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**PEPP Requirements Definition**

**#16- Retirement Option Letter**

**May 30, 2022 V1.7**

**Confidential**

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Version Control

|  |  |  |
| --- | --- | --- |
| Date | Author | Change |
| January 26, 2021 | Sheryl Britton | Initial copy |
| February 23, 2021 | Sheryl Britton | Updates |
| September 8, 2021 | Janette Paus | Edit to standardize formatting and wording. |
| October 26, 2021 | Janette Paus | Amended Section 6A-page margins |
| October 28, 2021 | Janette Paus | Updated Section 6A-envelope size; removed Section 7A and Point 1 from Section 12-both referring to PEBA Design Layout |
| March 2, 2022 | Janette Paus | Added Section 8 #13 Changed Retire@Ease to PEPP Retirement Planner |
| May 30, 2022 | Janette Paus | Section 8- removed and added JIRA tickets and updated issues requiring correction; amended Point 5 for jurisdictions; added a comment to Point 8 re: dynamic portions in the VPB Options section. |

# Business Objectives

There are two objectives:

1. To provide a complete document which can be submitted to JEA to make necessary corrections to production letters.
2. For future use when amending this letter in the future.

# Background

During the PEPP Renewal project this letter was created and implemented at Go Live. There were a number of outstanding corrections at Go Live and some additional issues have been identified since. The purpose of this document is to describe the components of the letter and to identify all the issues requiring correction so JEA can fully correct and deliver the letter.

This document, along with the Communication Design Layout, will be incorporated into a JIRA ticket with JEA and prioritized according to business importance.

# Purpose of the Letter

To provide up-to-date information of the member’s PEPP account and advise member of their retirement choices.

# Scope

In scope for delivery of this ticket is:

1. Correcting issues which have been identified since Go Live.
2. Any outstanding tickets raised before Go Live.
3. Update of PEPP Logo and Footers – showing new addresses.

Out of Scope for this ticket is:

1. Any changes required to support jurisdictional requirements.

# Features

The letter is comprised of static sections of information and non static sections of information (known as smart sections). The PEBA design layout of the letter lays out the sections which are to be static and which must be smart.

# Functional Requirements

The functional requirements will consist of the following:

## Communication Standard for Creation and Distribution of Letter

The following standards have been established by PEBA Education and Engagement Branch and must be followed in the design and build of the letter:

* PEPP letterhead (header and footer) will be incorporated into the letter layout in pantones 295, 375, 7562. These same colours may be used within the body of the materials as well.
* Public Employees Pension Plan on the right in the header is Calibri bold 12 pantone 295.
* Address is Calibri light 11 pantone 375- address is retrieved from the PEPP Stakeholder address stored in PENFAX.
* Registration number when it is shown should be Calibri light 9 and black.
* Two spaces between province and postal code in all addresses.
* Names in the address block are to be upper case.
* Addresses in the address block are to be upper case.
* If an address is within Canada, do not display country.
* General text is all Font Calibri light 11 Font size 11 for text, smaller within tables – text within tables can be 9 or 10 (Note- no smaller than 9 no larger than 11 depending upon what will fit on the page properly). Tables are full margin width of page, top row is Pantone 295 size 12, headings are bold and white within top row, headings over alpha columns are left aligned, headings over numeric columns are right aligned (unless otherwise displayed in layout template), rows alternate between blue (Pantone 295 @ 35%) and no colour. Dates within tables are currently not abbreviated. Data under the headings are also aligned as per the headings. Footnotes are in font size 9.
* PEBA acknowledges that letters are generated by PENFAX as size 11 and therefore size 12 font may not be available. Calibri light 12 bold for sub section headings (term options, death, retire opts).
* Calibri light 18 bold for form headings.
* PEPP Logo is 2.2cm high x 4cm wide.
* One space after a period.
* Local telephone numbers all show prefix 306-
* Body of the letter is flush left and ragged right – no justification.
* There will be no overlay page for addresses.
* One blank line between paragraphs, two blank lines between sections (headings) and between tables – unless this forces an awkward page then adjust accordingly.
* If a paragraph will split at the bottom of a page, force to the next page. Keep sections together as well.
* Letter to be designed as Smart Letter PDF and NOT RTF
* Letter form name to be shown in the bottom left hand – above the Logo Footers- on each form page. A new version of the layout is attached for reference purposes.
* This letter uses a 10” x 13” Window Envelope. Addresses can consist of 1, 2 ,3 and 4 address lines and letters must be formatted properly for each address type in order to ensure it can be used in the 10” x 13” envelope. Letters must be window tested before being sent to PEBA.
* The page margins will be configured as follows:
* 1.5 cm left margin for the logo
* 1.9 cm left margin for date, address and body of letter
* 2.25 cm top margin to top of “PEPP” letters
* 4.1 cm top margin to top of date field
* 5 cm top margin to top of first address line
* 1.6 cm top margin to Public Employee Pension Plan address logo
* 1.3 cm right margin

**IMPORTANT NOTE:** JEA has no control over variances in these measurements introduced by how BI renders a PDF, how a PDF may print from Adobe or a web browser, or by printer settings.

**PEBA Reply**- We agree with this statement in principle. However, any final testing and sign off will be performed on PEBA printers and if adjustments are required, then we would need JEA to adjust to ensure copies coming off the PEBA printers are fitting in the envelopes properly.

## Business Functionality to Accommodate

Each letter must have a naming convention associated with it. The letter number, name and version has been determined by PEBA. The elements are all uppercase and defined below:

* PLAN LETTER - PEPP=P, MEPP=M
* LETTER NUMBER – a numeral assigned by PEBA
* LETTER NAME – a description assigned by PEBA
* VERSION NUMBER – the approved template version expressed as an integer and decimal (e.g., 1.1)
* YY – the year represented as two-digits (e.g., 2021 = 21)

The naming convention to appear on the letter is:

PLAN LETTER+LETTER NUMBER+LETTER NAME+VERSION NUMBER+DASH+YY

As a result, the naming convention for this letter will be:

P16RETIREOPTSV1.4-21

This letter will be used in the following situations and must take into account the following:

This letter will be generated when a PEPP member has retired and will either take a full pension; a partial pension; a small benefit; a onetime payment.

## Canada Post Mailing and Postal Code Requirements

The letter must meet all relevant Canada Post Mailing and Postal Code Requirements.

# Technical Requirements

The technical requirement will consist of the following:

## Batch Requirements for the Letter

The following requirements must be included:

1. The letter must be printed in its own unique batch as a mass batch.
2. The batch will include any and all letters created out of the nightly batch.
3. Individual PDF’s must be created and attached to the member’s outgoing communication tab in PENFAX for future reference.
4. The PDF must be available to the member through PENWEB.
5. Batch name must incorporate a shortened version naming convention that BI publisher and the letter form is following. The batch name should include the following (in upper case):
   1. PLAN LETTER – PEPP=P, MEPP=M
   2. LETTER NUMBER – a numeral assigned by PEBA
   3. LETTER NAME – a description assigned by PEBA

For this letter: P16RETIREOPTS

1. The letter must be generated and dated based on the business day the transaction was processed which resulted in the letter being generated through the nightly batch - if the batch runs after midnight, the date and any associated calculations displayed on the letter must reflect the day the letter was processed.
2. If a manual batch is ran, the manual batch must create the letter for the business day the batch is ran, and the associated letter picked up and included in the mass batch file for the letter.
3. If a letter is deleted, do not include in the nightly letter batch.

## Printer Setup and Print Configurations

The batch of letters will be printed either simplex or duplex at the printer. Therefore, all letters in the batch following the first letter must repeat all information as per the design layout. Each letter must be treated uniquely and print uniquely in the batch. Where forms or statements are part of the letter, there must be page breaks or associated identifiers within the batch to identify all the forms or statements which pertain to that member to support duplex printing and ensure information from one member does not “bleed” into or become part of the next letter.

## BI Publisher Naming and Filing

As noted above, there must be consistency between the BI Publisher name and the Batch name. The BI Publisher name must follow the naming standard identified earlier.

When creating the BI Publisher file name, a separate file name should be established for the BI Publisher Library for each letter type and the naming convention of the file name should also follow the letter number and letter name. The version number is not required in the file name.

# Summary of Issues Requiring Correction

The following JEA tickets have been created and are pending with JEA. A single JEA ticket has been created for the following outstanding corrections. The JEA CR must contain all the tickets for full correction of the letter to occur.

Current JEA tickets-

1. PEBA 4880- estate is displayed on all option letters when no beneficiary on file
2. PEBA 4898- Text alignment on retirement option (<P3>)
3. PEBA-5453- $ sign is missing in Unit Value in several letters
4. PEBA-5599- retirement option letter and termination option letter not generated via data posting term file for one member
5. PEBA-5500- Incorrect annuity calculation performed for married member on Retirement Option Letter when spouse date of birth is missing
6. PEBA-5861- SPAF Policy required- change request (enhancement) to set a MINIMUM EQUITY limitation for SPAF estimates and PEPP Retirement Option Letters regarding the SPAF as an option available on retirement.

Outstanding issues:

1. Please review corrections in header, address, and sincerely. Are not meeting standard provided.
2. Need to review the footnotes and the fonts as not consistent with provided standard.
3. \* text at the bottom of the page should be in size 9 font.
4. The online tools title, “Retire@Ease” needs to be changed to “PEPP Retirement Planner” throughout the letter.
5. In <P1> remove ‘ON’, ‘QC’ from the comment and add ‘NB’ to the comment. Add ‘ON’, ‘QC’ and ‘NS’ to the line on the 2nd from last page, “\*VPB is available for money under SK...”.
6. In the table title **Your Investment summary as at <last\_val\_date>**, on Page 2,investment should be lower case.
7. On Page 4, the entire section “Variable Pension Benefits (VPB) estimates should not be included in the letter if VPB is not an option.
8. On Page 4, if VPB is an option, amend Section “Variable Pension Benefits (VPB) estimates” and include:
   1. In the title, <P4>, the word “estimates” is dynamic, to appear in the letter once the Retirement Income Guide is available (target: Summer 2022)
   2. <P5> is also dynamic, to appear in the letter once the Retirement Income Guide is available (target: Summer 2022)
9. On Page 5, “<P6> \*Variable Pension Benefit is not available...” should not show if VPB is *not* an option. Some samples are being produced when VPB is not an option.
10. Add <P7> “We don’t have your spouse’s date of birth on file…” to page 6.
11. Single life annuity estimate is not showing for members with a spouse. This is required.
12. On page 7, in the Section , “I choose to stay with PEPP, the 2nd box option is missing an asterisk beside “Variable Pension Benefit.\*”
13. On the last page, below the statement “I have non-locked in and/or voluntary money”, please add check box- ‘Leave these funds in my PEPP account’.
14. With respect to JIRA ticket PEBA-5861, <P7>, <P8> and <P9> are dynamic- not to be included in the letter if the account qualifies for a small benefit.

# Assumptions/Constraints

1. Assumptions:
2. The priority for resolution of the letter issue will be assigned by business
3. A ticket for resolution will be opened at JEA and will contain all the required information
4. When the requirements document is provided to JEA, a technical spec document, including a layout proof will be provided back to PEBA, reviewed and approved before JEA will provide a CR
5. The CR will be based on the above and only after the technical spec, the design layout and the CR have been reviewed and approved, will JEA commence development on the letter.
6. Constraints:
7. Time- Ability to create within the 30 day window
8. JEA Resource availability

# Reporting and Quality Assurance

The letter must be included in the following PEPP letter reports:

* PEPP Daily Letter Report- letter must appear on the report for the business day the letter was generated as noted in batch requirements above.
* Any letters produced on a daily basis out of a manual batch which has been run, must be picked up and included, the same as a system generated letter.

# Other Considerations

None



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1. PEPP Logo- included as an additional document to these requirements and attached into the ticket.
2. PEPP Letterhead example- attached in ticket
3. PEPP Footer- attached in the ticket

Approvals:

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| --- | --- | --- | --- |
| Name | Role | Signature | Date |
| Sharon Christie | Communications | S.Christie | April 11/22 – *SC reviewed sections 6A & 8 only* |
| Leanne Toth | PEPP Supervisor |  |  |
| Heather Culetta | PEPP Supervisor |  |  |
| Barb Diebel | PEPP Manager |  |  |
| Ryan Kotylak | Manager, Business Support Services |  |  |