



Payroll-based reporting

Pension Administration Link

2025



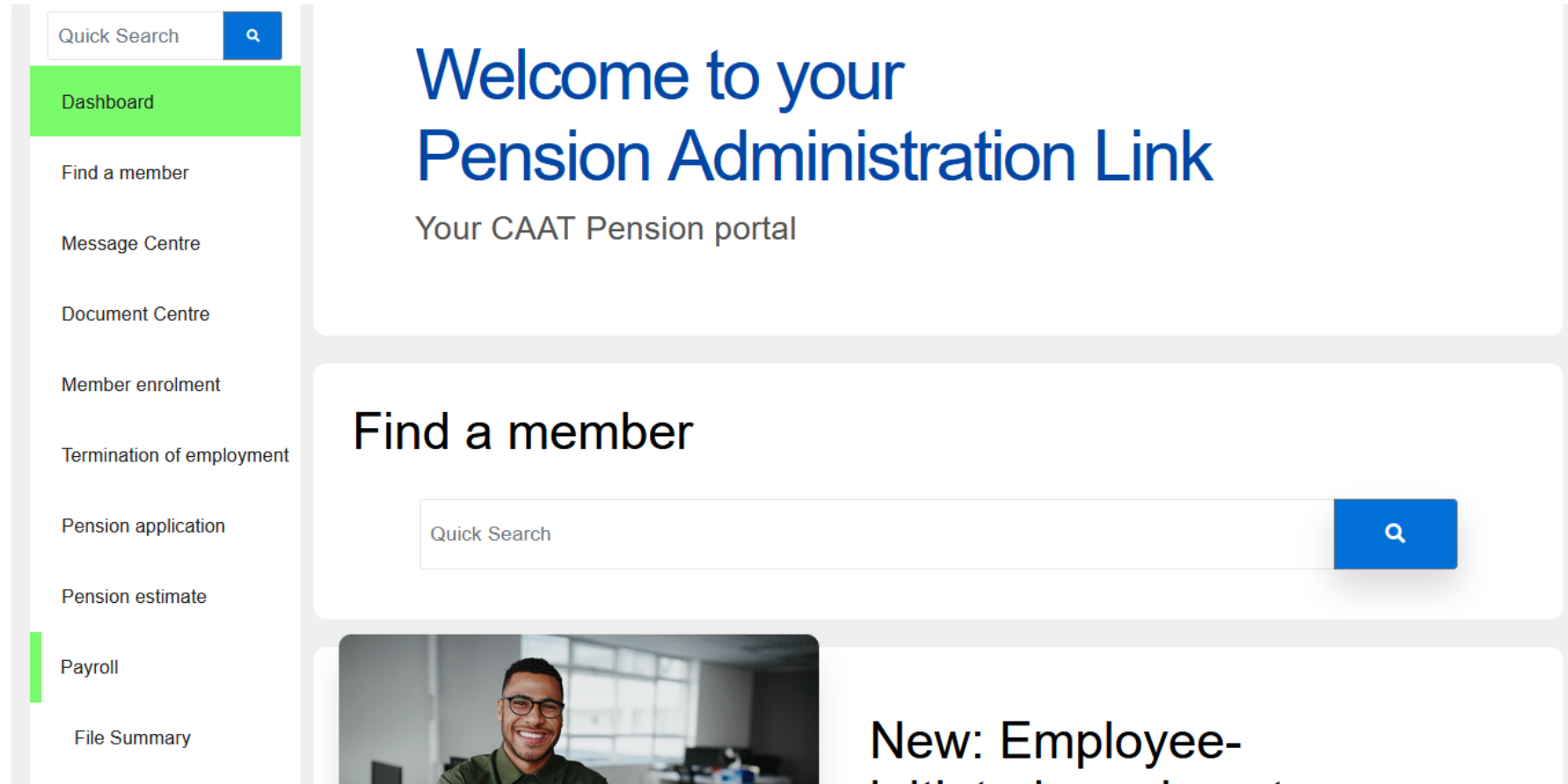
Payroll-based reporting (PBR)

- PBR has been available in Pension Administration Link (PAL) since March 2022
- PBR files loaded in PAL are accessible for review at any time
- CAAT employer Pension Analysts are available for support

Benefits of using PBR online

- Eliminates use of multiple platforms to submit files
- Easily make updates to a payroll file before final submission
- Employees are able to view data immediately in the member portal, My Pension
- Report pension adjustments (PAs) online

Payroll-based reporting – Menu location



The screenshot shows the CAAT Pension portal interface. On the left is a vertical navigation menu with the following items: Dashboard (highlighted in green), Find a member, Message Centre, Document Centre, Member enrolment, Termination of employment, Pension application, Pension estimate, Payroll (highlighted with a green bar and a blue arrow pointing to it from the left), and File Summary. At the top of the main content area is a 'Quick Search' box with a magnifying glass icon. Below this is a large heading: 'Welcome to your Pension Administration Link' with the subtitle 'Your CAAT Pension portal'. Underneath is another 'Find a member' section with a search box and a magnifying glass icon. At the bottom, there is a section titled 'New: Employee-' with a small image of a smiling man in a green shirt.

PBR in PAL – Process steps

- Step 1 – Upload your PBR file
- Step 2 – Validate and review
- Step 3 – Edit records, if necessary
- Step 4 – Post data

Step 1 – Upload

The screenshot shows a web application interface for payroll management. On the left is a navigation menu with items: Quick Search, Dashboard, Find a member, Message Centre, Document Centre, Member enrolment, Termination of employment, Pension application, Pension estimate, Payroll (highlighted in green), and File Summary. The main content area has a header 'Payroll' with the subtitle 'Submit and view payroll files'. Below this is a section titled 'Start a payroll submission' containing a blue button labeled 'Upload a new payroll file'. A large red arrow points to this button from the right, with the text 'Step 1' written inside it. Below the button is an 'Upload history' section with a link: 'Go to the most recent file uploaded: 15-Jan-2019 - 1935368'. A table below the link shows the upload history.

Payroll date	Process ID	Total posted: DBplus contributions	Records posted (%)
31-Jan-2019	1934526	0	

Step 2 – Validate file and review errors

Payroll file summary

View details of uploaded payroll file then edit, validate and post to complete

Payroll file options

Select your payroll file

28-Feb-2022 - 1942106

[View member data](#) [Edit payroll date](#) [Validate payroll file](#) [Post payroll file](#) [Delete payroll file](#)

Payroll file summary: 28-Feb-2022 - 1942106

Contributions summary			
Total DBplus reported	Total DBplus posted	Adjustments	Records Posted (%)
10119.22	0	0	

Upload details +

Member data summary +

Errors in payroll file: 28-Feb-2022 - 1942106

Member ID	Employee number	Social Insurance Number	Name in system	Error ID	Status	Error category	Error description
172989	172989050	001835941	AEGJSSWOG WEITEST	76204	Warning	Member Information	CPS-76204: SIN and LNAME not match for Preferred Employer.
172988	172988050	001835933	HFKQZURH DSFYVTBBD...	50034	Error		CPS-50034: Country is missing as provided by Preferred Employer.

1 - 2 of 2 items



172989050 - AEGJSSWOG WEITEST

Validation [Personal](#) [Contact](#) [Employment](#) [Contribution rate](#) [Pension adjustment](#)

Error ID	Status	Error type	Error description	Override
76204	Warning	Demographic	CPS-76204: SIN and LNAME not match for Preferred Employer.	

1 - 1 of 1 items

Step 3 – View and edit data if necessary

Payroll file options

Select your payroll file

28-Feb-2022 - 1942106

View member data Edit payroll date Validate payroll file Post payroll file Delete payroll file

Payroll file summary: 28-Feb-2022 - 1942106

Contributions summary			
Total DBplus reported	Total DBplus posted	Adjustments	Records Posted (%)
10119.22	0	0	

Upload details +

Member data summary +

Data errors	
Error Type	Count
Demographic	2
Employment	0

A28 -

Validation Personal Contact Employment Contribution rate Pension adjustment

Employee number: A28 Social Insurance Number: 999999999

First name: First Middle initial:

Last name: Last Name Date of birth: 10-Apr-1965

Sex: Male Language preference: Francais

Marital status: Separated

Payroll details

Record 1

From date: 01-Jan-2019 To date: 15-Jan-2019

Step 4 – Re-validate and post

Payroll file options

Select your payroll file

28-Feb-2022 - 1942106

View member data

Edit payroll date

Validate payroll file

Post payroll file

Delete payroll file

Payroll file summary: 28-Feb-2022 - 1942106

Contributions summary

Total DBplus reported	Total DBplus posted	Adjustments	Records Posted (%)
3096.69	3096.69	0	100

PBR – Wrapping up

- Employers can run their own reports using the **Employer reports** feature in the PAL menu
 - Ask your Pension Analyst for a demo
- Feedback about PAL is welcome and appreciated

