



PLANet USER GUIDE



Working Collaboratively

Contact MEPP

Toll Free: 1-877-506-6377

Phone: 1-306-787-2684

Fax: 1-306-787-0244

mepp@plannera.ca

110 - 1801 Hamilton Street
Regina, Saskatchewan S4P 4W3

www.plannera.ca



Administered by **Plannera Pensions & Benefits**



WHAT'S INSIDE

PLANet Overview

What is PLANet?.....	2
What can you do in PLANet?.....	2
Password and Username.....	2
User Role(s) and Security	3
PLANet Website Address.....	3
File Types	3
Steps for Creating a File	4
Steps for Importing a File	4

Getting Started

How to Log In (First Time, etc.)	5
The Dashboard	6
Changing Your Password	7
Setting Up Your Security Questions	8
Forgot Your Password or Username?	9
User Preferences	10
Logging Out	11

How to Process an Enrolment.....	12
----------------------------------	----

How to Remit Contributions

Creating a Contribution File	17
Importing a CSV Contribution File	22
Importing a CSV Contribution File	28
Importing a CSV Contribution File	30
How to Process a Layoff	32
How to Process a Leave	36
How to Process a Return to Work	40
How to Process a Termination	44
How to Process an Address Change	48
How to Process a Data Change	52

How to Copy a File	56
How to Delete a Record	57
How to Abandon a File	58
How to Print a PDF.	59
How to Print a Contribution Summary	63
CSV Contribution File Example	64

PLANet Overview

What is PLANet?

PLANet is MEPP's online pension administration system that allows employers of the Municipal Employees' Pension Plan (MEPP) to submit pension contributions and other information to their employees pension plan member records.

Benefits

PLANet will make it easier for you to connect with MEPP and allow you to interact with MEPP in a more efficient and timely way by streamlining submitting contributions and other information to MEPP.

What can you do in PLANet?

Employers will be able to:

- enrol new employees;
- remit contributions;
- change employees address;
- change employment type;
- process layoffs;
- process leaves of absences;
- process return to works; and
- process terminations.

Password and Username

The authorized user(s) will be assigned a personal username and password that only they can use for accessing PLANet. This ensures that the appropriate user can create, upload, edit and view data for their employee(s).

User Role(s) and Security

Each user will be assigned a security role that will determine which functionality(ies) is available to that user. In addition, each user will be assigned to one Employer. This ensures that users can only process and view data from their own organization(s).

When you process for multiple employers you will need to be set up as a user per employer.

PLANet Website Address

Once you have received your account information, you will be sent a website link to the system via email.

Here is the website link to PLANet: <https://employer.plannera.ca/mepp/employer/>

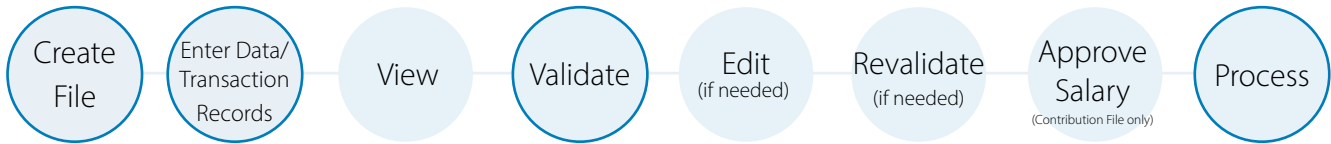
File Types

As an employer you will be able to create and process different types of files in PLANet. Each file type will have different fields to ensure that the correct data is submitted for the type of transaction being processed to MEPP.

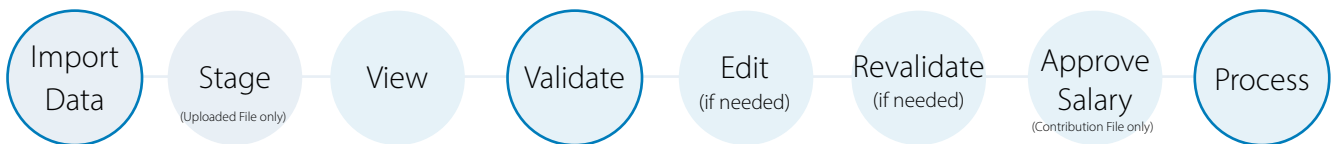
Examples of File Types

- Enrolment
- Contributions
- Address Change
- Data Change (Employment Type)
- Layoff
- Leave
- Return to Work
- Termination

Steps for Creating a File



Steps for Importing a File



Getting Started

How to Log in

MEPP will send the authorized user(s) their personal username and password along with a link to the PLANet login page. If you have not received your account information, please complete and send a [User Information and Authorization form](#) to MEPP or contact MEPP via email or phone.

Log In Page



The screenshot shows the PLANet login page for MEPP Employers. At the top left is the PLANet logo, and at the top right is a link to 'Go back to MEPP'. The main heading is 'Welcome MEPP Employer!'. Below this is a message: 'First time visiting PLANet? Need a username? Contact your MEPP Administration to get started.' The login form has a title 'Log in' and two input fields: 'Username *' and 'Password *'. To the right of the form is a text box with instructions: 'Please enter your username (assigned to you from MEPP) and password, then select Log in to enter the site.' Below this are sections for 'First-time Users' (stating registration is required) and 'Need Help?' (providing contact numbers: 1-800-767-2684 or Toll Free 1-877-506-6377). At the bottom of the form are links for 'Forgot your password?', 'Forgot your username?', and 'Need help?'. A green 'Log in' button is at the bottom right. The Mepp logo is at the bottom left, and social media icons for Facebook, Twitter, and YouTube are at the bottom right.

First time Logging In

The first time you log in you will be required to enter the username and password MEPP sent you.

1. In the **Username** field enter the provided **username**.
2. In the **Password** field enter the provided **temporary password**.
3. Click **Log in**

Note: You must use the assigned username and password sent to you by MEPP to log in for the first time. **Forgot your password?** and **Forgot your username?** will not work until after you've logged in for the first time.



When you first log in to PLANet it is important that you update your password immediately. See "Changing your Password" on page 6.

Logging In

After you logged in for the first time, changed your password and set up the security questions, your password will be updated and used when logging into PLANet moving forward. The initial password MEPP provided you will no longer work.

1. Enter your user specific credentials into the **Username** (assigned by MEPP).
2. Enter your **Password**.
3. Click the **Log in** button.



Where can I find my username and password?

Your log-in credentials are sent to the email address assigned to your MEPP account after you have completed the *PLANet User Information and Authorization form*. If you have not received your account information contact MEPP.

The Dashboard

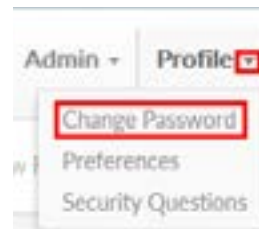
After you log into PLANet, the first page displayed is the Dashboard. Most functionality and capabilities are accessed from this screen. This guide will cover all the functionality accessible from this screen.

If you navigate away from the dashboard, you can return by clicking **Dashboard** in the menu along the top of your screen.



Changing Your Password

1. From the Dashboard, click **Profile** at the top right of the screen.
2. Click **Change Password**.



Note: The **Change Password** window lists the **Password Rules** that are required to enter your new password.

Password Rules:

- 8 characters minimum (40 max);
- At least one of each of: upper case, lower case, number and symbol;
- Last five passwords cannot be reused.

Password Expiry:

- A users password will expire after 180 days and the user will receive a reminder seven days prior to expiry.

Account Locked:

- Accounts will lock after five failed attempts. If you get locked out of your account please contact MEPP at 306-337-4090 to unlock it. Each password attempt will result in a temporary lockout (15 seconds after first, 30 after second, 1 minute after third and 5 minutes after 4th).

3. Enter your **Current Password**.

Note: If this is your first time, it will be the temporary password sent to you by MEPP.

4. Enter your **New Password**.
5. Enter your new password again in the **Confirm Password** field.
6. Click **Submit** to save your changes.

A screenshot of a web form for changing a password. It contains three input fields: 'Current Password: *', 'New Password: *', and 'Confirm Password: *'. At the bottom right of the form, there are two buttons: a grey 'Cancel' button and a green 'Submit' button.

Note: If you have entered a new password that does not comply with the Password rules or if your new password matches the current password a **warning** will appear and you will be required to enter a different password.

Example of Warning Message(s):

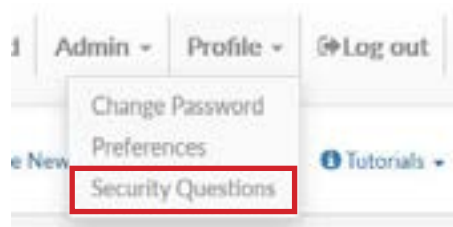
- New and Confirmation passwords have to match.
- New password cannot be the same as current password.

Setting Up Your Security Questions

It is important the first time you log in to set up your Security Questions as this will allow you to regain access to your PLANet account in the case your forget your username or password.

Note: **Forgot your password?** and **Forgot your username?** will not work until you've changed your password and set your security questions.

1. From the **Dashboard** in the top right, click **Profile**.
2. Select **Security Questions**.

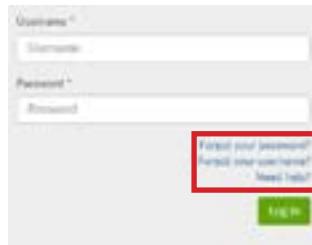


3. Choose three questions from the drop down list and answer each in the provided text box.
Note: Your answers are case-sensitive and space-sensitive.
4. Click **Submit** to save your changes.

A screenshot of a 'Security Questions' form. The form has a title bar 'Security Questions' with a close button. It contains three sections, each with a question label, a dropdown menu, and a text input field. The first dropdown menu is circled in red. At the bottom, there are 'Cancel' and 'Submit' buttons. Below the buttons, there is a small note: '• The answer is case-sensitive and space-sensitive' and '• * is for masking QID's and can never be the answer'.

Forgot Your Password or Username?

If you forget your password or username, the log in screen allows you to have the information emailed to the email address associated with your account. Click the **Forgot your password?** or **Forgot your username?** link as required.



Forgot your Password

1. Click **Forgot your password?** on the log in page.
2. Enter your assigned **Username**.
3. Click **Submit** to reset your password.

Note: PLANet will email a password reset request to the email address associated with your account.

4. Click the **Embedded Security Link** to confirm you want to reset your password.
5. Answer the **Security Questions** provided.

Note: Your answers are case-sensitive and space-sensitive.

6. Click **Submit**.
7. You will then be prompted to enter a **New Password**.
8. Then enter the new password again in the **Confirm Password** field.
9. Click **Submit**.



Forgot your Username

This function is not available at this time.

1. Click **Forgot your username?** on the log in page.
2. Enter the **Email Address** associated with your account in the field that appears.
3. Click **Submit**.

Note: PLANet will email a link to confirm your email account.

4. Click the **Embedded Security Link** in the email.
5. Answer the **Security Question** provided.

Note: Your answers are case-sensitive and space-sensitive.

6. Click **Submit**.
7. PLANet will email the username to the email address associated with your account.

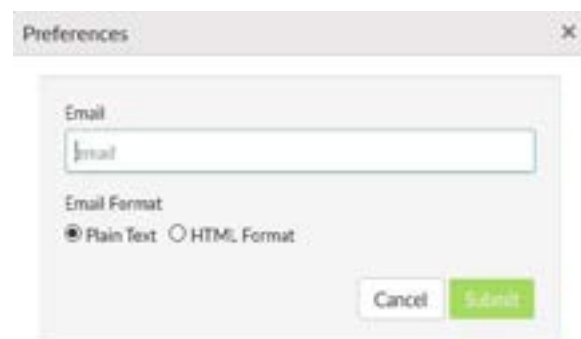
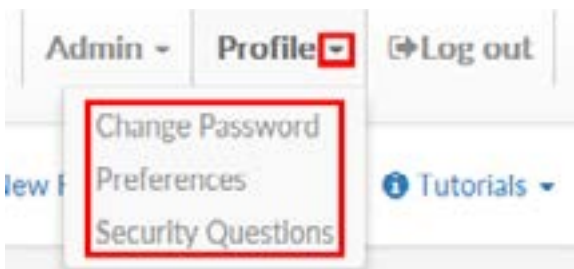


Please check your email. An email containing your username has been sent to the email address associated with your account.

User Preferences

In addition to changing your password, the **Profile** menu allows you to update your user preferences and modify your security questions.

Clicking **Preferences** opens a window to allow you to change the email address connected to your user account. You can also select the **Email Format**.



Logging Out

When you have finished using PLANet, click the **Log Out** button in the top right hand of the screen. This will exit the application and return you to the **Log In** screen.

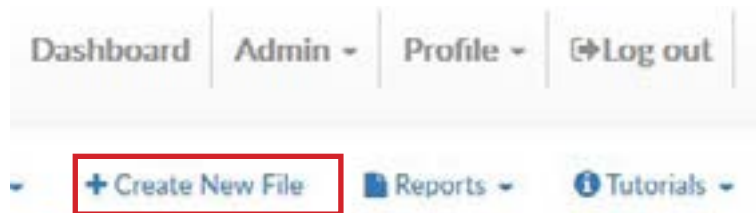


Note: You will be automatically timed out of PLANet if you do not use the application for a period of time.

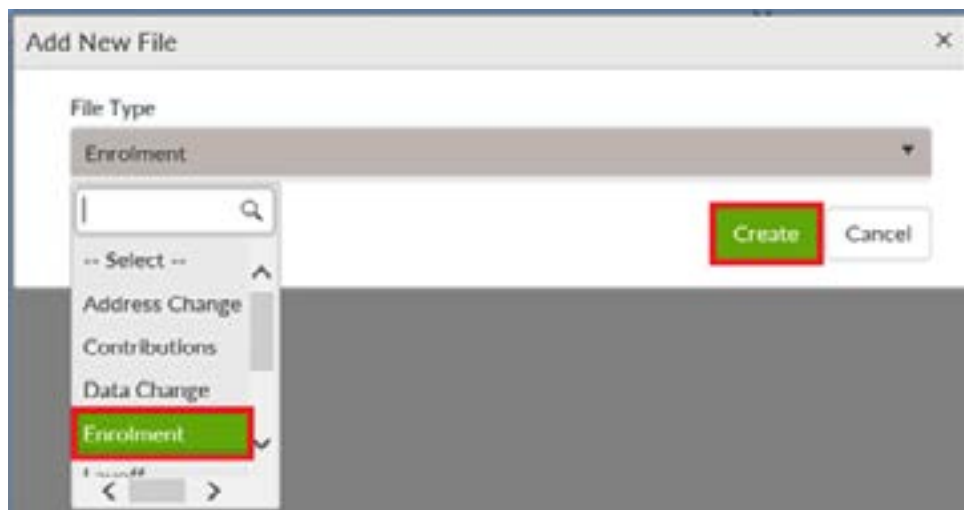
How to Process an Enrolment

Creating a New Enrolment

1. From the **Dashboard**, select **Create New File** at the top right of the screen.



2. The **Add New File** window will display.
3. Select **Enrolment** from the drop down list. Select the file type or use the search field to narrow down your selection list.
4. Click **Create**.



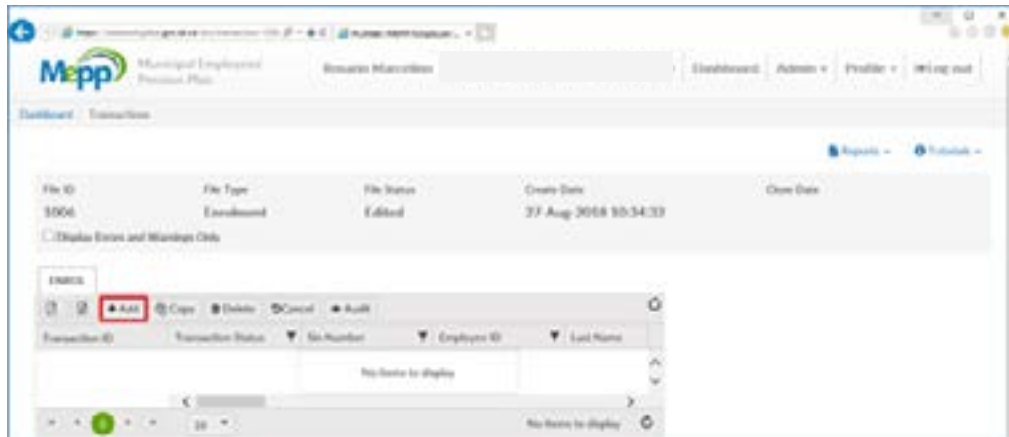
5. The new **Enrolment** file will appear at the top of the **File List**.

Note: The status is listed as "Edited" which indicates that the file is ready for data entry.

6. Click **File ID** to open the file and this takes you to the **Transaction** screen. The transaction list shows no items to display until new records are added.



7. Click **Add** to create a new transaction and the **Create window** is displayed.



8. Enter all fields, including the Employee ID (number assigned by the employer), SIN, or both.
Note: The Transaction ID and Transaction Status cannot be edited. These fields will automatically populate.

Enter
Data

The screenshot shows the 'Create' window in the Mapp system. The window title is 'Create'. At the top, there is a table with columns for 'File ID', 'File Type', 'File Status', and 'Create Date'. The table contains one row:

File ID	File Type	File Status	Create Date
2015	Employment	Edited	07-Sep-2018 14:00:00

Below the table is a form with the following fields:

- Transaction ID: [Text field]
- Transaction Status: [Dropdown menu, value: Edited]
- Sin Number: [Text field]
- Employee ID: [Text field]
- Last Name: [Text field]
- First Name: [Text field]
- Middle Name: [Text field]
- Address Line 1: [Text field]
- Address Line 2: [Text field]
- Address Line 3: [Text field]
- City: [Text field]
- Province: [Dropdown menu, value: SK | SASKATCHEWAN]
- Country: [Dropdown menu, value: CAN | CANADA]
- Postal Code: [Text field]
- Birth Date: [Text field]
- Home Phone: [Text field]
- Home Email: [Text field]
- Date of Employment: [Text field]
- Gender: [Dropdown menu]
- Member Type: [Dropdown menu]
- Marital Status: [Dropdown menu]
- Employment Type: [Dropdown menu]
- Date of Enrollment: [Text field]

At the bottom of the form are four buttons: 'Previous Transaction', 'New Transaction', 'Add', and 'Cancel'. The 'Add' button is highlighted in a red box.

Mandatory Fields include:

- SIN or Employee ID
- Last Name
- First Name
- Address Line 1
- City
- Postal Code
- Province and Country
(These are auto populated)
- Birth Date (dd-mmm-yr)
- Date of Employment
(The employee's first paid work day)
- Date of Enrolment
(The first day the employer deducted pension

contributions for hours worked. This may be different than the date of employment because of probation periods or other reasons.)

- Gender
- Member Type
(General/Designate)
- Marital Status
- Employment Type
(12 month/10 month/Casual/Seasonal)

Non Mandatory fields include:

- Home Phone
- Home Email

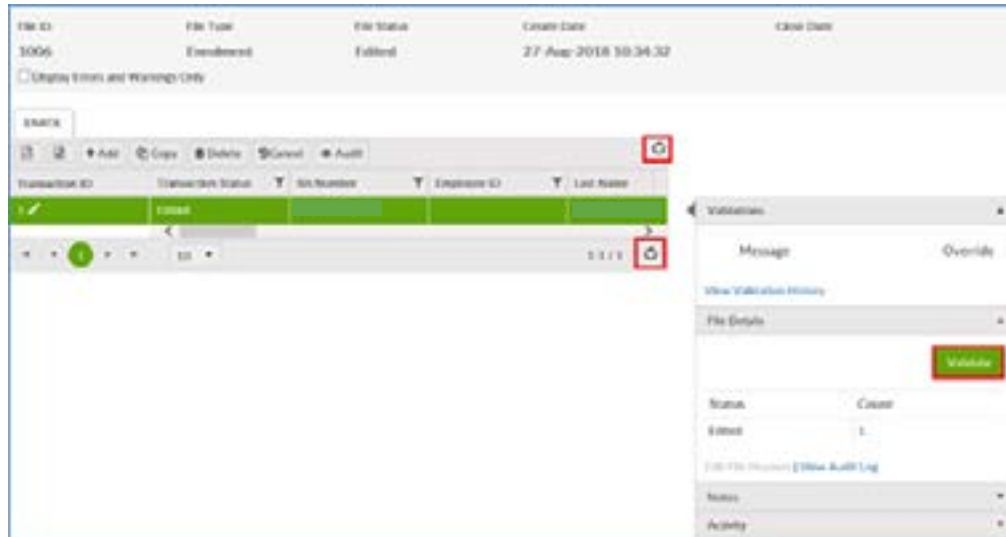
9. Once all the information has been entered click **Save**. If you have missed a mandatory field the system will notify you.

10. The new record is displayed on the transactions list after saving the file.

11. To add more enrolment records to the file, click Add or Copy.

12. Confirm all file details, ensure the correct file is highlighted, then click **Validate**.

Note: If necessary, click the **Refresh** button to update the list.



13. Once the file transaction is validated, the **Status** will either change to **Invalid** (if there are any errors or warnings in the file) or **Valid**.

If Errors or Warnings Appear

Note: If there are errors or warnings in the file, the **File Details** region will provide a count of how many are invalid. If there are errors found in the file, they must be corrected and revalidated before the file can be processed. If there are warnings found in the file, they must be corrected or overrode and revalidated before the file can be processed.

Invalid/File Details Region

Transaction ID	Transaction Status	SIN	Employee ID	Last Name	First Name
6955	Invalid		26594563	DOE	JOHN

14. Once the Status is **Validated**, the file can be processed and sent to MEPP.

15. Click **Process** and the file will be sent to MEPP.

Note: Once the file is processed, it remains in the **File List** but is now in view-only mode. A **Processed** file may only be **Copied** or the **File Exported**.



File ID	File Type	Create Date	Close Date	User	Status
1006	Enrollment	27-Aug-2018 10:34:32		mmarcelino	Validated

File Details

Process

Status	Count
Valid	1

File Headers | View Audit Log

Validations and Exceptions

Message Override

This file has no validations yet.

View Validation History

Notes

Activity

File Details/Edit File Headers

File ID	File Type	Create Date	Close Date	User	Status
1006	Enrollment	27-Aug-2018 10:34:32	27-Aug-2018 13:52:54	mmarcelino	Processed

File Details

Processed On 27-Aug-2018 13:52:52

Processed By mmarcelino

Status	Count
Valid	1

File Headers | View Audit Log

Validations and Exceptions

Message Override

This file has no validations yet.

View Validation History

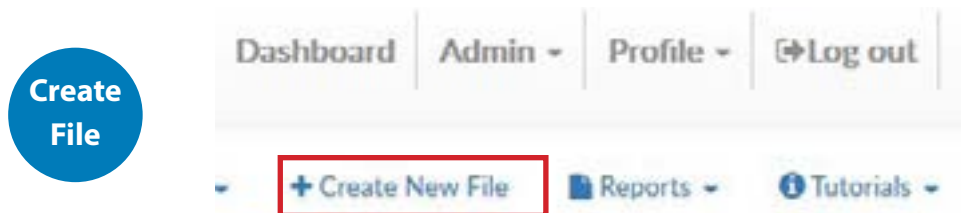
Notes

Activity

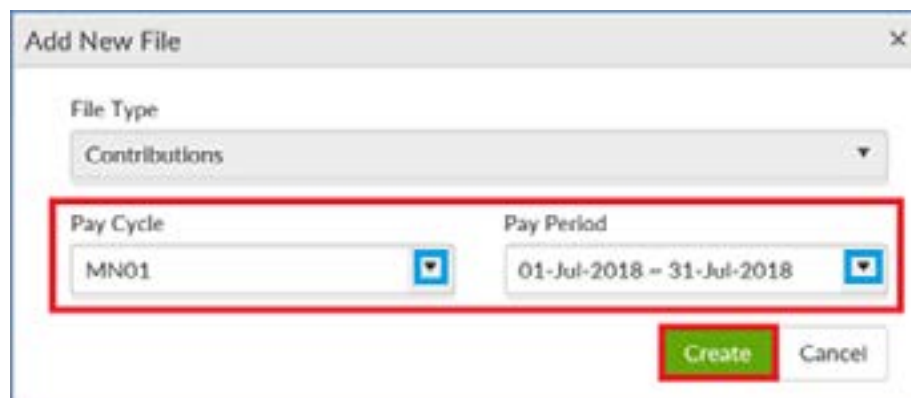
How to Remit Contributions

Creating a Contribution File

1. From the **Dashboard**, select **Create New File** at the top right of the screen.

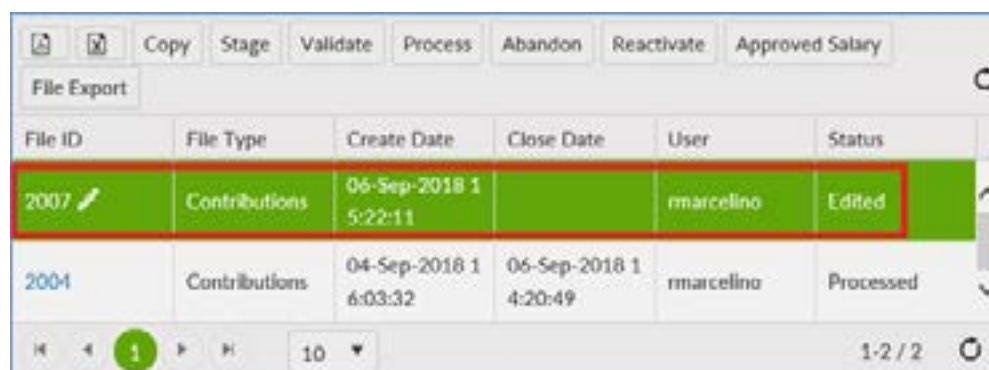


2. The **Add New File** window will display.
3. Select **Contributions** from the drop down list. Select the file or use the search field to narrow down your selection. Select pay cycle and pay period from the dropdown list.
4. Click **Create**.



5. The new **Contribution** file will appear at the top of the **File List**.

Note: The status is listed as "Edited" which indicates that the file is ready for data entry.



File ID	File Type	Create Date	Close Date	User	Status
2007	Contributions	06-Sep-2018 1 5:22:11		rmarcelino	Edited
2004	Contributions	04-Sep-2018 1 6:03:32	06-Sep-2018 1 4:20:49	rmarcelino	Processed

- Click **File ID** to open the file. Clicking the File ID button displays the **Transaction** screen. The transaction list shows no items to display until new records are added.

File ID	File Type	Create Date	Close Date	User	Status
2007	Contributions	06-Sep-2018 15:22:11		rmarcelino	Edited

- Click **Add** to create a new transaction and the **Create window** is displayed.

File ID	File Type	File Status	Create Date
2007	Contributions	Edited	06-Sep-2018 15:22:11

Display Errors and Warnings Only

PDR

+ Add Copy Delete Cancel Audit

Transaction ID	Transaction Status	Sin Number	Employee ID
No items to display			

- Enter all fields, including one of Employee ID or SIN.

Note: The Transaction ID and Transaction Status cannot be edited. These fields will be automatically populated by PLANet.



Create

Transaction ID: [] Transaction Status: Edited Sin Number: []

Employee ID: [] Last Name: [] First Name: []

Contribution Type: [] Contribution Begin: [] Contribution End: []

Service Type: [] Employer Contribution: 287.54 Employee Contribution: 287.54

Actual Hours: 168 Salary: []

Previous Transaction Next Transaction **Save** Cancel

Mandatory Fields include:

- SIN or Employee ID
- Last Name
- First Name
- Contribution Type
- Service Type
- Employer Contribution
- Employee Contribution

- Actual Hours

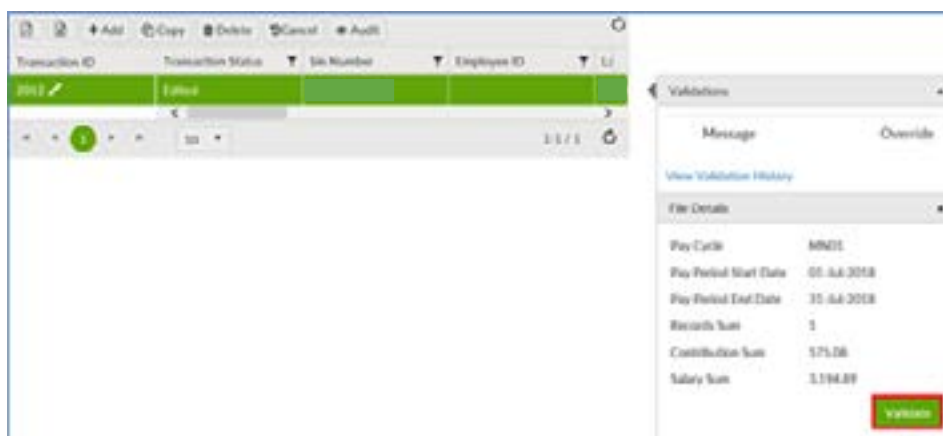
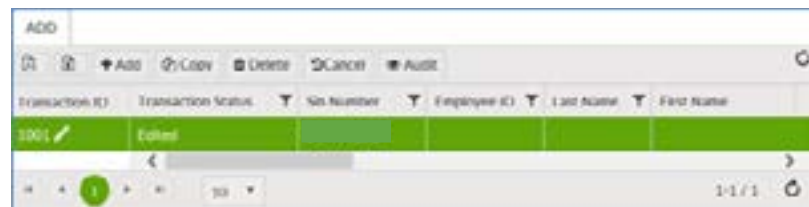
Non Mandatory Fields include:

- Contribution Begin*
- Contribution End*

*the beginning/end of the pay period you are remitting, OR the beginning/end of an action as it occurred.

9. Once all the information has been entered click **Save**. If you have missed a mandatory field the system will notify you.
10. The new record is displayed on the transaction list after saving the file.
11. To add more contribution records, click Add or Copy.
12. Confirm all file details, ensure the correct file is highlighted, then click **Validate** in the File Details region.

Note: If necessary, click the **Refresh** button to update the list.



13. Once the file transaction is validated, the **Status** will either change to **Invalid** (if there are any errors in the file) or **Valid**.

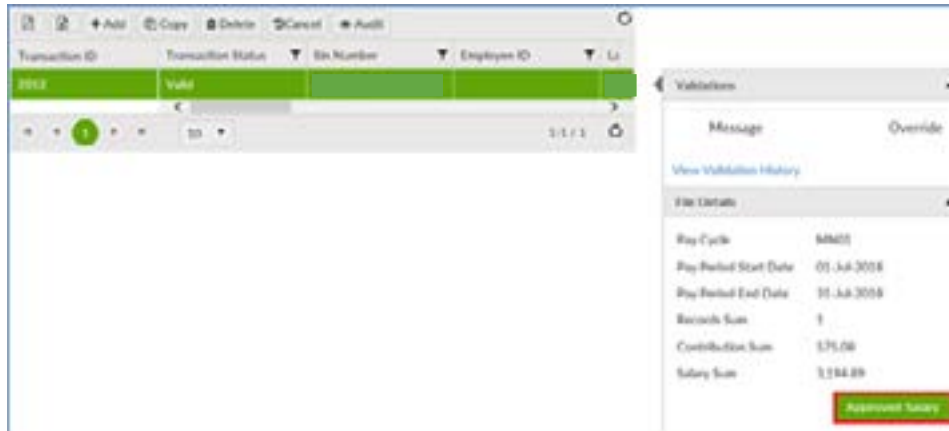
If Errors or Warnings Appear

Note: If there are error or warnings in the file, the **File Details** region will provide a count of how many are invalid. If there are errors found in the file, they must be corrected and revalidated before the file can be processed. If there are warnings found in the file, they must be corrected or override and revalidated before the file can be processed.

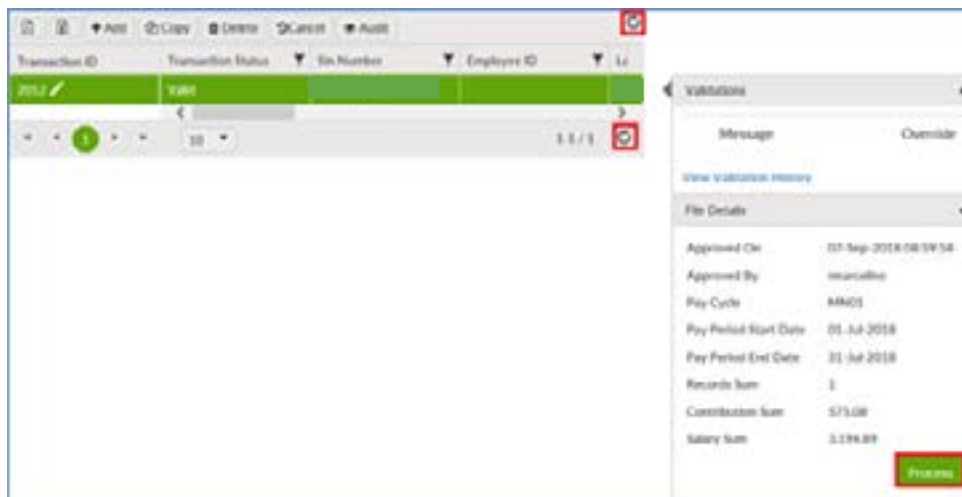
Invalid/File Details Region

Transaction ID	Transaction Status	SIN	Employee ID	Last Name	First Name
6955	Invalid		26594563	DOE	JOHN

14. Once Validated, review the Approved Salary in the file details region and confirm by clicking **Approved Salary**.



15. Click **Process** in the File Details region and the completed file will be sent to MEPP.



File Details - After Posting

The **File Details** region will display the details of the final processed file.

Note: Once the file is processed, it remains in the **File List** but in view-only mode. A **Processed** file may only be **Copied** or the **File Exported**.

Download and Print a Report

Once the file has been processed the user can download and print the Employer Contribution Detail Report for their hard copy and future reference.

1. From the Dashboard, highlight on the correct Contribution File by clicking the row.

File ID	File Type	Create Date	Close Date	User	Status
2007	Contributions	06-Sep-2018 1 5:22:11	07-Sep-2018 0 9:02:41	marcellino	Processed
2004	Contributions	04-Sep-2018 1 6:03:32	06-Sep-2018 1 4:20:49	marcellino	Processed

File Details	
Approved On	07-Sep-2018 08:59:58
Approved By	marcellino
Processed On	07-Sep-2018 09:02:40
Processed By	marcellino
Pay Cycle	MN01
Pay Period Start Date	01-Jul-2018
Pay Period End Date	31-Jul-2018
Records Sum	1
Contribution Sum	575.08
Salary Sum	3,194.89

Status	Count
Valid	1

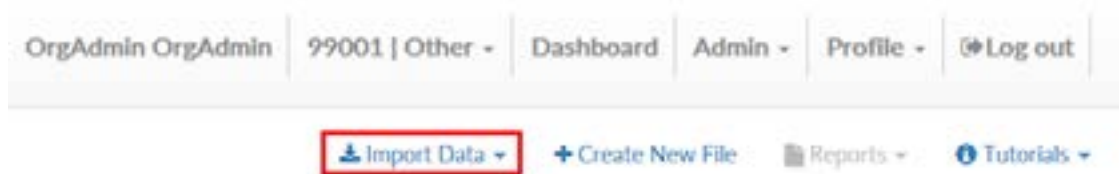
2. Select **Reports** (beside Create New File).
3. Select Employer Contribution Detail.
4. Open downloaded file.
5. Save and/or Print file.

- Activity Reports
- Audit Reports
- Errors Reports
- Employer Contribution Detail**
- Employer Contribution Detail for Employers

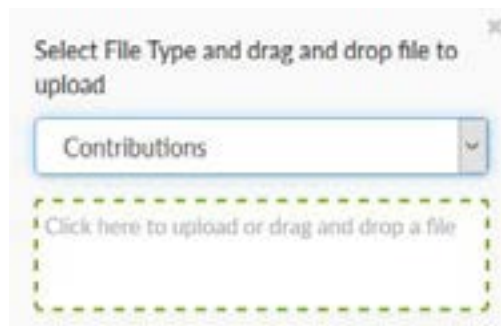
How to Remit Contributions

Importing a CSV Contribution File

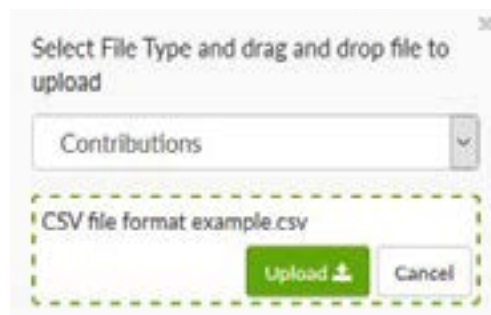
If a contribution file exists in an approved CSV file format, the file can be uploaded to PLANet. See page 64 for a CSV Contribution File Example for required fields.



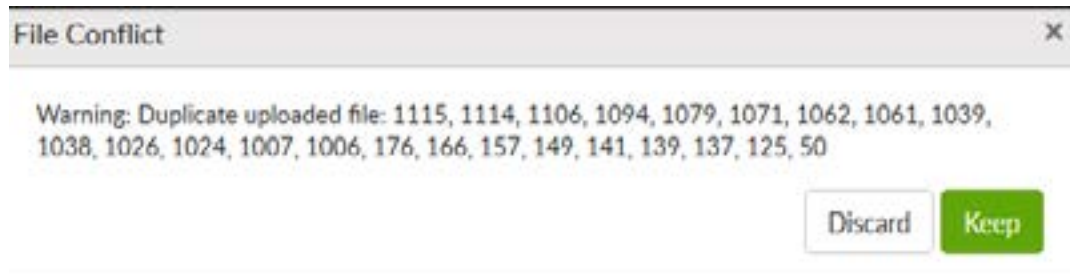
1. From the **Dashboard**, select **Import Data** near the top right of the screen (beside Create New File).
2. The **Import Data** window will display.
3. Select **Contributions** from the File Type drop-down list.
4. Once the **Contributions** file has been selected, in the perforated box either click in the box to **Browse** or drag and the drop a file.



5. Once the file is displayed in the **Import** region, click **Upload**.



Possible Warning: Duplicate Copy of File



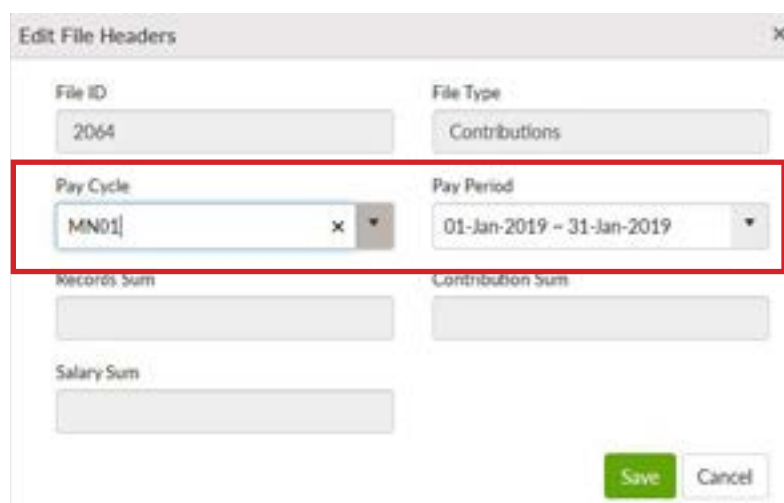
Note: If a file with the same data already exists in PLANet, a message will display indicating that a duplicate copy of the file already exists, which allows you to keep or discard the file being uploaded.

- Once the file is uploaded, the **Edit File Headers** window is displayed and the uploaded file is titled **Contribution file**.

Note: File Headers are not required for other file types and the **Edit File Headers** screen will not be displayed or available for anything other than a contribution file.

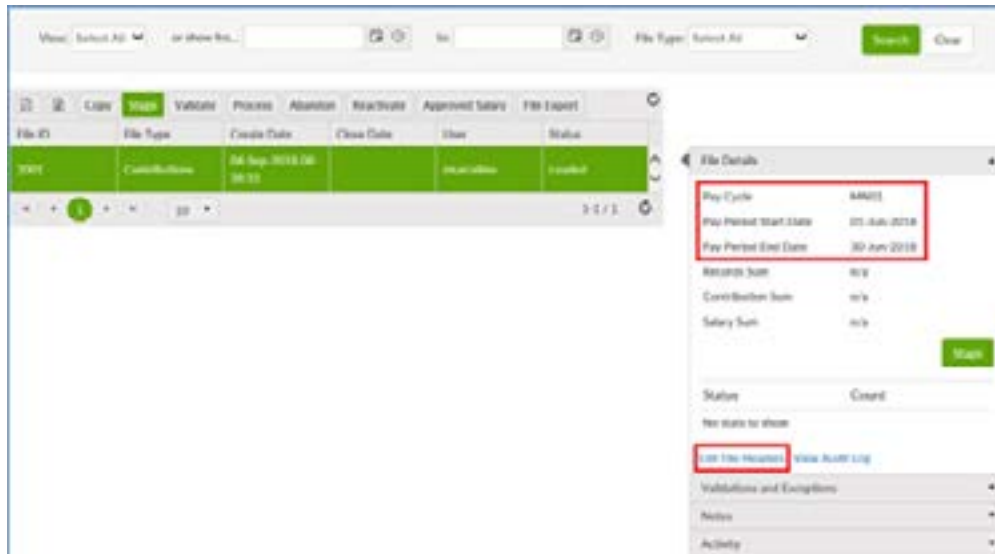
- Enter the **Pay Cycle** and **Pay Periods**.

Note: The File ID and File Type are populated automatically and cannot be updated.

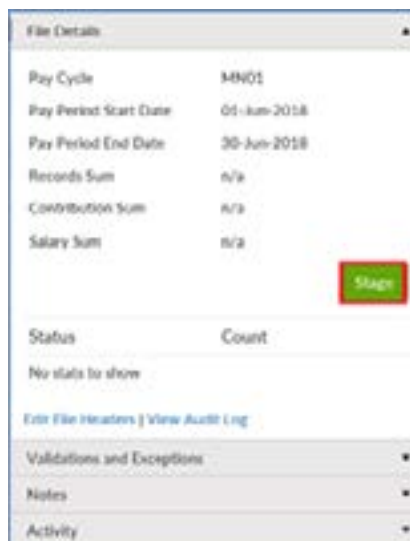


- Click the **Save** button.

9. The file is listed and the **File Details** of the highlighted file are displayed on the right .



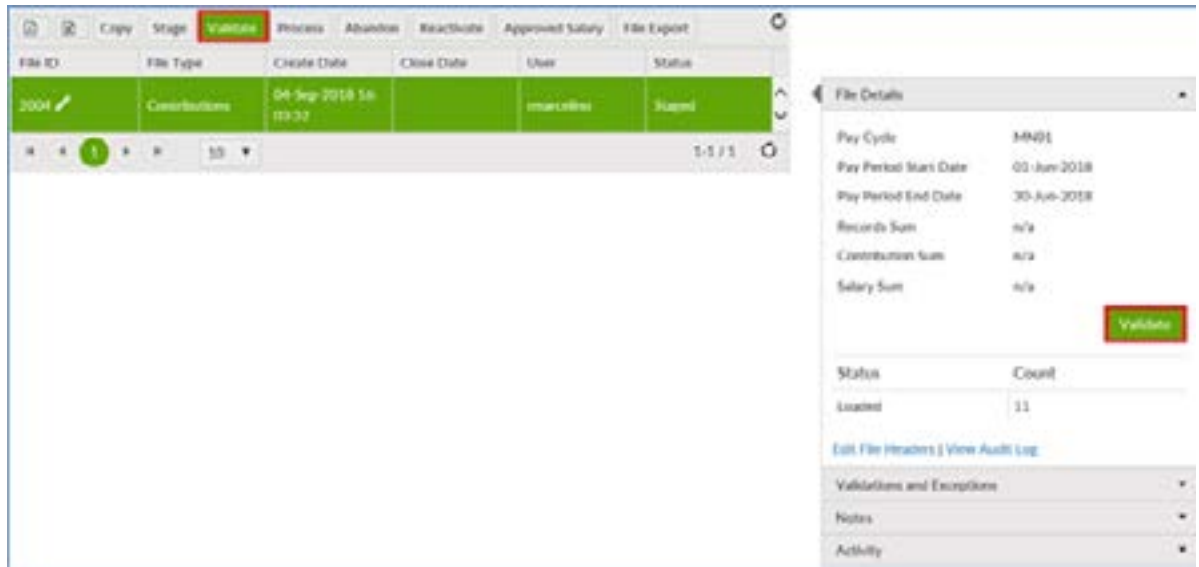
10. Click **Stage** to upload the data and to show the file has been imported to PLANet.



File ID	File Type	Create Date	Close Date	User	Status
2065	Contributions	25-Jan-2019 13:58:07			Staged
2064	Contributions	25-Jan-2019 11:58:11	25-Jan-2019 13:57:15		Abandoned

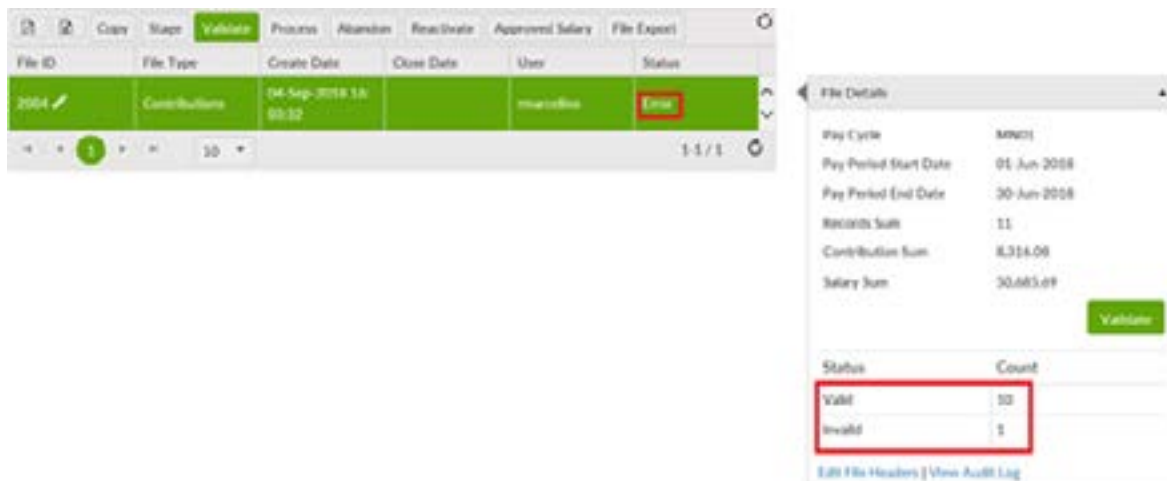
11. Click **Validate**.

Note: File validation can be performed from the **Dashboard** or from the **File Details** screen. Once the file is validated, the **Status** of the file will change to **Validated** (if there are no errors or warnings) or **Error** (if there are errors or warnings in any of the transaction records).



If the file is large, the validation process may take some time. If you log out of PLANet, the validations will continue to run.

12. If any files are invalid, edit by clicking on **File ID** of the invalid record(s) and update the fields. When corrected, click **Validate**.



If Errors or Warnings Appear

Note: If there are errors or warnings in the file, the **File Details** region will provide a count of how many are invalid. If there are errors found in the file, they must be corrected and revalidated before the file can be processed. If there are warnings found in the file, they must be corrected or overrode and revalidated before the file can be processed.

13. Once Validated, review the Salary Sum and confirm by clicking **Approved Salary**.

Note: Confirm the contribution sum and salary sum under file details to your records before you click **Approve Salary**.

Approve Salary

File ID	File Type	Create Date	Close Date	User	Status
2004	Contributions	04-Sep-2018 16:03:32		marcelino	Validated

File Details

- Pay Cycle: MN01
- Pay Period Start Date: 01-Jun-2018
- Pay Period End Date: 30-Jun-2018
- Records Sum: 11
- Contribution Sum: 8,316.08
- Salary Sum: 51,018.90

Approved Salary

14. Once validated, send the completed contribution file to MEPP by clicking **Process**.

Note: Once the file is processed, it remains in the file list but is view-only. A processed file may only be **Copied** or **File Exported** (export of the final/edited file to a CSV file).

Process

File ID	File Type	Create Date	Close Date	User	Status
2004	Contributions	04-Sep-2018 16:00:39		marcelino	Validated

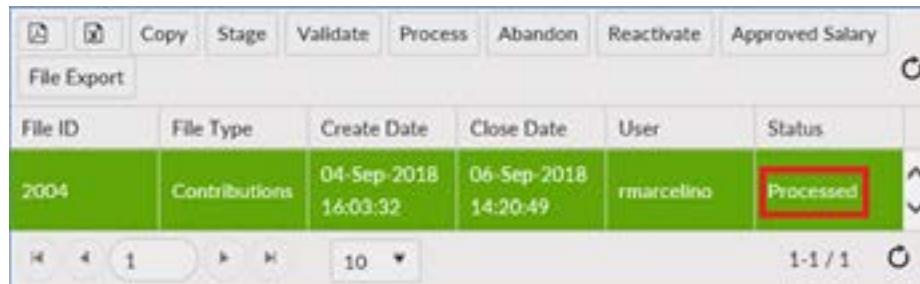
File Details

- Approved On: 04-Sep-2018 16:15:18
- Approved By: marcelino
- Pay Cycle: MN02
- Pay Period Start Date: 01-Jun-2018
- Pay Period End Date: 30-Jun-2018
- Records Sum: 11
- Contribution Sum: 8,316.08
- Salary Sum: 51,018.90

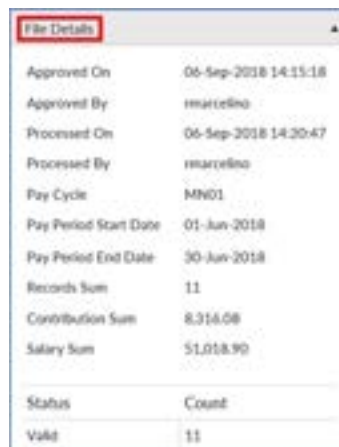
Process

File Details - After Posting

The **File Details** region will display the details of the final processed file.



File ID	File Type	Create Date	Close Date	User	Status
2004	Contributions	04-Sep-2018 16:03:32	06-Sep-2018 14:20:49	rmarcelino	Processed

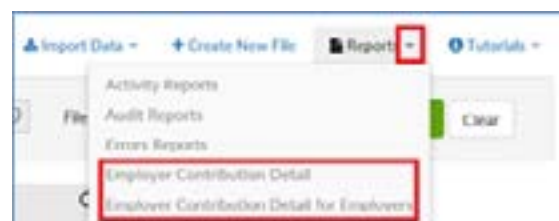


File Details	
Approved On	06-Sep-2018 14:15:18
Approved By	rmarcelino
Processed On	06-Sep-2018 14:20:47
Processed By	rmarcelino
Pay Cycle	MN01
Pay Period Start Date	01-Jun-2018
Pay Period End Date	30-Jun-2018
Records Sum	11
Contribution Sum	8,316.08
Salary Sum	51,018.90
Status	
Valid	11

Download and Print a Report

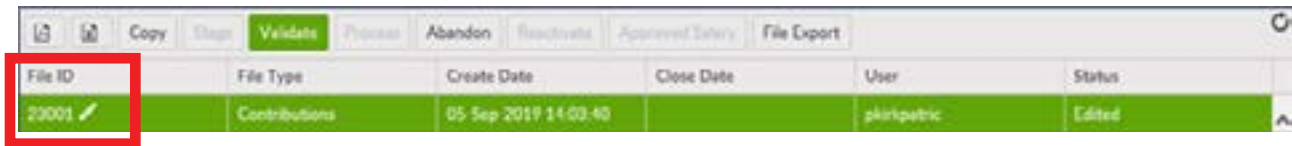
Once the file has been processed the user can download and print the Employer Contribution Detail Report for their hard copy and future reference.

1. From the dashboard, highlight the contribution file by clicking on the row.
2. Select **Reports** (beside Create New File).
3. Select Employer Contribution Detail or Employee Contribution detail for Employers.
4. Open downloaded file.
5. Save and/or Print file.



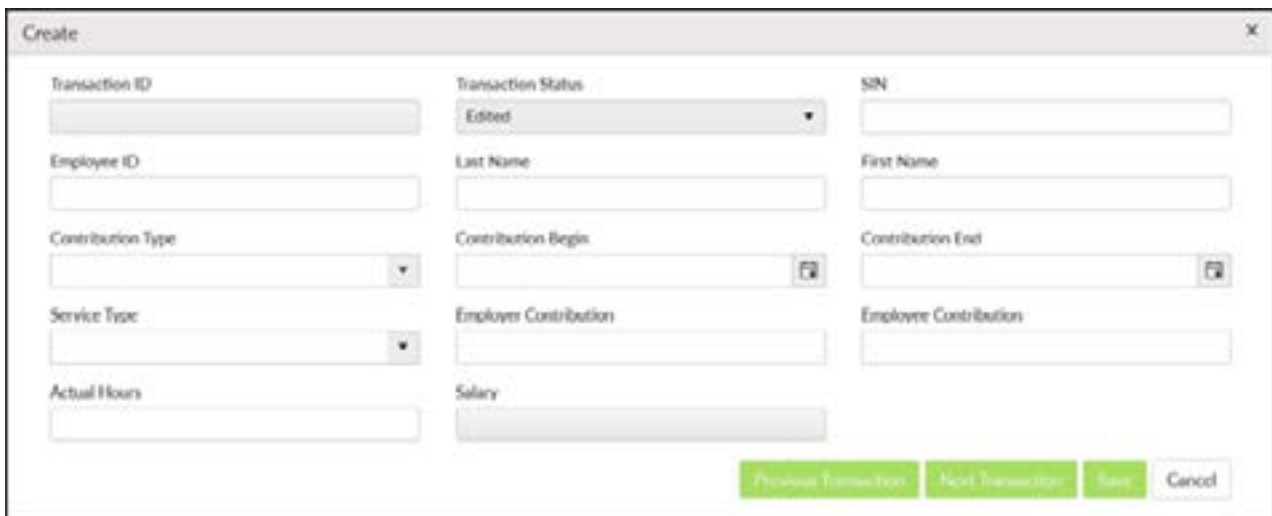
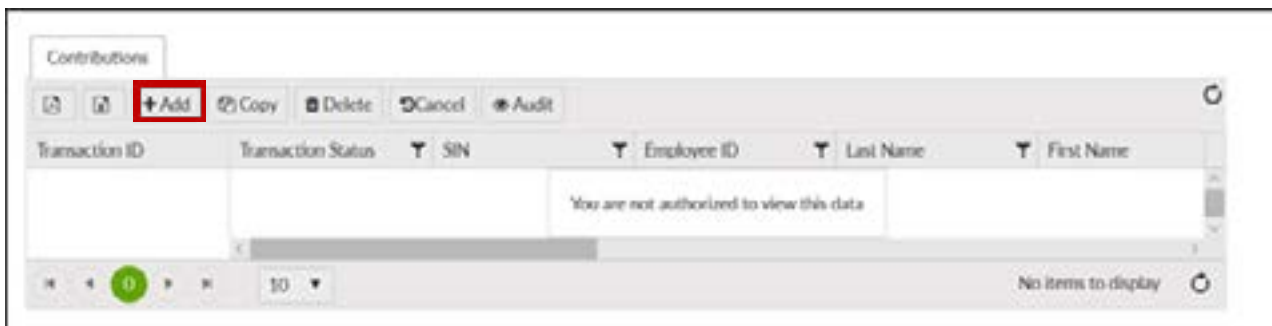
How to do Retro on a Contribution File

1. From the Dashboard click **File ID** to open the Contribution File that you created.



File ID	File Type	Create Date	Close Date	User	Status
20001	Contributions	05-Sep-2019 11:03:40		plink@bpic	Edited

2. Click the **Add button** to create a new transaction and the Create Window is displayed.



A Retro can only be for a previously processed pay period(s) and can either be entered by pay period or as a lump sum.

3. Enter fields in **Create Window** above as follows:

- SIN or Employee ID (only one is required)
- Last Name
- First Name
- Contribution Type: R for Retro
- Contribution Begin: first day of the final pay period that the Retro pertains to
- Contribution End: Last day of the final pay period the Retro pertains to

NOTE: Contribution period begin and end dates must be in the same pay period. (i.e. if your pay cycle is monthly and your retro is for the period January 1, 2020 to March 31, 2020 - you can do as a lump sum in which case contribution begin would be March 1, 2020 and contribution end would be March 31, 2020. If you are breaking it down by pay period then you would have to create a transaction for each pay period – in this example you would break it down by each month January, February and March 2020)

NOTE: If Retro includes previous years and you are doing it as a lump sum, you must break it down by year submitting the total amount in the last pay period of the year in which retro pertains to or the last pay period that the member contributed in that year whichever is earlier. However, if you are breaking it down by pay period you would create a transaction for each pay period in the year the retro pertains to.

- g. Service Type: NP for New Plan
- h. Employer Contribution: Enter the amount of Retro.
- i. Employee Contribution: Enter the amount of Retro.
- j. Actual Hours: Should always be 0 for Retro so you need to enter 0 in the Actual Hours field.

NOTE: You cannot leave the actual hours field blank.

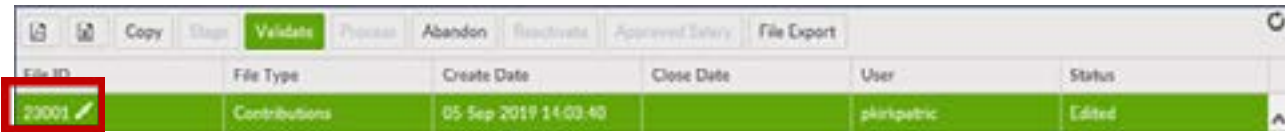
Transaction ID	Transaction Status	SIN
<input type="text"/>	Edited	<input type="text"/>
Employee ID	Last Name	First Name
<input type="text"/>	Doe	John
Contribution Type	Contribution Begin	Contribution End
R Retro	01-Mar-2020	31-Mar-2020
Service Type	Employer Contribution	Employee Contribution
NP New Plan	100.00	100.00
Actual Hours	Salary	
0	<input type="text"/>	

NOTE: Retro is for period January 1 to March 31, 2020 and it was entered as a lump sum so the pay period would be the last pay period in which the retro pertained to. In the above example it would be March 1 to 31, 2020. If you wanted to do the Retro by pay period you would have to create 3 transactions for January, February and March, 2020 and breakdown the employer and employee contributions by month.

- 4. Click **Save**.
- 5. If you have more than one employee that requires a Retro for a previous pay period repeat steps 2 to 4.

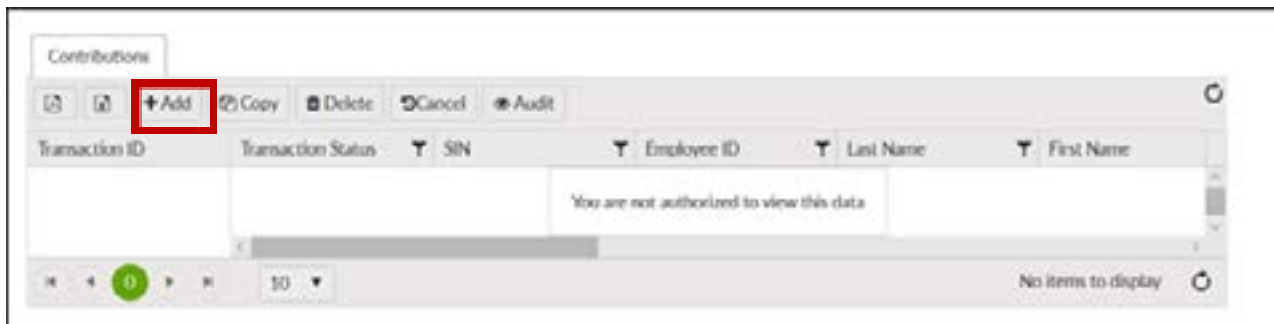
How to do an Adjustment on a Contribution File

1. From the Dashboard click **File ID** to open the Contribution File that you created.



File ID	File Type	Create Date	Close Date	User	Status
22001	Contributions	05 Sep 2019 14:03:40		pkirpatric	Edited

2. Click the **Add button** to create a new transaction and the Create Window is displayed.



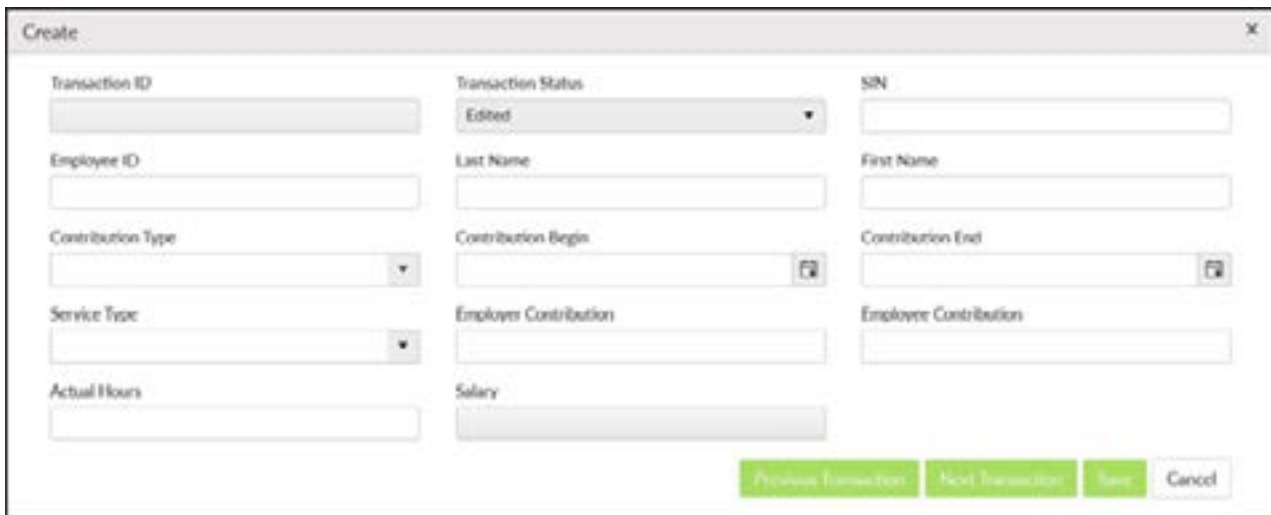
Contributions

+Add Copy Delete Cancel Audit

Transaction ID Transaction Status SIN Employee ID Last Name First Name

You are not authorized to view this data

No items to display



Create

Transaction ID:

Transaction Status: Edited

SIN:

Employee ID:

Last Name:

First Name:

Contribution Type:

Contribution Begin:

Contribution End:

Service Type:

Employer Contribution:

Employee Contribution:

Actual Hours:

Salary:

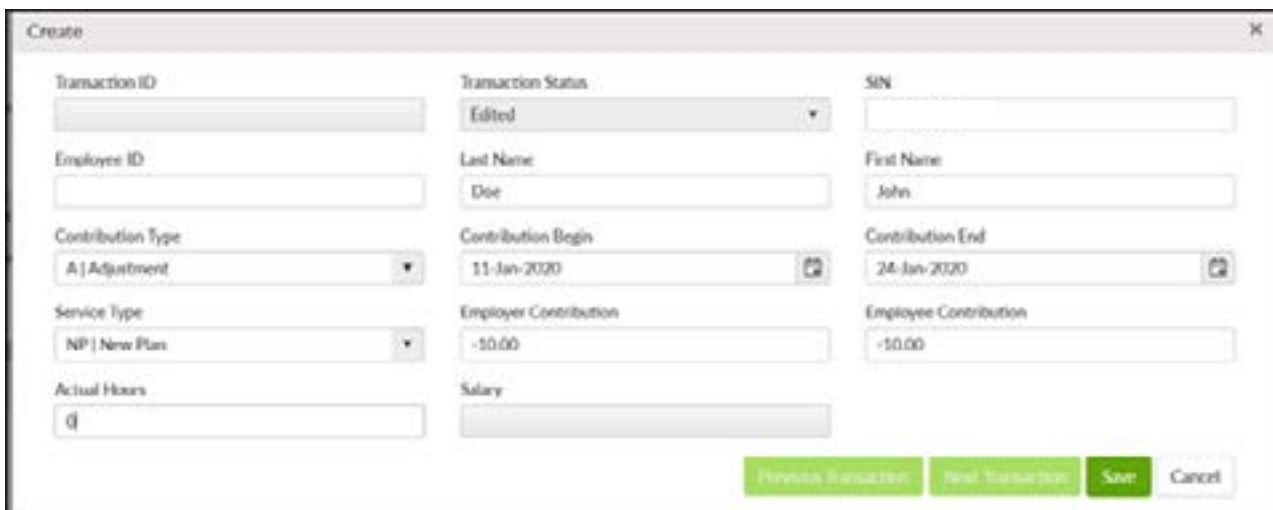
Previous Transaction Next Transaction Save Cancel

3. Enter all fields in **Create Window** above as follows:

- SIN or Employee ID (only one is required)
- Last Name
- First Name
- Contribution Type: A for adjustment
- Contribution Begin: Beginning of the pay period for the adjustment period
- Contribution End: End of the pay period for the adjustment period
- Service Type: NP for New Plan
- Employer Contribution: Enter the amount of the adjustment. NOTE: adjustments can either be negative

-
- or positive amounts
 - i. Employee Contribution: Enter the amount of the adjustment. NOTE: adjustments can either be negative or positive amounts
 - j. Actual Hours: Enter the amount of hours that you are adjusting. NOTE: adjustments in hours can either be negative, positive, or there may be no hours [if no hours you must enter 0 in Actual hours field (you cannot leave the hours field blank)].

Example with fields completed below:



Transaction ID	Transaction Status	SIN
<input type="text"/>	Edited	<input type="text"/>
Employee ID	Last Name	First Name
<input type="text"/>	Doe	John
Contribution Type	Contribution Begin	Contribution End
A Adjustment	11-Jan-2020	24-Jan-2020
Service Type	Employer Contribution	Employee Contribution
NP New Plan	-10.00	-10.00
Actual Hours	Salary	
0	<input type="text"/>	

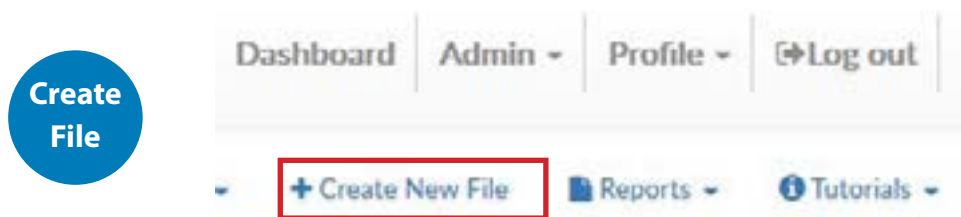
Previous Transaction Next Transaction Save Cancel

4. Click **Save**.
5. If more than one employee requires an adjustment for a previous pay period repeat steps 2 to 4.

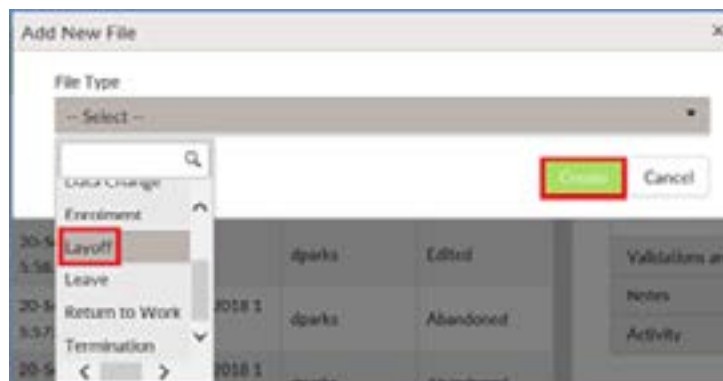
How to Process a Layoff

Creating a Layoff File

1. From the **Dashboard**, select **Create New File** at the top right of the screen.



2. The **Add New File** window will display.
3. Select **Lay-off** from the drop down list. Select the file or use the search field to narrow down your selection.
4. Click **Create**.



5. The new **Lay-off** file will appear at the top of the **File List**.

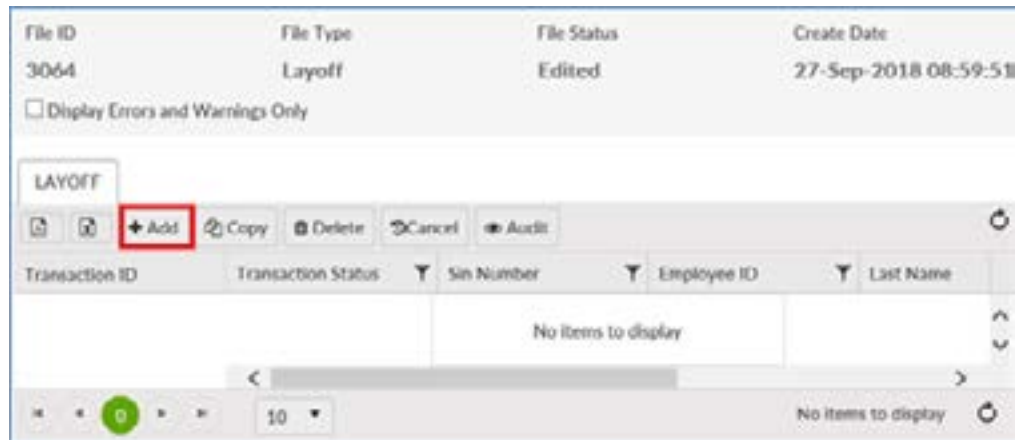
Note: The status is listed as "Edited" which indicates that the file is ready for data entry.

6. Click **File ID** to open the file. Clicking the File ID button displays the **Transaction** screen which is currently empty.

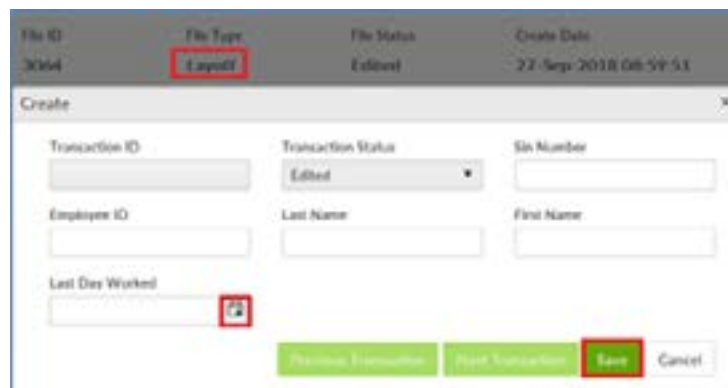


File ID	File Type	Create Date	Close Date	User	Status
3004	Layoff	27-Sep-2018 08:59:51		marcelino	Edited
3006	Layoff	10-Sep-2018 08:38:14	10-Sep-2018 08:39:08	marcelino	Processed

7. Click **Add** to create a new transaction and the **Create window** is displayed.



8. Enter all fields, including one of Employee ID (number assigned by the employer) or SIN.
Note: The Transaction ID and Transaction Status cannot be edited. These fields will automatically populate.



Mandatory Fields include:

- SIN or Employee ID (number assigned by the employer)
- Last Name
- First Name
- Last Day Worked

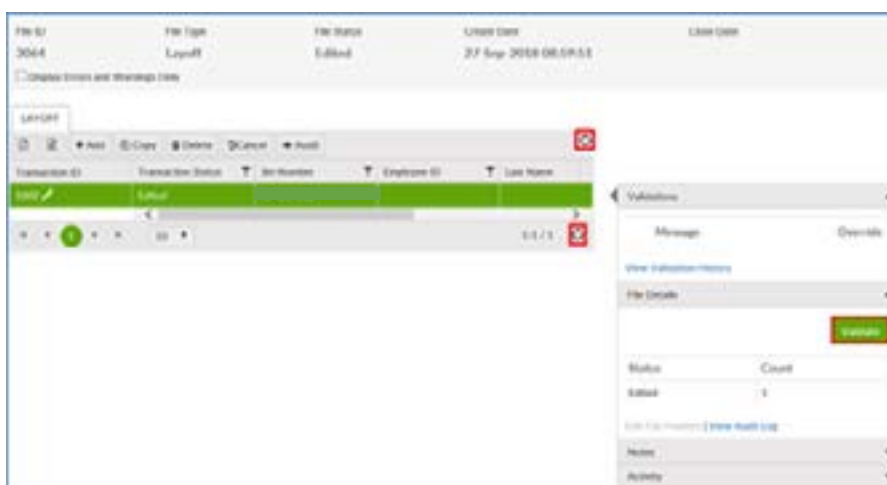
9. Once all the information has been entered click **Save**. If you have missed a mandatory field the system will notify you.

10. To add more layoffs, click **Add** or **Copy**.

Note: The new record is displayed on the transaction list after saving the file.

11. Confirm all file details, ensure the correct file is highlighted, then click **Validate**.
12. Once the file transaction is validated, the **Status** will either change to **Invalid** (if there are any errors or warnings in the file) **or Valid**.

Validate



If Errors or Warnings Appear

Note: If there are errors or warnings in the file, the **File Details** region will provide a count of how many are invalid. If there are errors found in the file, they must be corrected and revalidated before the file can be processed. If there are warnings found in the file, they must be corrected or override and revalidated before the file can be processed.

Invalid/File Details Region

Transaction ID	Transaction Status	SIN	Employee ID	Last Name	First Name
6955	Invalid		26594563	DOE	JOHN

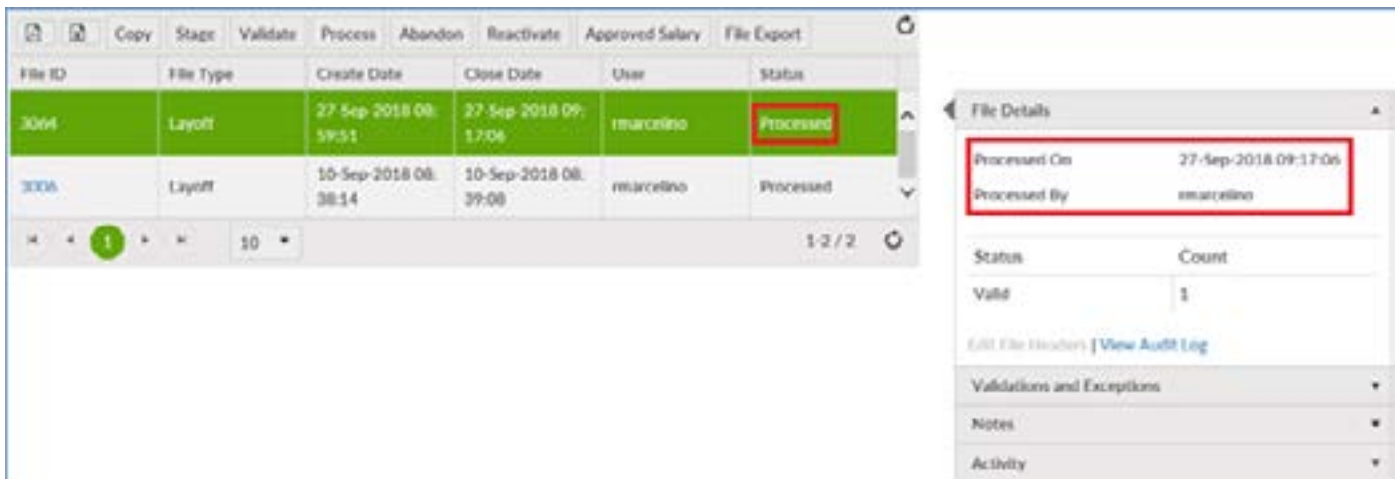
13. Once the Status is **Validated**, the file can be processed and sent to MEPP.
14. Click **Process** and the completed file will be sent to MEPP.



Note: Once the file is processed, it remains in the **File List** but now in view-only mode. A **Processed** file may only be **Copied** or the **File Exported**.

File Details - After Posting

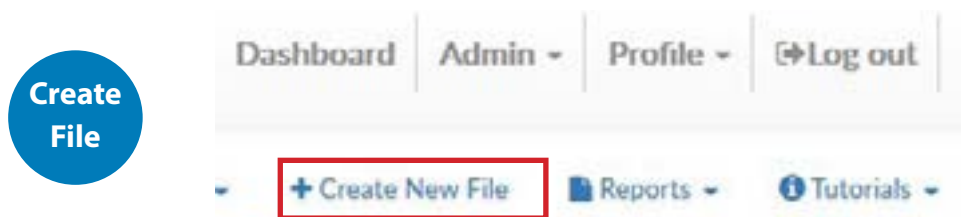
The **File Details** region will display the details of the final processed file.



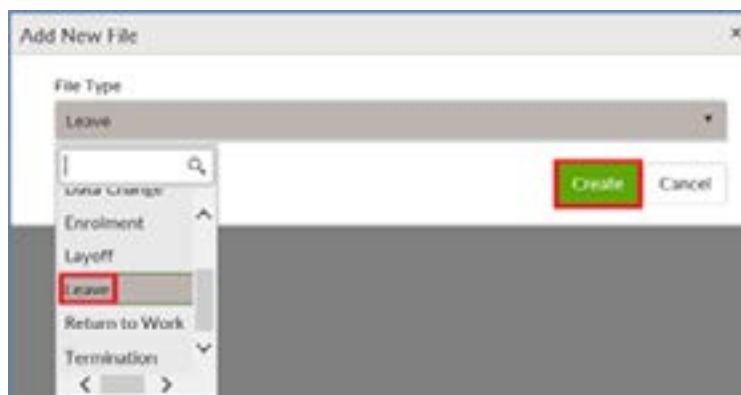
How to Process a Leave

Creating a Leave File

1. From the **Dashboard**, select **Create New File** at the top right of the screen.



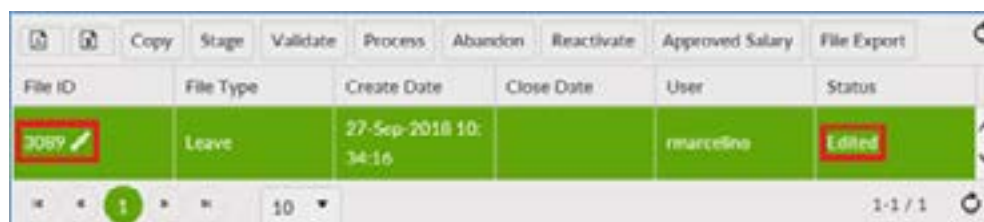
2. The **Add New File** window will display.
3. Select **Leave** from the drop down list. Select the file or use the search field to narrow down your selection.
4. Click **Create**.



5. The new **Leave** file will appear at the top of the **File List**.

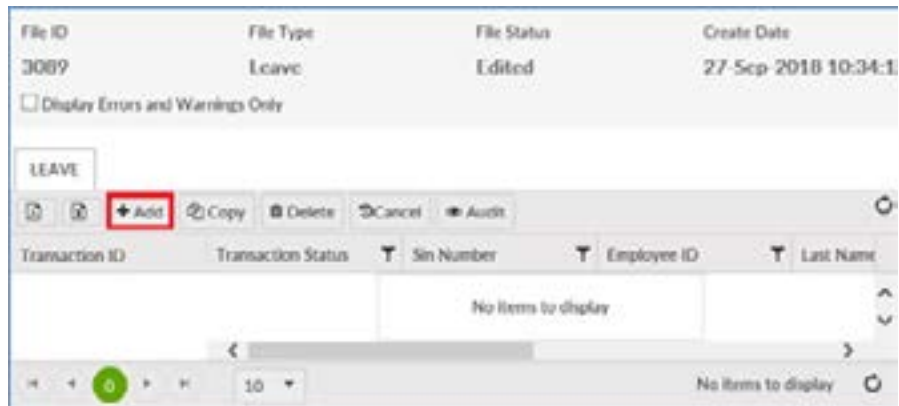
Note: The status is listed as "Edited" which indicates that the file is ready for data entry.

6. Click **File ID** to open the file. Clicking the File ID button displays the **Transaction** screen which is currently empty.



File ID	File Type	Create Date	Close Date	User	Status
3089	Leave	27-Sep-2018 10:34:16		marcelino	Edited

7. Click **Add** to create a new transaction and the **Create window** is displayed.



8. Enter all fields, including one of Employee ID (number assigned by the employer) or SIN.
Note: The Transaction ID and Transaction Status cannot be edited. These fields will be automatically populated by PLANet.



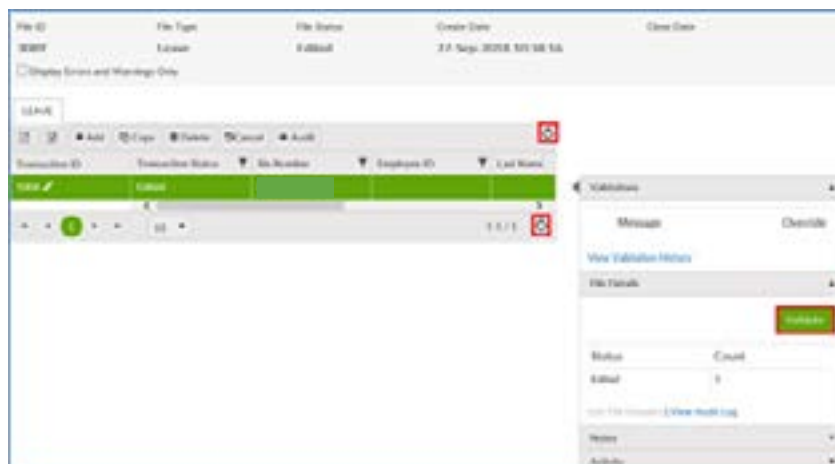
Mandatory Fields include:

- SIN or Employee ID (number assigned by the employer)
- Last Name
- First Name
- Type of Leave
- Last Day Worked

9. Once all the information has been entered click **Save**. If you have missed a mandatory field the system will notify you.

10. To add another leave, click Add or Copy.

11. Confirm all file details, ensure the correct file is highlighted, then click **Validate**.



12. Once the file transaction is validated, the **Status** will either change to **Invalid** (if there are any errors or warnings in the file) **or Valid**.

If Errors or Warnings Appear

Note: If there are errors or warnings in the file, the **File Details** region will provide a count of how many are invalid. If there are errors found in the file, they must be corrected and revalidated before the file can be processed. If there are warnings found in the file, they must be corrected or overrode and revalidated before the file can be processed.

Invalid/File Details Region

Transaction ID	Transaction Status	SIN	Employee ID	Last Name	First Name
6955	Invalid		26594563	DOE	JOHN

13. Once the Status is **Validated**, the file can be processed and sent to MEPP.

14. Click **Process** and the completed file will be sent to MEPP.

Note: Once the file is processed, it remains in the **File List** but in view-only mode. A **Processed** file may only be **Copied** or the **File Exported**.



File ID	File Type	Create Date	Close Date	User	Status
3089	Leave	27-Sep-2018 10:34:16		marcelino	Validated
3087	Enrolment	27-Sep-2018 10:32:20	27-Sep-2018 10:33:57	stutt	Processed

Status	Count
Valid	1

File Details - After Posting

The **File Details** region will display the details of the final processed file.

File ID	File Type	Create Date	Close Date	User	Status
3089	Leave	27-Sep-2018 10:34:16	27-Sep-2018 11:26:28	marcelino	Processed
3087	Enrolment	27-Sep-2018 10:32:20	27-Sep-2018 10:33:57	stutt	Processed

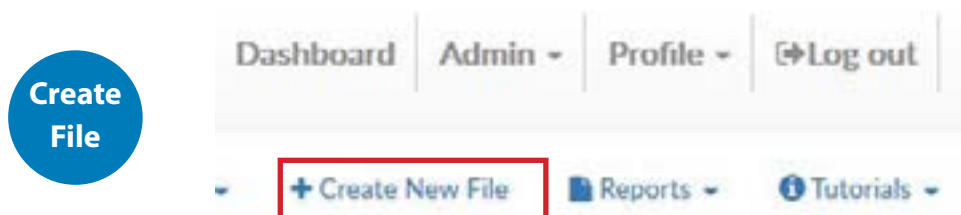
Processed On	Processed By
27-Sep-2018 11:26:28	marcelino

Status	Count
Valid	1

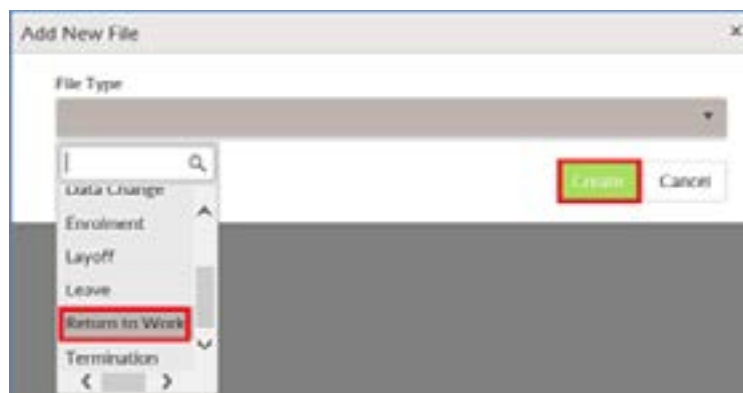
How to Process a Return to Work

Creating a Return to Work File

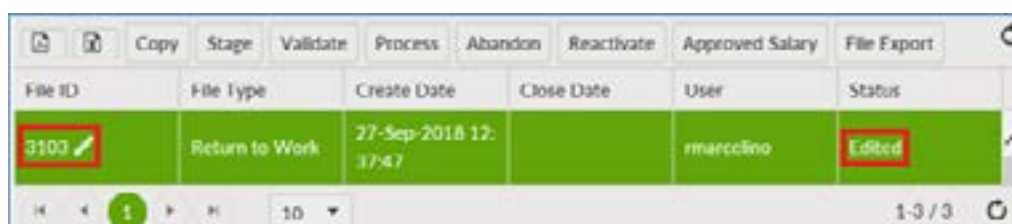
1. From the **Dashboard**, select **Create New File** at the top right of the screen.



2. The **Add New File** window will display.
3. Select **Return to Work** from the drop down list. Select the file or use the search field to narrow down your selection.
4. Click **Create**.

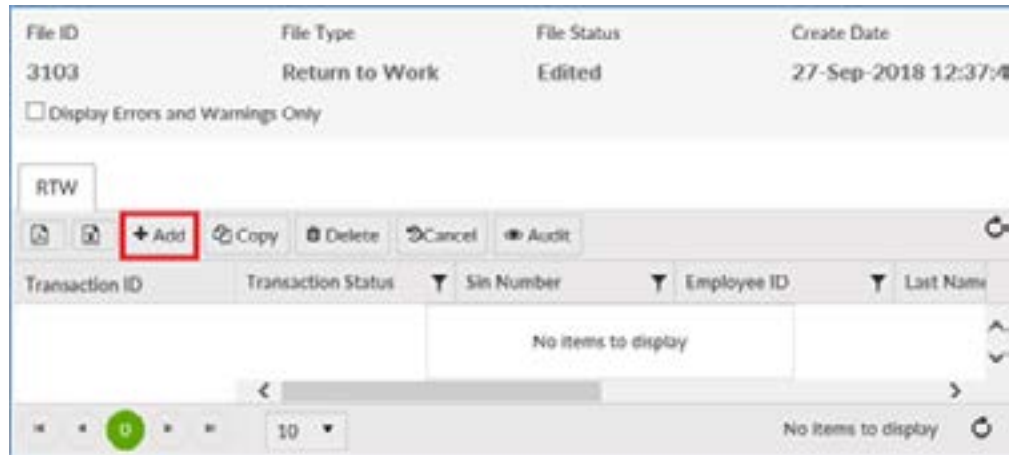


5. The new **Return to Work** file will appear at the top of the **File List**.
Note: The status is listed as "Edited" which indicates that the file is ready for data entry.
6. Click **File ID** to open the file. Clicking the File ID button displays the **Transaction** screen which is currently empty.



File ID	File Type	Create Date	Close Date	User	Status
3103	Return to Work	27-Sep-2018 12:37:47		rmarcclino	Edited

7. Click **Add** to create a transaction and the **Create window** is displayed.



8. Enter all fields, including one of Employee ID (number assigned by the employer) or SIN.
Note: The Transaction ID and Transaction Status cannot be edited. These fields will be automatically populated by PLANet.



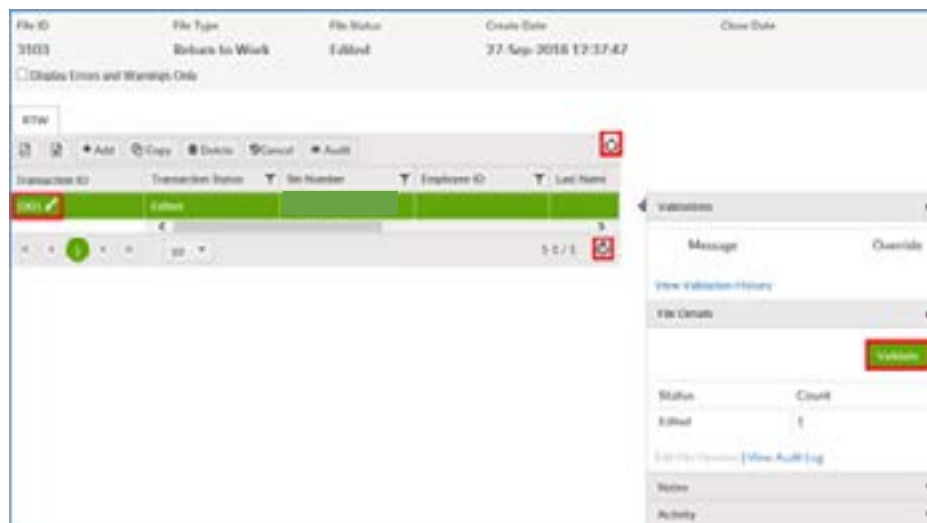
Mandatory Fields include:

- SIN or Employee ID (number assigned by the employer)
- Last Name
- First Name
- Date Return to Work
- Employment Type

9. Once all the information has been entered click **Save**. If you have missed a mandatory field the system will notify you.

10. To add more return to works, click Add or Copy.

11. Confirm all file details, ensure the correct file is highlighted, then click **Validate**.



12. Once the file transaction is validated, the **Status** will either change to **Invalid** (if there are any errors or warnings in the file) **or Valid**.

If Errors or Warnings Appear

Note: If there are errors or warnings in the file, the **File Details** region will provide a count of how many are invalid. If there are errors found in the file, they must be corrected and revalidated before the file can be processed. If there are warnings found in the file, they must be corrected or overrode and revalidated before the file can be processed.

Invalid/File Details Region

Transaction ID	Transaction Status	SIN	Employee ID	Last Name	First Name
6955	Invalid		26594563	DOE	JOHN

13. Once the Status is **Validated**, the file can be processed and sent to MEPP.
14. Click **Process** and the completed file will be sent to MEPP.



File ID	File Type	Create Date	Close Date	User	Status
3100	Return to Work	27-Sep-2018 12:37:47		marcelino	Validated
3064	Layoff	27-Sep-2018 08:59:51	27-Sep-2018 09:17:06	marcelino	Processed
3006	Layoff	10-Sep-2018 08:38:14	10-Sep-2018 08:39:08	marcelino	Processed

Note: Once the file is processed, it remains in the **File List** but now in view-only mode. A **Processed** file may only be **Copied** or the **File Exported**.

File Details - After Posting

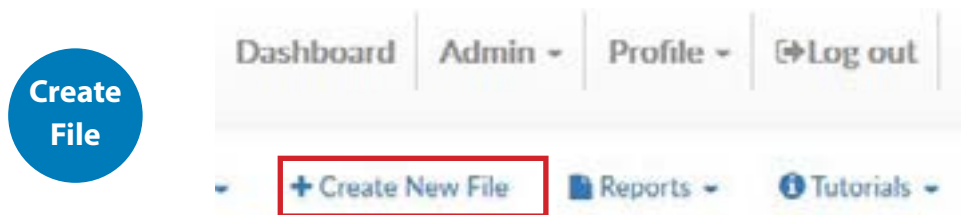
The **File Details** region will display the details of the final processed file.

File ID	File Type	Create Date	Close Date	User	Status
3100	Return to Work	27-Sep-2018 12:37:47	27-Sep-2018 12:50:11	marcelino	Processed
3064	Layoff	27-Sep-2018 08:59:51	27-Sep-2018 09:17:06	marcelino	Processed
3006	Layoff	10-Sep-2018 08:38:14	10-Sep-2018 08:39:08	marcelino	Processed

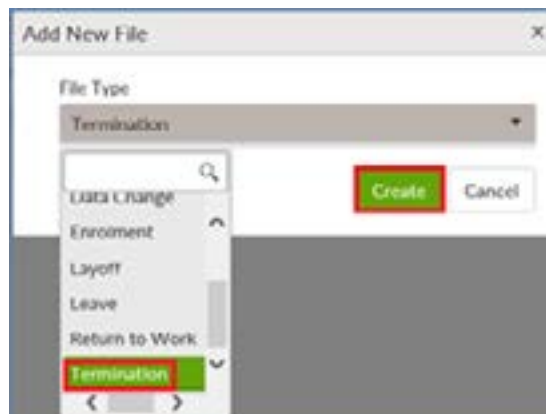
How to Process a Termination

Creating a Termination File

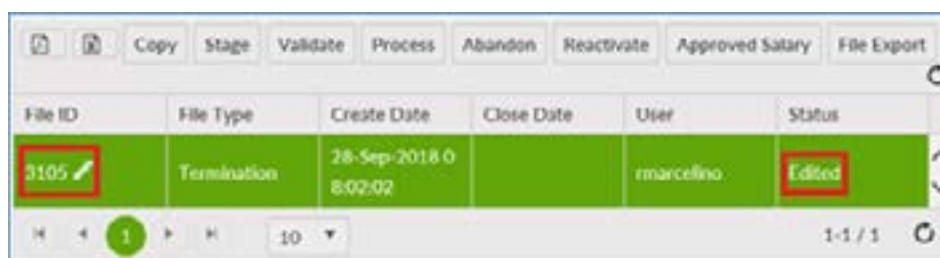
1. From the **Dashboard**, select **Create New File** at the top right of the screen.



2. The **Add New File** window will display.
3. Select **Termination** from the drop down list. Select the file or use the search field to narrow down your selection.
4. Click **Create**.

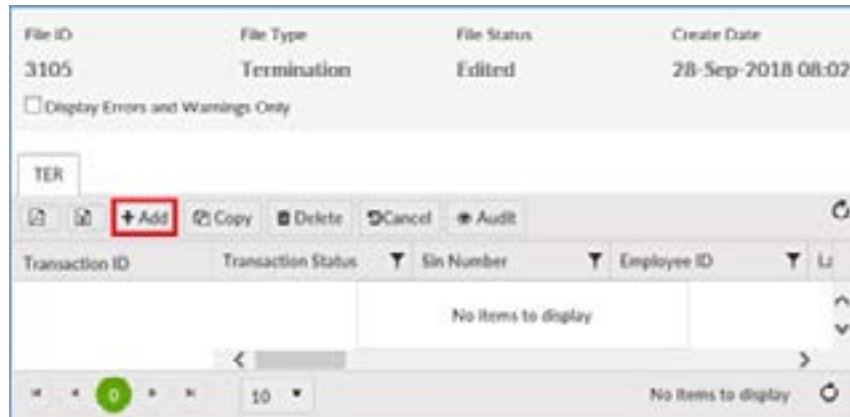


5. The new **Termination** file will appear at the top of the **File List**.
Note: The status is listed as "Edited" which indicates that the file is ready for data entry.
6. Click **File ID** to open the file. Clicking the File ID button displays the **Transaction** screen. The transaction list shows no items to display until new records are added.



File ID	File Type	Create Date	Close Date	User	Status
3105	Termination	28-Sep-2018 08:02:02		rmarcelino	Edited

7. Click **Add** to create a transaction and the **Create window** is displayed.



8. Enter all fields, including one of Employee ID (number assigned by the employer) or SIN.
Note: The Transaction ID and Transaction Status cannot be edited. These fields will be automatically populated by PLANet.



9. Once all the information has been entered click **Save**. If you have missed a mandatory field the system will notify you.

Mandatory Fields include:

- SIN or Employee ID (number assigned by the employer)
- Last Name
- First Name
- Last Day Worked - enter the last day you paid the employee
- Final Contribution Amount - enter sum of employee and employer contributions for the final pay period
- Actual Hours for Final Pay Period - enter actual hours worked in the final pay period
- Termination Reason
- Address, City and Postal Code
- Province and Country. These are auto populated by PLANet but you can change it if your employee moved to another country. Click the drop down list and choose the correct province and/or country.

Non Mandatory fields include:

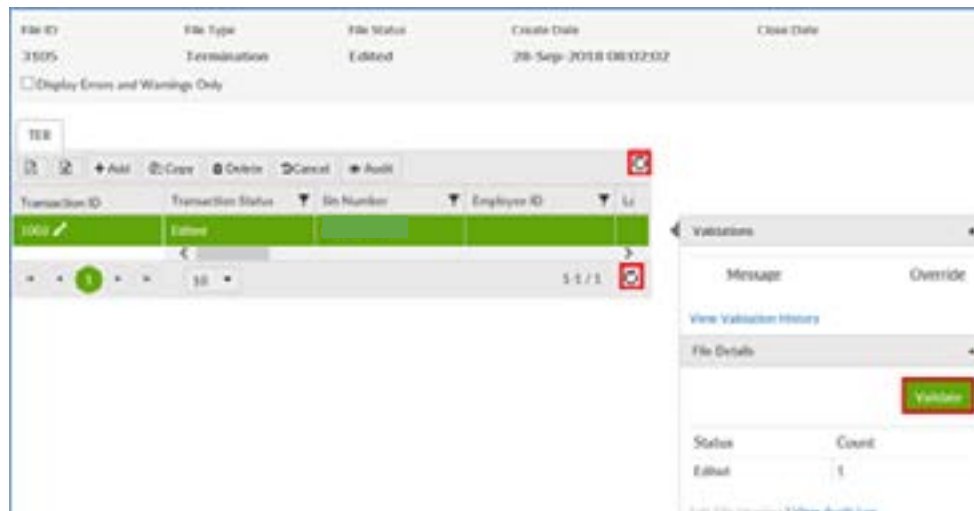
- Home Phone
- Home Email

Note: Last date worked, Final Contribution Amount and Actual Hours for Final Pay Period entered on the Termination Notice must match the information you enter on the final contribution file that you remit for the terminated employee.

10. To add more terminations, click **Add or Copy**.

Note: The new record is displayed on the transaction list after saving the file.

11. Confirm all file details and then click **Validate**.



12. Once the file transaction is validated, the **Status** will either change to **Invalid** (if there are any errors or warnings in the file) **or Valid**.

If Errors or Warnings Appear

Note: If there are errors or warnings in the file, the **File Details** region will provide a count of how many are invalid. If there are errors found in the file, they must be corrected and revalidated before the file can be processed. If there are warnings found in the file, they must be corrected or overrode and revalidated before the file can be processed.

Invalid/File Details Region

Transaction ID	Transaction Status	SIN	Employee ID	Last Name	First Name
6955	Invalid		26594563	DOE	JOHN

13. Once the Status is **Validated**, the file can be processed and sent to MEPP.

14. Click **Process** and the completed file will be sent to MEPP.



File ID	File Type	Create Date	Close Date	User	Status
3105	Termination	28-Sep-2018 08:02:02		marc@bms	Validated

Status	Count
Valid	1

Note: Once the file is processed, it remains in the **File List** but now in view-only mode. A **Processed** file may only be **Copied** or the **File Exported**.

File Details - After Posting

The **File Details** region will display the details of the final processed file.

File ID	File Type	Create Date	Close Date	User	Status
3105	Termination	28-Sep-2018 08:02:02	28-Sep-2018 08:55:43	marc@bms	Processed

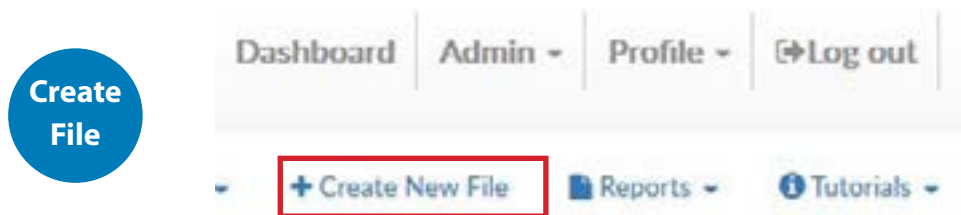
Processed On	Processed By
28-Sep-2018 08:13:43	marc@bms

Status	Count
Valid	1

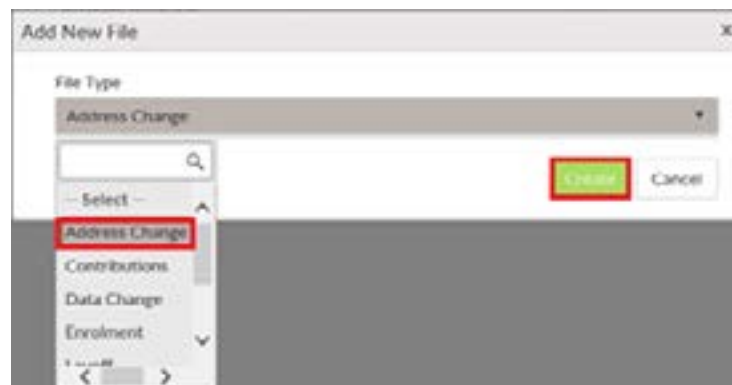
How to Process an Address Change

Creating an Address Change File

1. From the **Dashboard**, select **Create New File** at the top right of the screen.



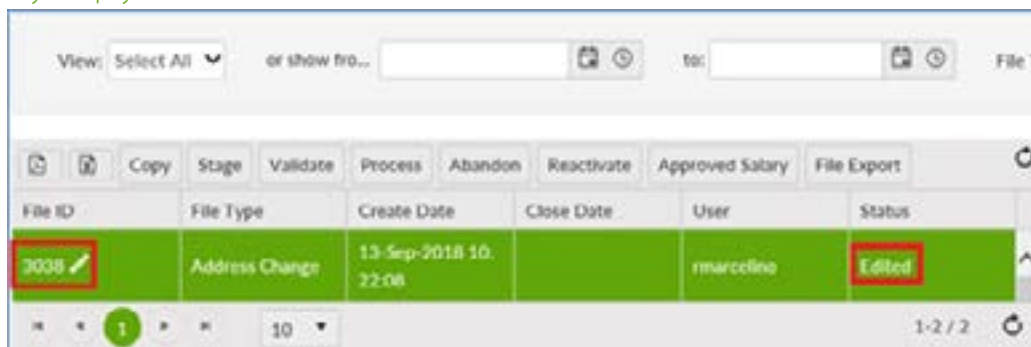
2. The **Add New File** window will display.
3. Select **Address Change** from the drop down list. Select the file or use the search field to narrow down your selection.
4. Click **Create**.



5. The new **Address Change** file will appear at the top of the **File List**.

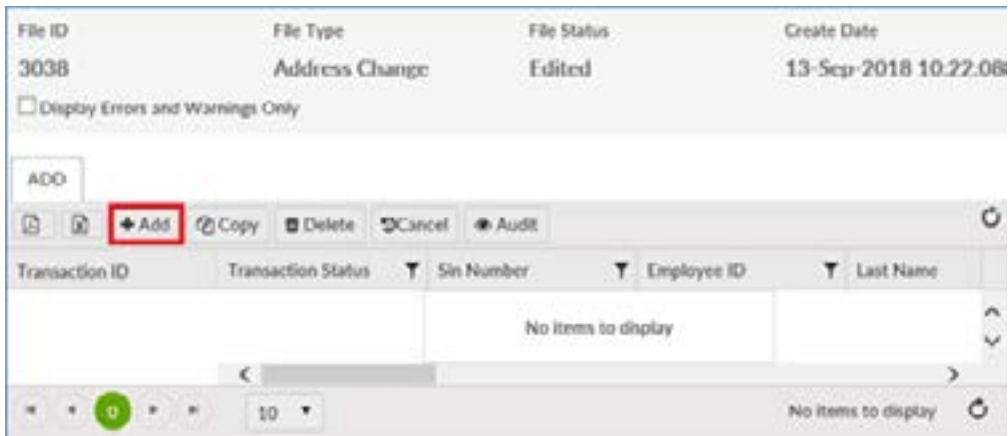
Note: The status is listed as "Edited" which indicates that the file is ready for data entry.

6. Click **File ID** to open the file. Clicking the File ID button displays the **Transaction** screen which is currently empty.



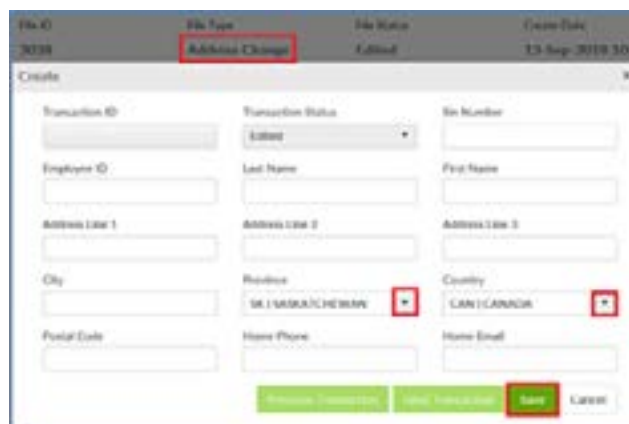
File ID	File Type	Create Date	Close Date	User	Status
3038	Address Change	13-Sep-2018 10:22:08		rmarcelino	Edited

7. Click **Add** to create a transaction and the **Create window** is displayed.



8. Enter all fields, including one of Employee ID (number assigned by the employer) or SIN.

Note: The Transaction ID and Transaction Status cannot be edited. These fields will be automatically populated by PLANet.



9. Once all the information has been entered click **Save**. If you have missed a mandatory field the system will notify you.

Mandatory Fields include:

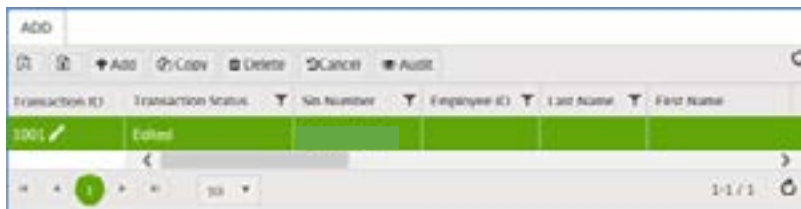
- SIN or Employee ID (number assigned by the employer)
- Last Name
- First Name
- Address Line 1
- City
- Postal Code

- The Province and Country. These are auto populated by PLANet but you can change it if your employee moved to another country. Click the drop down list and choose the correct province and/or country.

Non Mandatory fields include:

- Home Phone
- Home Email

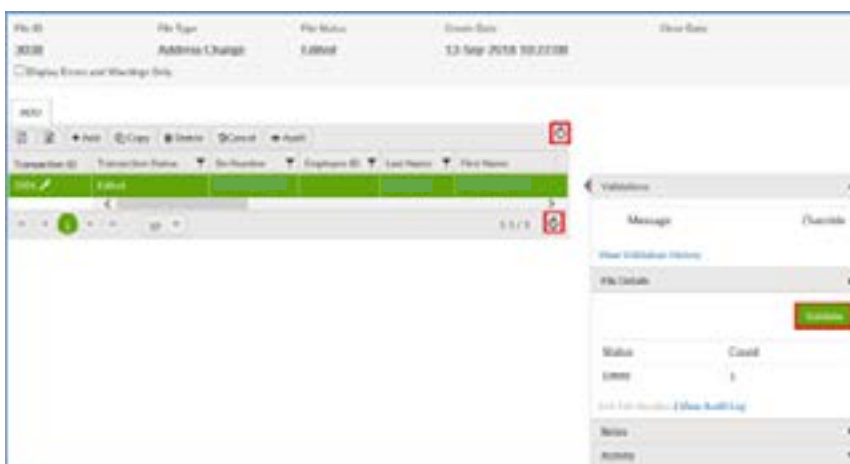
10. The new record is displayed on the transaction list after saving the file.



11. To change more addresses, click Add or Copy.

12. Confirm all file details, ensure the correct file is highlighted, then click **Validate**.

Note: If necessary, click the **Refresh** button to update the list.



13. Once the file transaction is validated, the **Status** will either change to **Invalid** (if there are any errors or warnings in the file) **or Valid**.

If Errors or Warnings Appear

Note: If there are errors or warnings in the file, the **File Details** region will provide a count of how many are invalid. If there are errors found in the file, they must be corrected and revalidated before the file can be processed. If there are warnings found in the file, they must be corrected or override and revalidated before the file can be processed.

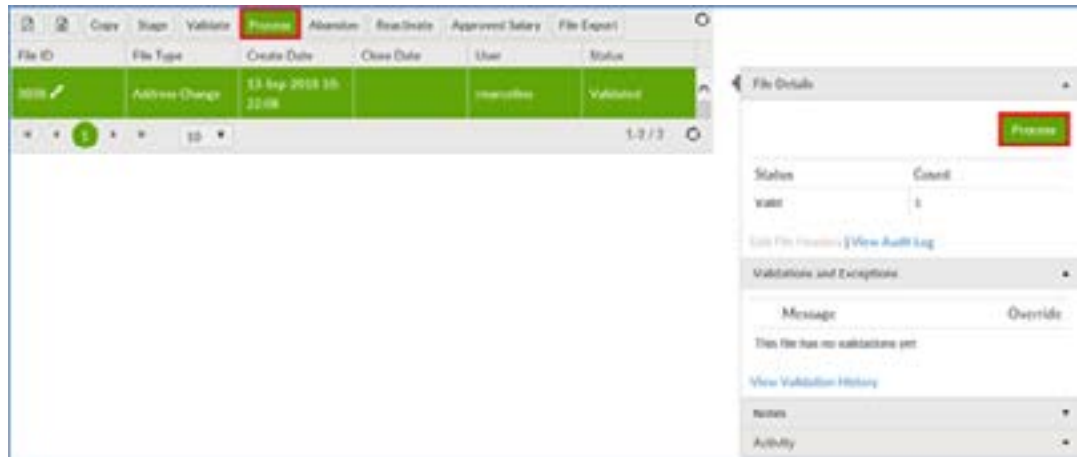
Invalid/File Details Region

Transaction ID	Transaction Status	SIN	Employee ID	Last Name	First Name
6955	Invalid		26594563	DOE	JOHN

14. Once the Status is **Validated**, the file can be processed and sent to MEPP.

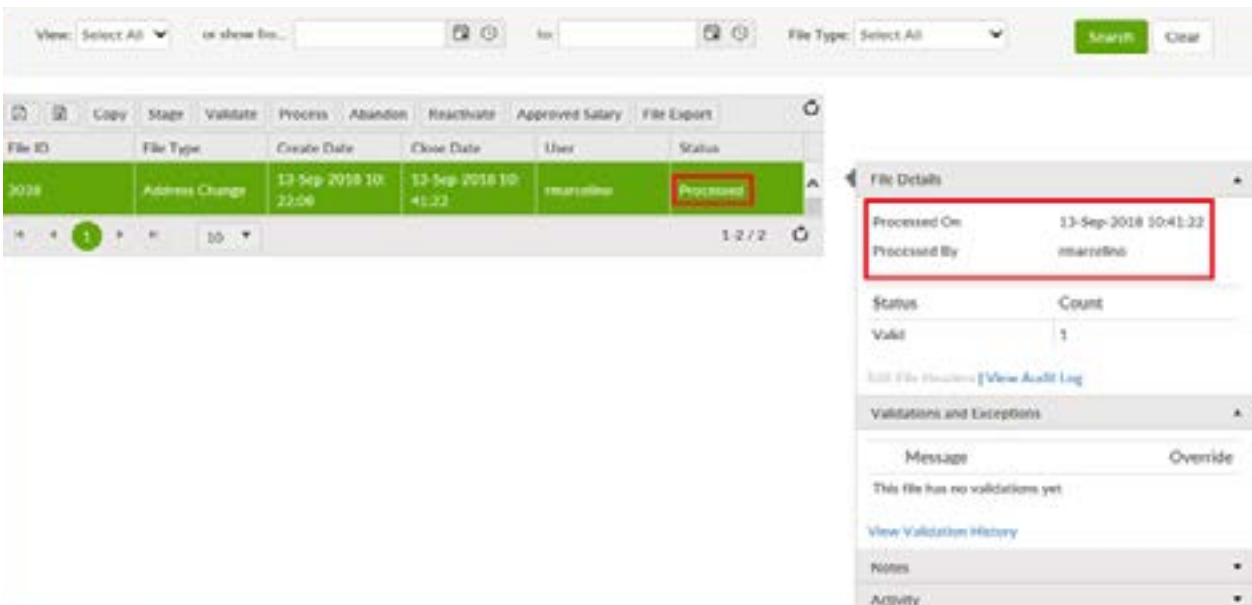
15. Click **Process** and the completed file will be sent to MEPP.

Note: Once the file is processed, it remains in the **File List** but now in view-only mode. A **Processed** file may only be **Copied** or the **File Exported**.



File Details - After Posting

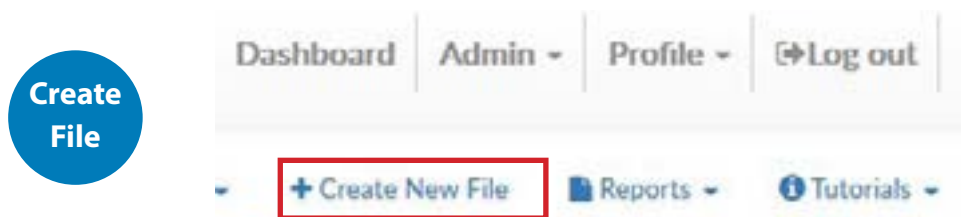
The **File Details** region will display the details of the final processed file.



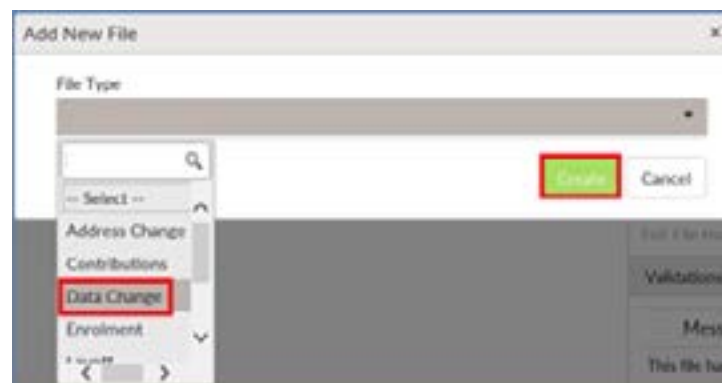
How to Process a Data Change

How to Change Employment Type for an Employee

1. From the **Dashboard**, select **Create New File** at the top right of the screen.



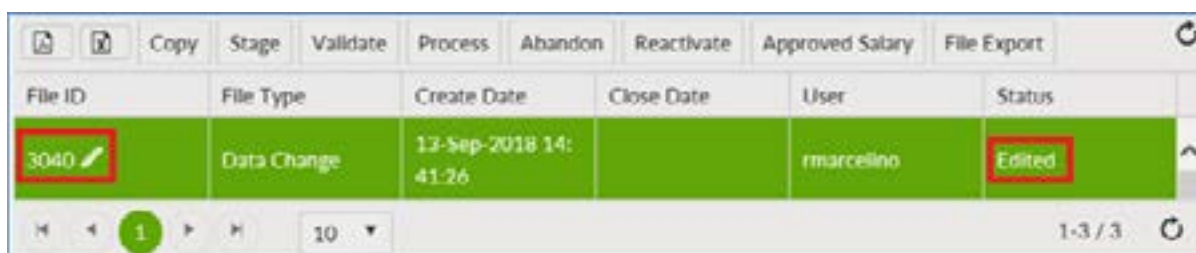
2. The **Add New File** window will display.
3. Select **Data Change** from the drop down list. Select the file or use the search field to narrow down your selection.
4. Click **Create**.



5. The new **Data Change** file will appear at the top of the **File List**.

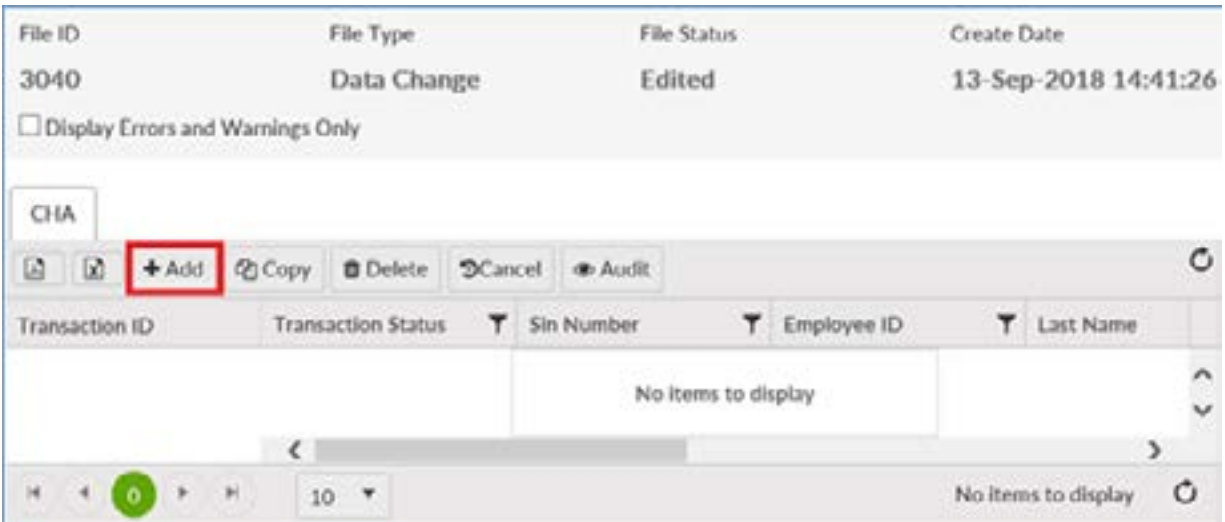
Note: The status is listed as "Edited" which indicates that the file is ready for data entry.

6. Click **File ID** to open the file. Clicking the File ID button displays the **Transaction** screen which is currently empty.



File ID	File Type	Create Date	Close Date	User	Status
3040	Data Change	13-Sep-2018 14:41:26		rmarcelino	Edited

7. Click **Add** to create a new transaction and the **Create window** is displayed.



8. Enter all fields, including one of Employee ID (number assigned by the employer) or SIN.

Note: The Transaction ID and Transaction Status cannot be edited. These fields will be automatically populated by PLANet.



Mandatory Fields include:

- SIN or Employee ID (number assigned by the employer)
- Last Name
- First Name
- Event Date (must be the end of the previous pay period. For example, if the data change was effective Jan. 4, 2020 and the previous pay period ended Dec. 27, 2019, then the event date would be Dec. 27, 2019.)
- Event Type
- Employment Type

9. Once all the information has been entered click **Save**. If you have missed a mandatory field the system will notify you.

10. To change an employment type for another employee, click Add or Copy.

Note: The new record is displayed on the transaction list after saving the file.

11. Confirm all file details and then click **Validate**.



12. Once the file transaction is validated, the **Status** will either change to **Invalid** (if there are any errors or warnings in the file) **or Valid**.

If Errors or Warnings Appear

Note: If there are errors or warnings in the file, the **File Details** region will provide a count of how many are invalid. If there are errors found in the file, they must be corrected and revalidated before the file can be processed. If there are warnings found in the file, they must be corrected or overrode and revalidated before the file can be processed.

Invalid/File Details Region

Transaction ID	Transaction Status	SIN	Employee ID	Last Name	First Name
6955	Invalid		26594563	DOE	JOHN

13. Once the Status is **Validated**, the file can be processed and sent to MEPP.

14. Click **Process** which will send the file to MEPP.

Process

File ID	File Type	Create Date	Close Date	User	Status
3040	Data Change	13-Sep-2018 14:41:34		mrcarroll	Validated

Status	Count
Valid	1

Note: Once the file is processed, it remains in the **File List** but now in view-only mode. A **Processed** file may only be **Copied** or the **File Exported**.

File Details - After Posting

The **File Details** region will display the details of the final processed file.

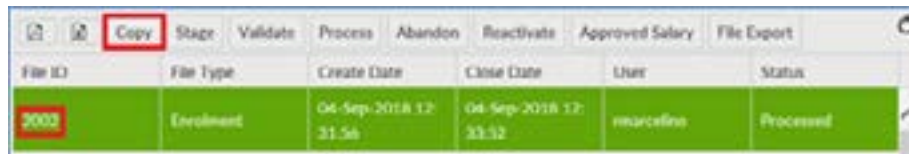
File ID	File Type	Create Date	Close Date	User	Status
3040	Data Change	13-Sep-2018 14:41:34	13-Sep-2018 14:57:52	mrcarroll	Processed

Processed On	13-Sep-2018 14:57:51
Processed By	mrcarroll

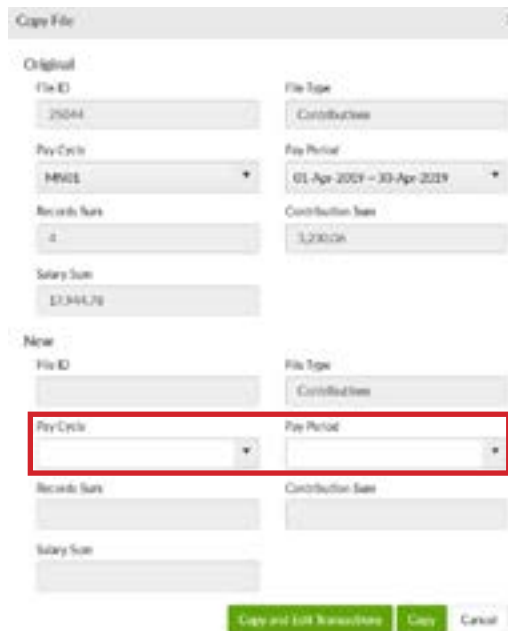
How to Copy a File

If a new file is required that contains similar data to a previous processed file, the original file can be copied and updated to reduce data entry.

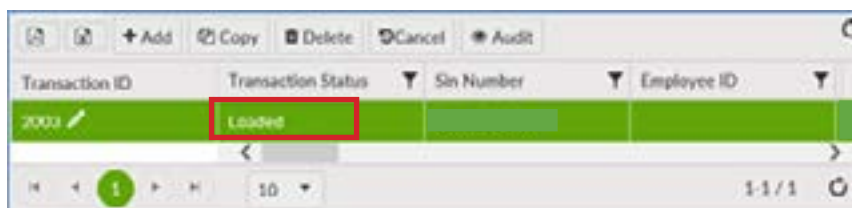
1. From the **File List on the dashboard**, click the file you want to copy, which will be highlighted in green.
2. Click the **Copy** button at the top left of the file list menu.



3. The **Copy File** window will appear.
4. Enter the **Pay Cycle** and **Pay Period** for the new file.



5. Click either the **Copy** button or the **Copy and Edit Transactions** button to create a copy of the file.
6. A new transaction has been loaded.



7. Click on the first Transaction ID number and edit all fields to reflect the information for the current pay period. Click on **the next transaction** and continue to edit until all records reflect the correct information for the current pay period.
8. Confirm all file details, then click **Validate** in the file detail region.
9. Once the file transaction is validated, the status will either change to **invalid** (if there are any errors), or **valid**. If there are errors/warnings, they must be corrected or overrode and re-validated.
10. Once validated, review the approved salary in the file details region and confirm by clicking **approved salary**.
11. Click **process** and the completed file will be sent to MEPP.

How to Delete a Record

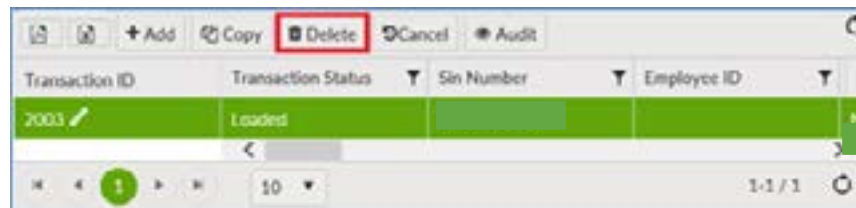
Delete Button

Clicking the **Delete** button in the transaction screen removes the record from the file.

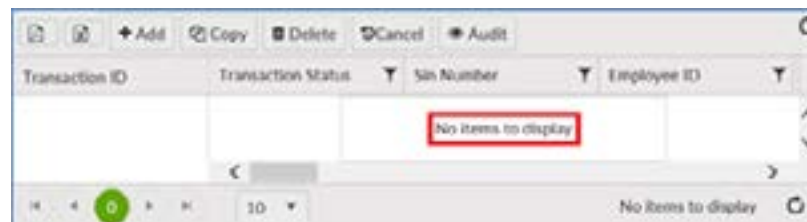


Deleting a File within a Transaction

1. Ensure the correct record is highlighted that you want to delete.
2. Click **Delete**.



3. The selected **Record** will be removed from the transaction list.



How to Abandon a File

Abandon Button

If the file was loaded or added in error, click the **Abandon** button to deactivate the file. Only files that have not been processed can be abandoned.

Abandoning a Transaction File

1. From the dashboard, ensure the correct file is highlighted that you want to set to abandon.
2. Click **Abandon** (the file will disappear from the file list).

How to Print a PDF.

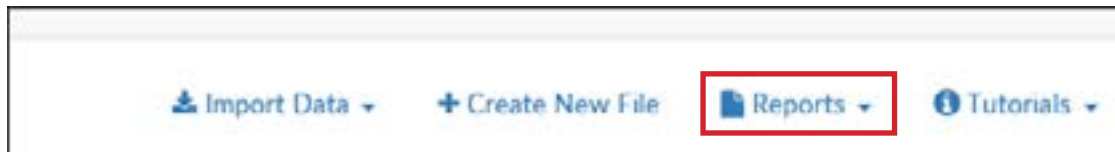
Print Button

If you would like to print/save a copy of a File Type for your records, you can click the **Print** and/or **Save** to your files.

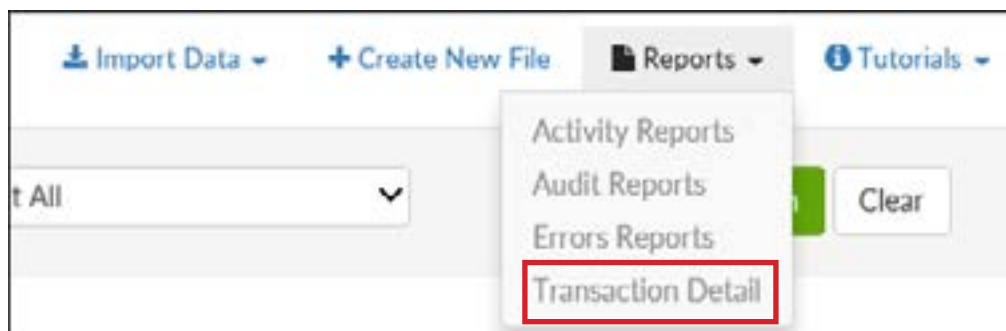
How to Print a PDF. from Different File Types

File types include: Address Change, Enrolments, Layoff, Leave, Return to Work and Terminations (excluding a Contribution File Type).

1. From the **Dashboard**, click **Reports** located at the top right hand corner of the screen.
NOTE: You can only print a PDF. from a File Type with a status of **Processed**.



2. From the dropdown menu select **Transaction Detail**.



3. The **Transaction Detail** window will appear.

The screenshot shows a window titled "Transaction Detail" with a close button (X) in the top right corner. The window contains several input fields and a dropdown menu:

- File ID:** An empty text input field.
- Employee ID:** An empty text input field.
- From Date:** A date input field with a calendar icon, currently empty.
- To Date:** A date input field with a calendar icon, currently empty.
- Transaction Type:** A dropdown menu with "Select All" selected.
- SIN:** An empty text input field.
- Print Option:** A dropdown menu with "Single" selected.

At the bottom right of the window, there are two buttons: a green "Submit" button and a grey "Cancel" button.

4. There are a few ways to search the documents you would like to print.

A. You may **select a specific Transaction Type** from the dropdown menu or leave it selected as **Select All** and enter the **From Date** and **To Date**:

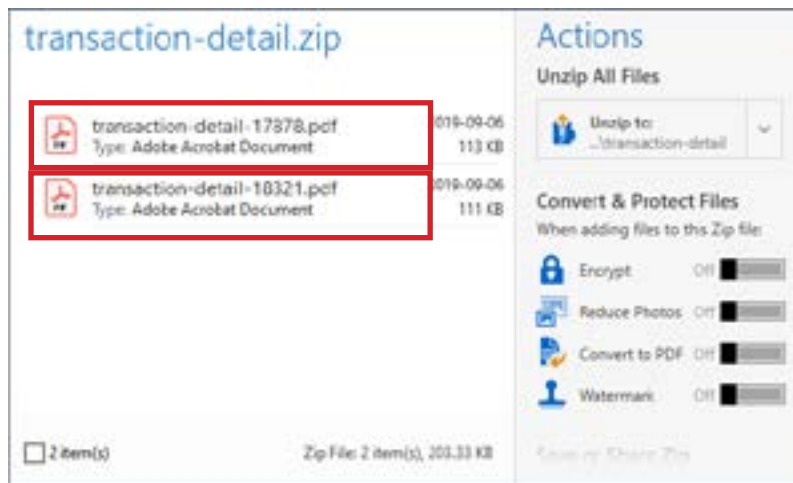
a. Click submit.

This screenshot is similar to the previous one, but with red boxes highlighting specific elements:

- A red box around the **Transaction Type** dropdown menu, which is set to "Select All".
- A red box around the **From Date** field, which contains the date "01-Aug-2019".
- A red box around the **To Date** field, which contains the date "31-Aug-2019".
- A red box around the green **Submit** button.

b. You can either print the PDF. or Save the PDF. to your files. Click **Open**.

The screenshot shows a file dialog box with a yellow title bar. The text inside the dialog reads: "Do you want to open or save transaction_detail.zip from webtext3.pcbagov.ukua?". At the bottom right, there are three buttons: "Open", "Save", and "Cancel".



B. You may select by File ID number:

a. Click submit.

A screenshot of a "Transaction Detail" form. The form contains several input fields and dropdown menus: "File ID" (containing "17878"), "Transaction Type" (dropdown menu with "Select All" selected), "Employee ID", "SIN", "From Date", "To Date", and "Print Option" (dropdown menu with "Single" selected). A green "Submit" button is highlighted with a red box, and a "Cancel" button is located to its right.

b. You can either print the PDF. or Save the PDF. to your files. Click **Open**.



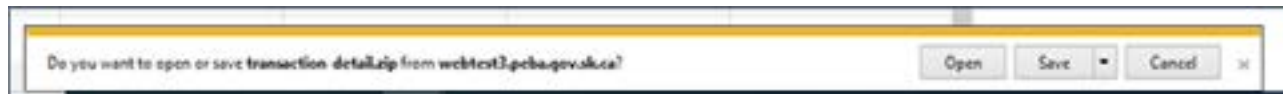
C. You may select by SIN or Employee ID number and enter the From Date and To Date:

a. Click submit.

The screenshot shows a web form titled "Transaction Detail". It contains the following elements:

- File ID:** An empty text input field.
- Employee ID:** An empty text input field.
- Transaction Type:** A dropdown menu currently showing "Select All".
- From Date:** A date picker field showing "01-Jun-2019".
- To Date:** A date picker field showing "31-Aug-2019".
- Print Option:** A dropdown menu currently showing "Single".
- Buttons:** A green "Submit" button and a grey "Cancel" button.

b. You can either print the PDF. or Save the PDF. to your files. Click **Open**.



NOTE: Under the **Print Option** you can either select **Single** or **Multiple**.

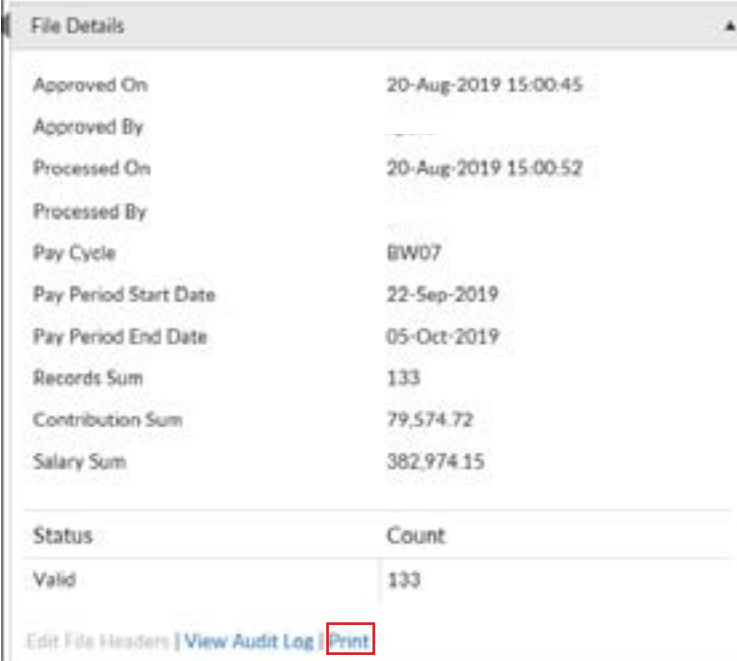
Single: if you have more than one record in a file type, the **single** print option will produce one document and separate the records by a page break.

Multiple: if you have more than one record in a file type, the **multiple** print option will produce separate PDF. documents that you can save electronically or print the PDF.

How to Print a Contribution File Summary

Printing a Contribution File Summary

1. From the **File List**, click the **Contribution File** you want to print.
NOTE: You can only print a Contribution File with the status of **Processed**.



The screenshot shows a 'File Details' window with the following information:

Approved On	20-Aug-2019 15:00:45
Approved By	
Processed On	20-Aug-2019 15:00:52
Processed By	
Pay Cycle	BW07
Pay Period Start Date	22-Sep-2019
Pay Period End Date	05-Oct-2019
Records Sum	133
Contribution Sum	79,574.72
Salary Sum	382,974.15

Status	Count
Valid	133

At the bottom of the window, there are three buttons: 'Edit File Headers', 'View Audit Log', and 'Print'. The 'Print' button is highlighted with a red box.

2. The **Contribution File** selected will highlight in green.
3. Click the **Print** button at the bottom right hand side of the **File Details Region**.
4. The **Contribution File Summary** page will appear.
5. Right click on the mouse and click **Print** to print the **Contribution File Summary** page.

CSV Contribution File Example

Contribution File (SIN/Employee ID format)

Use the below specifications to upload required contributions to MEPP, using Employee ID and/or SIN as the member identifier.

The file must be provided in .CSV (comma separated values) format. Example below.

*One of SIN or Employee ID is required.

File Label	SIN	Employee ID	Last Name	First Name	Contribution Type	Pay Period Start Date	Pay Period End Date	Service Type	Employer Contributions	Employee Contributions	Actual Hours Worked
Format	999999999	999999999	Character 40	Character 40	Single Character: N, A, or R	DD-MMM-YY	DD-MMM-YY	Single Code: NP, LAC, LAM, PLC or PLM	Number with two decimal places	Number with two decimal places	Number with two decimal places

Comments

A	SIN	Cannot have spaces or hyphen between numbers
B	Employee ID	Cannot have spaces or hyphen between numbers
C	Last Name	Maximum character 40
D	First Name	Maximum character 40, middle initials are allowed but not mandatory (e.g. "Jim D" or "jim d")
E	Contribution Type	N, A or R are the only allowable values
F	Pay Period Start Date	Must be in "DD-MMM-YY" format
G	Pay Period End Date	Must be in "DD-MMM-YY" format
H	Service Type	NP, LAC, LAM, PLC and PLM are the only allowable values
I	Employer Contributions	For all contribution amounts, express with two decimal places to separate dollars and cents, no "\$" sign or commas; For LAC or PLC, if the amount is "0", leave the field blank
J	Employee Contributions	For all contribution amounts, express with two decimal places to separate dollars and cents, no "\$" sign or commas
K	Actual Hours Worked	Must have a number; decimal and 2 decimal places allowed; For adjustments or retro pay, if the hours are none, indicate the value as "0"

Example

A	B	C	D	E	F	G	H	I	J	K
999999999	999999999	DOE	JOHN	N	01-Mar-18	31-Mar-18	NP	500.00	500.00	130

Example of CSV file:

```
156384692,26594563,DOE,JOHN,N,01-Jan-19,31-Jan-19,NP,500,500,130
265941385,34865965,SMITH,ROBERT,N,01-Jan-19,31-Jan-19,PLC,,500,130
```