



Employer Education Session

Data Collection Tool (DCT)
— Refresher session

January 14, 2025



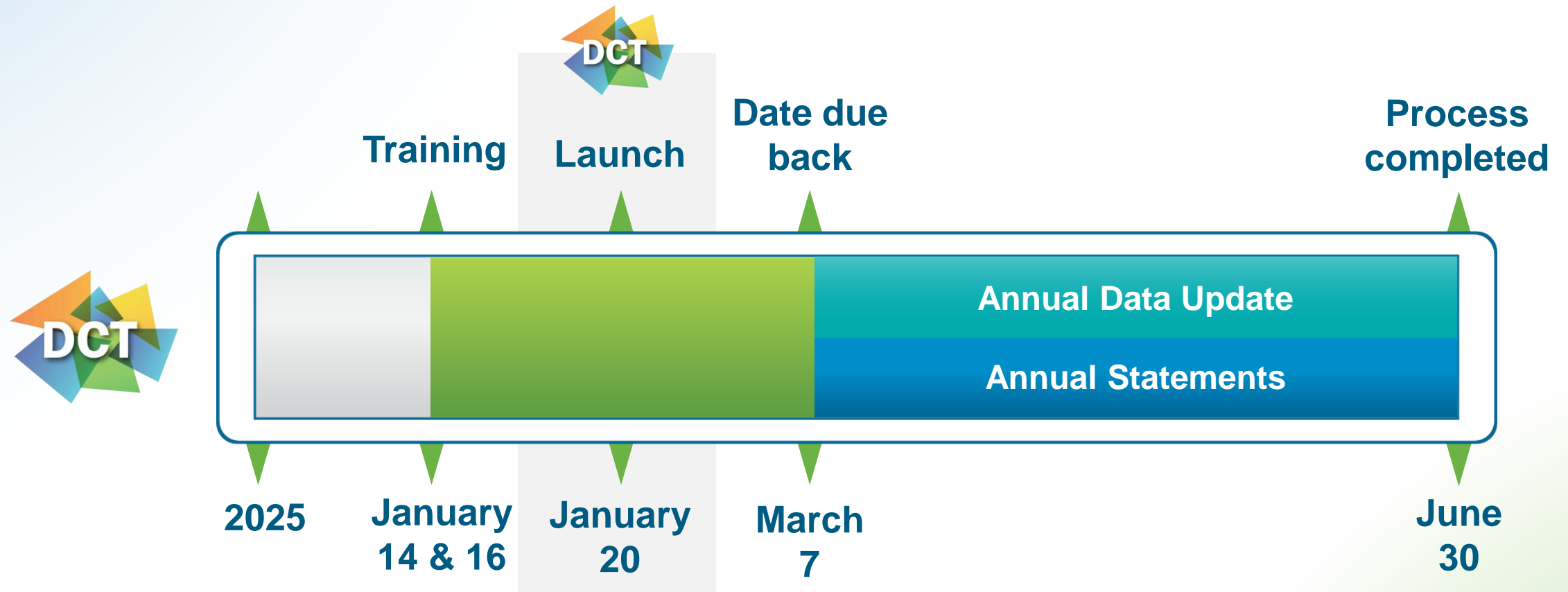


Agenda

1. DCT overview
2. Reminders

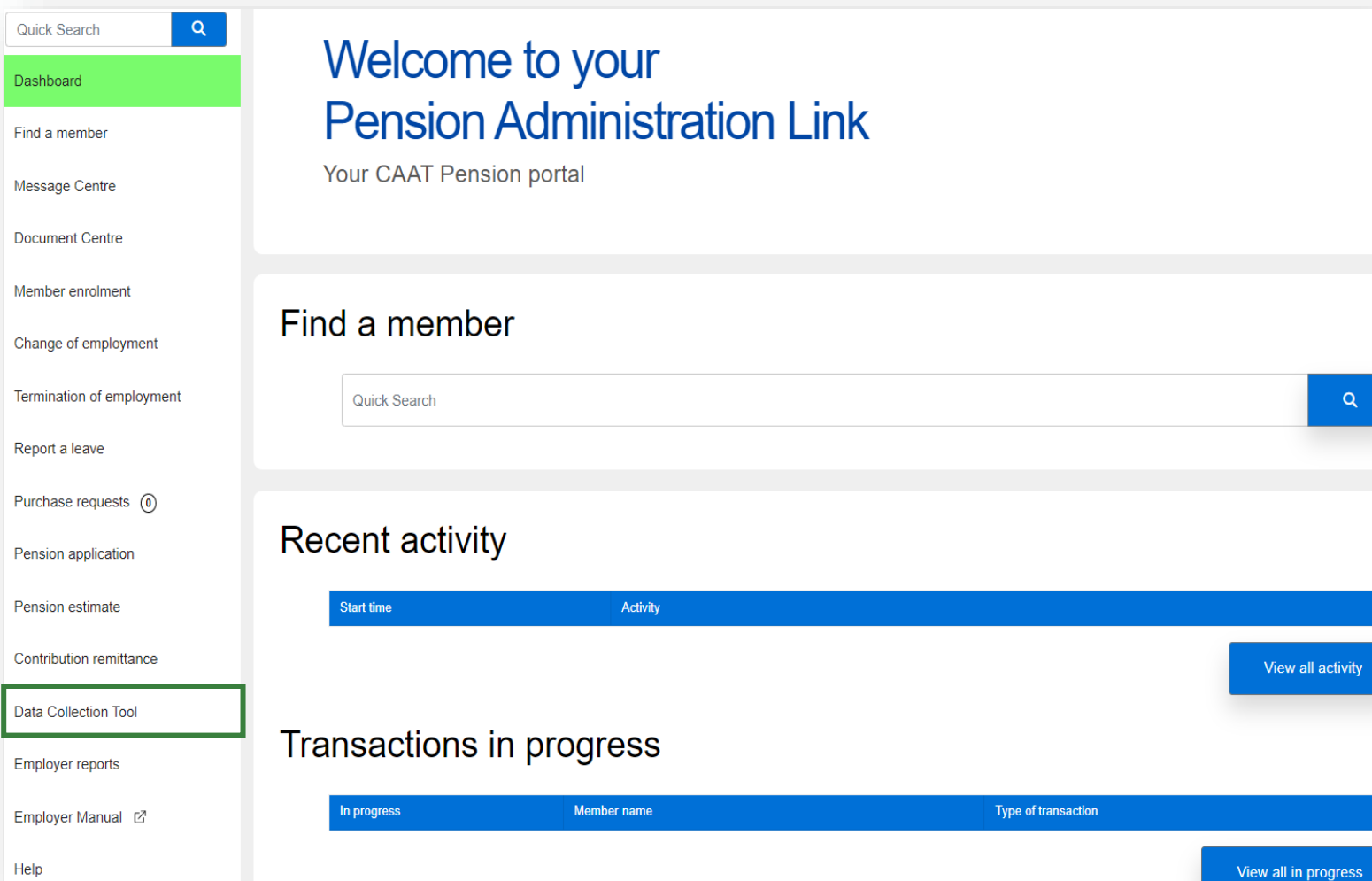
DCT overview

2024 Data Collection Tool (DCT) schedule



Logging into DCT – PAL users

- If you are a PAL user, log into PAL and select Data Collection Tool in the left menu



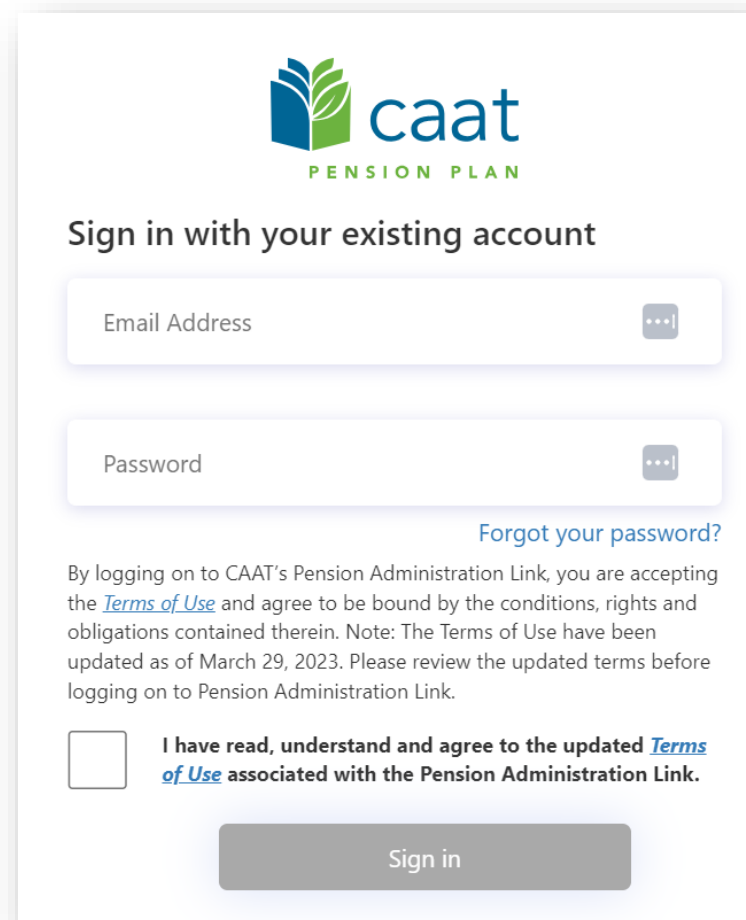
The screenshot displays the PAL user interface. On the left is a vertical navigation menu with a search bar at the top. The menu items are: Dashboard (highlighted in green), Find a member, Message Centre, Document Centre, Member enrolment, Change of employment, Termination of employment, Report a leave, Purchase requests (0), Pension application, Pension estimate, Contribution remittance, Data Collection Tool (highlighted with a green box and a blue arrow pointing to it from the left), Employer reports, Employer Manual (with an external link icon), and Help. The main content area on the right features a welcome message: "Welcome to your Pension Administration Link" and "Your CAAT Pension portal". Below this is a "Find a member" section with a search bar. The "Recent activity" section shows a table with columns "Start time" and "Activity", and a "View all activity" button. The "Transactions in progress" section shows a table with columns "In progress", "Member name", and "Type of transaction", and a "View all in progress" button.

Logging into DCT – Non-PAL users

- Employers that do not have PAL access can access the DCT using the following link:

<https://dct.caatpension.ca/>

- Use your existing DCT credentials to log in and set up multi-factor authentication



The screenshot shows the login interface for the CAAT Pension Plan. At the top is the CAAT Pension Plan logo, which consists of a stylized green leaf icon next to the text 'caat' in blue and 'PENSION PLAN' in green below it. Below the logo, the text 'Sign in with your existing account' is displayed. There are two input fields: 'Email Address' and 'Password', both with eye icons to toggle visibility. Below the password field is a link that says 'Forgot your password?'. A paragraph of text follows, stating: 'By logging on to CAAT's Pension Administration Link, you are accepting the [Terms of Use](#) and agree to be bound by the conditions, rights and obligations contained therein. Note: The Terms of Use have been updated as of March 29, 2023. Please review the updated terms before logging on to Pension Administration Link.' Below this text is a checkbox and the text: 'I have read, understand and agree to the updated [Terms of Use](#) associated with the Pension Administration Link.' At the bottom of the form is a grey 'Sign in' button.

DCT home screen

The screenshot displays the DCT home screen with the following components:

- Header:** caat PENSION PLAN and DCT DATA COLLECTION TOOL logos.
- Navigation:** Member Data, Reports, Utilities, Help, Employer: ABC Employer, Test User.
- Quick Search:** A search bar with a magnifying glass icon.
- Member Data Summary:**
 - Last Member Viewed: 999940984: CASE5, DONALD
 - Number of Members: 14
 - New Members: 1
 - Employment Status Change: 20
- Data Problems:**
 - Earnings Problems: 0
 - DBprime PA Problems: 0
 - DBplus PA Problems: 0
 - Missing Info: 12
 - Contributions Problems: 0
 - Service Problems: 0
 - Demographic Problems: 0
 - Status Update Problems: 0
 - Retroactive Payments: 0
 - Plan Design Problems: 0
 - Employee/Employer Contribution Level Problems: 0
 - Members with NC Status Problems: 0
- Timeline:** A central timeline for the 2025 Annual Data Update and Statements process. Key dates include Training (2025), Launch (January 14 & 16), Date due back (March 7), and Process completed (June 30). The timeline is divided into sections for Annual Data Update and Annual Statements.

DCT submission due date: Friday, March 7, 2025

Member Details – Personal (DBprime)

Member Details

EMPNO: 123 NAME: TEST, ONE DOB: 1999-12-01



Personal Summary Retro-active Pays Partial Day Leaves Validation Result Timeline NC Status

Surname TEST

First Name ONE

Middle Name Middle Name

Gender Female

Marital Status

Language English

Date of Birth 1999-12-01

Hire Date 2021-12-01

Enrolment Date 2021-12-01

Status and Payroll Data



Effective Date 2023-01-01

Annual Salary Rate 0

Plan Design DBprime

Employment Status ACT - Active

Employee Type Fulltime

Employee Group Administration

Earnings

Contributions

Service

Member Details – Personal (DBplus)

Member Details

EMPNO: 456 NAME: TEST, TWO DOB: 1984-10-01

Personal Summary Retro-active Pays Partial Day Leaves Validation Result Timeline NC Status

Surname	TEST	First Name	TWO	Middle Name	Middle Name
Gender	Male	Marital Status		Language	
Date of Birth	1984-10-01	Hire Date	2019-04-01	Enrolment Date	2019-04-01

Status and Payroll Data

Effective Date	2023-01-01	Annual Salary Rate	0	Plan Design	DBplus
Employment Status	ACT - Active	Employee Type	Other than fulltime	Employee Group	Administration
Earnings	+	Contributions	+	Employer Contributions	+

Member Details – Summary

Personal **Summary** Retro-active Pays Partial Day Leaves Validation Result Timeline NC Status

	Reported	Calculated	Difference
Total Regular Contributions	\$0.00	\$0.00	\$0.00
Total DBplus Regular Contributions	\$0.00	\$0.00	\$0.00
Total Pregnancy/Parental Contributions	\$0.00	\$0.00	\$0.00
Total DBplus Pregnancy/Parental Contributions	\$0.00	\$0.00	\$0.00
Total RCA Contributions	\$0.00	\$0.00	\$0.00
Total Pregnancy/Parental RCA Contributions	\$0.00	\$0.00	\$0.00
Total DBprime Pension Adjustment	<input type="text" value="0"/>	\$0.00	\$0.00
Total DBplus Pension Adjustment	<input type="text" value="0"/>	\$0.00	\$0.00
Total Service	0.00000	1.00000	1.00000

Comments:

Re-calculate

Member Details – Retro-active Pays

Member Details

EMPNO: 123 NAME: TEST, ONE DOB: 1999-12-01

Personal Summary **Retro-active Pays** Partial Day Leaves Validation Result Timeline NC Status

Year	Retro Earnings	
2022	500.00	+
Total Retroactive Earnings		\$500.00

Status and Payroll Data

Effective Date	2023-01-01	Annual Salary Rate	0	Plan Design	DBprime
Employment Status	ACT - Active	Employee Type	Fulltime	Employee Group	Faculty Member
Earnings		Contributions		Service	
Regular	80000.00	Regular	9516.40	Basic	1.00000
Retro Pay	500.00				

Member Details – Partial Day Leaves

Member Details

EMPNO: 123 NAME: TEST, ONE DOB: 1999-12-01

Personal Summary Retro-active Pays **Partial Day Leaves** Validation Result Timeline NC Status

Date	Service Deduction	
2023-12-07	0.00035	+ x
Total Service for Partial Day Leaves		0.00035

Status and Payroll Data

Effective Date	2023-01-01	Annual Salary Rate	0	Plan Design	DBprime
Employment Status	ACT - Active	Employee Type	Fulltime	Employee Group	Faculty Member
Earnings		Contributions		Service	
Regular	80000.00	Regular	9516.40	Basic	0.99965

Member Details – Validation Result

Member Details

EMPNO: 123 NAME: TEST, ONE DOB: 1999-12-01

Personal Summary Retro-active Pays Partial Day Leaves **Validation Result** Timeline NC Status

Override	Field	Reported Value	Expected Value	Error Description	Severity
	Total DBprime Pension Adjustment	0	9604	Reported DBprime PA is not within tolerance	Warning
	Retro-active Pays	0.00	500.00	Total retroactive earnings does not equal sum of the annual retroactive earnings amounts	Error
Total Number of Errors:		2			

Run Validation

Status and Payroll Data

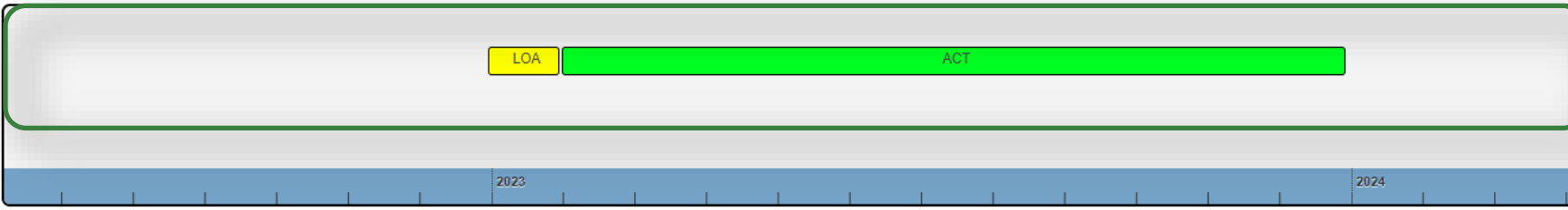
Effective Date	2023-01-01	Annual Salary Rate	0	Plan Design	DBprime
Employment Status	ACT - Active	Employee Type	Fulltime	Employee Group	Faculty Member
Earnings		Contributions		Service	
Regular	80000.00	Regular	9516.40	Basic	1.00000

Member Details – Timeline

Member Details

EMPNO: 123 NAME: TEST, ONE DOB: 1999-12-01

Personal Summary Retro-active Pays Partial Day Leaves Validation Result **Timeline** NC Status



Status and Payroll Data

Effective Date	2023-01-01	Annual Salary Rate	0	Plan Design	DBprime
Employment Status	LOA - Unpaid Leave Of Absence	Employee Type	Fulltime	Employee Group	Faculty Member
Earnings	+	Contributions	+	Service	+

Effective Date	2023-02-01	Annual Salary Rate	0	Plan Design	DBprime
Employment Status	ACT - Active	Employee Type	Fulltime	Employee Group	Faculty Member
Earnings	+	Contributions	+	Service	+

Member Details – NC Status

Member Details

EMPNO: 456 NAME: TEST, TWO DOB: 1984-10-01

Personal Summary Retro-active Pays Partial Day Leaves Validation Result Timeline **NC Status**

Date
2022-06-30
Last Day Worked

Status and Payroll Data

Effective Date	2023-01-01	Annual Salary Rate	0	Plan Design	DBplus
Employment Status	NC - Other-Than-Full-Time – Not	Employee Type	Other than fulltime	Employee Group	Faculty Member
Earnings	+	Contributions	+	Employer Contributions	+

Reminders

Reminders – Import process

- Reconcile data (including membership) before starting and submitting your DCT
- Check the Import Log report for any rejected members
- If you cannot find a member with a changed Social Insurance Number (SIN), search the old SIN before adding to the DCT
- Add any missed members to the DCT
 - Note: The system will default **Employee Group** to **Administration**, so please update the record if Administration is not applicable

Reminders – Forms

- Send missed enrolments, changes to a plan design, LTD/WSIB notices and benefit applications via PAL
- Use Employer reports feature in PAL to identify missing transactions
- Review tolerances to determine if you need to submit a revised termination, retirement or death application
 - DBprime: \$150 earnings tolerance for changes
 - DBplus: \$140 tolerance for change in total employee/employer contributions

Reminders – Data

- For members who changed their employee group, update the employee group with a January 1 effective date under **Status and Payroll Data**
- Use **Comments** in the **Summary** tab to bring anything to your Pension Analyst's attention. For example, if you are making changes to the original data on DCT
- Provide contribution worksheets as requested
- Include retroactive payments applicable to the prior years for retirements and terminations under **Retro-active Pays** for DBprime members

Reminders – Data *(continued)*

- **Incorrect plan design:**

- Delete the existing record and create a new one under **Status and Payroll Data**; send Change of Employment form via Message Centre

- **New plan design not previously reported:**

- Add status as **IDT** and submit Change of Employment via PAL

- **Adding new records:**

- Review all fields for accuracy, particularly Employee Group (e.g., Administration vs. Support)

Additional resources

- DCT Guide
- DCT Submission Checklist
- Employer Pension Analyst

