

Bringing our office to your office



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

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

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

Two versions of the report are created:

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

Notes:

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

The effective 201 is a beach areas of direct below.

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.

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

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

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

-access	
	Bringing our office to your office.
mber information Reques	sts Event status Utilities Batch processes Dashboard 💌 e-Corresponde
Extract member informa	tion
	Create new e-Correspond
11	* Mana
Please select extract	type → Supp Plan Class Definition Extract ▼
Supplemental Plan Class	Select •
NRA	60 😳 65 🕫 *
Agreement Effective Date (AED)	2008300 * III
Occupation	Other 🔽
Employee Affiliation	CUPE - Canadian Union of Public Employees - PARAMEDIC

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

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

"Due to insufficient Credited Service, please provide Agreement Effective Year Earnings in the Supplemental Plan Class Estimate Import." Once you've identified the members, use the **Import file builder** in e-access or have your IT department create the import file. For details on file specifications see e-access **Help** (under Batch processes).

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

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

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

e-a	Bringing our o	iffice to your office.
Impo	rt a file :: Step 2 - select import fil	e
		🛠 OMERS Import file builder 🛛 🖬 Post related message
For m	ore information on supported file for	mats please, see HELP.
	Select import file type	Supp Plan Cost Estimate
	Agreement effective date	20091001 *
	Supplemental plan class	Paramedic

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.

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

e-access Bring	ging our offic	e to your	office.	1.1	016
Member information Requests	Event status	Utilities	Batch processes	Dashboard	🖾 e-Correspondence
→ e-Form 301 - Supplemental	Plan Cost Estin	nate Reque	st	-	
				M (reate new e-Corresponden
					* Mandato
	Assumptio	ins			Employer's information
Assumptions					
Agreement Effective Date	Oct-01-2008				
Supplemental Plan Class	Paramedic				
Supplemental Plan Provision	♥ "Best four" □ 85 Factor □ 2.33% acc □ "Best three	' earnings rual rate e'' earnings	<i>v</i>		
Earnings Projections % up to Agreement Effective Year	2007	2008 (Agr	eement Effective Year)		
Earnings Projections % after Agreement Effective Year	2009	2010	2011	2012	2013
Past Service ? Member Details Format	C Flat File (.txt) C PDF Report (.pdf)				
Notes					×.
				Reset	💋 Save 🛅 Submit 🥤

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

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

e-acces	S Brin	ging our office	e to your o	∍ office.	HOME	WHAT'S N	EW HELP	SIGN OUT
Member information	Requests	Event status	Utilities	Batch processes	5 Da	ashboard	e-Corre	spondence
→ Requests Submit Viewing 1 to :	tted to OMEI L of 1 results	RS	Page 1 (of 1			- 7	
Class name		D	ate subm.			Attachmer	it	
Paramedic		J	ul-07-2008	BEST4 3rd Party	Supp P	lan Cost Esti	mate	
				Be-Form 301 - Supplemental Plan Cost Estimate				
							New	/ search 🔘

Employer Name: CITY OF EXAMPLE Data Requested: Jul-11-2008 Group Number: 123456 User ID. User ID. Supplemental Plan Provision: 2.33% acrual rate Future Service Contributions Rates* Effective For: User ID. Supplemental Plan RPP Primary Plan RPP Rebound Effective For: 2016 Effective To: Supplemental Plan CPP 0.20% Across Market Supplemental Plan CPS Supplemental Plan Class Contribution Totals by Year - Estimated Member Cost 2016 2012 2013 Supplemental Plan Class Contribution Totals by Year - Estimated Employer Cost State 1.1 2012 2013 Supplemental Plan Class Sontribution Totals by Year - Estimated Employer Cost State 1.2 State 3.3.652 State 1.2 Supplemental Plan Class Sontribution Totals by Year - Estimated Employer Cost State 1.2 2012 2013 Supplemental Plan Class Sontribution Totals by Year - Estimated Employer Cost State 1.2 2012 2013 Supplemental Plan Class Sontribution Totals by Year - Estimated Employer Cost State 1.2 State 1.2 State 1.2	Mar-14-2008 17: OPS\$SUPUAT	07	OMERS Supplemental Plan Cost Estimate Report					
Supplemental Plan Provision: 2.33%, accrual rate Future Service Contributions Rates* Effective Form: Jul01-2008 Effective Form: Supplemental Plan RPP Below YuPE: 2.75%, 2.20%, 2.20%, Above YuPE: 2.75%, 2.20%, 0.20%, Supplemental Plan Class Contribution Totals by Year-Estimated Employer Cost. Supplemental Plan Class Contribution Totals by Year-Estimated Employer Cost. Supplemental Plan Class South Totals by Year-Estimated Employer Cost. Supplemental Plan Class South Totals by Year-Estimated Employer Cost. Supplemental Plan Class South Totals by Year-Estimated Employer Cost. Supplemental Plan Class South Totals by Year-Estimated Employer Cost. Supplemental Plan Class South Totals by Year-Estimated Employer Cost. Supplemental Plan Class South Totals by Year-Estimated Employer Cost. Supplemental Plan Class South Totals by Year-Estimated Employer Cost. Supplemental Plan Class South Totals by Year-Estimated Employer Cost.	Employer Name: Group Number:	CITY OF EXAMPL 123456	E			Date Requested: User ID:	Jul-11-2008	
Supplemental Plan Provision: 2.33% &Cruit rate Future Service Contributions Rates* Effective Form: U.J. 01-2008 Effective Form: Supplemental Plan RPP Primary Plan RPP Primary Plan RPP Rebound Selever VMFE: 2.75% 0.20% 0.20% Supplemental Plan Class Contribution Totals by Year - Estimated Member Cost Supplemental Plan Class Contribution Totals by Year - Estimated Employer Cost Supplemental Plan Class Contribution Totals by Year - Estimated Employer Cost Supplemental Plan Class Southout Totals by Year - Estimated Employer Cost Supplemental Plan Class Southout Totals by Year - Estimated Employer Cost Supplemental Plan Class Southout Totals by Year - Estimated Employer Cost Supplemental Plan Class Southout Totals by Year - Estimated Employer Cost Supplemental Plan Class Southout Totals by Year - Estimated Employer Cost Supplemental Plan Class Southout Totals by Year - Estimated Employer Cost Supplemental Plan Class Southout Totals by Year - Estimated Employer Cost Supplemental Plan Class Southout Totals by Year - Estimated Employer Cost								
Visiting Service Visiting Vi	supplemental Pl	an Provision: 2.33	% accrual rate					
Supplemental Plan Class Contribution Totals by Year - Estimated Employer Cost 2006 2011 2012 2013 Supplemental Plan Class Contribution Totals by Year - Estimated Member Cost 2014 2012 2013 Staff Staf	future Service							
Zeros 201-01-2008 Effective From: Supplemental Plan RPP Primary Plan RPP Rebound Balow YMPE: 2.75% 0.20% Supplemental Plan CPP 0.20% 0.20% Supplemental Plan Class Contribution Totals by Year - Estimated Member Cost 201 2012 2013 Supplemental Plan Class Contribution Totals by Year - Estimated Member Cost 206 2011 2012 2013 RPP \$161.613 \$334.331 \$346.012 \$356.144 \$370.679 \$383.652 Supplemental Plan Class Contribution Totals by Year - Estimated Employer Cost 206 2011 2012 2013 Supplemental Plan Class Soft Site Site Site Site Site Site Site Sit	Contributions Rat	os*						
Interfactor Aut. 01-2020 Britichers 2005 Britowin Tor 2005 Balow YMPE 2.75% 2006 2006 Supplemental Plan Class Contribution Totals by Year - Estimated Member Cost Supplemental Plan Class Contribution Totals by Year - Estimated Employer Cost Supplemental Plan Class Contribution Totals by Year - Estimated Employer Cost Supplemental Plan Class Southon Totals by Year - Estimated Employer Cost Supplemental Plan Class Southon Totals by Year - Estimated Employer Cost Supplemental Plan Class Southon Totals by Year - Estimated Employer Cost Supplemental Plan Class Southon Totals by Year - Estimated Employer Cost Supplemental Plan Class Southon Totals by Year - Estimated Employer Cost Supplemental Plan Class Southon Totals by Year - Estimated Employer Cost Supplemental Plan Class Contribution Totals by Year - Estimated Employer Cost Supplemental Plan Class Contribution Totals by Year - Estimated Employer Cost Supplemental Plan Class Contribution Totals by Year - Estimated Employer Cost								
Supplemental Plan RPs Primary Plan RPP Robust Above YMPE: 2.75% 0.20% Supplemental Plan Class Contribution Totals by Year - Estimated Member Cost 201 2012 2013 RPP 2009 2040 2014 5370,679 \$383,652 Supplemental Plan Class Contribution Totals by Year - Estimated Employer Cost 2011 2012 2013 Supplemental Plan Class Contribution Totals by Year - Estimated Employer Cost 2011 2012 2013 Supplemental Plan Class SouthPlan State Sta	Effective From:	Jul -01-2008						
205% 0.20% Supplemental Plan Class Contribution Totals by Year - Estimated Member Cost 200% 2008 2009 2011 2012 2013 PPP \$101.613 5343.431 \$340.802 \$358.144 \$370.679 \$\$438.652 supplemental Plan Class Contribution Totals by Year - Estimated Employer Cost 2008 2010 2011 2012 2013 supplemental Plan Class Contribution Totals by Year - Estimated Employer Cost 2008 2011 2012 2013 supplemental Plan Class Contribution Totals by Year - Estimated Employer Cost 2008 2010 2011 2012 2013 supplemental Plan Class Contribution Totals by Year - Estimated Employer Cost 2013 2014 2012 2013 supplemental Plan Class Contribution Totals by Year - Estimated Employer Cost 2013 2014 2012 2013 supplemental Plan Class Contribution Totals by Year - Estimated Employer Cost 2013 2014 2012 2013	Lilective To.	Supplemental Plan	RPP Primary Pl	an RPP Rebound				
bbove YMPE 2,75% 0,20% Supplemental Plan Class Contribution Totals by Year - Estimated Member Cost 2011 2012 2013 RPP 2006 2009 2011 2012 2013 Stiglinemental Plan Class Contribution Totals by Year - Estimated Employer Cost \$333,652 \$356,144 \$370,679 \$383,652 Supplemental Plan Class Sontribution Totals by Year - Estimated Employer Cost 2012 2013 2012 2013 Supplemental Plan Class Sontribution Totals by Year - Estimated Employer Cost 516,151 \$353,351 \$346,052 \$358,164 \$370,679 \$333,652	Below YMPE:	2.75%		0.20%				
Supplemental Plan Class Contribution Totals by Year - Estimated Member Cost 2011 2012 2013 RPP \$161.613 \$334.331 \$346.032 \$358.144 \$370,679 \$383,652 Supplemental Plan Class Contribution Totals by Year - Estimated Employer Cost 2011 2012 2013 Supplemental Plan Class Contribution Totals by Year - Estimated Employer Cost 2011 2012 2013 RPP \$161.613 \$354.032 \$356.144 \$370,679 \$333,632 RPP \$161.613 \$354.032 \$356.144 \$370,679 \$333,632	Above YMPE:	2.75%		0.20%				
2008 2009 2010 2011 2012 2013 RPP \$161,513 \$333,331 \$346,032 \$358,144 \$370,679 \$383,652 Supplemental Plan Class Contribution Totals by Year - Estimated Employee Cost 2019 2011 2012 2013 RPP \$161,513 \$334,331 \$346,052 \$368,164 \$370,679 \$383,652	Supplemental Pla	In Class Contribution T	otals by Year - Estima	ted Member Cost				
2006 2001 2012 2013 PPP \$161,513 \$334,331 \$346,032 \$358,144 \$370,679 \$383,652 Supplemental Plan Class Contribution Totals by Year - Estimated Employer Cost 2001 2012 2013 2008 2009 2010 2011 2012 2013 PPP \$161,613 \$334,331 \$346,032 \$358,144 \$370,679 \$383,652		2008	2009	2010	2011	2012	2013	
2008 2009 2011 2012 2013 XPP \$161,513 \$334,331 \$346,032 \$356,144 \$370,679 \$383,652	RPP	\$161,513	\$334,331	\$346,032	\$358,144	\$370,679	\$383,652	
2006 2009 2011 2012 2013 RPP \$161,513 \$344,331 \$346,332 \$356,144 \$370,679 \$383,652								
2008 2009 2010 2011 2012 2013 RPP \$161,513 \$334,331 \$346,032 \$356,144 \$370,679 \$383,652	Supplemental Pla	in Class Contribution T	otals by Year - Estima	ted Employer Cost				
RPP \$161,513 \$334,331 \$346,032 \$358,144 \$370,679 \$383,652		2008	2009	2010	2011	2012	2013	
	RPP	\$161,513	\$334,331	\$346,032	\$358,144	\$370,679	\$383,652	
	Total estimated m	nember cost required to	purchase all past ser	vice for the class as of t	he Agreement Effective	Date: \$8,158,052		
Total estimated member cost required to purchase all past service for the class as of the Agreement Effective Date: \$8,158,052	Notes:							
Total estimated member cost required to purchase all past service for the class as of the Agreement Effective Date: \$8,158,052	*The latest c	ontribution rates in effe	ct have been used to	calculate the above futu	re service estimates as	future contribution rates o	annot be predicted in advance.	
Total estimated member cost required to purchase all past service for the class as of the Agreement Effective Date: \$3,158,052 close: "The latest contribution rates in affect hous bean used to calculate the above future service astimates as future contribution rates cannot be nonlined in advance	All amounts	are rounded to the nea	rest dollar.				annot be predicted in durance.	
Total estimated member cost required to purchase all past service for the dass as of the Agreement Effective Date: \$8,155,052 Notes: The latest contribution rates in effect have been used to calculate the above future service estimates as future contribution rates cannot be predicted in advance. All amounts are rounded to the meanest dollar.	The share C	upplemental Plan class	s contribution totals in	clude both Supplementa	Plan RPP contribution	and Primary Plan Rebou	nd RPP contributions where applic	

The estimated costs are not guaranteed and are subject to change.
 4 Member(s) are excluded from the Past Service Cost Estimate as they are not eligible to purchase past service (i.e. no past service or not actively employed)

Earnings Projections % after Agreement Effective Year	The OMERS Supplemental Plan Cost Estimate Report projects future contribution costs for each of the five years after the agreement effective year.
	To include future pay increases, enter the percentage. Or, for a flat projection, enter 0.

Sample of OMERS Supplemental Plan Cost Estimate Report

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.



Supplemental Plan Provision





You can select one or more provisions. Note: 2.33% is not available for police civilians.

> Mail One University Ave. Suite 800 Toronto ON M5I 2P1



E-mail employer@omers.com (en français ou anglais)

