, reconciliation should take less time than it has historically. Some employers have already enquired about reconciling their 2006 account!

HELP IS JUST A FEW CLICKS AWAY

- Member and ESA earnings reports
- Deleted service report
- LTIP summaries
- Calendar-year summaries
- Work Centre



07/08 CALENDAR TIME

It's that time of year again – our annual calendar collection.

Why? Ensures we can provide accurate benefits to your employees.

Who? All employers: Ministry of Education provides information for school boards; collect directly from designated private schools and designated organizations.

When? The sooner, the better – thanks if you've already sent.

What?

Send us work days plus information for positions that fall outside the regular teaching calendar for 2007/08.

The information we need depends on whether the pay group or profile already exists in our database.

EXISTING

Changes to previous school-year calendar that may include:

- pay frequency
- first pay date in school year
- start and end date of first pay period
- pay percentages

NEW

Separate pay schedule for each unique group that includes:

- list of all pay dates
- start and end dates of each pay period
- payroll formula (i.e., monthly, semi-monthly, bi-weekly, work days per period, pay percentages, etc.)

FYI: MEMBER SURVEY IN APRIL

We are working with the Ontario Teachers' Federation (OTF) and Ontario Government to conduct a random survey of our membership.

The main goal of this survey is to gather members' preferences for contribution rate increases versus future benefit reductions if a shortfall arises in the future.

OTF'S PENSION EDUCATION INITIATIVE

This month, all of your employees should receive a publication called "Let's talk about the future of your pension." It features an overview of the pension package, plus potential financial situations and responses for 2008, when we will conduct our next financial review.

In April, an independent research firm (POLLARA) may contact some



of your employees to participate in a survey (2,500 people to be randomly selected). The survey will test opinions and preferences, which will help the OTF and Ontario Government plan for the future.

If your employees have any questions or concerns about the survey, they should visit our website or the OTF's website.

TYPICAL QUESTIONS ASKED BY EMPLOYERS



Q If I am making retroactive payments that apply to last year, which contribution rate do I use?

A Use the new contribution formula (9.3% up to the YMPE) for any payments made after December 31, 2006.

The contribution rate is determined by when the payment is made, not when the work occurred.

OTF WEBSITE
www.otffeo.on.ca

TEACHERS' WEBSITE
www.otpp.com

HOW TO REACH US



Employer Information
Services
Ontario Teachers'
Pension Plan Board
5650 Yonge Street
Toronto, Ontario
M2M 4H5



E-mail
eisinquiry@otpp.com
Employer Website (TIM)
employers1.otpp.com
Corporate Website
www.otpp.com



Toronto area
(416) 227-7525
Toll-free
1-866-867-9147



Toronto area
(416) 730-7807
Toll-free
1-800-949-8208

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