

December 6, 2024

To: Benefit Administrators / Human Resource Personnel

From: Shiona Buckshaw
Manager Partner Services, Employee Benefits

Re: Benefits Bulletin – Payroll Employers Pre-Annual Measure Activities
Employee Benefit Plans

The purpose of this document is to provide answers to the commonly asked questions surrounding the Pre-Annual Measure and the Annual Measure activities.

What is the pre-annual measure?

The pre-annual measure is a modified version of the annual measure. The pre-annual measure identifies those employees not currently enrolled in the SHEPP pension plan and who will gain eligibility on January 1, 2025 based on actual hours worked from January 1, 2024 to November 30, 2024. Early enrolment into the SHEPP plan ensures that payroll premium deductions begin on January 1, 2025. The pre-annual measure applies only to payroll organizations on AIMS.

With the implementation of AIMS, group life insurance and disability income plans **will not be included in the pre-annual measure** as they have in the past. AIMS includes functionality that automatically calculates retro deductions, removing the need for employers to manually calculate and set up arrears.

Eligibility for the extended health care and dental plans are not measured during the pre-annual measure. Extended health care and dental eligibility will be measured during the annual measure in January 2025.

When is the pre-annual measure being run?

The pre-annual measure will run on Sunday, December 8, 2024.

If you are processing a life event between December 8 – 10, 2024 and there is a Pre-Annual Measure Life Event (future dated January 1, 2025) already processed, you will need to back out the Pre-Annual Measure Life Event prior to running your life event. Once you have completed running your life event, please re-evaluate the Pre-Annual Measure Life Event. This will ensure the process you are generating will be completed and the employee will be measured for SHEPP and Civic eligibility at the pre-annual measure. The pre-annual measure life event must be evaluated in AIMS to have the employee measured effective January 1, 2025.

Once the pre-annual measure has completed, the Pre-Annual Measure Life Events will be backed out by 3sHealth Employee Benefits. This step is in preparation of the annual measure which will be ran in early January 2025. As part of benefit processing in AIMS, there can only be one evaluated life event per day and both the pre-annual and annual measure are processed with an effective date of January 1, 2025. 3sHealth Employee Benefits will provide each employer a list of employees who meet SHEPP or Civic pension plan pre-annual measure eligibility. Employers will also be able to see that the employee had the hours to meet eligibility by viewing the Pension Hours with an Effective Date of January 1, 2025 to ongoing in the Benefits Balances section in AIMS.

What information is used in the pre-annual measure?

3sHealth uploads a file with actual hours to the end of November for all payroll organizations on AIMS. The hours from this upload file are used for the aggregate hours calculation for casual and temporary employees. If the employees measured at pre-annual do not meet requirements for eligibility, then no enrolment will be created and they will be re-assessed in the annual measure.

Where can I review the results of the pre-annual measure?

A pre-annual report will be provided to each employer after results in AIMS have been verified. Pre-annual processing will be complete on Monday, December 9, 2024. The results will show employees identified as eligible in SHEPP effective January 1, 2025.

Please note that during the pre-annual measurement period, 3sHealth runs multiple queries to verify the accuracy of the data. As a result of the queries, we may manually update an employee's record in AIMS. Employee Benefits will send you an email notifying you of any manual updates made to your employees' records.

3sHealth Employee Benefits will send a communication to inform employers when results in AIMS are ready for review.

Where can I find the employee notification letters?

To support our employer partners, 3sHealth Employee Benefits will send employees, who are eligible for SHEPP as a result of the pre-annual measure, notification letters and election forms on behalf of their employer. If the labor disruption at Canada Post is in effect after the pre-annual measure is run, 3sHealth Employee Benefits will send the employees their letters and election forms by email.

Notification letters will be generated after the annual measure for all benefit plans. 3sHealth Employee Benefits will send welcome packages, notification letters, and enrolment information forms to employees after the annual measure runs in January.

How do I enroll the employee into SHEPP?

To create the employee's SHEPP enrolment record effective January 1, 2025 and onwards, please run the **Admin Change Life Event** in AIMS. As part of creating the SHEPP enrolment, please also include a comment in the Notes section advising the employee elected to join SHEPP after the pre-annual measure.

When will the annual measure be run?

More details regarding the annual measure will be forthcoming early in January 2025.

What should I do if I have questions about the pre-annual measure results?

If you have questions regarding the pre-annual measure results or the pre-annual measure process, please send an email to ebp@3sHealth.ca. To help us respond to your inquiry we ask that you put "PRE-ANNUAL INQUIRY" in the subject line of your email. You may also contact a 3sHealth Benefit Services Officer by telephone at 1.866.278.2301, option 4.