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2017: SB05

**MEMORANDUM TO:** Senior Business Officials  
  
Secretary-Treasurers of School Authorities (Isolate  
Boards)  
  
Business Administrators (Section 68 School Authorities)

**FROM:** Romina Di Pasquale  
Director (A)  
Benefits Trust Branch

**DATE:** March 15, 2017

**SUBJECT:** **Employee Life and Health Trusts (ELHT) – Wave 4 and  
5 Update**

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As a follow-up to previous memoranda on the implementation of the Employee Life and Health Trusts (ELHT), the ministry is providing an update to school boards on the next transition wave of 2016-17.

### **Trust Migration Update**

On February 1, 2017, eleven boards in Wave 2 and twelve boards in Wave 3 transitioned to the ELHTs. This resulted in the migration of over 27,000 employees in the elementary and secondary education sector to the ELHTs. In addition to the 27,000 plus employees noted above, Wave 4 scheduled for April 1<sup>st</sup> will also see over 52,000 employees transition to the ELHTs. This brings the total number of employees receiving benefits under the ELHTs to 125,000 as of April 1, 2017.

The feedback from unions, federations and school boards indicate that the experience transitioning in wave 2 and 3 has improved for all stakeholders. The Trust Resolution and Action Committee (TRAC) continues to work towards resolving the technical and implementation issues of transitioning into the ELHTs and to improving the experience of boards transitioning in Waves 4 and 5.

The school boards participating in Wave 4 (April 1, 2017) and Wave 5 (June 1, 2017) have been slightly revised as a result of recommendations made by TRAC (see **Appendix A** for details).

## Wave 5

Wave 5 is the last scheduled transition wave for the migration of teachers from the Ontario Secondary School Teachers' Federation, the Ontario Education Catholic Teachers' Association, and the Elementary Teachers' Federation of Ontario, as well as the Ontario Secondary School Teachers' Federation – Education Workers and the Elementary Teachers' Federation of Ontario Education Workers to the ELHTs.

School boards that have been rescheduled to Wave 5 should ensure they communicate this change to their insurance carrier as soon as possible to ensure the continuation of benefit coverage for its employees.

All Wave 5 boards should have received a task list (see **Appendix B**) on February 28, 2017 with due dates for remitting data to OTIP prior to the boards' participation date. To ensure the success of the Wave 5 transition, boards are reminded of their obligation to provide data to the Ontario Teachers' Insurance Plan (OTIP) by the dates outlined in the OTIP task list. As detailed in Appendix B, the following dates and data requirements are critical:

- Carrier data to OTIP – due **March 10, 2017**;
- Test files to OTIP – beginning **March 6 – 20, 2017**; and
- Final Production files to OTIP – due no later than **March 31, 2017**.

**The due dates for providing a complete data set to OTIP must be observed.** Adherence to the due dates and data requirements is essential for ensuring a seamless migration to the ELHTs, no gaps in benefits coverage, and a positive enrolment experience for school board employees.

### Potential Consequences of Non-Compliance

Boards are reminded that, in accordance with **2016:B16 - GSN Update in Support of Transition to Employee Life and Health Trusts (ELHT)**, legislative grants provided through the GSN are conditional on the school boards complying with the terms of the Trust Agreements, including paying the necessary monthly contributions to the ELHTs beginning on the participation dates.

If a school board fails to comply with the terms of the Trust Agreements, these conditions would, if imposed, authorize the Minister of Education to withhold, or require the board to repay, all or part of the GSN grant until such time that the school board meets the terms of the Trust Agreements.

School boards are advised to contact their Trustees' Associations or the ministry immediately if they are concerned with meeting the deadlines or providing the data requested.

### Supports for Boards

The ministry, the Ontario Public School Boards' Association, the Ontario Catholic School Trustees' Association and OTIP are available to work with school boards in wave 5 to assess the progress on meeting the dates, and to offer assistance where possible. This assistance is also readily available for school boards that transitioned in one of the earlier waves and that continue to work towards providing all of the necessary information to the ELHTs.

We would also like to remind school boards of the additional supports outlined in **2016: SB 39 - Employee Life and Health Trusts – Implementation Engagement and Supports** in which the ministry has requested school boards to collect information about their incremental one-time costs that are directly related to the transition of employee benefits to the ELHTs. The ministry is requesting that boards collect information on expenses directly related to the transition of employee benefits to the trusts, such as costs for Human Resources, Information System (HRIS) upgrades or patches and additional time for staff (information technology, human resources, payroll, accounting or other) up to March 31, 2017.

For any questions, please contact Brad Partington at [Brad.Partington@ontario.ca](mailto:Brad.Partington@ontario.ca) or (416) 326-3804 or Emily White at [Emily.White@ontario.ca](mailto:Emily.White@ontario.ca) or (416) 325-8790.

***Original signed by***

Romina Di Pasquale  
Director (A)  
Benefits Trust Branch

Attachment: Appendix A – Wave 4 and Wave 5 School Boards  
Appendix B – Wave 5 OTIP task list and timeline

cc. Joshua Paul, Assistant Deputy Minister (A), Financial Policy and Business Division  
Doreen Lamarche, Executive Director (A), Fiscal & Financial Planning  
Teacher Federations  
Education Worker Unions  
Principal and Vice-Principal Associations  
Education Council of Associations for Benefits  
Trustee Associations  
Ontario Teachers Insurance Plan

## APPENDIX A – Migration to Employee Life and Health Trusts (Waves 4 & 5)

Wave 4	Wave 5
<b>School Boards</b>	<b>School Boards</b>
Algoma DSB (OSSTF only)	Algonquin-Lakeshore CDSB
Avon Maitland DSB	Bruce-Grey CDSB
CDSB of Eastern Ontario	Dufferin-Peel CDSB
Durham CDSB	Grand Erie DSB (OSSTF only)
Durham DSB	Hastings & Prince Edward DSB
Grand Erie DSB (ETFO only)	Keewatin-Patricia DSB (ETFO only)
Greater Essex County DSB	Lakehead DSB
Hamilton-Wentworth DSB	Lambton Kent DSB
Limestone DSB	Near North DSB
London DCSB	Niagara CDSB
Northwest CDSB	Nipissing CDSB
Peterborough Victoria Northumberland and Clarington CDSB	Northeastern CDSB
Simcoe Muskoka CDSB	Ottawa CDSB
St. Clair CDSB	Rainy River DSB
Sudbury CDSB	Superior-Greenstone DSB
Superior North CDSB	Upper Canada DSB
Toronto CDSB	Windsor Essex CDSB
Toronto DSB	York Region DSB
Trillium Lakelands DSB	<b>Provincial Schools</b>
Upper Grand DSB	The Ernest C Drury School for the Deaf
Wellington CDSB	The Robarts School for the Deaf
<b>School Authorities</b>	The Sir James Whitney School for the Deaf
John McGivney Children's Centre School Authority	W. Ross Macdonald School
Bloorview School Authority	Amethyst School
	Centre Jules Leger
	Sagonaska School
	Trillium School
	<b>School Authorities</b>
	Campbell Children's School Authority
	James Bay Lowlands Secondary School Board
	Moose Factory Island DSAB
	Moosonee DSAB
	KidsAbility Education Authority
	Niagara Peninsula Children's Centre School Authority
	Penetanguishene Protestant Separate School Board

## Appendix B – Wave 5 Task List and Timeline

### WAVE 5 TASK LIST & TIMELINE – GETTING READY FOR TRANSITION (LIVE DATE JUNE 1, 2017)

	PRODUCTION LOAD TASKS	DATE
List of Documents	<p>OTIP has provided the following documents to assist you with your Production data delivery</p> <ol style="list-style-type: none"> <li>1. Carrier Data <ul style="list-style-type: none"> <li>• DSB Letter of Direction</li> <li>• OTIP Carrier Workbook</li> <li>• Claims History Request (Trust History Transfer Spec)</li> <li>• Working with your Current Carrier advice (amending your plan)</li> </ul> </li> <li>2. HRIS Data <ul style="list-style-type: none"> <li>• Eligibility <u>Mapping Guide</u> with grand parenting, if any</li> </ul> </li> <li>3. The Three Spreadsheets <ul style="list-style-type: none"> <li>• Not At Work</li> <li>• Life Benefit Data</li> <li>• Survivors</li> </ul> </li> </ol>	February 28
1. Carrier Data	<p>Send the DSB Letter of Direction and Workbook to your carrier <u>right away</u>. OTIP has worked with most carriers and they will be familiar with this request. Your carrier will send the data to you. Review it. Upload it to your OTIP SFTP.</p> <p>Send the Claims History Request to your carrier right away. This data goes from your carrier directly to Manulife. See page 2 for who receives the data at Manulife. This is due to Manulife in May.</p> <p>Read the “Working with your Current Carrier” advice and start the conversation with your Account Executive regarding amending your current contract. Depending on your contractual agreement, discuss timelines and actions required to amend your carrier arrangements.</p>	<p><b>Carrier data to OTIP by March 10</b></p> <p>Claims History to Manulife by May 8</p> <p>Know the date for when you need to give carrier notice</p>
2. HRIS Data	<p>Prepare your system with OTIP Functionality (talk to your vendor if you need help with this).</p> <p>Review the Mapping Guide – this is a living document so expect updates</p> <ul style="list-style-type: none"> <li>○ Start mapping eligible employees to their ELHT location/class and plan</li> <li>○ Read the Member Status and Leave Codes section and start coding your employees appropriately</li> <li>○ Read the LTO rules (if they apply) and include this group if they meet the criteria</li> <li>○ Grand parenting – OTIP works with the ELHTs to provide grand parenting if it applies.</li> </ul> <p>Produce a HRIS Full file from your system and put it into your OTIP SFTP</p> <p>OTIP will provide you feedback on your file coding and data quality. We expect 2 – 3 iterations until we will have production-ready data</p>	<p><b>IMPORTANT DATES</b></p> <p><b>TEST FILES multiple times from March 6 – 20</b></p> <p><b><u>FINAL</u></b></p>

	PRODUCTION LOAD TASKS	DATE
	<b><u>Important</u></b> that we <u>get our teams together – send us your availability for a 45 minute conference call every week. We'll set up the recurring event.</u>	<b><u>PRODUCTION FILE is due no later than March 31</u></b>
3. Spreadsheets	<p><u>Not At Work</u> – Who is not at work, who is not on your HRIS? Are all your LTD claimants on your HRIS? Do you have disabled members that are on a life waiver? Review this document and it will be discussed at the conference call so everyone is clear.</p> <p><u>Life Benefits Data</u> – see instruction tab and provide this data to us</p> <p><u>Survivors</u>– Does the board have any survivors? If yes, complete a page for each. If not, send OTIP an email stating there are none. This will be revisited before live date in case this changes.</p>	LOAD TO SFTP no later than March 20
4. Data Reviews	OTIP will work together with you to review your Production Data and look for opportunities to improve data quality before live date	April 3 - April 11
5. Payroll & Remittance	OTIP will be sending you a TEST Payroll File. The Payroll & Remittance process will be reviewed at the weekly conference call.	April 25 or earlier
6. HRIS Changes	Next opportunity to improve data quality and to update HRIS data since the Production file and before live date	May 10

HRIS = Human Resources Information System Note: the dates are best estimates and are subject to change given the dynamic nature of the transformation