

# Employer Offer of OMERS Membership Checklist

Use this checklist to help with the administration of membership offers to your other-than-continuous full-time employees (OTCFT) who are not required to join the OMERS Plan as a condition of their employment.

Membership must be offered to these employees when you know the employee first becomes eligible. Failure to offer membership can result in an omission period, which can be expensive for employers.

Although making and keeping documentation of the offer is only required the first time the employee meets the eligibility requirements, we encourage you to provide a reminder to employees who re-qualify. This gives employees the opportunity to revisit their options.

## Eligibility Test

- ☐ Look at hours worked and earnings at any participating OMERS employer in the previous two calendar years. For example, for 2018 offers, look at 2016 and 2017 hours and earnings.

Include overtime hours/earnings,

- ☐ vacation pay and hours a member would have worked during a statutory leave.

Offer membership if in each of

- ☐ the previous two calendar years the employee has met one of the following two conditions:

worked at least 700 hours

- ☐ (including overtime) in total; or
- ☐ earned, in total, including overtime and vacation pay, at least 35% of the Year's Maximum Pensionable Earnings (35% is \$19,215 for 2016, \$19,355 for 2017)

## New Hires

- ☐ Ask about current or previous employment with another OMERS employer.
- ☐ Document their response.
- ☐ Offer membership immediately if the employee qualifies.

To ensure that you are confident employees qualify for membership, we encourage you to ask employees to provide supporting documentation.

## October - Annual Process

- ☐ Check earnings and hours worked over the previous two calendar years.
- ☐ Offer membership within 60 days of year-end.

## New Hires

- ☐ Prepare the cover letter - you can use the Offer of OMERS membership cover letter.
- ☐ Provide the employee with the cover letter and *OMERS Handbook* for membership offers.
- ☐ Follow up if the employee does not return Form 104.
- ☐ Keep the signed Form 104 permanently in your records.
- ☐ Enrol the employee by submitting an *e-Form 102 – Enrolling a member* if they choose to join the OMERS Plan.
- ☐ Document the process of offering membership and any responses from your employees.