

Ministry of Education
Benefits Trust Branch
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2016: SB30

MEMORANDUM TO: Senior Business Officials

Secretary-Treasurers of School Authorities (Isolate Boards)

Business Administrators (Section 68 School Authorities)

FROM: Doreen Lamarche
Director
Benefits Trust Branch

DATE: September 20, 2016

SUBJECT: **Update on Transition to Employee Life and Health Trusts (ELHT) - Waves 2 and 3**

This memorandum is issued as a follow up to the memorandum **2016:SB18 – Update on the Transition to Employee Life and Health Trusts** and provides school boards with further information on the transfer of employee benefits to the ELHTs.

Implementation

As previously communicated, employees will be transitioned to the ELHTs on a staggered basis over the 2016-17 school year. It is anticipated that there will be 5 waves as follows:

Wave 1	November 1, 2016
Wave 2	February 1, 2017
Wave 3	February 1, 2017 (French school boards only)
Wave 4	April 1, 2017
Wave 5	June 1, 2017

Waves 1 to 3 have now been finalized and may be subject to change only where a school board has not yet ratified the local terms of the collective agreement as of the participation date. In August, the shared services provider, Ontario Teachers Insurance Plan (OTIP), notified several school boards of the employee bargaining groups that will be part of waves 2 and 3 (see appendix A for the list of school boards, but note that not all employee bargaining group are moving in each waves). Wave 2 school boards have received a letter that authorizes their current insurance carrier to transfer employee health benefits information to OTIP as well as a listing of key milestone dates to ensure the successful transition to the ELHTs. Wave 3 school boards are working collectively on their transition tasks including working with their current insurance carrier. Wave 2 and 3 school boards can also refer to the updated Implementation Task List and Related Timelines as a planning tool (see Appendix B).

School boards participating in the next waves will be notified as soon as the information is available.

We continue to encourage all school boards to keep all employee benefits information as up-to-date and accurate as possible which will facilitate the transition process.

Final Benefits Costing Template

The ministry is approaching the completion of the validation process of the benefits costing templates. At this time, we'd like to thank the school boards for all of their assistance in answering questions from the ministry, auditors, OTIP and the trustee associations.

School boards should expect to receive a final version of their benefits costing template via email from the financial analyst who reviewed the templates shortly. School boards are requested to review the information in the template and confirm that the data is correct. This confirmation should be communicated via email to the financial analyst within **10-business days** of receipt of the final costing template and we are requesting that the Senior Business Officials of school boards be copied on the email confirmation where they are not the sender.

These final templates will be used to support the funding calculations for the employee groups moving to the ELHTs.

ELHT Funding Requirements

By October 3, 2016 the ministry is committed to notifying school boards that are participating in Wave 1 (November 1, 2016 transfer) of the amount of their first monthly payment to the trusts. As the validation process is not yet complete on the final benefits costing template, a preliminary amount will be used until the validation process is complete.

OTIP will continue to work with the Wave 1 boards to ensure that a payment process is established and other data connections are functioning.

Later in October, the ministry will notify school boards of the proposed changes to the Grants for Students' Needs (GSN) funding formula to reflect the benefits funding amounts to the trusts, including the ministry commitment to fund \$300 per FTE starting in 2016-17.

For any questions, please contact Emily White at Emily.White@ontario.ca or (416) 325-5226 or Brad Partington at Brad.Partington@ontario.ca or (416) 326-3804.

Original signed by

Doreen Lamarche
Director
Benefits Trust Branch

Appendix A: Wave 1, 2 and 3 School Boards

Wave 1	Wave 2	Wave 3
Brant Haldimand Norfolk CDSB	Algoma DSB	Conseil des écoles catholiques du Centre-Est
Halton DSB	Algonquin and Lakeshore CDSB	Conseil des écoles publiques de l'Est de l'Ontario
Kawartha Pine Ridge DSB	Avon Maitland DSB	CSC de district des Grandes Rivières
Ottawa-Carleton DSB	Bluewater DSB	CSC du Nouvel-Ontario
Peel DSB	Brant Haldimand Norfolk CDSB	CSC Franco-Nord
Rainbow DSB	Bruce-Grey CDSB	CSC Providence
Renfrew County CDSB	DSB of Niagara DSB	CSDC Centre-Sud
Renfrew County DSB	DSB Ontario North East	CSDC de l'Est Ontarien
Simcoe County DSB	Dufferin-Peel CDSB	CSDC des Aurores Boréales
Thames Valley DSB	Durham DSB	CSD du Grand Nord de l'Ontario
Thunder Bay CDSB	Grand Erie DSB	Conseil scolaire public du Nord-Est de l'Ontario
Waterloo Region DSB	Greater Essex County DSB	Conseil scolaire Viamonde
	Halton CDSB	
	Hamilton-Wentworth CDSB	
	Hamilton-Wentworth DSB	
	Huron-Perth CDSB	
	Keewatin Patricia DSB	
	Lakehead DSB	
	Lambton Kent DSB	
	London DCSB	
	Near North DSB	
	Niagara CDSB	
	Nipissing-Parry Sound CDSB	
	Ottawa CSB	
	Sudbury CDSB	
	Superior North CDSB	
	Toronto CDSB	
	Waterloo CDSB	
	Windsor-Essex CDSB	
	York CDSB	

Appendix B

Wave 2 & 3 – Updated 2016-17 Implementation Task List & Related Timelines

TASKS	TESTING	PRODUCTION
DSB notified of wave placement	Aug 12	N/A
OTIP to provide transition guides, task list and timeline to DSB (any updates to be provided by Production phase)	Sep 8	Nov 3
DSB to provide contact information to OTIP for both the HRIS and Payroll testing activities (contact name / phone number / email address)	Sep 12	N/A
OTIP to provide templates for additional data (e.g. Not At Work members, life volumes)	N/A	Nov 3
DSB to request Benefits, Dependant, Life data files from current carrier (in specifications format, for purposes of populating the claims history template, provide overview of life benefits structure)	Sep 12	Nov 3
DSB to create <u>HRIS file</u> for eligible members that are transitioning and deliver to OTIP via SFTP. Testing period starts – back and forth until file has no errors (DSB & OTIP)	Oct 3 – Oct 12	Nov 22 – Dec 2
DSB to deliver Benefits, Dependant, Life data files to OTIP via SFTP. Provide overview of employee life benefits plan structure. Instruct carrier to deliver claims history template to Manulife.	Oct 3 – Oct 12	Nov 22 – Dec 2
DSB to create <u>HRIS Changes File</u> and provide to OTIP. Testing period starts until HRIS Changes file has no errors (DSB & OTIP)	N/A	Dec 2 – Dec 16
OTIP to create <u>Payroll Test File</u> and provide to DSB. Testing period starts for Payroll Test File until file has no errors (DSB & OTIP)	N/A	Dec 2 – Dec 16

TASKS	TESTING	PRODUCTION
OTIP to review <u>Carrier and HRIS</u> File error logs and provide DSB with feedback	Oct 27 – Nov 3	N/A
Member portal site live	N/A	Jan 4, 2017

HRIS = Human Resources Information System

Note: the dates are best estimates and are subject to change given the dynamic nature of the transformation.