Employer Web Services E-Handbook

1. Introduction to Employer Web Services

You play a key role in providing the information that allows us to calculate the pensions of your employees who are plan members and maintain their income continuity. While public information—such as the *Employer Instruction Manual* and web services documents—is available on each plan's employer website sign-in page, we also offer employers services and information through the secure employer websites and Employer Portal.

Because maintaining the privacy and security of members and employers is a top priority, accessing this information requires signing in with a valid username and password. Once signed in, you can easily locate and access both public and secure information.

The employer reporting tools in the Employer Portal help you to supply us with employee information. The tools give you control over the records and information you supply, and improve the quality of data you provide—giving instant feedback on specific issues that can affect information accuracy.

Use this e-handbook as a handy resource for your questions about Web Services, including how to access the secure employer website and Employer Portal, creating and managing access to the reporting tools, and creating and managing who receives pension communication. More information can be found in:

- *Employer Instruction Manual*—under *Employer information* on the employer website or under *Web services* on the employer sign-in page, *Reporting instructions* under Employer reporting and the relevant application pages
- Detailed reporting instructions—in the Employer Portal. Click *Employer Reporting > Reporting Instructions*.
- Online webinars and eLearning—under *Employer Education* on the employer website

2. Web Services and Employer Reporting

To report employee information, you will need to use a variety of tools. These are the services and documents available to assist you:

Secure employer website

News—quick, easy access to the monthly Employer Newsletter, employer bulletins and other employer information.

Forms—access to a variety of forms, such as *Certification of Death* and *Purchase of Service Application*.

Employer Instruction Manual—provides instructions to help you administer the pension plan on behalf of your employees who are plan members.

Employer education—eLearning and webinars designed to make your job easier by providing you with the knowledge needed to collect and remit contributions, fulfill legislative duties, submit pension data, and administer your employees' pensions efficiently and effectively.

Employer Portal

Employer reporting—where to securely access and submit downloaded files for reporting pension data, and resources to carry out these pension duties. You can also communicate with Employer Operations using Message Board (from the Employer Portal main page dashboard).

Data Submission—a secure way of submitting employer reporting files in standard or Excel format. You can also manage your employer profile and view the history of files submitted.

Note: If you submit a file and then sign out/close out of your system before receiving verification it was successfully submitted, you might see that file in the Submission Pending Confirmation section. It is important to clear any files listed here. To do so, choose the file by selecting its name, then click *Finish*.

Employee information at termination/retirement (EITR)—securely submit termination or retirement information about employees.

File Pick-up—a secure method of downloading pension adjustment files, LTD confirmation reports and other files created by Employer Operations for review or confirmation.

LTD Policy Validation—an annual process to confirm the information on record about your open and approved LTD policies is correct. You need to confirm if you have no approved LTD policies. Instructions and an FAQ are available on the secure employer site.

LTD Start/Stop—report LTD start and stop information for members on your approved LTD plan. If you enter single records, you can create the following:

> **LTD Start/Stop Submitted Report**—review start and stop information submitted for your employees within a specified period.

> **RG/RH Reconciliation Report**—review regular service event (RG) information (if recorded) up to the LTD start date and view rehabilitation service event (RH) information (if recorded) up to the LTD end date.

Message Board—for your organization to securely communicate with Employer Operations staff by creating and responding to topics.

Plan Member Record Electronic Form—for creating and updating plan member record information online.

Plan Member Record/Member Validation—used for checking if new employees should be enrolled in the pension plan. This feature can validate single and multiple records.

Note: WorkSafeBC does not need or have this tool.

View Member Data—allows you to view employees' career service and salary, identify purchase of service periods and assist with other pension administration needs.

Reporting Instructions—provides detailed instructions on the different file types that can be created in standard or Excel format.

Employer remittance (E-Remit)—allows you to submit pension contributions. You can complete a remittance form online and have funds transferred from your organization's bank account on a chosen date. Additional information about E-Remit is available on the secure employer site.

User management—online self-serve security tool for managing user access, information in your organization and pension administrative contacts.

> **Manage users and roles**—create and maintain staff usernames and passwords, and grant access to secured web services.

> **Manage contacts and assignments**—create and manage who receives pension communication.

3. Managing Your Web Services Account

Heightened awareness of information and privacy protection in the private and public sectors has led to the introduction of privacy legislation in British Columbia and other jurisdictions. We have formalized our arrangement with employers for accessing and using our secure web information and services.

To sign up for Web Services, and ensure you've securely set up access to the secure employer website and Employer Portal, here's a checklist of what you need to do:
- ✓ Review and set up technical requirements for accessing Web Services
- ✓ Review, complete and submit to us the applicable page from the British Columbia Pension Corporation Secured Web Services Agreement
- ✓ Review, complete and submit to us the *Primary User Designation* form
- ✓ Review, complete and submit to us the *Pre-authorized Debit (PAD) Agreement* and void cheque (also needed to sign up for E-Remittance)
- ✓ Identify all your staff requiring security access
- ✓ Identify which services are required by your staff
- ✓ Set up your staff as users to access Web Services
- ✓ Assign roles to your staff who need to access Web Services
- ✓ Delete users who no longer need Web Services access

3.1 Technical Requirements for Accessing Web Services

Before signing up to use Web Services, make sure you meet the minimum technical requirements. Your IT department, IT support personnel or service provider should review these guidelines, as they are in the best position to help you configure your system to access Web Services while maintaining your corporate security profile and needs.

3.1.1 Browsers

Our website is compatible with most of the browsers currently used. Compatible browsers include:
- Microsoft Edge
- Firefox
- Safari
- Chrome

3.1.2 Encryption

We use strong security measures, including firewalls, intrusion detection and anti-malware, to protect our network and your information. To ensure your internet connection to Pension Corporation's (corporation's) site is securely encrypted and help you feel confident you're connected only to our site, we use 256-bit encryption and a valid website certificate to confirm our identity. Encryption makes it impossible to intercept the information travelling between your computer and the corporation site.

3.1.3 JavaScript

Applications on the secure employer site require JavaScript be enabled in a visitor's browser. This is similar to requirements most financial institutions have for internet banking. Some organizations and individuals accessing the secure employer site may have strict access controls stopping them from viewing websites that use JavaScript. For organizations and individuals with these restrictions, their IT department or internet service provider can determine the best way to enable access in their environment. Additionally, users may contact the corporation for more information. Publicly available information (on the general employer site) does not require JavaScript be enabled.

3.2 Creating a New Web Services Account

Once you meet the minimum technical requirements to access Web Services, you need to create an account. For security measures, you'll need a username and password to access the system. It's easy to sign up. (To set up access to E-Remittance, go to section 3.2.1)

- On the employer website sign-in page under Web Services:
  - Web Services Agreement—review the British Columbia Pension Corporation Secured Web Services Agreement and sign page 8.
  - Primary User Designation—complete the *Primary User Designation* form.
  - *Note*: These documents must be signed by an appropriate senior management authority that can legally represent your organization. Consider consulting sections 3.3 Web Services Users and 3.3.1 User Roles and Numbers before completing the *Primary User Designation* form.
- Email your completed documents; send each document to the contact address indicated on the document.
- Once you receive notification that you can access Web Services, you will need to set up users and assign them specific roles.

Note: Once a Primary User is set up, we will email you a username; in a follow-up email, we'll send you the temporary password. Meanwhile, a system-generated temporary password will be emailed to the Primary User's email address. Your Primary User will then be ready to set up and manage Secondary Users and Users within your organization. To access Web Services and the secure employer website and Employer Portal, they will need to enter their username and password on the employer website sign-in page.

3.2.1 Setting up access to E-Remit

How to remit contributions:

- On the employer sign-in page under Web Services:
  - Web Services Agreement—review the Web Services Agreement and sign page 8.
  - Primary User Designation—complete the *Primary User Designation* form.
  - Review, complete and submit a Pre-authorized Debit (PAD) Agreement, along with a void cheque for the bank account the payments will be made from.
    Note: The PAD agreement must be signed by a senior signing officer for the bank account specified in the agreement (i.e., someone with the authority to commit to banking arrangements). If there are different employers in your organization, we will only need a separate PAD agreement for each one if they use different bank accounts. If your organization participates in more than one pension plan, you can complete a separate agreement for each plan or use one PAD agreement to cover all plans. Consider reading sections 3.3 Web Services Users and 3.3.1 User Roles and Numbers before completing the Primary User Designation form.
  - Email your completed documents; send each document to the contact address indicated on the document.
  - Once we receive your signed PAD agreement:
    - if you have already set up your users and assigned them roles in Web Services, your organization will be set up for E-Remit within two weeks.
    - if you have not set up your users and assigned them roles in Web Services, once you receive notification of access to Web Services, you need to set up users and assign them specific roles for Employer Data Submission before gaining access to E-Remit.

Note: Once your Primary User is set up, we will email you a username; in a follow-up email, we'll send you a temporary password. Meanwhile, a system-generated temporary password will be emailed to the Primary User's email address. Your Primary User is now ready to set up and manage Secondary Users and users within your organization.

3.3 Web Services Users

Once you have Web Services access to the secure employer website and Employer Portal, you need to set up users and assign them specific roles. You are responsible for managing your staff roles and assigning the correct roles.

Things to consider when identifying and assigning user types and roles:

- There are three user types—Primary User, Secondary User and User.
- There can be only one Primary User (assigned by your organization) per employer number (Organization ID).
- The Primary User
  - is required to be an authorized signing authority in your organization,
  - creates and manages all other levels of users by controlling their access to the secure employer site,
  - is similar to the security access management role in your organization that typically issues usernames and passwords, and
  - may create, update and delete roles and users—letting you control who has access to what information in your organization.
- A user cannot be given more access to the system than the user who created their role.
- If the Primary User needs to do any of the role functions, they must be set up as a Secondary User with applicable roles assigned.
- When assigning roles, keep in mind that Message Board is used to communicate all employer reporting information issues. Users who need to see these messages must be assigned the Message Board role.
- If an employee no longer needs access to the employer websites (e.g., they have ended their employment, changed jobs, or gone on a leave of absence), you must delete their account as outlined in the British Columbia Pension Corporation Secured Web Services Agreement.
- Individuals in numerous organizations access our web services tools, so the usernames your users choose must be unique across all employers. It might help to develop a prefix unique to your organization that can be applied to each username (e.g., XXJaneDoe).
- Determine your organization's internal procedures before assigning users. Things you might want to consider:
  - Who can create remittances?
  - Who is allowed to approve (i.e., who is your spending authority)?
  - How do you make sure the transactions are recorded in your general ledger?
  - How do you advise cash management staff of the funding requirements?
  - Who can we contact if there are problems with an electronic remittance after submission?

3.3.1 Primary User

- Creates Secondary Users and Users.
- Assigns roles to Secondary Users and/or Users to give them access to available web services.
- Resets Secondary User and User passwords so they can regain access to Web Services.
- Removes Secondary Users and/or Users from the system (for details about removing users, see 3.4 Deleting and Recreating Web Services Users).
- Assists Secondary Users and Users in updating or changing passwords.
- Receives some mass email communications (e.g., Employer Newsletter and reporting-based emails from Employer Operations).

Note: If a Primary User is locked out of the system, they should contact Employer Operations to reset their password. Only Employer Operations can permanently remove or temporarily suspend a Primary User from the system. Primary Users cannot remove themselves. If a Primary User is deleted, then all users under the Primary User are deleted.

3.3.2 Secondary Users

- Have roles assigned to them as determined by the Primary User.
- Create Users, if the Primary User has given them this role.
- Assign roles to Users.
- Reset Users' passwords so they can regain access to Web Services.
- Remove Users from the system, although they cannot remove the Primary User or themselves
- Creating and assigning contacts to roles to receive some mass email communications (e.g., reporting-based emails from Employer Operations).

Note: When Secondary Users are assigned roles by Primary Users, they can then assign the same roles to Users. If a Secondary User hasn't been assigned a certain role, they won't be able to assign that role to anyone else. If a Secondary User is locked out of the system, they should contact their Primary User. If a Secondary User is deleted, there is no effect on other users created by that Secondary User.

3.3.3 Users

- Created by the Primary User or a Secondary User.
- Assigned roles determined by the Primary or Secondary User.
- May request to receive mass email communications (e.g., Employer Newsletter and reporting-based emails from Employer Operations).

Note: Users cannot create users or delete users from the system. If Users are locked out of the system, they should contact their Primary or Secondary User.

3.3.4 User roles and numbers

A user's role (e.g., Primary User) determines what that user can see and do in the secure employer website and Employer Portal. A user may be assigned several roles or a single role, depending on their job function. In the future, new roles might be added as we create new services.

Each user role is assigned a number. When the role number is assigned, the user will have full access to that service.

1. Access Member Data—view a member's pensionable service and salary.
2. N/A—there is currently no role 2.
3. Plan Member Record—create and update records for plan members, and access the Member Validation tool.
   Note: WorkSafeBC does not need or have this tool.
4. Access Secure Information and Forms—access the secure employer site. This is the basic, default level of user access.
5. View Electronic Remittance—view submitted electronic remittances.
6. Create Electronic Remittance—create electronic remittances.
7. Approve and Submit Electronic Remittance—approve and submit electronic remittances.
8. Create and Manage Users (Secondary Account)—access all secondary account privileges. Only a Primary User can assign this role.
9. Create and Manage Users (Primary Account)—create and manage all users of the organization. This role can only be set up by corporation staff. The Primary User has only two roles (4 and 9).
10. N/A—there is currently no role 10.
11. Data Submission—submit files, create and manage file profiles, and view the submission history for any file submitted. Access the LTD Start/Stop and the Employer Information at Termination/Retirement (EITR) tools.
12. Message Board—access Message Board to create, view and respond to topics. You can only close topics you have created.
13. File Pick-up—view or download available files, such as amended pension adjustment files, the *LTD Confirmation Report* and the *Active Members with No Service in the Last Calendar Year Report*.
14. LTD Policy Validation—annually validate your approved group disability policy information, verify the group disability policy information we have on file is current or confirm you have no approved policy(ies).
15. Employer Contact Management—create and remove mandatory and optional employer contacts, assign, and update contact information.

3.4 Deleting and Recreating Web Services Users

There are times when you will need to delete user accounts for employees who no longer need access to Web Services. These might include employees who have ended their employment with your organization or taken leave of absence. Other times, you might accidently delete a user and need to restore their access to the system. Only the Primary User can delete or recreate Secondary Users and Users:

3.4.1 Deleting users:

If an employee ends employment or takes a leave of absence, the user's account will need to be deleted:

1. Sign in to your plan's secure employer site. Access the Employer Portal then click *User Management* in the navigation menu to bring up a list of list of your organization's web services users.
2. Click the name of the user account you would like to delete. A screen will appear for that account.
3. Select Delete User at the bottom left of the screen. You will receive the following message: *Warning: You are about to remove the following user. Please ensure you wish to perform this action.*
4. To proceed with deleting the user, click Delete in the lower right corner of the screen. A confirmation screen will appear: *You have successfully deleted the following user.* It will also contain the user's information if you want to print a copy for your records.
5. To delete more users, click Return to User Management Home and repeat steps 2 to 5.

3.4.2 Recreating users:

If a user account was deleted and they still require access to Web Services, the Primary User will need to recreate their account:

1. Sign in to your plan's secure employer site. Access the Employer Portal then click *User Management*. You will see a list of actions with a brief explanation of each.
2. Click Create User. There are five steps for providing contact information and assigning user roles. For step 1, fill in all fields and then click Next. Follow the directions for each step. When you reach step 4, click Finish. An initial password will appear in a highlighted box.
3. Send the initial password to your staff member (user). Let them know they will need to change this password the first time they sign in to Web Services.

Note: If the Primary User changes, contact Employer Operations immediately.

4. Setting Up Your Data Submission Profile

Before you can submit a file in Web Services, you must set up your profiles. Profiles identify which specific file types you will submit, in which formats:

1. Sign in to the secure employer site, access the Employer Portal and then choose *Data Submission* from the Employer Reporting drop-down menu.
2. Select the plan, then select Submit File.
    Note*:* The first time you select Submit File, you will be asked to set up a profile.
3. You will be presented with a list of file types (Payroll and Tombstone). Select all applicable boxes, and click Continue.
4. The selected file types will be displayed on the next screen. You can personalize the default name to a file name that is more meaningful to your organization. Once you have completed this task, click Continue.
5. Identify the file format as either Standard Format or Excel Format for each file type displayed, and click Continue.
6. The profile is now complete. You will see a summary screen. Click Finish.
7. You may now submit and continue processing a file, or click Cancel to return to the Employer Portal home page.
8. To make updates to previous reports, go to Manage Profile.

5. Employer Contact Management

5.1 Accessing Employer Contact Management
All users can view contact information. Assign Role 15 to users you want to create or update contacts for your organization in Contact management.

5.2 Creating new contacts
If the contact person you are adding is not already a contact for your organization, you will need to provide details:

1. Select Create new contact.
2. Complete all *Required fields.
3. If needed, edit the pre-populated work address on file for this contact.
   Note: Specific communication material, such as pension adjustment statements and or member benefit statements, will be delivered to this address if this person is listed as a contact for these roles.
4. Select Next to confirm information entered.
5. Select Finish to add the contact information, or Cancel to go back to contact management or update contact information.

5.3 Assign and change contact roles

You will need to provide some mandatory contacts and, if you choose, provide optional contacts. Your organization needs to provide us with points of contact, which must include a director of finance, a director of human resources (for each plan if a multi-plan employer). You'll also need to provide points of contact to receive important communication from us. These roles have unique needs and are set up outside of Web Services.

Mandatory contacts are marked *.

- **Director of finance**—receives some mass email communications (e.g., Employer Newsletter, Member News, employer bulletins and reporting-based emails from Employer Operations when something is overdue).

- **Director of human resources**—receives some mass email communications (e.g., Employer Newsletter, Member News and employer bulletins).

- **Electronic pension adjustment recipient**—receives electronic pension adjustment statements in an email (for employers who have opted to receive their pension adjustments electronically).

- *Member's Benefit Statement* **recipient**—receives member's benefit statements by mail.

- **Pension adjustment recipient**—receives pension adjustment statements by mail, and some mass email communications (e.g., Employer Newsletter, Member News and employer bulletins).

Optional contact list

- **Additional email notification**—all mass emails (e.g., Employer Newsletter, Member News and Employer Bulletin).
- **Employee Information at Termination or Retirement**—primary contact for submissions and questions.
- **Long-term Disability Reporting**—primary contact for submissions and questions.
- **Payroll**—primary contact for annual/segment report submissions and questions.
- **Plan Member Record**—primary contact for submissions and questions.
- **Purchase of Service**—primary contact for submissions and questions.
- **Union reporting**—primary contact for submissions and questions.

To assign a new contact to a role

You can assign one contact *per plan* for mandatory roles. You can also assign multiple contacts *per plan* for optional roles. Here's how:

1. Select Manage contact and role assignments.
2. Click on the drop down for the role you wish to assign.
3. Select the contact you wish to assign from the drop down list.
   Note: if you are adding multiple contacts, select the drop down and add each contact before saving changes.
4. If all drop down boxes are filled for multiple contacts, you can add more by selecting Add contacts at the bottom of the page, for optional contacts only.
5. Select Save changes to add the contact(s).

To change a contact role

Whether you are needing to re-assign a role to another person or remove a contact:

1. Select Manage contact and role assignments.
2. Click on the drop down for the role(s) you wish to amend.
3. For mandatory roles, you must select another contact. For optional roles, you can assign the role to another contact or select None for no contact.
4. Select Save changes to complete your updates.

4.4 Deleting a contact

Before you can delete a contact, if there is a role assigned to that employee, you must first unassign them from that role. After saving those changes, you can delete the contact:

1. Go to the Unassigned contacts field at the bottom of the page.
2. Select the contact you wish to delete.
3. Select Save changes to remove the contact.

For more information, contact Employer Operations; we're here to help.

- E-Remittance
- All other enquiries:
    - employer.services@pensionsbc.ca
    - Message Board
    - Toll-free: 1-855-356-9701 (Canada/U.S.)