This newsletter is designed to present York employees, former employees and retirees with useful general information pertaining to their pension & benefits. Please keep in mind that since this newsletter is distributed to different groups with different entitlements, for example former employees no longer have benefits, that all articles may not pertain to you and your situation.

York University Retirement Planner (YURP) and HR Self Serve

Recently an announcement was made regarding improved access to the HR Self Serve (formerly known as YESSS) system. There has been confusion between YURP and HR Self Serve and what service each will provide to you.

YURP—for those active and deferred members of the York University Pension Plan you can log into YURP and access your annual pension statement as well as run your own termination, death or retirement estimates. To access YURP go to: http://www.yorku.ca/hr/services/employees/yurp.html

If it is your first time logging into YURP type your nine digit employee number (begins with 10…) in the appropriate box. Click on Forgot your password. The password will be emailed to you. The password is case sensitive and you can not copy and paste it into the field. You must type the password into the appropriate field. Sometimes the e-mail with your password goes to your junk folder so check there if you have not received an email within one hour. If you have tried to log into YURP more than six times unsuccessfully you will have to contact us at askpb@yorku.ca to reset your account.

HR Self Serve—active employees can review and/or update personal information as well as emergency contacts, review extended health, dental and life insurance coverage as well as your beneficiaries. Pay statements and direct deposit account information can also be viewed. To help save a tree you can disable your printed pay statement and view it online.

To access HR Self Serve go to: https://hrselfserve.yorku.ca/psp/HR91PRD/?cmd=login

Use your Passport York username and password to log in as the YESSS username and password is no longer active.
Realignment of the Pension & Benefits Office

A reminder that there is a new way to contact the Pension & Benefits office:

There is now a central repository for all enquiries. To contact the Pension & Benefits office please e-mail askpb@yorku.ca or call 416-736-2100 extension 27572 (askpb). The phones are answered between 9:00 am and 4:00 pm unless we are in a meeting or the University is closed.

If you have contacted us recently you will have seen an e-mail from us as a response to a phone call or e-mail transaction. The subject line will indicate “Incident INCXXXXXXXX”. Please make sure this incident number appears in all subsequent correspondence to our office. That way any additional information or questions can be linked back to the original request.

For more efficient service please have your nine digit employee number available when you contact us.

As a reminder you can obtain answers to any extended health (including vision) or dental questions by accessing the Sun Life member website at https://www.sunnet.sunlife.com/signin/mysunlife/home.wca?

You can also contact Sun Life at 1-800-361-6212 Monday to Friday 8:00 am to 8:00 pm or access your benefits booklet at http://www.yorku.ca/hr/services/employees/benefits.html

If you are looking for pension estimates please access the York University Retirement Planner at http://www.yorku.ca/hr/services/employees/yurp.html

The Pension & Benefits office will be pleased to provide service for items such as:

- A benefit claim that has been declined which you believe should be covered and Sun Life has provided you an unsatisfactory response when you questioned them.
- Any form of leave of absence and how it may or may not affect your pension or benefits.
- Assistance in completing pension or benefit forms that require completion.
- Questions regarding a change in status, for example, reducing your hours, getting married, having a baby, etc.

Stay tuned for more exciting changes that will be coming later this year that will provide you another avenue to obtain answers to your questions.

Additional Voluntary Contributions (AVCs)

You are allowed to make additional voluntary contributions to the York University Pension Plan, up to the limits set out in the Income Tax Act. Since AVC’s are part of the York University Pension Fund (which is a tax-exempt registered pension plan) your AVC account balance is allowed to grow on a tax-deferred basis. These contributions will provide you with additional pension at retirement. Please note that AVC’s may only be withdrawn when you terminate membership in the Plan or retire and that unlike required contributions which are matched by the University, AVC’s are not matched by the University. These funds are affected by mortality table changes and rate of return of the fund.

For further information, please call (416) 736-2100 ext 27572 or email askpb@yorku.ca
Sun Life Member Website and On-line Claim Submissions

Sun Life has enhanced their on-line claim submission for those affiliations that do not have a pay direct drug card.

Most but not all prescription drug claims can be submitted through the member website and the on-line claim submission process. The exceptions which still require the paper claim submission are:

- drugs that have to be injected
- compound drugs (Sun Life needs to review the breakdown of the ingredients)
- drugs and diabetic supplies where no Drug Identification Number (DIN) is indicated on the receipt (i.e. syringes for insulin injections)

Sun Life audits a number of claims and while most audits occur without you being aware there are instances where you will be asked to submit the documents verifying the expense is correct. In the event Sun Life asks you to provide verification of an expense and you do not submit the documentation within their time limits Sun Life reserves the right to remove your access to the on-line claim submission on a permanent basis.

Please be sure to provide any required documentation to Sun Life in the time period they provide to you.

Retirement Dates

The normal retirement date under the York University Pension Plan is the July 1st coincident with or immediately following your 65th birthday. There is however an early retirement provision that provides pension plan members with the ability to retire and begin receiving their pension as early as the first of the month following their 55th birthday. Currently the Income Tax Act indicates that a pension may start no later than the end of the year of attainment of age 71. For those individuals that are attaining age 71 in 2012 a Retirement Option Form package will automatically be sent to you. Please note that for those individuals attaining age 71 in December 2012, their pension must begin December 1, 2012 (which is actually prior to the attainment of age 71).

For all individuals that are planning on retiring in 2012 please be sure to have advised your department. The Pension & Benefits office needs to be informed no less than three months prior to the retirement date so we are able to mail out the Retirement Option Form and package to you so you are able to review, complete the forms and return it to us for processing. It is imperative that you fully complete all the forms, including having your signature witnessed where required. We also require the documents with original signatures. Photocopies, fax or scanned forms will not be processed.

As per the YUFA collective agreement YUFA employees are able to retire January or July 1 with nine months notice to the appropriate individuals.

Non-academic employees are asked to provide six months notice where possible to provide your department to plan for your retirement.

Your age at retirement will affect the monthly pension amount. To determine the impact on your pension at various ages please access the York University Retirement Planner at http://www.yorku.ca/hr/services/employees/yurp.html
**Want the P&B Times faster and reduce paper? Provide us with an e-mail address.**

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### Need More Information?

Information provided in this newsletter is of a general nature. Should you require further information that specifically pertains to you please contact the Pension & Benefits office by e-mailing askpb@yorku.ca or call 416-736-2100 extension askpb (27572) between 9:00 am and 4:00 pm Monday to Friday. For Fridays from June 1 up to and including Labour Day weekend the phones will be answered until 3:00 pm.

In the event the information contained herein conflicts with the applicable contract, policy or guideline, the terms of the contract, policy or guideline will prevail.

Here are just a few websites you can access to gain more information:

- **York’s Pension & Benefits Office**: [www.yorku.ca/hr/units/cpb/pensionbenefits.html](http://www.yorku.ca/hr/units/cpb/pensionbenefits.html)
- **York’s HR Self Service**: [https://hrselfserve.yorku.ca/psp/HR91PRD/?cmd=login](https://hrselfserve.yorku.ca/psp/HR91PRD/?cmd=login)
- **York’s Retirement Planning Centre**: [www.yorku.ca/retire](http://www.yorku.ca/retire)
- **Sun Life’s Plan Member services**: [www.sunlife.ca/member](http://www.sunlife.ca/member)
- **York University Retirement Planner**: [www.yorku-ret.ca](http://www.yorku-ret.ca)