Frequently Asked Questions (FAQs)

Table of Contents

General

G1) What is PLANet?

PLANet is MEPP's new online pension administration system.

PLANet has two portals, one for employers and one for members. The employer portal allows employers to upload or enter payroll information of their employees' pension plan member records. Whereas the member portal gives members secure access to up-to-date information regarding their pension, the ability to make changes to their account information and gain access to MEPP's retirement tools.

G2) What will I (the employer) be able to do in PLANet?

PLANet will enable you to do tasks online such as:

- Enrol new members;
- Remit contributions;
- Process layoffs, leaves of absences, terminations, return to works; and
- Make status and data changes.

G3) Why is MEPP moving away from ERS to PLANet?

PLANet replaced MEPP's old online system, ERS, in order to make it easier for the employer to send information to MEPP and to connect with us in a more efficient and timely way.

PLANet will provide you with increased efficiency and will help submitting contributions and other information to MEPP, and the use of paper forms.

G4) What is different in PLANet than ERS?

- The ability to enrol a member online and no need for an employee signature.
- No more submitting salary contributions, PLANet calculates that for you.
- The option to create detailed reports of processed files.

G5) How do I receive my username and password for PLANet?

You must fill out a *User and Authorization Information Form* in order to receive your username and password from MEPP. Once submitted MEPP will send you your username, password and URL to PLANet.

G6) What type of ways can I get help with using PLANet?

- Read PLANet's User Guide;
- Watch online videos relating to specific "How To's" of PLANet; and/or
- Contact a MEPP Employer Relations Coordinator (ERC) through email at erc.mepp@plannera.ca or by phone at 306-337-4090.

Updating Personal Information

U1) We don't always receive the employee's personal information for example: phone number and/or email address, etc. to update in PLANet. What should we do if we don't have the proper information?

These fields are not mandatory and can be left blank if no data is available. The employee can update their personal information to MEPP by filling out a *Personal Change Form* and sending it to MEPP via email.

U2) If I have a terminating employee that is changing their address and personal information how do I inform MEPP?

Personal data changes should not be done on the *Termination Form*. If the address, phone number, or email requires updates at the time of termination, create an *Address Change Form* type to process the new information.

The employee may also inform MEPP of changes to their personal information at any time using PLANet.

U3) Is there a way for an employee to update their own personal information?

Employees will have their own member portal in PLANet to make changes. Or an employee can fill out a *Personal Change Form* from our website and submit it via email or mail to inform MEPP.

U4) Do you want more than one address, phone number or email address per employee? Or can we only send one?

Please send only **one** address per employee in PLANet.

U5) What do I do if an employee transfers from one MEPP employer to another MEPP employer?

MEPP will require an *Enrolment Form* from the employer they have transferred to, and a *Termination Form* from the employer they transferred from.

U6) The documentation indicates that we can do addresses outside of Canada and the USA. Are there codes that we should use in these instances?

Yes, codes will be provided in a drop down menu when entering the information in PLANet.

File Specifications/Processing

F1) Do you have an example in Excel CSV (Comma-delimited) format for File Specifications?

Yes, the CSV file example of the file specifications is available for download from our website on our MEPP PLANet webpage or click here: CSV File Example on the Forms, Guides and Tutorials page.

The file specification in excel will provide specific CSV file formats for contributions. This information will enable you to work with your Human Resources, Information Technology, and/or Payroll service providers on the development of these files.

F2) Our organization already sends the information in an approved CSV format, will I need to make any changes moving forward?

Yes, if you already submit contributions using the CSV file format, the file will require three changes:

1. add an Employee ID column
2. remove the salary column; and
3. split contribution sum into employer and employee contribution columns.

If you currently submit in any other file format (i.e., Excel) it will be up to you to convert the file to CSV prior to processing.

F3) Are we required to submit the contribution files by both Employee ID and SIN, or just one or the other?

Only one is required; you can remit by either Employee ID or SIN. Please note, if you want to submit by Employee ID you must first contact your Employer Relations Coordinator (ERC) so they can advise what steps are required to get MEPP's database uploaded with all your Employee ID's.

F4) If an employee has no contributions for a particular pay period, do we include them in the contribution file?

No, if an employee has no contributions for a particular pay period, do not include them in your file.

F5) What if I do not want to upload a CSV contribution file?

Employers who do not want to upload a contribution CSV file can copy a previously processed contribution file in PLANet instead. The copied file can then be used to edit, validate, approve and post. To make a copy please refer to the quick steps PDF on "Copying a File" located on the *Employers* page of the MEPP website.

F6) Can the date format be in numerical values and will PLANet convert it for me?

No, the date format in PLANet can only be entered as dd-mmm-yyyy or dd-mmm-yy (ex. 01-MAR-2020 or 01-MAR-20). There is also a calendar option that allows you to select your dates.

F7) We currently email our files to MEPP for processing. Does this change with the PLANet system?

Yes, all submissions are expected to be done through PLANet. Emailing submissions directly to MEPP will not be supported after the transition period.

F8) Can I enter the employee's "salary" on PLANet?

No, the salary field is not required to be completed so it is greyed. PLANet automatically calculates the pensionable salary from the contributions submitted by the employer. MEPP ensures the pensionable salary uploaded to the members' records equates to the contributions that are received from the employers.

F9) If I make a change to a file in PLANet do I need to validate it again?

Yes, any time you make a change to a file you must validate that file again before proceeding.

F10) What happens if the salary sum does not agree with my records?

When you are submitting a contribution file through PLANet there is a step called "Approved Salary" that you must review before proceeding to process the contribution file. At this time, you have the opportunity to confirm that the 'salary sum' showing in PLANet matches your records. If there is a discrepancy it is at this time that you need to investigate further to determine why there is a discrepancy and make the necessary changes before proceeding.

F11) Are potential hours required on a contribution file?

No, you only enter actual hours on a contribution file.

F12) Can I make changes to a file after I process it?

No. Once a file is processed it is in view mode only. You cannot abandon or make changes to a processed file.

F13) What happens if I discover a mistake on a file that I processed in PLANet?

You must contact a Employer Relations Coordinator at 306-337-4090. Once a file is processed you cannot make any changes to it. If you need to make a change to a processed file please contact MEPP directly and we will take you through the next steps depending on what the change is. To contact a MEPP Employer Relations Co- ordinator, please call 306-337-4090.

F14) If I create a contribution file and selected the wrong pay period start date and pay period end date or forgot to select a pay period do I have to abandon and create a new file?

No. From the dashboard or from the File ID screen at the right hand side of your screen, under File Details click on 'Edit File Headers'. An Edit File Headers screen will pop up allowing you to change your pay period for the correct dates. Then click 'save.'

F15) When I copy a previous contribution file and forget to pick a pay cycle and pay period do I have to abandon and redo?

No. All you need to do is edit the file header by clicking 'edit file header' on right hand side of your screen under "File Details" and input your pay cycle and pay period.

F16) Can I change my pay cycle for my organization?

Yes. You will need to contact the Employer Relations Coordinators at MEPP via email before you can remit your contribution file through PLANet. Please notify us in advance at erc.mepp@plannera.ca to provide enough time to set up your new pay cycle. In your email please include the new pay cycle and the effective start date of the new pay cycle. MEPP will then assign the new pay cycle code to select in PLANet for your organization.

Leave of Absence

L1) What Leave code should I use when an employee goes on a leave?

LV| Leave - Personal or educational leave. Employee does not contribute while on leave.

Use when employee is on an employer approved leave of absence. Upon return to work, the Employee is responsible to pay both portions unless the employer has decided to match contributions. As per MEPP legislation, contributions are not permitted while on leave. Contributions for the period of leave may be remitted once the employee has ended the leave and has <u>returned to work.</u>*

PLV| Parental Leave - Maternity, paternal, or adoption leave. Employee does not contribute while on leave.

Upon return to work, the Employee is responsible to pay both portions unless the employer has decided to match contributions. As per MEPP legislation, contributions are not permitted while on leave. Contributions for the period of leave may be remitted once the employee has ended the leave and has <u>returned to work.</u>*

DIS| Disability Leave- Unpaid sick, medical WCB or disability. Employee can contribute while on leave.

Employee is responsible to pay their portion and the employer must match. Contact MEPP for a quote of contributions. If an employee does not pay during their leave, they will still have the option to contribute upon their return to work.

*If employee does not return to work following a leave, MEPP will require a Termination file through PLANet from the employer.

L2) An employees was previously on a MEPP Leave of Absence (LOA) and are now making contributions for the period of their leave. MEPP requires that an employee would have one line in the file for "N" Normal Contributions (Employee/Employer) and a separate line for the repayment amounts classified as "P" Leave of Absence repayment arrears (Employee and Employer). Would there be two lines in the actual file for each employee in this situation?

Yes, there will be two lines entered within one contribution file for an employee who is back from a LOA and making both regular and repayment contributions. One will be coded as "N" Normal, the other coded as "P" Arrears.

Negative Contributions/Refunds/Overpayments

N1) How do I code an over contribution or under contribution from a previous contribution remittance in PLANet?

When you are processing your current contribution file in PLANet you can add any adjustment records for negative or positive adjustments for a previously processed contribution file. For an adjustment record the contribution type would be "A" for adjustment. Next you would need to enter the contribution begin and end date for the pay period that you are adjusting. Lastly, enter the negative or positive adjustment in the employer contribution, the employee contribution and the actual hours field. PLEASE NOTE: If there are no adjustments to the hours make sure to enter 0 because the field cannot be blank. Also, the negative or positive adjustment is the difference between what was previously processed for contributions and actual hours versus what they should have been.

N2) Can I have negative contributions and/or actual hours?

The only time you can have negative contributions and/or actual hours is if you are doing a contribution type 'adjustment' on a contribution file.

Errors and Warnings

E1) Can I override an error message?

No, an error message must be fixed before you can continue to the next step in PLANet.

E2) After I validate a file is there a way to see only the records that have errors/warnings?

Yes. From the File ID screen, in the top left hand corner, click on the box

☐ Display Errors and Warnings Only

Once you click on the box all records that do not have errors/warnings will disappear and the only records displayed are those with errors or warnings. Please note: You must click on each record so they are highlighted in green in order to see the error/warning.

E3) Can I print a report that shows me all the errors and warnings on a file?

Yes. Once you validate a file, if you have errors and/or warnings you can print a hardcopy of those errors and warnings. From the dashboard highlight the appropriate file, in the top right hand corner of your screen click on reports and then click on error reports. This report will show all your records that have errors and/or warnings. You cannot make any changes from this report, you will need to make the necessary changes in the actual contribution file.

E4) If I have multiple errors and/or warnings do I have to validate after I fix each record?

No. You can fix all your records first before you validate the file.