

Frequently Asked Questions (FAQs)

Plannera Pensions & Benefits (Plannera) Employer Relations Coordinators (ERCs) have compiled this list of frequently asked questions to assist employers with the new PLANet system. New questions and information will be added often. If your question isn't listed, please feel free to reach out to the ERCs. They can be reached at erc.pepp@plannera.ca or 306-787-1662.

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Frequently Asked Questions (FAQs)

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1) What is a Batch Number in a contribution file upload?

This is a unique 6-digit number to help identify a particular Contribution file.

- a. The required format is DDMM## - DD (i.e. 01-31) MM (i.e. 01-12); and
- b. The last two digits (##) is free form and can be any two numbers (i.e. 01-99) or any two letters (A-Z i.e. TS). It can also be a combination of numbers and letters (i.e. 0531**TS**, 0531**99** or 0531**T9**).
- c. Are you receiving a Duplicate Batch # error in your contribution file?
 - i. This means the exact 6-digit sequence has been used previously. Click on “Edit File Headers” to update.

The screenshot shows a web interface with a 'File Details' section and a 'Validations and Exceptions' section. The 'File Details' section contains the following information:

Batch Number	150521
Transaction Count	n/a
Total Contributions	n/a
Employer Code	n/a
Pay Date	31122020

Below the details is a 'Validate' button. Underneath is a table showing the status of the file:

Status	Count
Edited	1

Below the table are links: [Edit File Headers](#) | [View Audit Log](#) | [Print](#). The 'Edit File Headers' link is highlighted in yellow.

The 'Validations and Exceptions' section shows a message:

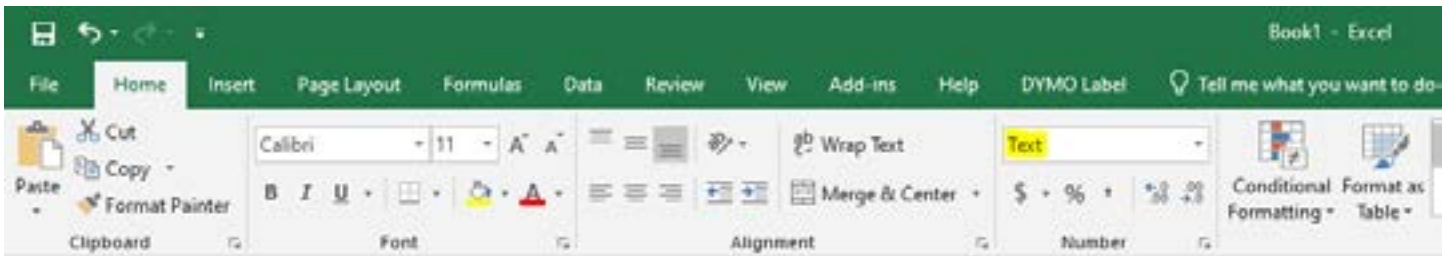
Message	Override
Duplicate File Batch Number has already been processed	<input type="checkbox"/>

If you have questions or would like further instructions please contact your Employer Relations Coordinators (ERCs) at 306-787-1662 or erc.pepp@planner.ca.

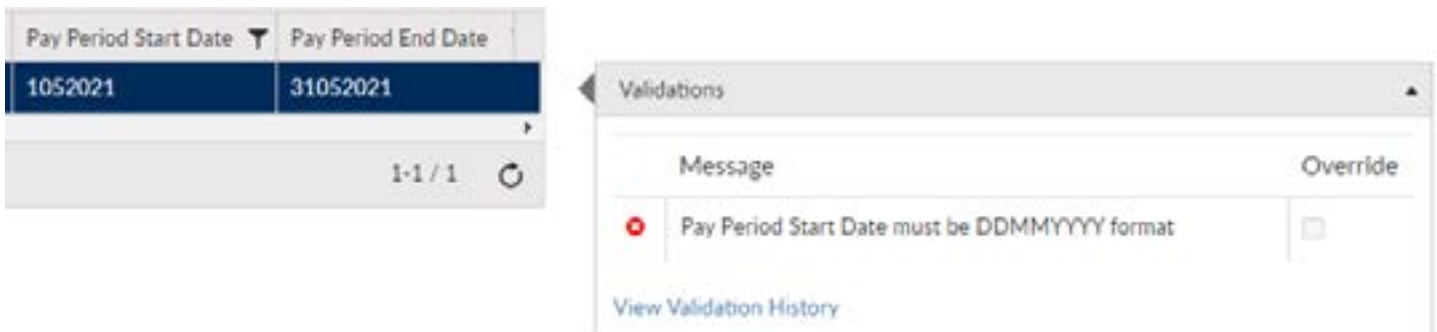
2) How do I fix the lead zeros on an uploaded file?

To fix lead zeros from dropping off when you upload a CSV file, make the amendments in your original Excel workbook and save a new CSV file with the changes. Do not make changes to a CSV file, this can cause the lead zero's to drop on upload.

When formatting your original excel spreadsheet ensure your format is set to "text" as this will make the spreadsheet hold on to the lead zeros.



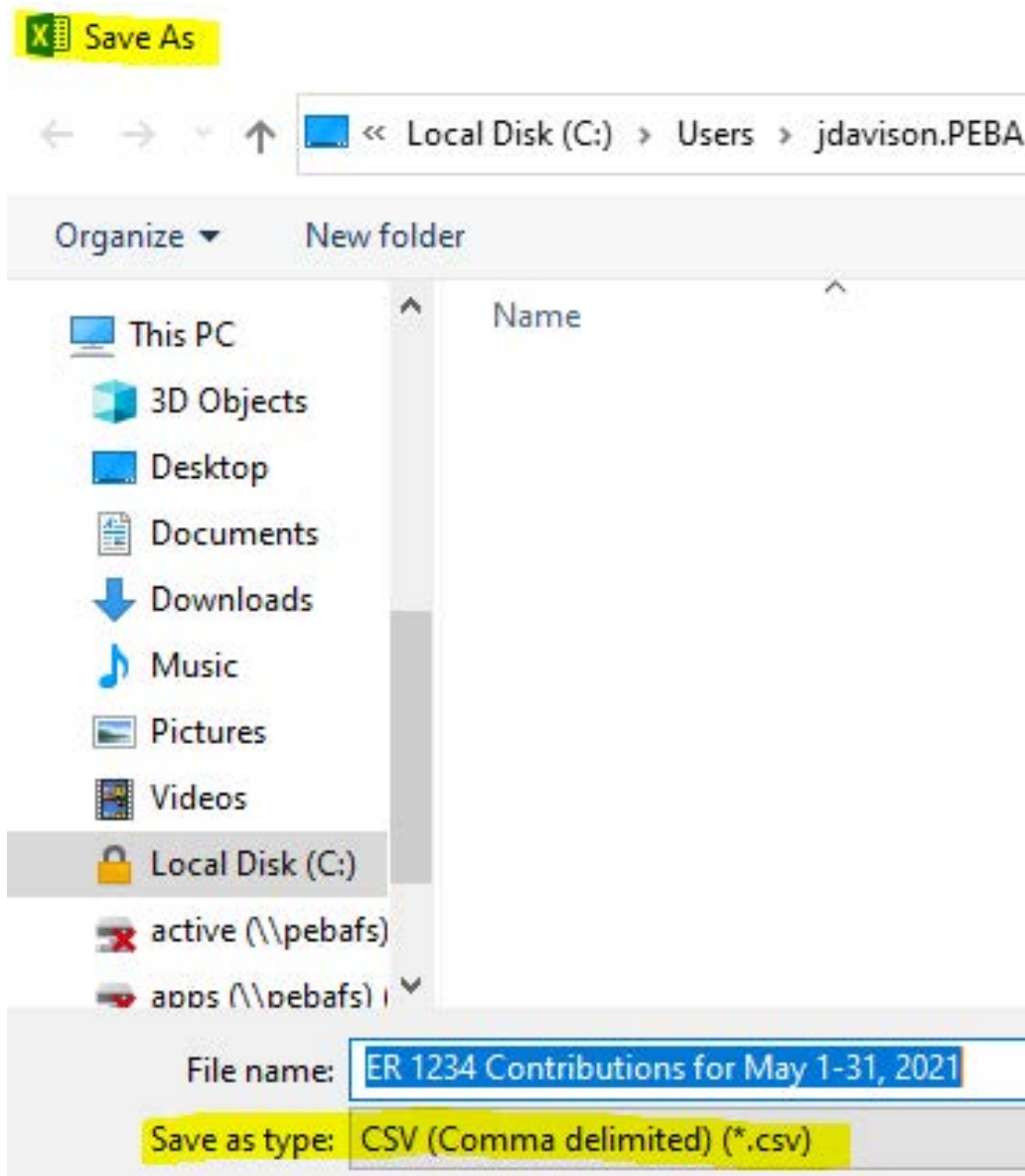
Check that your dates are in the correct format DDMMYYYY. This means that if the day is from the 1st to the 9th, the format will have to include a zero at the beginning (eg. 06112020 is used for November 6, 2020).



*If you are still having issues, please contact your ERCs at 306-787-1662 or erc.pepp@plannera.ca and we will walk you through the process and provide you with a template to utilize internally.

3) How do I save my file in CSV format and which CSV File Type do I choose?

- a. In Excel, select "File", then choose "Save as".
- b. In the "Save as" window, choose **CSV (Comma delimited) (*.csv)** as the Save as type .



4) How do I add or remove an administrator for PLANet?

- a. Go to [the PEPP website](#).
- b. Click on the “Employer” tab, then choose “PLANet” from the menu. Complete the User Information and Authorization form located under Resources.
- c. Email completed form to erc.pepp@plannera.ca. When the new administrator has been set up, we will email them their unique user ID and password to access PLANet.

*If you have any questions or need further clarification, contact your Employer Relations Coordinators (ERC) at 306-787-1662 or erc.pepp@plannera.ca and we will answer any questions you may have.

5) I’m locked-out of PLANet. What do I do?

To unlock your account, call your Employer Relations Coordinators at 306-787-1662 or erc.pepp@plannera.ca

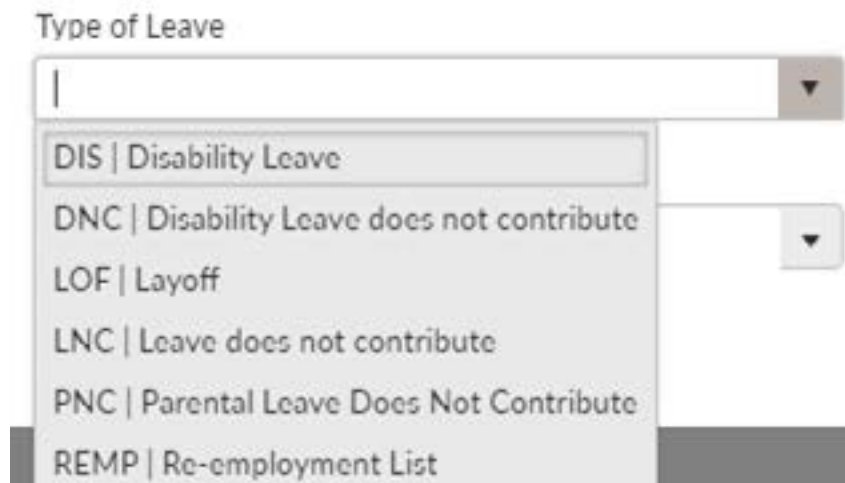
Your account will be locked if you enter an incorrect username or password **three** times.

6) I forgot my PLANet password. How do I reset it?

- a. Reset a forgotten password using the “forgot password” button.
- b. If you have not set-up security questions in PLANet, call 306-787-1662 or email erc.pepp@plannera.ca to reset your password.

7) What are the different Leave Types for PEPP?

The Leave Types for PEPP are:



The image shows a screenshot of a web application's dropdown menu. The title of the dropdown is "Type of Leave". The menu is open, displaying a list of six options, each with a small downward arrow to its right. The options are: "DIS | Disability Leave", "DNC | Disability Leave does not contribute", "LOF | Layoff", "LNC | Leave does not contribute", "PNC | Parental Leave Does Not Contribute", and "REMP | Re-employment List". The background of the page is a light gray, and the dropdown menu has a white background with a light gray border.

1. DIS – Disability Leave (still contributes)

PEPP Legislation expects contributions to continue while an employee is in receipt of Disability Income Replacement from the employer's disability carrier.

- See Contributions to PEPP while on Disability Leave under the Employer forms tab;
- See the Employer Administration guide - Section 7. Plan Provisions d) Contributions for an employee receiving disability benefits and e) Completing Disability Leave Contributions form.

2. DNC – Disability Leave does not contribute

This leave type is used when an employee is in receipt of Disability Income Replacement from the employer's disability carrier but the employee refuses to make their employee contributions to the employer. Employees are expected to continue contributions while in receipt of Disability Income, as a result the option to repay for this period of Leave will NOT be provided upon their return to work.

- See Contributions to PEPP while on Disability Leave under the Employer forms tab;
- See the Employer Administration guide - Section 7. Plan Provisions d) Contributions for an employee receiving disability benefits and e) Completing Disability Leave Contributions form.

3. LOF – Layoff

This leave type is used when an employee is laid off. Contributions are not permitted during a period of Layoff or upon return. There are no provisions in PEPP Legislation to allow for the employee to repay for a period of Layoff. While the employee/employer relationship still continues, the employee does not have access to their PEPP account as their funds remain locked-in.

Continued on next page...

4. LNC – Leave does not contribute

This leave type is used when an employer approves an unpaid Leave of Absence for reasons other than Parental Leave. Contributions are not permitted while an employee is on an employer approved unpaid Leave of Absence; the option to repay for that period of Leave must be provided to the employee upon return to work – see member PEPP Talk on Leave of Absence and the employer LOA Contribution Options form.

5. PNC – Parental Leave does not contribute

This leave type is used when an employer approves an unpaid Leave of Absence for parental reasons (i.e. maternity). Contributions are not permitted while an employee is on an employer approved unpaid Leave of Absence; the option to repay for that period of Leave must be provided to the employee upon return to work – see member PEPP Talk on Leave of Absence and the employer LOA Contribution Options form.

6. REM – Re-Employment List

This leave type is used when an employee is put on a Re-employment list. Contributions are not permitted during a period of being on a Re-employment List or upon return. There are no provisions in PEPP Legislation to allow for the employee to repay for a period of being on the Re-employment list. While the employee/employer relationship still continues, the employee does not have access to their PEPP account as their funds remain locked-in.

8) How do I notify PEPP of a Leave (Work Absence)?

In PLANet* create a Leave file. Then choose from the following Actions:

A – Add is used when an employee commences a Leave and you are first notifying PEPP of this Work Absence.

U – Update is used when you are updating a Leave date (either the Start Date, End Date, or both).

D – Delete is used when an error is made when first creating a Work Absence. Please contact your ERCs to confirm this is the best course of action to fix the mistake.

*If your employee commenced a Leave prior to PLANet, please reach out to your ERC to confirm the Leave Type.

9) What are the leave maximums?

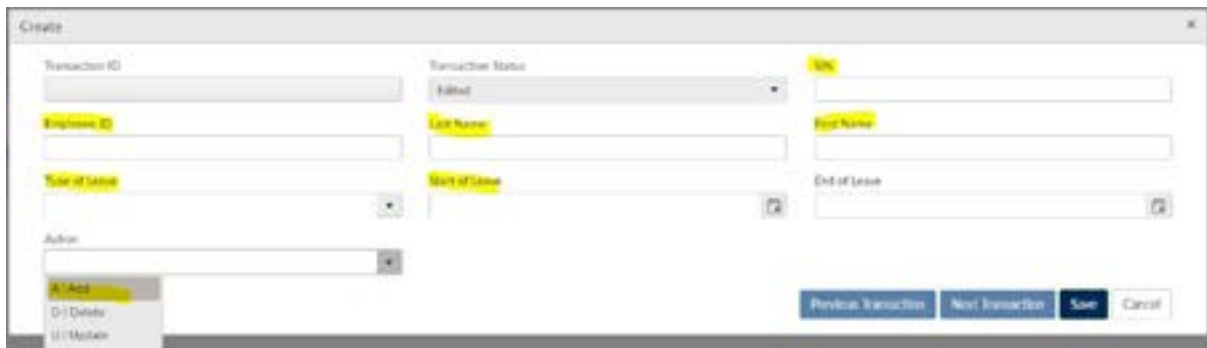
The *Income Tax Act* (Canada) limits the total amount of leave for which you may make contributions.

- You may contribute for a maximum of five years of accumulated leaves of absence.
- In the case of maternity or paternity leaves, the maximum is increased by an additional three years (to eight years in total).
- There are no rules regarding a minimum period for a leave of absence.

10) What is required for all the functions of a Leave file?

Here are all the functions of the Leave file and what is needed to process the different functions:

- To notify PEPP of a **Leave Start Date**, upon commencing the Leave, the file should include:



- To notify PEPP of a **change in Start Date** (Leave start date is changing), the file should include:



- To notify PEPP of a **change in Leave Type**:

Scenario #1 – Incorrect Leave Type provided upon Leave commencing:

Employer is required to Cancel the Leave (canceled Leave steps below) and resubmit Leave file with correct Leave Type.

Scenario #2 - At some point during a Leave, the Leave Type changes i.e. LNC to DIS:

Employer is required to submit Leave files with Start and End Dates for each Leave Type.

- To notify PEPP of a **cancel**ed Leave after the Leave file/Leave Start Date is already provided to PEPP, file should include:

The screenshot shows a 'Create' form with the following fields and settings:

- Transaction ID: [Empty]
- Transaction Status: Edited
- Employee ID: [Empty]
- Leave Name: [Empty]
- Type of Leave: [Empty]
- Start of Leave: [Empty]
- End of Leave: [Empty]
- Action: Cancel
- Buttons: Previous Transaction, Next Transaction, Save, Cancel

- To notify PEPP of a **Leave End Date**, file should include:

The screenshot shows a 'Create' form with the following fields and settings:

- Transaction ID: [Empty]
- Transaction Status: Edited
- Employee ID: [Empty]
- Leave Name: [Empty]
- Start of Leave: [Empty]
- End of Leave: [Empty]
- Action: Update
- Buttons: Previous Transaction, Next Transaction, Save, Cancel

- To notify PEPP of a **change in Leave End Date**, file should include:

The screenshot shows a 'Create' form with the following fields and settings:

- Transaction ID: [Empty]
- Transaction Status: Edited
- Employee ID: [Empty]
- Leave Name: [Empty]
- Start of Leave: [Empty]
- End of Leave: [Empty]
- Action: Update
- Buttons: Previous Transaction, Next Transaction, Save, Cancel

11) How do I add notes to PLANet files?

On your Dashboard, prior to submitting/ processing a file you will:

- click to highlight the file,
- click the arrow on the "notes" field to expand the notes section,
- select Edit, and
- enter in your note.

The screenshot shows a 'Notes' dialog box with the following content:

- Text: Disability Contributions for May 1-31, 2021. Cheque #12264.
- Buttons: Save, Cancel

*Notes cannot be added once your file is in a "Processed" status.

12) How do I fix an error after the file is in “processed” status?

A file cannot be amended in PLANet once it’s in a “Processed” status. Please call 306-787-1662 or email erc.pepp@plannera.ca as soon as you discover an error and we will help you right away.

13) What do I do when an Employee ID (EEID) gives an error?

Ensure your EEID contains your 4-digit PEPP employer code at the beginning.

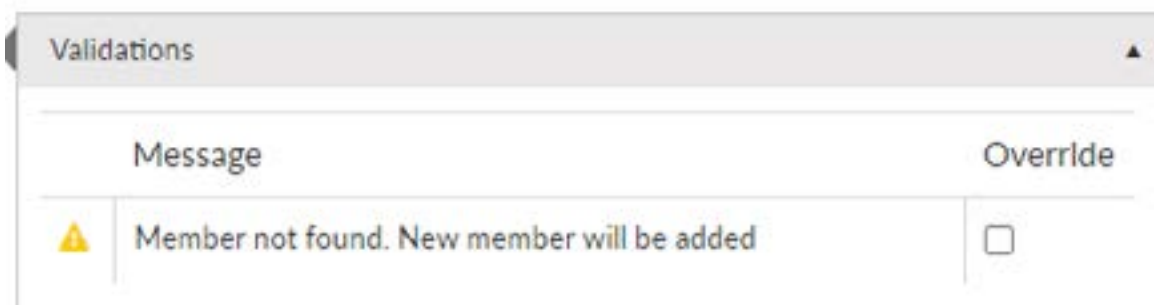
i.e 1234 (Employer Code) & 55555 (Internal EEID you’ve assigned) = PEPP EEID 123455555

*If you still receive an error please contact your ERCs at 306-787-1662 or erc.pepp@plannera.ca and we will be more than happy to help you out.

14) When submitting a Contribution file, I get a “Member not found” warning, will a new member be created?

As the message below says, a new member will be added, but this will create a skeleton account which CANNOT be used for a new employee’s account.

Prior to submitting any contributions for a new employee, you MUST enrol them with PEPP first by submitting an enrolment file in PLANet. Notify your ERCs as soon as the enrolment file has been “processed” and we will have it released internally so you can complete your contribution file.



15) When submitting a Contribution File, I get a “Member status is <terminated (or retired or deceased)>” warning. What do I do?



a. **Are you submitting a final contribution for a recently terminated employee?** If yes, and you are submitting contributions within 45 days of the employees termination date, override the warning.

b. **Has the employee been re-hired?** If yes, prior to submitting contributions for a previously terminated employee, you **MUST** re-enrol them with PEPP first by submitting an enrolment file in PLANet. Notify your ERCs as soon as the enrolment file has been “processed” and we will have it released internally so you can complete your contribution file.

16) The file I am processing in PLANet shows an “Error” status. What do I do?

- a. From the Dashboard, click to highlight the file (Blue), and view Validations and Exceptions (click arrow to expand the field), if this area is blank, there is a warning/error within the details of your file itself.
- b. From the dashboard, click on the “FILE ID” to open the file itself.
- c. Along the top of the screen, check off the “Display Errors and Warnings Only” box located under the File ID, this will only bring up the Transactions in an “invalid” transaction status.
- d. Review each Transaction accordingly – Messages will appear on the right under Validations.
- e. Warnings – can be overridden if acceptable or fixed in the transaction field accordingly.
- f. Errors – must be fixed or deleted from your file.

If you are still having issues processing your file please contact your ERCs at 306-787-1662 or erc.pepp@plannera.ca and we will be more than happy to help you out.

17) How do I update an employee's profile from a temporary SIN to their new Permanent SIN?

You would process this change through a Data Change File prior to submitting contributions with the new SIN (you can also update an address, phone number or an email with this file type). If you do not update the SIN, when submitting your next Contribution file you'll be creating a second PEPP account for this employee (a skeleton account) and you will receive a warning.

- a. From your dashboard check + Create New File.
- b. Select Data Change File.
- c. Enter in their original SIN you enrolled the member with.
- d. Enter in their Personal Information (Last name/First name).
- e. If you are only updating the SIN under Province (Delete SK: SASKATCHEWAN) & under Country (Delete CAN: CANADA) or the system will be looking for a new address in the file submission and would produce an error on your end.
- f. Under Effective Date of Change – enter in the date of change using the Calendar.
- g. Under New SIN field, enter in the new SIN for this employee.