

MARCH 2008

SIMCOE COUNTY DSB TOPS IN 2007

Going from silver to gold – Simcoe County DSB nabs this year's top honours after being a runner-up two years ago. Two district school boards in our nation's capital are also being recognized this year – Ottawa-Carleton and Ottawa Catholic. They, along with Lakefield College School, continue to make great strides in pension reporting.

"Wow, this is very satisfying considering all of the hard work we put into it," was the reaction of Joanne Gemus, Manager of Payroll and Benefits Services, when we gave her the good news. "It's so nice for all of our staff to be recognized and appreciated."

Shelley Dahmer, the Payroll Co-ordinator at Simcoe, broke the good news to Joanne.

"Without Shelley, there is no way we would have deserved this honour. She puts so much time and effort into every aspect of pension reporting, we tease her all the time about how 'particular' she is."



Making it happen at Simcoe (l to r): Linda Winchester, Roger Kennedy, Shelley Dahmer, Rick Swiscoski and Joanne Gemus.

REPORTING EXCELLENCE AT SIMCOE COUNTY

- ✓ **1-DAY** average response time resolving priority issues
- ✓ **97%** of employees have no data issues – we can process most service requests immediately

KUDOS TO THE TEAM

Shelley does the bulk of the day-to-day pension reporting.

While Shelley appreciates Joanne's compliment, she's quick to point out that the great team at Simcoe makes it all work.

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EXCELLENCE IN 2007

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“We don’t have one person assigned to working with Teachers’, we all have responsibilities,” explains Shelley. “I may be the one that deals directly with Teachers’ the most, but Linda, Rick and Roger also play an important role.”

Linda Winchester, Rick Swiscoski and Roger Kennedy are all Payroll Clerks at Simcoe. Linda and Rick focus primarily on occasional and supply teachers. Roger focuses on contract teachers and administrators. One specific example of being proactive is their diligent tracking of re-employment.

“Linda and Rick manually track the days worked of all the retired teachers we hire,” explains Joanne. “We’ve created a spreadsheet and check it regularly – we know exactly when they have exceeded their limits and begin deducting contributions immediately.”

Joanne acknowledges that they have been challenged on their tracking system a few times. She can’t recall losing any of them.

“One of our former team leaders at TPP once commented that Linda and Rick came up with questions about re-employment that they

“While we try to do as much as we can on our own in TIM, we never hesitate to pick up the phone and call. It’s better to save the time and money and ensure we get it right, ”

Shelley Dahmer, Payroll Co-ordinator

hadn’t even thought of!” proudly exclaimed Joanne.

SECRETS TO SUCCESS

If Shelley had to pick two things to account for Simcoe’s great results, it would be regular TIM usage and their great working relationship with their team at Teachers’.

“We’ve worked with quite a few different teams over the past few years. They’ve all been extremely helpful and will talk you through anything,” said Shelley.

“While we try to do as much as we can on our own in TIM, we never hesitate to pick up the phone and call. It’s better to save the time and money and ensure we get it right,” added Shelley.

Daniel Newman, the current team leader working with Simcoe, couldn’t be happier to help.

“Everyone at Simcoe is a pleasure to deal with – our entire team has a great relationship with them. Their responsiveness and conscientiousness can’t be beat,” raved Dan.

Both Joanne and Shelley are also thrilled with the great strides TIM has made over the years. “It’s so much faster to do things electronically,” said Joanne. “Our payroll

department is always looking for new initiatives and it’s great to see Teachers’ doing the same.”

“We used to get a huge wad of paper for reconciliation – it was extremely intimidating,” added Shelley. “Now we can work on things throughout the year, a little at a time, so it’s not as difficult reconciling.”

And one final comment from Shelley. “We continue to see improvements in TIM, and that’s great.

“I hated the weekly fax list – I love the new communication window. It’s so much easier to track correspondence and it eliminates duplication, which is extremely helpful since we have more than one person working on pension reporting.”



Simcoe County
District School Board

FINAL COMMENTS

Both Joanne and Shelley are relative newcomers to pension reporting – Joanne has just three years at Simcoe, and Shelley has four.

Since receiving an honourable mention two years ago, Simcoe has quickly become a model of best practices. A big reason is that they have never been afraid to ask questions.

“You have to realize that we’re all on the same page,” sums up Joanne. “We all want to provide the best service to our employees so no one should be afraid to call Teachers’ for help. There is a good resource available, everyone should use it.”

Congratulations Joanne, Shelley, Linda, Rick and Roger!

PAST THREE SELECTIONS...

THAMES VALLEY DSB (LONDON)

YORK REGION DSB (AURORA)

HAMILTON-WENTWORTH DSB

HONOUR ROLL

We'd also like to acknowledge the following three employers for their work in 2007. It's a first-time honour for the two boards serving the Ottawa area, both located in Nepean.

OTTAWA CATHOLIC DSB

High data quality and TIM usage are the two key reasons Ottawa Catholic DSB is one of our honourable mentions for 2007.

"Ginette is very thorough and meticulous in her work," praises Marija Sunara about Ginette Watson, Pensions Administrator and our key contact at Ottawa Catholic. Marija is the EIS analyst that has been working closely with Ginette for the past six years or so.

"Ginette wants to understand why, she doesn't just want the quick answer," adds Marija. "In addition to asking questions, she provides us with enough information to help us understand what she is doing at her end."

Ginette's EIS team also mentions that she has been a key contributor at employer workshops and is always offering comments and suggestions for improving TIM.

Congratulations to Ginette and her colleagues at Ottawa Catholic!

KEY STAT

✓ **97%** of employee data is reliable for use in benefit calculations as soon as we receive it

LAKEFIELD COLLEGE SCHOOL

For the second consecutive year, Lakefield College School has earned an honourable mention.

Nestled in the picturesque Kawartha Lakes region just north of Peterborough, this designated private school continues to shine through its adoption of web-based reporting best practices.

"Carol wasn't satisfied with just implementing web-based reporting three years ago, she quickly adopted our recommended best practices and is our most consistent monthly reporter," commented Susan Reynolds, one of the EIS analysts who works with Carol Jorgensen, Payroll Administrator.

For example, Carol proactively updates rates of pay for Lakefield's employees and provides this information to us well ahead of the next school year – we never have to chase her for this information.

Congratulations again Carol – keep up the great work!

KEY STAT

✓ **EVERY MONTH**, ensures required contributions agree with payroll records, and reports new employees

OTTAWA-CARLETON DSB

One of the key items we measure throughout the year is turnaround time for responding to priority requests for information. What a difference a year makes for Ottawa-Carleton DSB!

Jan Duckworth, Payroll Officer, has been working with Teachers' pensions for more than 20 of her 30 years at Ottawa-Carleton.

"While somewhat reluctant to make the switch to TIM at first, Jan worked really hard last year to keep on top of things in the Work Centre and is thrilled that someone has noticed her efforts!" said Geri Jansen, the Senior EIS Analyst working with Jan.

While there are still areas of pension reporting that Ottawa-Carleton finds challenging, Jan improved her board's turnaround time by more than two days.

"Jan aims to get priority inquiries answered the same day," adds Geri. "Last year, she was really successful meeting her goal."

KEY STAT

✓ **1-DAY** average response time to resolve priority issues

TIM: WHAT INFO AND HOW TO SEND IT

For the past three months, you've been able to initiate and track employee-specific correspondence directly through one central location in TIM. We've been working closely with many of you to help establish a good understanding of how this integrates with the other tasks in the Work Centre.

We've come up with some FAQs, tips, as well as some examples of what area of TIM you should use in certain situations.

FAQs

Q. I sent information about an employee. Why didn't you reply?

A. When telling us something about an employee, we assume you don't require a response unless you specifically request one.

Q. I have the same type of update for multiple employees. Can I send information for the group?

A. No, only use the correspondence function for employee-specific questions or information. Contact us for help resolving global issues.

TIPS

- Don't provide information that can be provided through other TIM functions (i.e., issue resolution, event notification, remittance details, etc.).
- Avoid duplication – don't submit events and repeat the details in the message box.
- Don't submit answers that contain comments unsuitable for the teacher to see.
- For inquiries that relate to more than one year, only one inquiry is required (i.e., not one/year). ■

	SITUATION	DETAILS	HOW TO SEND
EMPLOYEE - AT A GLANCE	Missing service	2005 Y2 service should have additional \$25 for Teacher in Charge	Go to employee's At a Glance page and change unreconciled service
	Qualifications	Member was qualified with OCT from 30 Sep 07	Go to employee's At a Glance page and delete the unqualified service
WORK CENTRE	Reduced salary	Member was on Wage loss indemnity from 3- 21 May/07	Submit the resolution "There's a reason, but it's not listed"
	Pay settlement	27 April pay is settlement as member went on leave	Submit the resolution "Mid-year wrap up"
EMPLOYEE - COMMUNICATION	Leave of absence	Member was on leave from 1 Sep 06 - 30 June 2007	Make an update for this employee and notify us (i.e., submit an event)
	Contributions after retirement	21st day of re-employment reached on Feb. 13, 2008	Ask or tell us something about this employee
	LTIP	Joan Brown's LTD has been extended beyond Dec. 29, 2007. Please reactivate her LTIP claim	Make an update for this employee and notify us (i.e., submit an event and send message with additional information)
	96th day of re-employment	Previously sent info re. this employee's 96th day of work. Just realized he actually didn't work some days, which changes his 96th day worked. He wasn't paid between Apr. 18 and Apr. 28, 2006. Please change his 96th day worked to May 3rd, 2006.	Ask or tell us something about this employee

TIM section ->

Employee -
At a Glance

Work Centre

Employee -
Communication

iACCESS WEB REGISTRATION CLIMBING

Thanks to three volunteers, 2,500 more members are now able to take advantage of the features on iAccess Web.

In 2007, we asked several employers to assist with a pilot project to help promote iAccess Web, the secure, members-only portion of our corporate website.

The purpose? To evaluate the potential for employers to help us increase the number of iAccess Web users.

Three school boards volunteered to help. They chose different methods to promote iAccess Web to their employees, keeping tracking of the number who eventually registered.

PEEL DSB (+ 1,394)

Donalda Johnson, Payroll Supervisor, chose to send targeted emails to employees at three different stages of their career: new teachers, mid-career teachers and those closer to retirement. We developed three unique messages for Donalda and she coordinated distribution with Peel's HR department.

DUFFERIN-PEEL DSB (+ 745)

Fred Gardiner, Manager of Payroll & Benefits, and Denise Jones,



Fred and Denise of Dufferin-Peel accept our thanks.

Pension Specialist, spearheaded this initiative at Dufferin-Peel. They also chose to send targeted emails to their employees last September, encouraging them to register for iAccess Web (focused on the same three demographic groups as Peel).

Dufferin-Peel also conducts seminars each year for their new teachers. Denise worked with the presenters to ensure they included information on iAccess Web and encouraged new hires to register. One of our team leaders, Julie Ryan, attended a seminar to support this initiative.

WEB SAVVIER THAN MOST?

Both Peel and Dufferin-Peel acknowledged that their employees are generally quite web savvy - both boards regularly promote online services. This fact likely contributed to the success for both boards.

DSB OF NIAGARA (+ 362)

Patti Nickel, Payroll Supervisor and Heather Bove, Human Resources Staffing Manager, chose a different tactic. Niagara conducts seminars for their new and occasional teachers before each new school year. We developed content for several slides in their presentations and provided them with copies of iAccess Web registration forms for distribution.

Patti and Heather asked attendees to complete the forms on the spot

REGISTERED MEMBERS...

2007 - 117,100

2006 - 91,600

2005 - 67,100



MEMBERS CAN IMMEDIATELY UPDATE THEIR PERSONAL INFORMATION, REVIEW THEIR CURRENT PENSION STATUS, COMPLETE PURCHASES AND APPLY TO RETIRE, ALL ONLINE.

so they could gather and return to us. While they were able to collect forms, they discovered that many of the new teachers who attended the seminar in July had already registered for iAccess Web (they were on supply lists prior to becoming permanent employees).

With the continued support of employers like Dufferin-Peel, Peel and Niagara, our members can reap the benefits of all the services we can provide.

WHAT'S NEXT

Our focus this year will be on teachers beginning their careers. We plan to engage your HR departments to help us integrate TPP online registration into your new hire packages (i.e., include a copy of the iAccess Web registration form in orientation packages prepared for new teachers).

If you have any ideas or suggestions, please contact Lorie Bissonette, Manager of Member Data and Employer Reporting.

RETIRING EMPLOYEES AND THIRD-PARTY CONTRACTS



Let's take a closer look at a recent "hot topic" that may impact your employees' ability to retire in June.

Some employers hire individuals to perform teaching duties but pay them through a contract arrangement (third party or independent). When these employees are making retirement plans, it's important for them to be aware of these guidelines.

CESSATION GUIDELINES

Any pre-existing arrangement to return to work after retirement may jeopardize a member's ability to begin receiving their pension.

Qualified teachers hired through a third party are bound by provisions of the Teachers' Pension Plan at any instruction site operated by you. Consequently, these employees must adhere to the same cessation

guidelines as those working in schools or designated organizations.

Specifically, a bona fide cessation of employment must occur for members to be eligible to begin receiving their pension – this applies to everyone, regardless of their employment arrangements.

If an arrangement to return to work is made before we receive a member's pension application and/or resignation, a bona fide cessation has not occurred. In these cases, members would not yet be eligible to receive a pension.

RE-EMPLOYMENT GUIDELINES

Teaching performed after going on pension by a qualified individual at a school is considered pensionable employment in our plan whether they are an employee of your organ-

ization or engaged through a third party or personal services contract.

This type of work may include, but is not limited to, work as a tutor, principal, counselor, etc. Therefore, pensioners working in these capacities at your organization must comply with re-employment provisions and limits.



TYPICAL QUESTIONS ASKED BY EMPLOYERS



Q If I hire Sharon, an independent consultant studying accommodation issues, through a third party for our board, do working after retirement limits apply to her?

A No. If someone is providing a strictly administrative function via an independent contract or third party agency, they are not bound by plan provisions.

In Sharon's case, she can work as many days as she would like without any effect on her pension.

VALID RESIGNATIONS

A valid resignation must occur for a member to be eligible to draw their benefit and before any arrangement to return to employment can be considered.

- Your Board of Trustees has approved the formal resignation and it has been accepted without conditions.
- You have paid, or have made arrangements to pay, any retirement gratuity the member is eligible to receive.
- Employee benefits associated with the original position have ceased.
- Any implications arising from terminating employment are invoked.
- The member has no arrangement in place to return to employment in education.

While employees can return to work before their first pension payment, there must be a valid resignation before they can become re-employed.

BRIEFLY...

Focus on '05 & '06

Reconciliation has kicked into high gear – our regional teams are contacting everyone and establishing milestones for reconciling your 2005 and 2006 accounts.

With our sights set on two calendar years, please remember our teams are available to help and support you through the process – they can give you tips and suggestions for making the best use of TIM, as well as answer any specific questions related to 2005 and 2006 data.

TIM CAN HELP



A few key areas in TIM will help you work through the annual reconciliation process:

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

WERE YOU THERE ON Nov. 5/07?

Designated employers attending our fall workshop in Toronto on Nov. 5, 2007 committed to completing their 2005 reconciliation by March 31, 2008. Thanks to those who have already met this target – all others, please contact us with an update.

HELP US MAKE IT BETTER

It's clear from our survey results and discussions with you that

reconciliation continues to be one of your most frustrating pension reporting responsibilities.

One of your primary concerns is the delay – having to wait a year or more to close the books on a previous year. Last year, we launched a new accounts receivable system, which delayed the start of reconciliation. Now that the system is up and running, we are confident that it will help this process run more efficiently in the years ahead.

We are also investigating ways to improve the process itself. This year, we will work with employers throughout the province to gather feedback and suggestions for improvement.

Thanks again for your patience – we are committed to working with you to reconcile all 2005 and 2006 accounts as quickly as possible.

SPRING WORKSHOPS: FOCUS ON DESIGNATED EMPLOYERS

Each workshop season, we traditionally conduct at least one session specifically for designated private schools and designated organizations. These sessions are always very well attended and highly valued – we often receive requests for additional sessions.

To meet this demand, we're going to focus solely on this unique group of employers in May. We plan on conducting additional workshops with all employers this fall.

WHAT'S ON TAP?

As you know, a plan amendment regarding eligibility becomes effective Sept. 1, 2008. It, along with the following, will be our key agenda items:

- reconciliation,
- pensionable salary,
- compliance,
- web-based reporting, and
- TIM usage.

We've sent an invitation to all designated private schools and designated organizations. Register early as space will be limited.

DATES

May 15

May 23

LOCATIONS

Cambridge

Toronto

ELIGIBILITY CHANGE ONLY AFFECTS DESIGNATED EMPLOYERS

Regardless of their employment position, all qualified teachers working at a designated private school or designated organization will become eligible for membership in the Teachers' Pension Plan on Sept. 1, 2008.

This change does not affect regular school boards, authorities or most faculties of education (exceptions are University of Windsor and Nipissing University, both designated organizations).

PACKAGE COMING SOON TO DESIGNATED EMPLOYERS ONLY

In the next few weeks, we'll be sending a package to all employers impacted by the change.

The package will include information for both employers and employees:

- FAQs (employers) and fact sheet (teachers)
- Waiver form
- Posters

CALENDAR UPDATE

A new statutory holiday and new collective agreements are just two things that will make this year a busier one than ever when it comes to dealing with calendars.

FAMILY DAY

With your cooperation, we were able to confirm almost everyone's plans for dealing with Family Day before it actually happened on Feb. 18. Overall, the majority of you (89%) decided not to change your calendars. In total, we needed to adjust 33 calendars for 23 employers.

Thanks to everyone for responding so quickly and providing us with the information we needed to help ensure reporting accuracy for all affected profiles/groups.

COLLECTIVE AGREEMENTS

Have you signed a new collective agreement this year? If you already

have, or will be later this year, please send us the details as soon as possible.

'08/09 SCHOOL YEAR

We're set to kick-off our annual calendar collection to prepare for the upcoming school year.

Here's a recap of the information we need to ensure your employees' benefit information reflects current data.

EXISTING OR NEW?

Send us work days plus information for positions that fall outside the regular teaching calendar for 2008/09.

The information we need depends on whether the pay group or profile already exists in our database – see the box for additional details.

What do we need?

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.)

HOW TO REACH US



Employer Information
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Pension Plan Board
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