



e-Form 301 – Supplemental Plan cost estimate

This online tool is for employers with employees who are firefighters, paramedics or members of the police sector. It can be used to request the estimated costs to provide a Supplemental Plan benefit to a selected member class or classes. Both past and future service cost estimates are provided.

The e-Form 301 generates an *OMERS Supplemental Plan Cost Estimate Report* detailing:

- **Future service costs:** includes the estimated cost of Supplemental Plan contributions for future service by year, projected for each of the five years after the agreement is expected to begin (member and employer contributions are listed separately). These projections are provided to help employers and associations/unions estimate future service costs; however, costs are subject to change.
- **Past service costs:** includes the estimated member cost to purchase each member's eligible past service as of the agreement effective date. These are provided to help estimate the total member cost of past service; however, costs are subject to change. If an employer enters into an agreement with OMERS to set up Supplemental Plan coverage, each member would receive a personalized past service estimate and election form.

Two versions of the report are created:

- **Employer version:** includes identifying information for all members in the class.
- **Third-party version (for the association/union):** excludes member names and identification numbers (i.e., only the age, past service available to purchase and the cost is listed for each member, not the member's name or identification).

Notes:

- Remember to report affiliation changes to OMERS – it's important that we have up-to-date employee affiliation information when processing a cost estimate.
- When you produce a Supplemental Plan cost estimate, be sure to give the association or union their copy (the third-party version). OMERS will also alert the association or union to expect to receive a copy from the employer. Similarly, if an association or union requests a cost estimate directly from OMERS, we will advise the employer.

How to use the e-Form 301

The e-Form 301 is a batch process. Outlined below is a step-by-step overview of the process. For detailed instructions on extracting data and creating an import file, use e-access **Help** and information pages.

Step 1: Identify members

The first step is to identify the members to include in the estimate. To do this, you can use your payroll/HR system or the **Extract data** utility in e-access.

If you use the **Extract data** utility in e-access, you will get the following screen:

Please select extract type → Supp Plan Class Definition Extract

Supplemental Plan Class Select

NRA 60 65 *

Agreement Effective Date (AED) 20081001 * YYYYMMDD

Occupation Other

Employee Affiliation CUPE - Canadian Union of Public Employees - PARAMEDIC

Dept ID

Reset Submit

You must enter the Agreement Effective Date and the NRA. The other fields are optional and can be used to fine tune your data.

The membership data extract from OMERS database creates a comma-delimited flat file that can be converted into Excel.

If recent Form 119 data (within two years of the agreement effective date) has not been reported for a member or if a member has less than 1.5 months of credited service, OMERS will not have “useable” earnings from which to project contributions. In either case, the following message will appear in the data extract file:

“Due to insufficient Credited Service, please provide Agreement Effective Year Earnings in the Supplemental Plan Class Estimate Import.”

If you want to include the member in the import, add the member’s actual (not annualized) contributory earnings annual salary for the current year when creating the import file. If you do not provide contributory earnings annual salary for the member or you do not delete the member from the import file, your e-Form 301 import will fail.

Step 2: Create the import file

Once you’ve identified the members, use the **Import file builder** in e-access or have your IT department create the import file. For details on file specifications see e-access **Help** (under Batch processes).

The import file must contain a key identifier (membership number or SIN) for each member. You may provide actual (not annualized) contributory earnings annual salary for the current year and earnings to use in the future – if you don’t provide earnings we will project using the latest Form 119 data we have on file where possible.

Step 3: Import data

Once your import file is created, import the member data into e-access using the **Import a file** process in the **Batch processes** pull-down menu. Or, if you’re using the Import file builder, when you’re finished building your file, click **Import the file**.

On the “Import a file” page enter the contact information, click **Next**, select **Supp Plan Cost Estimate** and attach your file for importing.

Import a file :: Step 2 - select import file

OMERS Import file builder Post related message

For more information on supported file formats please, see [HELP](#).

Select import file type Supp Plan Cost Estimate

Agreement effective date 20081001 * YYYYMMDD

Supplemental plan class Paramedic

Select import file → c:\20081001.txt Browse...

Back Cancel Import file

Once your import file is submitted, check it to ensure the import was successful – like you do for other batch imports (e.g., Form 119). Review and fix any errors and re-import if necessary.

Step 4: Submit your request

Once your import file is ready, you can process your request. Click **Requests > Requests NOT submitted to OMERS**, find your request and click on the link. On the next screen, enter the Supplemental Plan benefit or benefits you want estimates for and the earnings assumptions.

Enter earnings/projections percentages here – see the chart below.

You can select one or more benefits – see the chart below.

Field	
Supplemental Plan Provision	You can select one or more provisions. Note: 2.33% is not available for police civilians.
Earnings Projections % up to Agreement Effective Year	If you did not provide updated earnings in your import file, enter the percentage increase here and we will project member earnings by the percentage indicated. You can enter 0% for a flat projection.
Earnings Projections % after Agreement Effective Year	The <i>OMERS Supplemental Plan Cost Estimate Report</i> projects future contribution costs for each of the five years after the agreement effective year. To include future pay increases, enter the percentage. Or, for a flat projection, enter 0.

When you click **Submit**, the *OMERS Supplemental Plan Cost Estimate Reports* are created and will be available by the next business day. To view the reports, click **Requests > Requests Submitted to OMERS**.

Important: Be sure to give the applicable association or union the third party version of the report. The employer version includes member names and other personal information and is for employer use only.

Be sure to give the association or union the report marked "3rd Party."

Mar-14-2008 17:07 OPSSSUUAT		OMERS Supplemental Plan Cost Estimate Report				
Employer Name:	CITY OF EXAMPLE	Date Requested:	Jul-11-2008			
Group Number:	123456	User ID:				
Supplemental Plan Provision: 2.33% accrual rate						
Future Service						
Contributions Rates*						
Effective From:	Jul -01-2008					
Effective To:						
	Supplemental Plan RPP	Primary Plan RPP Rebound				
Below YMPE:	2.75%	0.20%				
Above YMPE:	2.75%	0.20%				
Supplemental Plan Class Contribution Totals by Year - Estimated Member Cost						
	2008	2009	2010	2011	2012	2013
RPP	\$161,513	\$334,331	\$346,032	\$358,144	\$370,679	\$383,652
Supplemental Plan Class Contribution Totals by Year - Estimated Employer Cost						
	2008	2009	2010	2011	2012	2013
RPP	\$161,513	\$334,331	\$346,032	\$358,144	\$370,679	\$383,652
Past Service						
Total estimated member cost required to purchase all past service for the class as of the Agreement Effective Date: \$8,158,052						
Notes:						
<ul style="list-style-type: none"> *The latest contribution rates in effect have been used to calculate the above future service estimates as future contribution rates cannot be predicted in advance. All amounts are rounded to the nearest dollar. The above Supplemental Plan class contribution totals include both Supplemental Plan RPP contributions and Primary Plan Rebound RPP contributions where applicable. The estimated costs are not guaranteed and are subject to change. 4 Member(s) are excluded from the Past Service Cost Estimate as they are not eligible to purchase past service (i.e. no past service or not actively employed). 						

Sample of *OMERS Supplemental Plan Cost Estimate Report*

Questions? We're here to help.

If you have questions about e-access or e-Forms, or to register a new user, please contact OMERS Client Services. Our service hours are Monday to Friday, 8:00 a.m. to 5:00 p.m. If you have questions about the Supplemental Plan, visit OMERS website at www.omers.com.



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