

# On-Line Retirement Application for Employees

## Prerequisites

To use this tool you must:

- Be a Canadian non-operating or management employee in active service;
- Be eligible for retirement within the next year;
- Ensure all vacation taken is accurately reflected in SAP;
- Have access to an email account;
- Have Adobe version 7.1 or higher
- Be connected to the internet using a higher speed than dial-up

## On-Line Retirement Application

The on-line retirement application can be used to: estimate your last day to work, select your retirement gift (if applicable) and to submit your retirement application electronically. To access the application, connect to ePortal. See the ePortal job aid for additional information.

1 Click on Employee Self Service.

2 Click on Retirement and Termination.

3 Click on Retirement Application Processes.

4 Click on the Access Online Retirement Application button (that will appear once step 3 is done).

The screenshot shows the ePortal interface with the following elements:

- Step 1:** The "Employee Self-Service" tab is selected in the top navigation bar.
- Step 2:** In the "Detailed Navigation" menu, "Retirement and Termination" is highlighted.
- Step 3:** Under the "Retirement" section, "Retirement Application Processes" is highlighted.
- Step 4:** A box highlights the "Access Online Retirement Application" button under the "Retirement Application Processes" section.

Other visible content includes "Pension" links (BC Rail Pension Plan, CN Pension Plan, etc.), "Resignation" link (Resigning from the Company), and "Portal Favorites".


The retirement application process has 4 steps.

## Overview



The first step is the overview. During this step you will be asked to review the Retirement Application Process Guide, reminded that all vacation taken must be accurately reflected in SAP, and asked to verify your address and email information.



If you click on the Home Address link, a new window will open. Once you have verified your address or edited and saved the changes, press the  button located at the top right corner to close this window.

Click on Next, to continue.

During the edit step, you will select a retirement date, generate your last day to work, select your supervisor and select a retirement gift (if applicable).

1 Select a retirement date and then click on Next.

2 Click on Modify retirement date to try a different date.

3 When you are ready, click on Apply for retirement.

4 Select your supervisor



You can find your supervisor by typing the first letters of their last name and then selecting from the pull down menu.

5 Answer the Worker Compensation salary benefits question

6 Choose your retirement gift



This section will only appear if you have at least 20 years of service

7 Click Next to continue.

**Retirement Application**

**Based on:**

Retirement Date:  [Payroll Calendar](#)

**Estimated Quotas:**

Time Account	Remainder
01 Annual vacations	240.00 Hours

**General Holidays:** Day(s)

Your estimated last day to work is: **Wednesday Feb 17, 2010**

**What would you like to do next?**

The following will only appear once you click on 'Apply for retirement'

Please select your supervisor name:

**Please answer Worker Compensation salary benefits question:**  
I am or will be receiving salary replacement benefits under a provincial workers compensation (WC) act. I understand that my pension benefits may be reduced if I receive any WC salary replacement benefits.

Please select your retirement gift:

I would like to receive the following gift:  [Link to Catalogue](#)



You can go back to a previous step at any time by clicking on Previous



To exit from this application at any time, click on Exit.

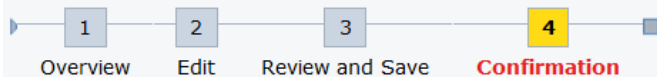
## Review and Save



During the Review and Save step, you will review a summary of all your information and electronically submit your official application for retirement. You cannot modify information during this step. To make any changes, click on Previous. When you are satisfied with your application, click on Submit and then click on Yes to confirm. Your application will be sent electronically to your supervisor for approval.

## Confirmation

During the final step, you will receive confirmation that your application has been submitted. A copy of all the information in your application along with confirmation that it was submitted will also be sent to you via email.



### Retirement Application

Your retirement application has been submitted to your supervisor for approval.

The status of your application can be viewed through ePortal Home by selecting My Tasks and the Request Tab.

NOTE: Please allow 5-10 minutes for your request to appear.

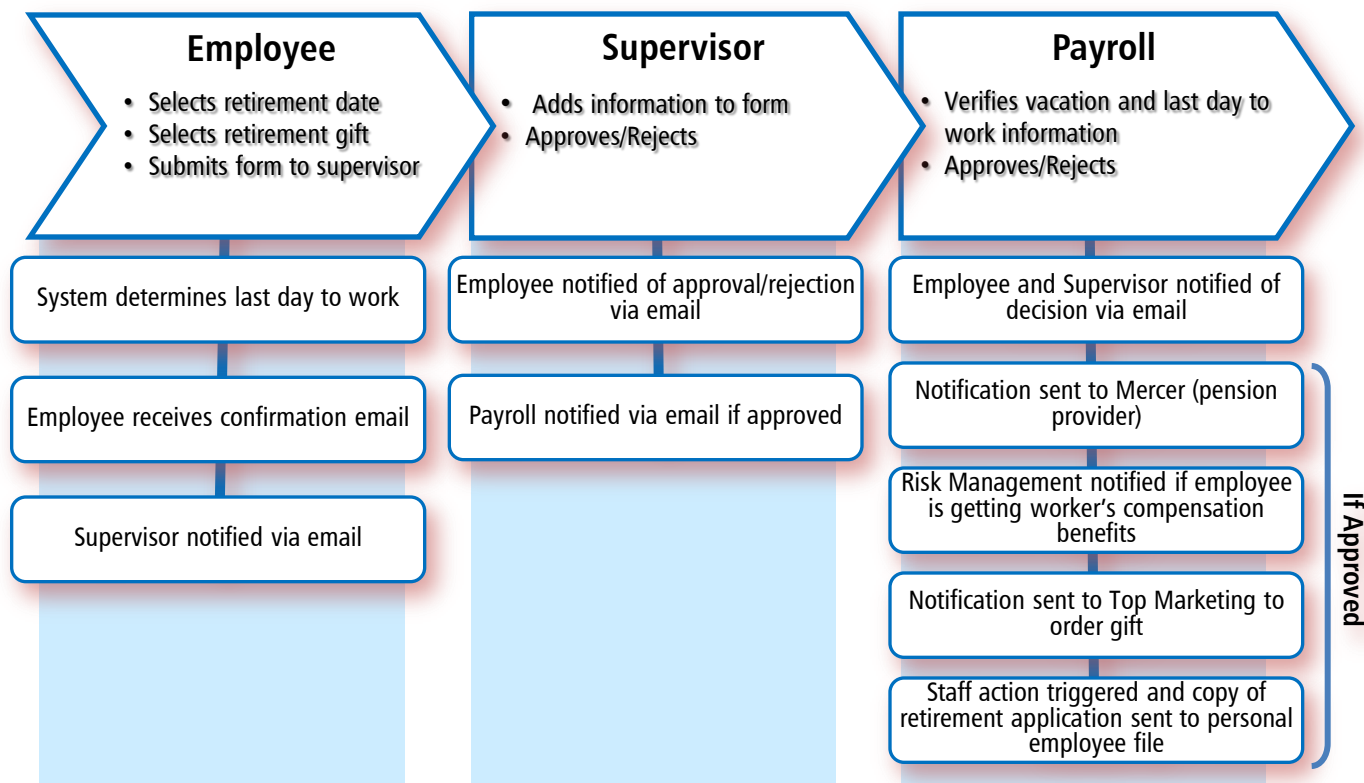
#### What do you want to do next?

[Go to Checklist](#)

[Go to My Task/Request](#)

[Go to Retirement and Termination Homepage](#)

## How does the Retirement Process work?



### 1. How can I see the status of my retirement application?

Log into ePortal. Click on the My Tasks tab (located on the second row of the main menu). Click on the Requests tab and your application will be listed. The retirement application will appear in your list with a description. Submitted for Approval/Confirmation indicates that it is pending either your supervisor's approval or payroll's approval. Emails will be sent notifying you of all decisions.

### 2. How come my request doesn't show up under Requests in My Tasks?

The system takes between 2 and 5 minutes before your screen is updated after you have submitted your retirement application form.

### 3. What should I do if I've changed my mind about retiring and I've already submitted my retirement application?

Ask your supervisor to withdraw your application.

### 4. When does Payroll process my request after my supervisor has approved it?

Payroll processes your application, four months prior to your retirement date. If your retirement date is less than four months away, Payroll processes your request immediately.

### 5. How do I apply for retirement if I am not actively working?

You will need to complete the paper Retirement application form and give it to your supervisor.

### 6. Why can't I find the On-Line Retirement Process on the Human Resources Site?

The on-line tool is only found on the Employee Portal.

### 7. Who should I call if my ePortal password does not work?

Make sure you are using your LAN password to log into ePortal. If you still cannot log in, the Help Desk can reset your password. They can be reached at 514-399-4357 (option 1 for English, option 2 for passwords) or 1-866-909-0557 (option 1 for English).

### 8. My estimated quotas for my vacation are not correct. Who do I contact?

You will need to contact Payroll at 1-800-363-6060, Option #5 - Benefits and Pension Administration

### 9. Why am I not prompted to select a retirement gift?

If you have less than 20 years of service, you are not eligible for a retirement gift.

### 10. I am unable to select a retirement date of the following month?

You must select a retirement date that is at least two months away to allow adequate time to process your request.

### 11. Why is my only option "Exit" when I click on the Access Online Retirement Application button?

To use the on-line tool, you must be eligible for retirement within the next 12 months and you must be actively working. If either of these conditions are not met, you will be not be able to use this tool,

### 12. Why is having an email account mandatory?

This is how we communicate with you regarding the status of your retirement application.

### 13. I am trying to complete my on-line retirement application and am having some difficulties. Who do I call?

You will need to contact Payroll at 1-800-363-6060, option #6 - ePortal Matters