

SEPTEMBER 2008

OPEN WINDOWS OF OPPORTUNITY

In-house presentations, office visits and workshops all provide a forum to discuss reporting challenges and learn more about the way things work.

Over the past few months, we've welcomed two of our primary contacts into our "home".

In May, Nathalie St-Pierre told us how the French school boards pooled their resources to implement and manage SAP. In August, Sharon Piwowarczyk explained the ins and outs of the new IPPS.net system.

"We greatly appreciate the time and effort Nathalie and Sharon dedicated to helping us learn," said Lorie Bissonette, Manager of Member Data and Employer Reporting.

"They both spent a lot of time preparing presentations specifically for us. Getting their expertise first-hand was invaluable."

DIDN'T REINVENT THE WHEEL

Several years ago, the French school boards took a unique approach to implement the SAP system. They banded together and formed a specialized consortium to share implementation – rather than reinvent the wheel, they collaborated to help make the transition a smooth one for all.

"The French school boards now have their own support group," explains Lorie. "If any changes are required, they prioritize as a group."



Since they all receive the same new functionality, they can turn to each other for help."

Nathalie, Manager of Payroll for the Conseil scolaire de district du Centre-Sud-Ouest, spent a few hours with our team to review SAP's functionality. It provided them with a much better understanding of how employers using this HR/payroll system maintain pension-related data.

"Collaboration is the key to success, emphasizes Nathalie. "Our staff members depend on us as well as TPP to ensure accurate and timely treatment of their personal data."

"By understanding SAP processes, we can reduce issues in TIM and our reconciliation timeframe, as well as increase efficiency and help members plan for their retirement."

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SHARING THEIR STORIES

Guest presenters play key role in educating staff and strengthening business relationships.

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EARLY EXPERIENCES WITH THE NEW SYSTEM

Sharon is Supervisor of Payroll Services for the Thames Valley District School Board. Thames Valley is one of three school boards currently using the IPPS.net payroll system.

“IPPS was designed specifically for school boards in the late ‘80s,” explains Sharon. “Over the years, school boards have shared the design, development and maintenance costs of the system.”

A rewrite of the original system was completed in January 2008. Thames Valley was the first to go live with the new version – the guinea pigs so to speak.

Sharon made the trip from London to explain the changes and all of its functionality to the entire EIS team.

“I’ve always valued the close working relationship that exists between TPP and employers,” says Sharon. “The opportunity to share insight into the workings of IPPS.net will certainly be beneficial to the EIS teams that work with those employers using the system.

One final comment from Sharon.

“The greater understanding of TIM by employers, and of employers’ systems by TPP, helps minimize issues and maximize accurate member data.”

THANKS FOR COMING OUT!



Nathalie St-Pierre (above) and Sharon Piwowarczyk (below) shared some valuable insight when they visited us this year.



PLAYING THE FIELD

This year, we’ve conducted 49 visits to school boards, designated private schools and designated organizations. We recognize the importance of these face-to-face meetings with you and hope to make more visits before the end of the year.

During the visit, your team representatives work with you to help resolve issues, walk you through TIM and discuss any concerns.

Being in your space provides us with a much better understanding of your file structures and how you navigate through your payroll systems and TIM.

ONGOING PARTNERSHIP KEY TO SUCCESS

Getting together with you is one of the most effective ways we can learn from each other. Talk to your team if you would like to schedule a visit to your office, or if you would like to come and see us.

If you’re interested in sharing your knowledge on a broader aspect of your HR/payroll system as it relates to pension reporting, contact Lorie directly.



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REMINDERS

DESIGNATED EMPLOYERS

Employment position doesn't matter as of Sept. 1, 2008.

Defining eligibility has always been a hot topic at workshops and during employer visits, especially for designated private schools and designated organizations.

The plan change announced earlier this year aims to simplify this aspect of pension reporting. That is, all qualified teachers working at a designated private school or designated organization are now eligible for plan membership. Their employment position no longer has an impact on their plan participation.

This means all designated employers will now determine membership eligibility using the same basic guideline – if they are qualified, they contribute.

IMPACT ON RE-EMPLOYMENT

Your employees who are receiving a pension from us are subject to our working after retirement limits as of Sept. 1, 2008, regardless of their employment position.

If these re-employed pensioners continue to work *after* the month in which they *exceed* the limit, they must notify us.

STILL TIME TO WAIVE MEMBERSHIP

If you have employees who were not eligible under historical provisions (see chart), they now have less than three months to waive their plan membership.

We urge all designated employers to ensure your employees are aware of the new plan provisions.

If we don't receive a completed waiver form in our office by Dec. 1, a previously ineligible

employee will be required to contribute as of Sept. 1.

Qualified teachers who begin working on or after Sept. 1, 2008, and pensioners, cannot waive plan membership. ■

MAKE IT A DOUBLE

Remit two LTIP payments in October.

If you receive a cheque this month to cover long-term income protection (LTIP) payments for the 2008/09 school year, include it with your October remittance. We will accept two payments in one month and apply it to the correct period.



Exception – you should remit in September only for payments required to complete the 2007/08 school year.

TIPS

- ✓ Check the “Below Minimum” column on the LTIP Summary page to identify any underpayments for the 2007/08 school year. Inform us if there were any changes in the employee's LTIP status (i.e., claim ended), retro-active adjustments or salary increases that apply to the school year in which the claim began.
- ✓ Do not include LTIP with your regular remittance (Payroll line on remittance page). ■

NEW ELIGIBILITY GUIDELINES FOR DESIGNATED EMPLOYERS ONLY

Date	Who is eligible?*
Until Aug. 31, 2008	Private schools – qualified teachers employed as a teacher Organizations with no designated capacities – all qualified teachers Organizations with designated capacities – only qualified teachers employed in a designated capacity
On or after Sept. 1, 2008	Private schools and organizations – all qualified teachers working in any role

* The eligibility change does not affect regular school boards, authorities, Ontario government ministries, the Toronto and Region Conservation Authority or most faculties of education (exceptions are University of Windsor and Nipissing University, as both are designated organizations).

WBR EMPLOYERS

Updated rates of pay = accurate member data.

We have been working closely with our web-based reporting (WBR) employers the past few weeks to ensure rates of pay are updated for the new school year.

This information is critical to calculating the salary, service credit and required contributions. Without updated information, we create service based on the previous school year's rate.

ELIMINATE MONTHLY VARIANCES

WBR employers have different requirements than their payroll-based reporting (PBR) colleagues. One of their most important responsibilities is to send updated rates of pay for their employees

ALL EMPLOYERS USE TIM - WHAT'S THE DIFFERENCE?

We receive data for 98% of plan members through payroll-based reporting (PBR). Employee data is reported on payroll frequency by PBR employers.

Only 2% of our member data is received through WBR. For those with a small employee base, we collect rates of pay annually. We project service which WBR employers confirm each month.

before the first pay date of each new school year.

WBR generates pay records based on your calendar, pay schedule and rate of pay information. To help you reduce or eliminate monthly contribution variances, it's important to do the following each month:

- ✓ Review monthly required values to ensure you remit what is required
- ✓ Update service for supply/occasional teachers
- ✓ Change service in TIM where required
- ✓ Report member-specific events to us through TIM (i.e., LTIP, leaves, resignation)

In addition to your updated rates of pay, each year we need your pension adjustments (PAs), school-year calendars, pay schedules and completed *New Employee* forms for eligible new hires. ■

RECONCILIATION 2008

Double challenging this year.

We're closing in on our October 31 target for reconciling all 2005 and 2006 accounts:

	COMPLETED*
2005	72%
2006	62%

* Closed employer accounts

Thanks for putting in the extra effort required to reconcile two

accounts in one year. We hope the download feature recently released on TIM (up-to-date Excel version of your Employee Earnings Report) will help make analyzing variances more manageable, especially for our large employers.

GIVE A HAND TO...

Two boards with large accounts came close to balancing with very little help from us:

- ★ **Peel DSB** – \$44 million within \$210
 - ★ **Windsor-Essex Catholic DSB** – \$12 million within \$35
-

TOP 3 WAYS TIM CAN HELP

1

Stay on top of priority issues in your Work Centre throughout the year.

2

Balance contributions monthly – identify, investigate and correct problems as they happen.

3

Contact us immediately when something doesn't make sense – don't let it sit for too long.

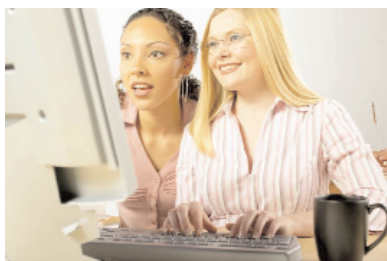
WEB WORLD

GETTING WHAT YOU WANT

Latest TIM features target your requests.

Put your hand up if you wish you could download your own employees' earning report. You're not alone.

Thanks to a TIM release in August, a downloadable Excel spreadsheet is the latest item you asked for, and received. Several of our larger boards have been actively using it to help them reconcile.



Since November 2007, we've also added the following features as a direct result of discussions with you:

- **Priority requests** – we eliminated the faxed requests for information and added them to your Work Centre. No more paper to sort through, all outstanding requests for member information are now online.
- **Work At A Glance** – to help you organize your TPP-related work, we also added a page showing a snapshot of your priority, data and contribution issues.
- **Correspondence** – you can now initiate employee specific correspondence with us and track it online. No more searching through emails and faxes for

LATEST TIM BIT WINNER

Congratulations to Barb Renaud of the Catholic DSB of Eastern Ontario, who was the first to reply to our June 24 tip.

While we've received a lot of positive feedback, you may prefer not to receive the weekly tips. If you'd like to be removed from our distribution list, just send a quick email to lkeon@otpp.com.

back-up or reference – it's all in TIM now.

DON'T STOP!

We always want to hear your feedback, good and bad. It's the only way we can continue to tweak existing and develop new features in TIM.

Pass on your comments to anyone on your team. Don't hesitate to share your opinions and experiences during workshops and visits.

WHAT'S HOT IN YOUR WORK CENTRE

Focus on qualification issues.

Two specific issues will prevent your employees from receiving an up-to-date personal statement of benefits over the next few weeks:

- No qualifications found on file
- Service outside qualification period

The start of a new school year is always busy. If you're having a

tough time determining which issues to focus on, put these two at the top of your list.

Your employees will thank you. ■

INTRODUCE NEW HIRES TO iACCESS WEB

They can call us to register.

A whopping 80% of this year's newest retirees applied online! The stats don't lie – iAccess Web, our secure member website, has evolved into an efficient and reliable way to do business.

NEVER TOO EARLY

With a couple weeks of experience under their belts, now is the time for new teachers to register for iAccess Web.

By becoming more familiar with the website and all it has to offer early in their careers, performing transactions will be a breeze when it's time to retire.



The fastest way to register is to contact our Client Services department directly. ■

GIVE YOURSELF A HAND

Two recent accomplishments not possible without you.

TPP BEST IN ITS CLASS

First-time for top honour.

Each year we take part in an independent study that evaluates the costs and services available at pension plans around the world. For the first time, we received top honours.

CEM Benchmarking Inc., the organization that measures cost effectiveness, recently ranked the Teachers' plan first among its peers in North America. The study evaluated 11 service categories, ranging from the payment of pensions to contact with members.



Without your ongoing commitment to accurate and timely pension reporting, we wouldn't be able to provide top-notch service to our members. Take a bow! ■

BY THE NUMBERS...

\$134,443,387

JUNE REMITTANCE (LARGEST EVER)

111,000

TOTAL PENSIONERS

3,124

JULY PENSION INCEPTIONS*

80%

ONLINE RETIREMENT APPLICATIONS

* FOR THE SECOND CONSECUTIVE YEAR, 100% OF MEMBERS WHO RETIRED IN JUNE RECEIVED THEIR FIRST PENSION PAYMENT IN JULY! THANKS FOR HELPING US ACHIEVE THIS "PERFECT" ACCOMPLISHMENT YET AGAIN.

WANT TO READ MORE ABOUT IT?

SEE THE NEXT ISSUE OF PENSION NEWS (SUMMER/FALL 2008).

HOW TO REACH US



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



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Hours

8 am to 5:30 pm, Monday to Friday

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