

What changes in an employee's status need to be reported to CSI?

a. New Hire

1. Determine [eligibility](#).
2. If eligible, new participants must complete an [Employee Application Form](#). The employer must complete the box on the reverse side of the form, including the salary to be paid and the participation date.

b. Change in Salary

Salary changes for the next Plan Year are reported on the enrolment form sent to schools in the spring. After the Plan Year begins, changes in salary can be reported on the [CSI Canadian Employee Benefits Billing Change Form](#). Mid-year salary changes may also be reported on the year-end Salary Verification Form.

c. Change in Legal Marital Status

1. Marriage: a newly married participant should complete a [Change of Beneficiary Form](#).
2. Death of spouse: if beneficiary dies, participant will need to designate a new beneficiary.
3. Divorce: a participant can not change his/her beneficiary to someone other than a spouse without the spouse's consent, unless the divorce is final, in which case a copy of the divorce decree must be included.

d. Change in Number of Dependants

A change in the number of dependants does not need to be reported.

e. Termination of Employment or Death of Employee

1. The school must report (in writing) the date of termination or death and final salary paid and full-time percent worked during the Plan Year.
2. Terminated employees have the option to leave money in the Plan or receive a cash refund. (Cash refund forms are available on the CSI web site.)
3. In the case of death, a copy of the death certificate and a contact person will be required.

f. Leave of absence

1. An employee who is on Maternity Leave or Parental Leave, as determined by the employer, may elect to continue making contributions to the pension plan during such leave.
2. Contributions shall be made by the school and the participant, based on the participant's salary in effect at the commencement of such leave, and credited service will continue to accrue.
3. An [Election of Contribution Continuance While on Maternity/Parental Leave Form](#) must be completed and sent to the pension office. If an employee does not choose to continue making contributions during the leave, they will be given an inactive status and will have a break in credited service.
4. For details on the Sabbatical Leave of Absence, refer to the plan booklet, pages 17 & 18, or call the pension office.

g. Retirement

1. Employees nearing retirement age are encouraged to call the pension office for estimated retirement calculations.
2. Employees who have terminated employment and are planning to retire within the next year should contact CSI for the application paperwork.
3. An [Application for Retirement Benefits](#) and [Declaration of Marital Status Form](#) should be submitted to the pension office at least three months prior to the retirement date.

h. Residence Change

When a participant moves, the employee or the school should report the change in address to the pension department.

i. Disability

1. All active participants are entitled to receive temporary disability benefits if they are unable to work due to a disability.
2. The Pension Trust Fund assumes the responsibility for making the contributions for the disabled participant during the period of his/her disability.
3. The participant's credited service continues to accrue during the period of disability.

j. Annual Enrolment

Each spring, enrolment materials are sent to each participating school for the next Plan Year. Included in the mailing is a School Plan Selection Form, a computer listing of all current employees, plus a supply of Employee Application Forms.

k. Change of Beneficiary

Refer to C, Change in Legal Marital Status.