



# Retirement Date Report

How to run a report from eePoint that captures the following dates for members:

- **ERD** – Earliest Reduced Retirement Date
- **EURD** – Earliest Unreduced Retirement Date
- **NRD** – Normal Retirement Date (age 65)

# MISCELLANEOUS TAB

The screenshot shows the 'Miscellaneous' tab in the eePoint system. The 'Miscellaneous' tab is highlighted with a green box. Below the navigation tabs, there are two input fields for 'Hrs Tkn Un Lieu' and 'Hrs Adj Un Lieu', both containing the value '0'. Below these is a section titled '5) Retirement Dates' which is highlighted with a blue box. This section contains four rows of retirement dates:

Retirement Dates as of:	12/31/2022
ERD:	07/01/2023
EURD:	07/01/2033
NRD:	07/01/2033

## Section 5) Retirement Dates

under the Miscellaneous tab in eePoint is where you will find the retirement dates for a member, and this is where we will be pulling the retirement dates from.

**NOTE:** WTW updates these fields annually (in June) as part of the Annual Pension Statement process (statements are mailed out in June). You will see that the effective date of the eligible retirement dates are as of December 31<sup>st</sup> of the year prior.

# RUNNING THE REPORT

1. Log into eePoint
2. Select the **Advanced Search** tab
3. Under the Condition 1 table, select:
  - a) Table = Employee
  - b) Column Name = Business Unit
  - c) Match = In
  - d) Value(s) = *select your organization name*



Search : Employee

Search **Advanced search** Most Recent Result

My Searches

**Condition 1**

Operator	Table	Column Name	Match	Value(s)
	Employee	Business Unit	In	Workplace Safety and Insurance Board Trustees of the WSIB Employees' Pension Plan Fund Workplace Safety & Prevention Services

Search | Add New Filter | Remove Last Filter

Records per page 10

Add Condition Remove Last Condition Clear Condition(s)

4. Click on **Search**

# RUNNING THE REPORT

eePoint will pull up the employee's that are in the Business Unit (organization) selected.

5. Select **All Records**

6. Click **Export**

Search : Employee

Search | Advanced search | Most Recent | **Result**

All Records | [Export](#) | [Save Search Criteria](#) | [Export Barcodes](#)

	Record ID	Name	SIN	Employee Num	Legacy EE Identifier	SWA ID Number	Business Unit	Union Code	Province Of Employment
<input checked="" type="checkbox"/>	1						Trustees of the WSIB Employees' Pension Plan Fund	Non-bargaining unit	Ontario
<input checked="" type="checkbox"/>	2						Trustees of the WSIB Employees' Pension Plan Fund	Non-bargaining unit	Ontario
<input checked="" type="checkbox"/>	3						Trustees of the WSIB Employees' Pension Plan Fund	Non-bargaining unit	Ontario
<input checked="" type="checkbox"/>	4						Trustees of the WSIB Employees' Pension Plan Fund	Non-bargaining unit	Ontario
<input checked="" type="checkbox"/>	5						Trustees of the WSIB Employees' Pension Plan Fund	Non-bargaining unit	Ontario
<input checked="" type="checkbox"/>	6						Trustees of the WSIB Employees' Pension Plan Fund	Non-bargaining unit	Ontario
<input checked="" type="checkbox"/>	7						Trustees of the WSIB Employees' Pension Plan Fund	Non-bargaining unit	Ontario
<input checked="" type="checkbox"/>	8						Trustees of the WSIB Employees' Pension Plan Fund	Non-bargaining unit	Ontario
<input checked="" type="checkbox"/>	9						Trustees of the WSIB Employees' Pension Plan Fund	Non-bargaining unit	Ontario
<input checked="" type="checkbox"/>	10						Trustees of the WSIB Employees' Pension Plan Fund	Non-bargaining unit	Ontario

# RUNNING THE REPORT

The **ADVANCED SEARCH EXPORT** window will appear.

*This is where you will select what eePoint fields you would like to include in the report*

7. Expand the following sections and select:

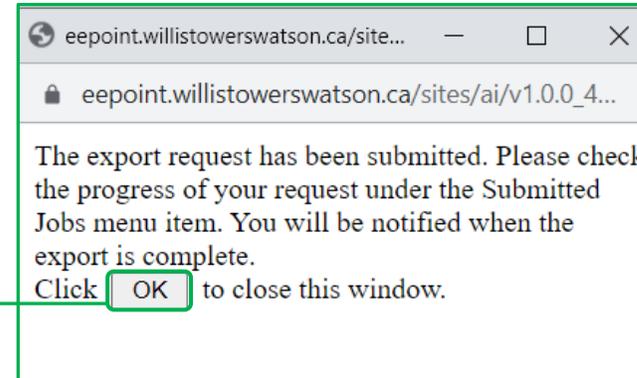
The image displays three sequential screenshots of the 'Advanced Search Export' window, illustrating the steps to configure the report fields and sections.

- First Screenshot:** Shows the 'Employee' section expanded. The 'File Name' is 'Export' and 'File Type' is 'Comma Separated Values (CSV)'. The following fields are selected with green checkmarks and arrows: Last Name, First Name, Employee Num, Hire Date, Term Date, and Status Code.
- Second Screenshot:** Shows the 'Miscellaneous' section expanded. The following fields are selected with blue checkmarks and arrows: Retirement Dates as of, ERD, EURD, and NRD.
- Third Screenshot:** Shows the 'Pension History' section expanded. The following fields are selected with blue checkmarks and arrows: Status Code and Plan Enrollment Date. A red box highlights the 'Record Limit' field, which is set to '1', with a callout: '! Ensure to update the 'Record Limit' to 1'. The 'Export' button is highlighted with a blue box.

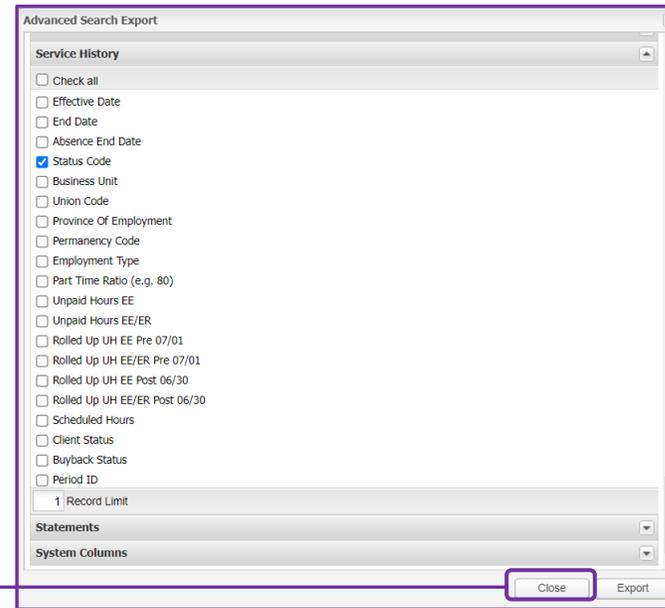
8. Click Export

# RUNNING THE REPORT

9. This eePoint message will appear indicating that your report is running. Click **OK** to close the window



10. You will be brought back to this Advanced Search Export window. Click **Close**



# RETRIEVING THE REPORT

You will receive an email notifying you that your report is ready

- WSIB - Advanced Search Export



eepoint - Do Not Reply <donotreply@eepoint.towerswatson.com>

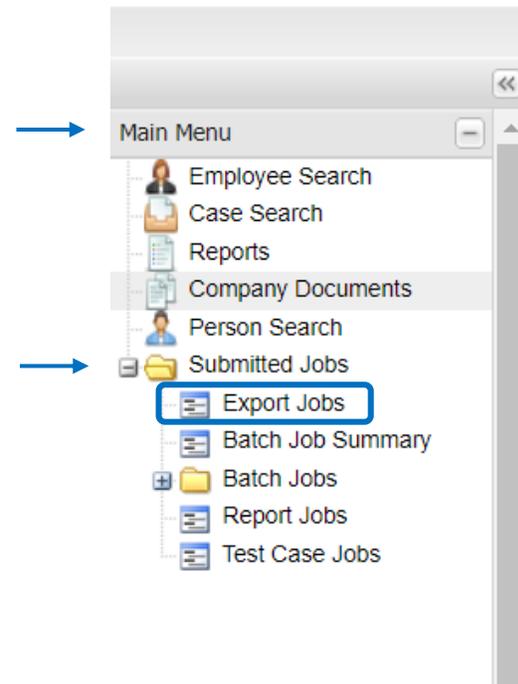
To ✓ Marsha Ubbi

 This sender donotreply@eepoint.towerswatson.com is from outside your organization.

The export completed successfully.

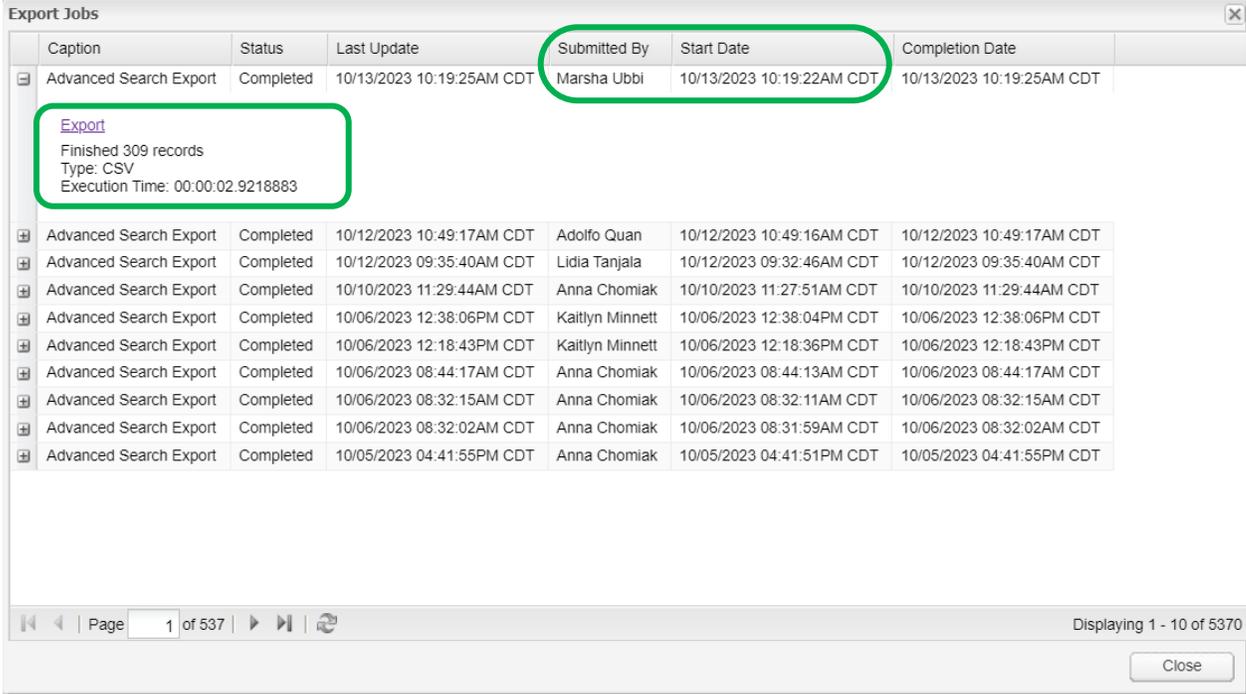
# RETRIEVING THE REPORT

11. In the Main Menu section in eePoint, select:  
**Submitted Jobs** > **Export Jobs**



# RETRIEVING THE REPORT

12. Your report is ready to download!  
Find your report and expand the selection.  
Click on **Export**



The screenshot shows a table titled 'Export Jobs' with the following columns: Caption, Status, Last Update, Submitted By, Start Date, and Completion Date. The first row is selected, and its details are expanded in a pop-up box. A green arrow points to the first row, and a green circle highlights the 'Submitted By' and 'Start Date' columns. Another green circle highlights the 'Export' link in the expanded details.

Caption	Status	Last Update	Submitted By	Start Date	Completion Date
Advanced Search Export	Completed	10/13/2023 10:19:25AM CDT	Marsha Ubbi	10/13/2023 10:19:22AM CDT	10/13/2023 10:19:25AM CDT
Advanced Search Export	Completed	10/12/2023 10:49:17AM CDT	Adolfo Quan	10/12/2023 10:49:16AM CDT	10/12/2023 10:49:17AM CDT
Advanced Search Export	Completed	10/12/2023 09:35:40AM CDT	Lidia Tanjala	10/12/2023 09:32:46AM CDT	10/12/2023 09:35:40AM CDT
Advanced Search Export	Completed	10/10/2023 11:29:44AM CDT	Anna Chomiak	10/10/2023 11:27:51AM CDT	10/10/2023 11:29:44AM CDT
Advanced Search Export	Completed	10/06/2023 12:38:06PM CDT	Kaitlyn Minnett	10/06/2023 12:38:04PM CDT	10/06/2023 12:38:06PM CDT
Advanced Search Export	Completed	10/06/2023 12:18:43PM CDT	Kaitlyn Minnett	10/06/2023 12:18:36PM CDT	10/06/2023 12:18:43PM CDT
Advanced Search Export	Completed	10/06/2023 08:44:17AM CDT	Anna Chomiak	10/06/2023 08:44:13AM CDT	10/06/2023 08:44:17AM CDT
Advanced Search Export	Completed	10/06/2023 08:32:15AM CDT	Anna Chomiak	10/06/2023 08:32:11AM CDT	10/06/2023 08:32:15AM CDT
Advanced Search Export	Completed	10/06/2023 08:32:02AM CDT	Anna Chomiak	10/06/2023 08:31:59AM CDT	10/06/2023 08:32:02AM CDT
Advanced Search Export	Completed	10/05/2023 04:41:55PM CDT	Anna Chomiak	10/05/2023 04:41:51PM CDT	10/05/2023 04:41:55PM CDT

Export Jobs

Export  
Finished 309 records  
Type: CSV  
Execution Time: 00:00:02.9218883

Page 1 of 537 | Displaying 1 - 10 of 5370

Close

13. Go to your 'Download' folder to retrieve the report

# VIEWING THE REPORT

Open the report and format/filter as you would like.

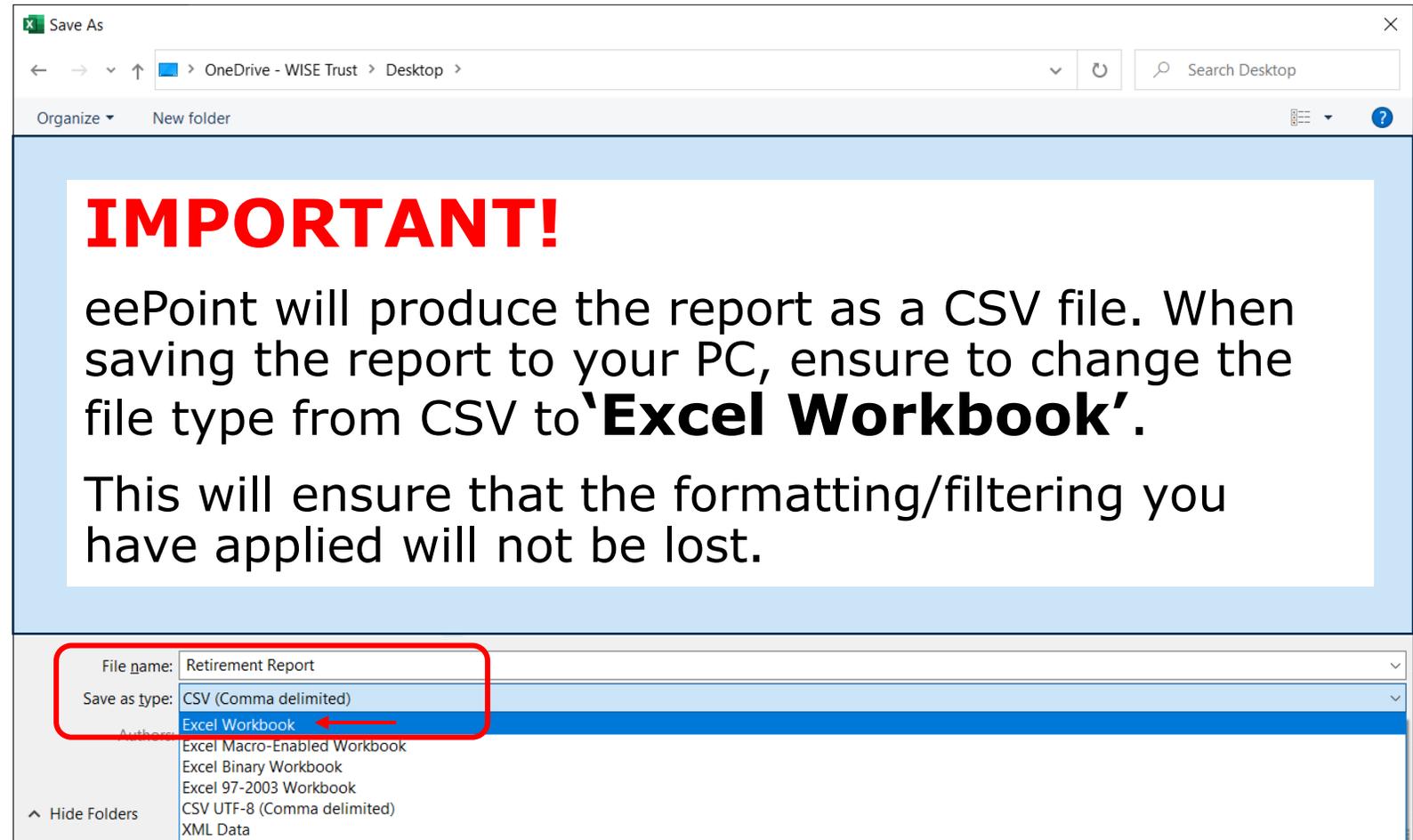
The columns in the report are the fields selected from Step 7 (Advanced Search Export)

Last Name	First Name	Employee Num	Hire Date	Term Date	Status Code	Retirement Dates as of	ERD	EURD	NRD	Status Code	Plan Enrollment Date
Test	Member1	00001	6/20/2022		Active	12/31/2022	1/1/2038	1/1/2043	1/1/2048	Active	6/20/2022
Test	Member2	00002	5/26/1995		LTD - Accruing	12/31/2022	11/1/2029	2/1/2027	11/1/2039	Active	5/26/1995
Test	Member3	00003	8/11/2014		LTD - Accruing	12/31/2022	5/1/2046	7/1/2045	5/1/2056	Active	8/11/2014
Test	Member4	00004	8/20/2020		Pregnancy/Parental Leave	12/31/2022	1/1/2047	11/1/2048	1/1/2057	Active	8/20/2020
Test	Member5	00005	9/25/2023		Active					Active	9/25/2023
Test	Member6	00006	7/4/2011		Active	12/31/2022	7/1/2042	1/1/2042	7/1/2052	Active	7/4/2011
Test	Member7	00007	11/21/2011		Active	12/31/2022	10/1/2036	5/1/2039	10/1/2046	Active	11/21/2011
Test	Member8	00008	12/7/1998		Active	12/31/2022	8/1/2027	4/1/2028	8/1/2037	Active	12/7/1998
Test	Member9	00009	2/6/2023		Active					Active	2/6/2023
Test	Member10	00010	3/17/2022		Active					Non-Member	
Test	Member11	00011	1/10/2023		Active					Non-Member	
Test	Member12	00012	11/16/2020	6/9/2021	Terminated					Non-Member - No Future Entitlements	
Test	Member13	00013	2/15/1993		Retired	12/31/2021	7/1/2022	11/1/2022	7/1/2032	Retired	2/15/1993
Test	Member14	00014	1/26/2009		Retired					Retired	1/26/2009
Test	Member15	00015	8/19/2022	2/10/2023	Terminated					Term - Opt Not Elected	8/19/2022

**NO RETIREMENT DATES REPORTED** - this is because the employee was hired in the current year, they are not a member of the Plan, or they are Terminated/Retired



# SAVING THE REPORT



The screenshot shows a 'Save As' dialog box in a file explorer. The path is 'OneDrive - WISE Trust > Desktop'. A large white box with a blue border is overlaid on the dialog, containing the following text:

**IMPORTANT!**

eePoint will produce the report as a CSV file. When saving the report to your PC, ensure to change the file type from CSV to **'Excel Workbook'**.

This will ensure that the formatting/filtering you have applied will not be lost.

Below the text box, the 'Save as type' dropdown menu is open, showing a list of file formats. A red box highlights the 'Excel Workbook' option, which is also indicated by a red arrow.

File name:	Retirement Report
Save as type:	CSV (Comma delimited)
	Excel Workbook
	Excel Macro-Enabled Workbook
	Excel Binary Workbook
	Excel 97-2003 Workbook
	CSV UTF-8 (Comma delimited)
	XML Data