I1 INTERFACE
Process and Validation Report Overview

June 2023

Contents

INTRODUCTION

The I1 interface consists of several files that contain data from each of the participating employers' HR and Pay systems. These interface files are used to support administration of the WSIB Employees' Pension Plan (the 'Plan') and are loaded to Willis Towers Watson's (WTW) eePoint system after the files are transmitted. The information reported on the I1 provides member data required for WTW to communicate with members, complete required transactions and calculations and pay pension benefits to members.

PURPOSE

This document will outline the I1 interface process, and the roles and responsibilities assigned to both WTW and the following participating employers:

- Infrastructure Health & Safety Association (IHSA)
- Public Services Health & Safety Association (PSHSA)
- Workplace Safety North (WSN)
- Workplace Safety & Prevention Services (WSPS)
- Workplace Insurance & Safety Employee Trust (WISE Trust)
- Workplace Safety & Insurance Board (WSIB)

The goal of this document is to ensure the handoffs are clear and all parties are aware of their responsibilities in ensuring the files are processed in a timely manner, with critical items handled immediately so the process can continue seamlessly. WTW has appointed an experienced team that is responsible for loading the files and interpreting the various reports and is available to answer queries from any of the employers that may arise.

TRANSMISSION DETAILS & LATE FEES

The participating employers will transfer electronic files biweekly (every Tuesday or Wednesday depending on their schedules) to WTW on a Secure File Transfer Protocol (sFTP) site as per the 20xx WTW Consolidated Processing Calendar.

Annual Processing Calendar & Annual Parameters

This processing calendar is updated annually as part of the year-end process and is based on feedback from the employers and their pay run calendars. The finalized schedule is shared with the employers by WISE Trust in December of each year, and the employer must then work with their internal IT teams to ensure the i1 interface is programmed to run per this shared schedule. This calendar covers important due dates such as:

- Interface file transmission dates
- Validation responses due dates
- Custom report delivery dates
- EFT schedules

Also part of the year-end process is the updating of the annual parameters and contribution rates. WISE Trust will send the employers the rate tables and this information must be shared with the Payroll/IT team to ensure that the correct contribution rates have been updated in the system.

I1 Files to WTW

The following files will be sent to WTW each i1 cycle:

PARTICIPATING EMPLOYER	I1 FILES TO WTW
IHSA	Service History, Demographic, Pay Rates, and Absence
PSHSA	Service History, Demographic, Pay Rates, and Absence
WSN	Service History, Demographic, and Pay Rates *(via DataLink)*
WSPS	Service History, Demographic, Pay Rates, and Absence
WISE Trust	Service History, Demographic, Pay Rates, and Absence
WSIB	Service History, Demographic, Pay Rates, Absence, Credits, and Multi

How the i1 Interface Works

Each employer's HR/Payroll system will generate a series of files that contains the data out of the pertaining systems. These set of files (listed above) are transmitted to WTW via sFTP on a bi-weekly basis. It is extremely important that the codes that are entered into the HR/Payroll system are codes that WTW currently has setup to accept into their system. The acceptable codes are laid out in the WSIB i1 Data Interface Requirements specification document. The use of the correct codes is also important as there are pension implications that can arise if an incorrect code is used.

For example:
There is a SWA member who is off on Short-Term Disability (STD) and ADP needs to be updated accordingly. The member is not getting paid by the employer; therefore, the STD period is considered unpaid (resulting in a break in the member's service). The 'Tables' tab in the WSIB i1 Data Interface Requirements document, shows the following codes that SWA21, SWA22, and SWA24 can use in ADP:

Action & Description		eepoint Service History code	Break in service?	Buyback?
STD	Short Term Disability	LOA - Paid - Accruing	No	No
STDNPD	Short Term Disability - Unpaid	Illness - Unpaid - Not Accruing	Yes	Yes
STDPD	Short Term Disability - Paid	Active	No	No

(the 'Break in Service' & 'Buyback' columns have been added here to show the effects of using each of these codes)

The code that will need to be entered into ADP is the **STDNPD** code. This is because of how the STD program is setup with the SWA employer – members do not get paid by the employer for the duration of this STD leave period. When the member returns from the leave, they will be issued a buyback quote for this period if the STDNPD code is used. If the code STD or STDPD is used in this case, this would result in an error in the member's pension record as these codes do not result in a break in service and the pension system would reflect that the member was on a Paid leave or as being Active. The member would receive pensionable service for this period (therefore resulting in overstated service) and no buyback quote would be issued. There may be other STD related codes that are available in ADP, but the ones in the table above are the only codes that WTW have mapped into eePoint.

Note: If new codes are created in the employers HR/Payroll system that are not included in the i1 specification document and are transmitted on an i1 interface run, these transactions will get dropped from the interfaces which will lead to incorrect member data. Should there be a business need to create a new code, the employer must reach out to WISE Trust with the details. WISE Trust will engage WTW in the work. Any rework caused by unmapped codes may be subject to out-of-scope fees and will be charged to the employer.

The i1 interface reports changes only; this means that it is not a full file of *all* employee records. The i1 process will capture updates made on the HR/Payroll system since the last i1 file was generated and will send these updates directly to eePoint via sFTP on a biweekly basis. The records being passed must be the members *full* record as per the WTW i1 specification document. For example, if there is only an address change to an employee's record, the full employee record is passed (all the required information, not just the address change).

It is important to note that both the employer HR/Pay system and WTW's eePoint system be in sync at all times. Data discrepancies will need to be resolved at the source system, which will then be transmitted on an interface.

If there is an issue with the transmission of the biweekly i1 feed to WTW, the employer must advise WTW as soon as possible. WTW will also reach out to the employer if there is an issue with the file delivery (ie. missing files, wrong layout, etc).

Late Transmission Fees

Each employer will be responsible for additional costs and associated fees relating to WTW receiving late interface files. Impacts to receiving files outside of the scheduled run dates include duplicate processing time, not having correct pension data, potential contribution issues, etc. where WTW is required to handle these cases on a time sensitive/special handling basis.

Below you will find the WTW fee schedule based on the time the interface file is received (and is subject to change at any time):

***Any* of the I1 files**	**On schedule**	**Late window 1**	**Late window 2**	**Late window 3**
File receipt timing	Wed at 07:00 AM	Wed 07:01 AM to 12:00 PM	Wed 12:01 PM to following Mon 07:00 AM	After Late window 2
Additional processing	N/A	None	> Off cycle processing of late files > Off cycle deemed contributions reporting (I3) > Off cycle Eligibility processing	> Off cycle processing of late files > Off cycle deemed contributions reporting (I3) > Off cycle Eligibility processing > Special handing for new members > Additional handling may be required based on timing of files receipt
Additional late fee	**N/A**	**$0**	**$1,200**	**From $1,300 (actual fee will be time and expense)**

SWA ADP USERS
ADP has setup the i1's to run on the employer side one day before the scheduled run date. This process was put in place to ensure that all i1 data requirements are met. An 'Exception Report' will be generated once the files have run. This report will outline mandatory data elements that are missing, and any other errors that have been detected within the files. Each employer must review this report and action the errors immediately. Please see ADP's document for additional information.

WHY ACCURATE DATA IS IMPORTANT

Member Perspective

- Provides members a level of confidence in the information they receive through consistency of accurate data
- Increases the effectiveness of pension modelling tools
- Sending pension communication in a timely manner to the correct mailing addresses
- Accurate pension benefits

Administrator/Employer Perspective

- The ability to service members well by providing the most accurate pension benefit information
- Data integrity reduces the risk of providing incorrect pension benefit payments
- Ensures payouts to the correct beneficiaries
- Increases administration efficiency
- Safeguards compliance with legislation
- Confirms consistency of information for auditor reviews

Legislative Perspective

- Non-compliance under the Ontario *Pension Benefits Act* can lead to administrative monetary penalties
- Imposed by Financial Services Regulatory Agency of Ontario (FSRA)
- Focused on adhering to timelines of:
  - Member statements
  - Payments of benefits
  - Providing information on membership eligibility

COMMUNICATION WITH PARTICIPATING EMPLOYERS

The WTW Admin Team will use *DataLink,* a WTW secured site, to post the validation reports and files there once the i1 interface process has been run and the data has been reviewed.

Since the information in these validation reports and files include sensitive member data, they must be posted to the *DataLink* site. Notification of documents transmitted via *DataLink* will be sent to the respective team's mailboxes and WTW will *not* include any sensitive information in the notification email to the employer. Documents posted to *DataLink* will expire within 10 days of the posted date, therefore the parties must download the documents in question as soon as they are posted.

WTW will also use the eePoint case management system called 'Case'. This is where WTW will communicate to the employer on specific member issues or enquiries. The employer will receive an email advising that a Case has been opened and there is a pending enquiry that WTW is looking for a response on. Case can be viewed on eePoint either by pulling up the associated Case number, or by opening a members record and viewing 'Case'.

REPORTS GENERATED & ACTIONS REQUIRED

Once the WTW Admin team processes the i1 interface file, a total of 8 Data Load Reports will be produced and sent to the respective employers via *DataLink*. The reports are as follows:

***New Hire**
Listing of all new hires, rehires, SIN changes.

***Termination**
List of Terminations/Retirements.

Interface File Validation Details
Listing of validation errors such as values out of range, fields not defined and missing fields.

Significant Changes
Significant change to a record has been sent across such as a change in date of birth.

Rejected
Records not processed by eePoint.

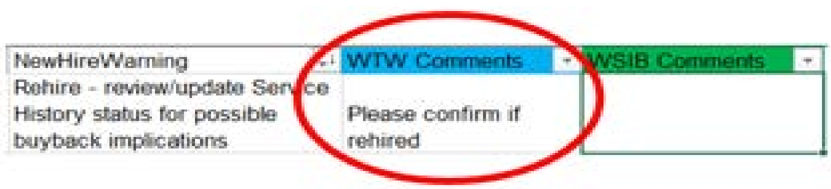
Retro
List of all changes with retroactive dates which will require intervention in eePoint by the WTW Admin Team.

Pension History, Service History, Pay Rate History
Large report summarizing all the records that were sent across the interface files.

Load Summary
No action required on this report – provided as an fyi

**WTW will reach out for confirmation on the New Hires and Terminations prior to the other reports being posted to DataLink. This is because an immediate review and response to these cases is required for WTW to produce the appropriate packages within the legislated timelines.*

WTW will add a column to the reports – **"WTW Comments"** – that will indicate the question or comment back to the employer for clarification. If this column is missing or if the fields are blank, this means there is no action required from the employer. Here is a sample of the New Hire report with the column and comment from WTW:



In the example above, there is a column – **"WSIB Comments"** – where the employer (WSIB in this example) must provide a response to WTW's comments. If this column is missing, simply add the column and enter in the appropriate responses.

If there is no comment/enquiry in the **"WTW Comments"** column, there is no action for the employer.

Please see the sections below for additional details on each of these reports, including WTW enquiries and the type of responses that are required from the employers on the reports.

NEW HIRE REPORT

When reviewing the New Hire report, you will see various messages related to employees who are new hires added to eePoint, employees whose SIN may have changed and possible rehired employees. While the new hires are straightforward and require no manual intervention by the WTW Admin team, certain other changes require actions as described below. This report will need to be reviewed and the employer must validate the records WTW is questioning and flag any other incorrect information.

Please note that WTW will send this report prior to sending all of the other i1 validation reports. This is because WTW requires an immediate response as the new hire welcome packages need to be sent out and must meet the legislated timelines (ie. welcome packages must be sent within 10 business days of receiving the complete new hire information on the datafeed).

SWA Employers
Have an employee who is a new to the company (new hire)? Remember to select a Pension ID from the block of ID's shared upon go-live with WTW

Social Insurance Number (SIN) Changes

Any occurrence of a SIN change is flagged in this report. An instance where this can occur is when an employee has received a permanent SIN and needs to replace the temporary SIN that was previously provided to the employer.

WTW will flag these to the employer with the following message:
'SIN change - adjust previous SIN in eePoint'
If the employer has confirmed this SIN change is valid, WTW will proceed with updating eePoint. Please see Appendix A for technical details on eePoint updates and SIN processing.

Rehires

When a rehire is flagged on the New Hire Report, WTW will check the effective date of the existing eePoint service history record with status code = Termination and determine:

- *If the new hire date is **one day** after that termination date*. If this is the case, WTW will assume this is a SWA/WSIB or WSIB/SWA transfer and WILL NOT create an alpha SIN. In these cases, the service history should be continuous – so in order for the incoming record to process properly and NOT look like a rehire, WTW will manually delete the 'Termination' service history record, make any other adjustments that may be required for other possible rehired members, and request the WTW Data Team member to re-extract and reprocess the files. When the I1 is re-processed, a new service history row should be created reflecting the member's new Business Unit effective at the 'transfer' date. The pension history records for the member will also be reviewed and manually adjusted by WTW to reflect one membership period, if necessary.
- *If the new hire date is **more than one day** after the termination date* – WTW will request confirmation from the employer whether this is, in fact, a legitimate rehired member and NOT a transfer as described in the first bullet. If the employer has confirmed that this rehire is valid, WTW will proceed with updating eePoint. Please see Appendix A for technical details on eePoint updates and SIN processing.

There are several different types of rehires for some of the employers. The table below identifies the various scenarios and the general rules around what to expect when reviewing the New Hire report (*using WSIB as an example*):

Member's Status Before Rehire	**Rehired as Temporary or Permanent**	**Sample EEID Prior to Rehire**	**Sample EEID Upon Rehire**	**Warning Message / Comments / Actions**
Terminated (deferred or cashed out)	Either	12345	12345	*Rehire – request client confirmation and adjust previous SIN in eePoint* **WTW Action** – Will confirm with WSIB that member is a rehire **Alpha SIN** and **Alpha Employee Num** are required
Terminated (non-member)	Either	12345	12345	*Rehire - review/update Service History status for possible buyback implications* **Alpha SIN** is **NOT** required **WTW Action -** Update the previous employment period to reflect the correct status for buyback purposes. Select 'Temporary Employment (Not Continuous)' and make sure the Buyback Status = Not Purchased and the Period ID is populated (+1 of the highest value on screen).
Retired	Permanent	12345	12345	*Rehire – request client confirmation and adjust previous SIN in eePoint* **WTW Action** – Will confirm with WSIB that member is a rehire and that the monthly pension ***should be*** suspended. Benefit Payment record(s) are updated accordingly. **Alpha SIN** and **Alpha Employee Num** are required
Retired	Temporary	12345	56789	*Rehire – request client confirmation and adjust previous SIN in eePoint* **WTW Action** – Will confirm with WSIB that member is a rehire and that the monthly pension ***should not be*** suspended as the member is 'Temporary' – pension continues to be paid. No adjustment required to benefit payment record(s). **Alpha SIN** is required

Member's Status Before Rehire	Rehired as Temporary or Permanent	Sample EEID Prior to Rehire	Sample EEID Upon Rehire	Warning Message / Comments / Actions
Retired – Mandatory	Temporary	12345	56789	*Rehire – request client confirmation and adjust previous SIN in eePoint* **WTW Actions** – Will confirm with WSIB that member is a rehire. Update the 'Contract Number' field in this member's benefit payment record(s) to reflect the new EEID 56789 and also update this number on the Employee screen – Employee Num field. This new employee number will feed to payroll on the I5 file. **Alpha SIN** is **NOT** required as member is over age 71 and has no possible future plan accrual.

TERMINATION REPORT

This report is used as a trigger for WTW to create termination and/or retirement kits for members. Please note that WTW will send an email with terminated members (not eligible for retirement) from this report prior to sending all of the other validation reports. This is because an immediate response is required for confirmation of the termination data and also the type of termination (voluntary vs. involuntary). WTW is required to send out Termination packages to members within 10 business days of receiving the complete termination data as per the legislated timelines.

***NEW** – the emails to the employers from WTW where they are asking for the Termination Reason, WTW will also be asking the 'From' and 'To' date of any ESA Notice period information that the terminated member may be entitled to. This will ensure that the appropriate termination and contribution information is captured in the members termination package.

WTW and the employers should pay special attention to the following situations and take the appropriate actions noted below.

If column 'Action Reason Code' = TERNSH and 'Action Reason Code Desc' = Terminatn:No Show **WSIB Action:** WTW will contact you to confirm the member was hired and terminated on the same date (deemed a 'no show'). Once your confirmation is received, WTW Admin will provide the SIN to the WTW Data Team and request deletion of the employee from eePoint.

WSIB Only: If column 'ESA Notice Period End Date' is populated with a date, the WTW Admin Team will manually change the effective date of the 'Terminated' Service History record to this date and will use this date as the termination date for the member's calculation.

Message	Employers - Actions
Member has started bridging period but remaining credits are less than the credits used to calculate member's retirement date - advise client.	You will be contacted and advised that the member's credit bank is not large enough to bridge to the member's anticipated retirement date. WSIB should provide WTW Admin with direction as to the next steps in terms of adjustment to the member's retirement date.
Member has started bridging period and is an exception case. Review credits versus the ones used to calculate the retirement date. If credits are missing, advise client.	This message is triggered for members where the *Hired Pre 09301977* flag is set to Y. These are special cases who may continue to accumulate certain credits while bridging. WTW will validate the credits against the results of the 'manual calculation' to determine if any credits are missing. If there is a suspected gap, WTW will contact WSIB for confirmation and/or investigation.
Did not update the first name with 'Estate of'	This message will typically appear when the member's status is changing to 'deceased'. You will be contacted to confirm the member's status and next steps.
Record is prior to an existing Active record in eePoint, ask for confirmation.	A terminated/retired/deceased status record was loaded with an effective date ***earlier than*** a non-terminated status row. WSIB should confirm whether the termination date is correct and/or if the later-dated 'non-terminated' status record is correct. Based on your direction, WTW will manually update the member's Service History accordingly.

INTERFACE FILE VALIDATION REPORT

There are several validation checks performed on the input files to ensure data is loaded and/or updated as expected. If any of the fields fail these validation checks, a message appears in this report. This table identifies all existing validation checks and the actions required to ensure data is loaded properly. This report should be **reviewed first** to identify any adjustments that may need to be made to your source system for the impacted members, or to advise WTW of new codes you are passing that will need to be programmed. Please pay particular attention to the column 'Action Required'.

File	Condition	Error Message	Action Required
DEMO	Last Name is blank	Last Name Missing – PERSON not loaded	Employer to correct source to ensure Last Name is populated for member
DEMO	First Name is blank	First Name Missing – PERSON not loaded	Employer to correct source to ensure First Name is populated for member
DEMO	Sex is blank	Invalid Sex Code – PERSON not loaded	Employer to correct source to ensure Sex is populated for member
DEMO	Birthdate is blank	Birthdate missing – PERSON not loaded	Employer to correct source to ensure Birthdate is populated for member
DEMO	Address Line 1 is blank	Address Line 1 missing – ADDRESS not loaded	Employer to correct source to ensure Address Line 1 is populated for member
DEMO	City is blank	City is missing – ADDRESS not loaded	Employer to correct source to ensure City is populated for member
DEMO	Province is blank	Invalid Province Code – ADDRESS not loaded	Employer to correct source to ensure Province is populated for member
DEMO	Country is blank or invalid	Invalid Country Code – ADDRESS not loaded	If field is blank, Employer must correct source to ensure Country is populated for member. If field is not blank and this validation is triggered, **WTW** will automatically update the eePoint list of valid Country codes to accept the new code and will re-run the I1 process to ensure the member's address has been loaded properly.
DEMO	Tax Location Code is blank or invalid	Invalid Tax Location Code – MISC not loaded	Employer to correct source to ensure Tax Location Code is populated for member
SERVICE	Reg_Temp is not one of "R" or "T".	Invalid Reg/Temp code – SERVICE not loaded	Employer to correct source to ensure valid Reg_Temp field is populated for member

File	Condition	Error Message	Action Required
SERVICE	Permanency code cannot be determined based on Reg_Temp and Employee Class fields	Unable to determine Permanency Code – SERVICE not loaded	Employer to correct source to ensure valid Reg_Temp and EmployeeClass fields are populated for member
SERVICE	Full_Part_Time is blank	Invalid FT/PT code – SERVICE not loaded	Employer to correct source to ensure valid Full_Part_Time field is populated for member
SERVICE	Status could not be determined from Action/Reason code	Invalid Action/Reason code – SERVICE not loaded	Employer to correct source to ensure valid Action- Reason field is populated for member. If a new code is being introduced, you should advise WTW of the code and its intended translated value.
SERVICE	Union Code is either not blank or not a valid code	Invalid Union code – SERVICE not loaded	Employer to correct source to ensure valid Union_Cd field is populated for member (note that it has been agreed with WSIB that a blank field is okay for retired members – Action-Reason = RWPXXX)
SERVICE	Employee Class is not one of B, D, E, F, H, J, K, L, M, N, O, Q, R, S, T, U, V, W, X, Y or Z	Invalid Employee Class code – SERVICE not loaded	Employer to correct source to ensure valid Employee Class field is populated for member
DEMO	Business Unit is blank	Invalid Business Unit code – SERVICE not loaded	Employer to correct source to ensure valid Business_Unit field is populated for member
UNPAID	Status code could not be determined from ABS_TYP-COD	Invalid Absence Type code	Employer to correct source to ensure valid ABS_TYP-COD field is populated for member. If a new code is being introduced, you should advise WTW of the code and its intended translated value.

SIGNIFICANT CHANGES REPORT

When reviewing the Significant Changes report, for any important demographic changes (for example *Birth Date Change*), WTW will check eePoint to see if the member is a rehire and has a previous record (with alpha SIN) for which the same change should be made manually.

Message	WTW - Actions
First Name Change Last Name Change Birth Date Change	If any of these messages are generated, WTW will check to see if the member is a rehire and has one or more Alpha SIN records in eePoint and will manually update to keep all 'lives' in sync.
Plan_Elect_Dt Change - *review data and advise if incorrect change*. Update SH to Active if applicable	This is a case where a member has become eligible to join the Plan and a new Pension History record has been created. WTW will update the member's Service History status to 'Active' effective the same date as the Plan Enrollment Date on Pension History.

REJECTED REPORT

This report will indicate the changes that were sent across the interface and which were NOT updated in eePoint. A review of this report must be done by the employer and the employer must validate the records WTW is questioning and flag any other incorrect information.

Message	WSIB - Actions
Hire Date/Rehire Date Change – not loaded – request client confirmation	A change in Latest Hire Date has been detected – the report shows current eePoint date and incoming date on the Demo file. Confirm back to WTW whether the date has actually changed and advise WTW to manually adjust Service History and/or Pension History, as applicable. Please note that for contract extensions for temporary staff where there is a break in employment that is less than 15 business days is considered continuous
Plan_Elect_Dt changed - not loaded - request client confirmation	A change in Plan Enrollment Date has been detected – the report shows current eePoint date and incoming date on the Demo file. Confirm back to WTW whether the date has actually changed and advise WTW to manually adjust Pension History, as applicable.
Change in Permanency Code from Permanent to Temporary not loaded - request client confirmation	This change in Permanency Code was detected and WSIB specifically requested that we flag this and confirm these cases with you. Confirm back to WTW if this is a correct change and WTW will manually adjust Service History accordingly with the effective date set to the 'ActionReason / Absence EffDt' provided on the rejected report.
Employee number changed - eePoint field not updated	If the incoming Demo SIN matches a SIN in eePoint but the employee number does not match and the Miscellaneous Screen field 'Data Owned by WTW' <> Yes, this message will be generated and WSIB should confirm the correct EEID with WTW. During implementation, WSIB informed WTW that a member's EEID changes at age 71 and WTW needs to ensure correct EEID is reflected in eePoint for I5 purposes.
Unknown prior status - review SH and confirm deletion - manual update required	When this message is generated, you need to confirm that the Service History record with the effective date shown on the report with this message (column ActionReason / Absence EffDt) should be deleted. Once confirmed, WTW will manually delete the relevant record(s).
Inactive record already in eePoint, record not loaded, ask for confirmation	A terminated/retired/deceased status code has been provided for a member but the member's latest Service History status is already terminated/retired/deceased. Please review the member's Service History records in eePoint and confirm to WTW whether the existing data looks fine, or advise if any adjustments are required.

Message	WSIB - Actions
Record is prior to an existing Active record in eePoint, ask for confirmation	A terminated/retired/deceased status code has been provided for a member with an effective date prior to the member's latest Service History record (which shows an 'active' status). Please review the member's Service History records in eePoint and confirm to WTW whether the data looks fine, or advise if any adjustments are required.
Record is on or before an existing Inactive record in eePoint, ask for confirmation	An 'active' status code has been provided for a member with an effective date prior to the member's latest Service History record (which shows an 'inactive' status – terminated/retired/deceased). Please review the member's Service History records in eePoint and confirm to WTW whether the data looks fine, or advise if any adjustments are required.
Data owned by WTW - no DEMO data updated	A change has been passed on the Demo file however the member's Miscellaneous Screen flag 'Data owned by WTW' is set to 'Yes' – therefore no updates are processed. This is because this data is owned by WTW because the member is either retired, terminated, or deferred. Data being sent across the interface should be for active members only. You should review the case and advise WTW if any manual adjustments are required.

RETRO REPORT

Review this report to see changes that were provided on the input files which have an element of retroactivity. Some records have been updated and others will require your confirmation followed by manual adjustments to be made by WTW.

Message	WSIB - Actions
New Service History for Prior Year.	A new service history record is provided with an effective date AFTER the most recent row on file and in the previous calendar year. For information only – no action required.
New Service History for current year: not loaded - request client confirmation.	A new service history record is provided with an effective date PRIOR to the most recent row on file. Please confirm if it is correct and WTW will manually add the record to eePoint.
New Service History for prior year: not loaded - request client confirmation.	A new service history record is provided with an effective date PRIOR to the most recent row on file and in the previous calendar year. Please confirm if it is correct and WTW will manually add the record to eePoint.
Retro LTD - Pay rate may need to be indexed effective Jan. 1	A new service history record is added or an existing record is changed reflecting a status code LTD* with an effective date in the prior calendar year. This is a retroactive LTD status change which should be reviewed to determine whether the member's pay rate needs to be indexed at January 1. If necessary, the Admin team will manually add the indexed pay rate effective January 1st.
Service History change for a Prior Year: request client confirmation	A service history record is changed which has an effective date in the previous calendar year (may or may not be PRIOR to the most recent row on file). The record has been loaded to eePoint but you should confirm if it is correct. If any manual adjustments are necessary, please confirm changes to be made and WTW will manually adjust.
Service History change	A service history record is changed which has an effective date in the current calendar year but PRIOR to the most recent row on file – WTW will review to ensure it makes sense and may request confirmation from the employer.
New PayRate for Prior Year	A new pay rate record is provided with an effective date AFTER the most recent row on file and in the previous calendar year. For information only – no action required.

Message	WSIB - Actions
New PayRate for Prior Year: loaded - request client confirmation.	A new pay rate record is provided with an effective date PRIOR to the most recent row on file and in the previous calendar year. The record has been loaded to eePoint but you should confirm if it is correct. If any manual adjustments are necessary, please confirm changes to be made and WTW will manually adjust.
PayRate change for a Prior Year	A pay rate record is changed which has an effective date AFTER the most recent row on file in the previous calendar year. For information only – no action required.
PayRate change for a Prior Year: request client confirmation	A pay rate record is changed which has an effective date PRIOR to the most recent row on file and in the previous calendar year. The record has been loaded to eePoint but you should confirm if it is correct. If any manual adjustments are necessary, please confirm changes to be made and WTW will manually adjust.
PayRate change	A pay rate record is changed which has an effective date in the current calendar year but PRIOR to the most recent row on file – WTW will review to ensure it makes sense and may request confirmation from the employer.
Unpaid absence record with effective date prior to most recent cut-off date - request client confirmation	WTW will check to see if an 'unpaid hours reach out letter' was sent to the member for the period. This is possible since there could have been other unpaid hours periods in the period. If the letter was sent, WTW will verify whether the member has contacted us for a quote as we may need to contact the member to let them know about this additional period. If the member did not receive an 'unpaid hours reach out letter' then WTW will discuss with the employer to decide whether a one-off letter should be sent with a different time limit to reply.

PENSION HISTORY, SERVICE HISTORY, PAY RATE HISTORY REPORT

This report does not require any detailed review. It is a summary of all changes made to the Service History, Pension History and/or Pay Rate history records for all members passed on the files. It serves as a good audit trail of updates made to these eePoint tables during each run.

LOAD SUMMARY REPORT

This report lists all files processed for the cycle, the trailer record counts for each file and the records read and processed for each file. No **employer** action is required with respect to this report.

Sample:

File Name	File Date	Trailer Record Count	Records Read (excluding Trailer)
WSIBDEM_TOWTW_20190406_modified.PAY	4/6/2019	38	38
WSIBSH_TOWTW_20190406.PAY	4/6/2019	60	60
WSIBPAY_TOWTW_20190406.PAY	4/6/2019	11	11
WSIBCRED_TOWTW_20190406.PAY	4/6/2019	9,345	9,345
WSIBABS_TOWTW_20190406.PAY	4/6/2019	6	6
WSIBMULTI_TOWTW_20190406.PAY	4/6/2019	0	0

Reviewing eePoint when going through the validation reports can help the employers better understand why the data is being questioned. Employers are encouraged to view eePoint and contact WTW/WISE Trust if they have questions or concerns.

VALIDATION REPORTS - TIMELINES

Once the initial reports have been provided to the employers for review, the employers must provide their responses back to WTW within **five (5) business days**. WTW must receive the responses within the stated deadline to ensure the eePoint, the pension system, has the most up-to-date and accurate information.

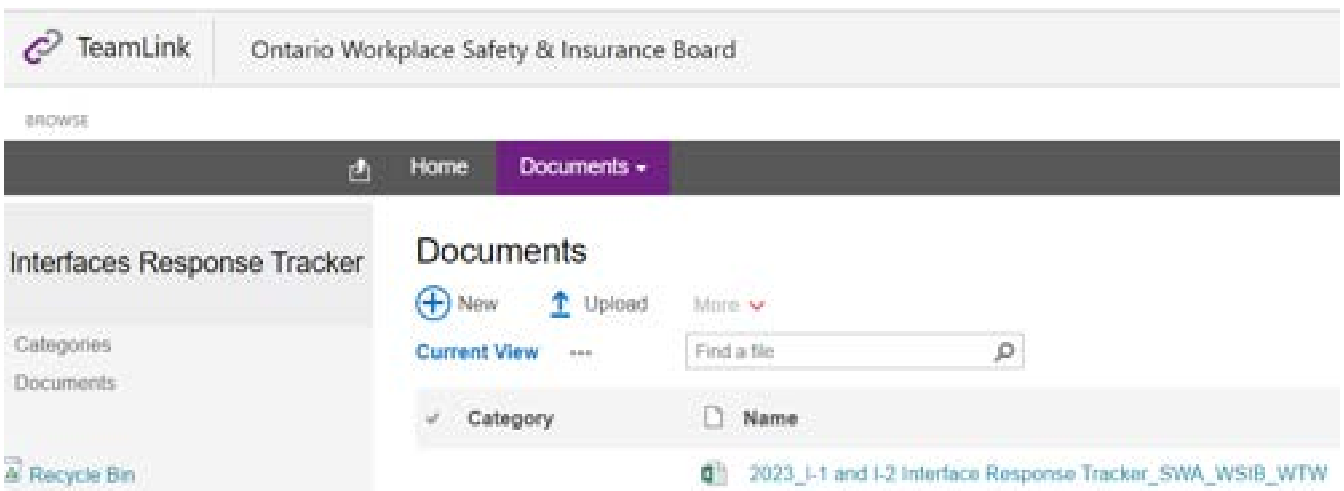
If there is no response required or confirmation to provide, the employer must respond to WTW's interface emails (cc: WISE Trust) with a statement confirming that a review has been done on the data validation files and that no response or action is required.

Once the employer has reviewed the validation reports and have updated the reports accordingly, the responses are to be posted back to *DataLink*. An email to WTW (with a cc: to the WISE Trust team) is also required for WTW to pick the files up.

WTW will update eePoint as per the comments provided by the employer in the validation reports within five - ten (5-10) business days, and they will reach out if they have any questions or concerns.

***New!** To view the status of WTW's updates on the feedback to the validation reports, employers will not only be able to see the changes directly to a members record on eePoint, but they will now have access to a spreadsheet called **20xx_I-1 and I-2 Interface Response Tracker_SWA_WSIB_WTW** which is posted on TeamLink here:

TeamLink* > *Documents* > *Interface Response Tracker



Employers can see when WTW has actioned their i1 (and i2) updates based on the information provided by the employers. Employers are asked to check on eePoint or refer to this document if they have questions on the updates to eePoint. They can also reach out to WTW (with a cc: to WISE Trust) for more information.

THINGS TO REMEMBER

- Employee data sent across on the interface is available on the pension system, eePoint. Employers can view their members records and review the information for accuracy. Employer's HR/Payroll system(s) and eePoint must be correct and in sync at all times

- Sending off-cycle or late interface runs may result in fees. Employers must notify WTW and WISE Trust if there is a delay in sending an interface file.

- If there are data discrepancies discovered in eePoint, create a '**Case**' (see Employer Manual for details). Ensure to make the necessary updates and/corrections to the source system in order for the data to flow across on the i1 interface.

- It is important that only the codes/actions that are stated in the tables outlined in the WSIB i1 Data Interface Requirements specification document is to be applied to a members record in the HR/Pay system. If other codes are created and used (that are not in these tables), these transactions will get dropped from the interfaces which will lead to incorrect member data. Should there be a business need to create a new code, please reach out to WISE Trust with the details. WISE Trust will engage WTW in the work. Any rework caused by unmapped codes may be subject to out-of-scope fees and will be charged to the employer.

- It is also important to understand the codes used in the employers HR/Payroll system and how the data translates in the pension system. Employers should review their internal specification documents (eg. SWA's will have access to the ADP specs) as well as the WSIB i1 Data Interface Requirements document.

- Members on Long-Term Disability (LTD) – employers should *not* be passing salary increases for member that are on LTD.

- Have there been changes to the Collective Bargaining Agreement that affects pensions? Contact WISE Trust for assistance.

- Plan members that have pension questions should be directed to the WISE Trust Pension Contact Centre at 1-855-242-1526

- When sending email to WTW or WISE Trust team, employers should copy the WISE Trust general inbox at wisetrustpensions@wisetrust.ca.

COMING SOON

Salary Information for Members on LTD

WTW and WISE Trust are currently working on improving the i1 interface for all members that are on Long-Term Disability (LTD).

Salary increases are sometimes entered into the employer's systems for members that are on LTD as they are entered in as a placeholder. This 'placeholder' will interface and update eePoint as if the member received the increase. Sending these salary increases over on the i1 interface can cause issues with the annual indexing of the earnings calculation, and calculation of the final average earnings.

WTW will be flagging salary increases that are received on an i1 for members on LTD and these will be added to the Rejected report. Employers will need to review the error message and action accordingly (ie. update the source system by removing the salary increase).

Temporary Employees who are rehired within 15 business days

When a temporary employee is rehired within 15 business days of the termination date (the expiration of the temporary employee's prior temporary employment contract), the interruption does not impact the continuous service to determine eligibility. This means that this period is deemed to be continuous employment/service as per the Plan text ((3.03(4)):

A Temporary Employee who is re-hired within 15 days of the expiration of the Temporary Employee's prior contract with the Employer is deemed to have Continuous Employment and upon becoming a Member may, in accordance with Section 11.02, purchase any period of service during which the Member was a Temporary Employee and was not enrolled in the Plan.

WTW will be adding logic to the i1 interface to capture employees that may fall within this scenario.

APPENDIX A – Technical Details

SIN CHANGES

If there is an update required to an existing SIN in eePoint, WTW will proceed with the following:

- change the member's eePoint SIN to the SIN provided on the report (column SIN)
- update the field 'Original SIN' on the Miscellaneous screen, *Section 1) Rehire Information*, with the member's temporary (old) SIN and
- request the WTW Data Team member to re-extract and reprocess the files. When the I1 is re-processed, this person will no longer appear on the New Hire report as the eePoint SIN now matches the SIN provided on the Demo file.

REHIRES

If a rehire is passed on the interface and confirmation from the employer is received, WTW will make the following (applicable) updates:

- change the last digit of the member's eePoint SIN to an alpha character (0=A, 1=B, 2=C, 3=D, 4=E, 5=F, 6=G, 7=H, 8=I, 9=J),
- update the field 'Original SIN' on the Miscellaneous screen, *Section 1) Rehire Information*, with the member's original correct SIN and
- request the WTW Data Team member to re-extract and reprocess the files.
- When the I1 is reprocessed, the rehire message will disappear and this member will appear as a 'New Hire' with the message *Rehire - confirm record once loaded and update Rehire record accordingly*. WTW will review the Service History and Pension History records for the new employment period to ensure they were loaded as expected. If one or both of these records are not found, a possible reason is that they did not load due to other 'validation' errors or rejection errors (as shown on those respective reports). WTW will need to manually add the missing row(s) in eePoint.
- Update the field 'Prior Employment Period' on the Miscellaneous screen, *Section 1) Rehire Information*, with the relevant selection based on the data profile of the alpha SIN record.

BUYBACKS

One of the buyback administration processes involves the WTW Admin Team initiating a buyback quote for members who are returning from an ESA leave. Each pay cycle, in order to determine which member(s) have returned from an ESA leave, the WTW Admin Team will use this report and filter on column K '*eePoint ServHist Status*' for one of these statuses:

- *LOA - Unpaid (ESA)*
- *Caregiver – Unpaid*
- *Pregnancy/Parental Leave*

It will show WTW those members for whom WTW was notified of their return during the current pay cycle. Below is a screenshot of the filtered report from an I1 testing run – the green shading shows the existing eePoint Service History Status Code and the pink shading shows the date of the member's return from leave:

SIN	First Name	Last Name	Action Reason / Absence EffDt	ActionReason / Absence Code	Action Reason / Absence Desc	Decoded Statu	eePoint ServHist Eff	eePoint ServHist Status
999999999	John	Doe	2/25/2019	RFLRFL	Return-LOA Retrn Lv	Active	1/14/2019	LOA - Unpaid (ESA)
888888888	Jane	Doe	3/4/2019	RFLRFL	Return-LOA Retrn Lv	Active	1/14/2019	LOA - Unpaid (ESA)