



e-Form 300 – Supplemental Plan agreement setup

This online tool is for employers who have entered into a formal agreement with OMERS to set up Supplemental Plan coverage for firefighters, paramedics or members of the police sector. Use the e-Form 300 to set up a selected member class or classes with Supplemental Plan benefit coverage.

Note: The e-Form 300 is used to set up coverage. For a cost estimate, use e-Form 301.

How to use the e-Form 300

The e-Form 300 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 set up with coverage for a Supplemental Plan benefit. 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:

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

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

Step 2: Create the import file

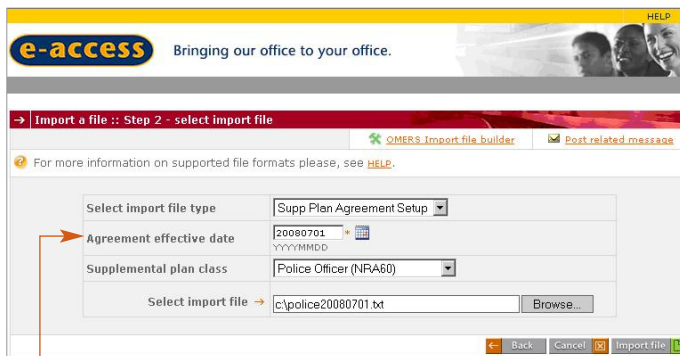
Once you've identified the members, use the **Import file builder** in e-access or have your IT department create the import file. For details on file specifications see e-access **Help** (under Batch processes).

The import file must contain a key identifier (membership number or SIN) and actual (not annualized) contributory earnings annual salary for the current year for each member.

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 Agreement Setup** and attach your file for importing.



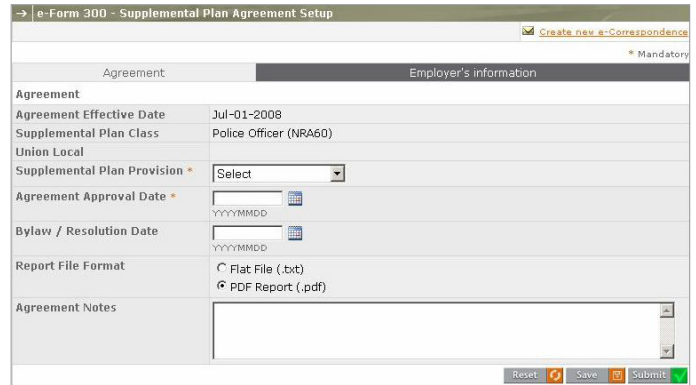
The **Agreement effective date** is the date that Supplemental Plan coverage starts – i.e., the date the agreement goes into effect.

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.

Important: Actual contributory earnings annual salary must be provided for all members in the import file. Do not annualize earnings for part-time employees.

Step 4: Submit your request

Once your import file is ready, you can submit 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 Provision and Agreement Approval Date.



Notes:

Agreement Approval Date: This is the date the employer enters into (i.e., signs) the *OMERS Supplemental Pension Plan for Police, Firefighters and Paramedics Coverage Agreement*.

Bylaw/Resolution Date: Although this is an optional field, we must have a copy of the bylaw or resolution before we can process your request.

Report File Format: This is the format of the summary reports available on e-access after your request is successfully processed. The default is PDF.

When you submit an e-Form 300 request, we will enrol the selected members in the Supplemental Plan. A personalized OMERS Supplemental Plan information package detailing membership and any past service cost information will be produced for each member. We will mail these packages to you to give to your members.

You will also receive a letter to confirm that Supplemental Plan benefit coverage has been set up for the selected member classes at your group.

Summary reports will also be available on e-access after your request is submitted and successfully processed.

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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