

# **OPTRUST SECURE PORTAL** User Guide



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## BACKGROUND

In 2003 OPTrust was one of the first pension plans to introduce Online Services. We have been making minor upgrades and changes ever since but now it is time to overhaul our whole pension administration system, Online Services included! The first step is to upgrade the underlying platform, and, in the process, we are also making some changes to the look and feel. It's the same functionality you are used to with a fresh face!



## **QUICK HITS**

## Q. How do I log in?

A. Log in by clicking the "Log In" button on the Online Services page of our website.

## Q. What do I use to log in?

A. Use your email address to log in.

## Q. Why won't my old password work?

A. In conjunction with the new system we have strengthened some of our security features including the requirement for stronger passwords that have numbers, letters and symbols.

## Q. How do I get my new password?

A. New passwords will be sent to all existing users through our existing Online Services accounts. Please note this password and put it in a safe place as you won't have access to the old system once the new system goes live on June 10. If you need a new password after June 10, ask your employer administrator or contact OPTrust at 1-800-637-0024.

## Q. Will the system time me out?

A. Yes, the system times out after 5 minutes of inactivity. However, a warning will be displayed at the one-minute mark.

## Q. How do I send a Secure Message?

A. Messages are sent though the Secure Message page that is accessed by clicking "Secure Messages" on the menu to the left of your screen.

### Q. How do I upload a file?

A. Files are uploaded through the File Upload site that is accessed by clicking "File Upload" on the menu to the left of your screen. If you can't see this menu item, it means you don't have access to upload files. Please see your employer administrator to amend your role if required.

### Q. How do I set up new users, change user roles or revoke access?

A. All the above functions are done through the User Administration module accessed by clicking "User Administration" on the menu to the left of your screen.

### Q. How do I change my password or security questions?

A. Passwords and security questions are updated by clicking "Settings" to the top right of your screen.

### Q. Do I have to log out or can I just close my browser?

A. Logging out is key to ensuring the protection of our members' information. To log out simply click the "Sign out" button to the top right of your screen.



## **INITIAL LOG IN**

## Welcome to our sign in page:

		welcome to the OPTrust Secure Portal
This is a secure site to send messa	ges and att	achments to OPTrust. If you have any questions please contact us at employerservice@optrust.com or 1-800-637-0024 or (416) 681-6100
Please sign in		
· · · · · · · · · · · · · · · · · · ·	Em ail*	Email Address
	EIIIdii	
Pa	assword*	Password
		Log in
		Forgot Your Password?
-		
		(2) He
onlineServices		
		Welcome to the OPTrust Secure Portal
This is a secure site to send message	es and atta	ments to OPTrust. If you have any questions please contact us at employerservice@optrust.com.or 1-800-637-0024.or (416) 681-6100
5		
Please sign in		
·····		
	Email	michelle@employer.ca
	Email	michelle@employer.ca
Pas	Email*	michelle@employer.ca Log in Forgot Your Password?
Pas	Email*	michelle@employer.ca Log in Forgot Your Password?
Pas	Email*	michelle@employer.ca Log in Forgot Your Password?
Pas	Email*	michelle@employer.ca Log in Forgot Your Password?
Pas	Email*	michelle@employer.ca
Pas	Email*	michelle@employer.ca
Pas	Email*	michelle@employer.ca  Log in Forgot Your Password?
Pas	Email <sup>*</sup>	michelle@employer.ca
Pas	Email*	michelle@employer.ca  Log in Forgot Your Password?
Pas	Email*	michelle@employer.ca
Pas	Email*	michelle@employer.ca Log in Forgot Your Password? Choosing My Security Questions
Pas	Email*	michelle@employer.ca  Log in Forgot Your Password?  Choosing My Security Questions
Pas nineServices se select three security questions to	Email*	michelle@employer.ca
Pas DineServices se select three security questions to	Email*	michelle@employer.ca  I ug In Forgot Your Password?  Choosing My Security Questions  rew security standards.
Pas Nine Services se select three security questions to Security questions to	Email*	michelle@employer.ca  I up in Forgot Your Password?  Choosing My Security Questions  new security standards.  Select

Security Answer
Cancel
Continue

Security question 2<sup>\*</sup> Select

Security question 3  $^{*}$ 

Security Answer

Select

~

~



## Choose questions that only you will know the answer to:

	Choosing My Security Questions	
lease select three security questions to meet th	e new security standards.	
Security question 1* Security question 2* Security question 3*	Select What is your favourite colour? What was your first pet's name? What was the model of your first car? What is your mother's midden name? What is your father's midden name? What is the name of the street where you grew up? What is the name of your favourite sports team? What is the name of your best friend in high school? Select	
	Security Answer	





⑦ Help

### Review the Terms & Conditions and click "Accept" to continue:



### Terms & Conditions

#### Use of Electronic Services

1. To use OPTrust Online Services, you must register by providing your OPTrust ID and choosing a password. By using your password and OPTrust ID for these OPTrust Online Services, you acknowledge that you have received, read, understood and agreed to the terms and conditions of this Agreement, including the information under the heading "Important Legal Information". You may use OPTrust Online Services only in accordance with this Agreement and the Important Legal Information, as amended from time to time.

2. You agree that you will not use OPTrust Online Services for illegal, fraudulent or defamatory purposes or take any steps which could undermine the security or integrity of any OPTrust Online Services, or cause harm to or threaten to harm any other user of OPTrust Online Services.

3. You authorize OPTrust to accept and act on any electronic instructions (including any application, direction or designation) given by you through OPTrust Online Services to the same extent as if you had given signed, written instruction to OPTrust.

4. You agree that you are solely responsible for maintaining the security of your password. You alone are responsible for keeping that password confidential, and for any and all activity that occurs on OPTrust Online Services under your account. You agree that you will only use OPTrust Online Services through your account. You agree to promptly notify OPTrust of any actual or suspected unauthorized use of your account. When you provide OPTrust with such notice, OPTrust reserves the right to suspend, deactivate, or replace your account to prevent further unauthorized activity.

5. You agree that you will not reproduce, sell, distribute, publish or commercially exploit the data on this site without the express written consent of OPTrust. You further agree that you will only use the information and data on this site for your own personal use.

6. You agree to receive newsletters electronically. You also agree to accept your Annual or Biennial Pension Statement, and if applicable, your Annual Buyback Statement electronically. You can change how you receive your Annual or Biennial Pension Statement and newsletters at any time, by choosing the "mail" option in "Communication Preferences". Buyback statements are only available electronically.

#### **Changing This Agreement**

7. OPTrust reserves the right to change the terms and conditions of this Agreement from time to time. You will be notified of a change in the terms and conditions when you next log in to your account after the change has been made. Your use of OPTrust Online Services after the effective date set out in the notice indicates your acceptance of the change.

#### Third Party Sites

8. Links to other websites are provided as a convenience only and do not constitute an endorsement or approval of the organization or the content of the site by OPTrust. Since OPTrust has no control or responsibility for third party sites, we do not assume any liability for their contents or any use you make of them.

#### Our Right To Terminate This Agreement

9. OPTrust may cancel your password, terminate this Agreement, or suspend or refuse to provide any electronic service without notice to you. OPTrust will not be liable for any loss or inconvenience that may result from such action. In all cases, you must fulfill all of your obligations under this Agreement.

#### Your Right to Cancel Any Electronic Service

10. Unless otherwise provided in this Agreement or agreed to by us, you may cancel OPTrust Online Services by notifying us by email or by phone.

11. Subject to your right to correct information in your personal file and any other rights you may have under law, you acknowledge and agree that once you have completed an online transaction (including updating your information or designations to the extent applicable), our records will be updated accordingly and will be considered correct and binding. You will receive an email confirming your online transaction. You agree to notify OPTrust if you do not receive confirmation of the transaction or if there are errors in the transaction. You acknowledge that OPTrust is entitled to rely on the information you provide through OPTrust Online Services to administer and pay benefits under the Plan.

#### Liability for Damages Limited

12. The internet is not a secure medium of communication and OPTrust cannot guarantee the privacy of information you share on this site. OPTrust makes commercially reasonable efforts to ensure that your information is safe and secure. However, OPTrust is not responsible in any manner for direct, indirect, special or consequential damages, however caused, arising out of your use of OPTrust Online Services, including damages you may suffer as a result of the transmittal of personal or confidential information by you to us, or the transmittal of such information to your from us, at your request, over the internet, or as a result of unauthorized activity in your account due to your breach of this Agreement.

13. OPTrust is not responsible or liable for any damage, loss or inconvenience you may incur if you are unable to access OPTrust Online Services as a result of any failure, error, or malfunction, even if the failure, error or malfunction is a result of our negligence or the negligence of our employees, agents or representatives.

#### Governing Law

14. This Agreement shall be governed by the law of the Province of Ontario and the laws of Canada applicable therein.

#### Quebec Only

15. I want this Agreement and any related documents to be in English. Je reconnais avoir exigé que cette convegion et les documents s'y rattachant soient rédigés en anglais.





Set a new password (again, something you will remember but is not easily guessable). We have built in additional requirements for passwords to help ensure your password is secure:

	Reset My Password	
	Reset my russword	
Our security settings have changed. Please reset Your password must include all of the following: • Uppercase (ABC) • Lowercase (abc) • Alphanumeric (a-z and 0-9) • Symbol (!@#\$%^&*()_+=) • Minimum of 8 characters	your password to meet the new security standards.	
Current Password*	Current Password	
Password *0	Password	
Confirm Password*	Confirm Password	

	Reset My Password	
Our security settings have changed. Please reset Your password must include all of the following: • Uppercase (ABC) • Lowercase (abc) • Alphanumeric (a-2 and 0-9) • Symbol (!@#\$%^&*()_+==) • Minimum of 8 characters	your password to meet the new security standards.	
Current Password *0		
Password *0		
Confirm Password*	•••••	
	Cancel Continue	



Once you click "Continue" you will be in the new site. The following reminder will pop up – click "I Understand" to continue:

OPTrust Security Reminder	
When leaving this site, please ensure you click the "Sign Out" button.	
	I Understand

VIDEO
Logging in.mp4

## **STEP BY STEP**

When you click on the "Sign In" link you will be brought to this page:

onlineServices	③ Help
	Welcome to the OPTrust Secure Portal
This is a secure site to send messages and atta	achments to OPTrust. If you have any questions please contact us at employerservice@optrust.com or 1-800-637-0024 or (416) 681-6100
Please sign in	
Email*	Email Address
Password*	Password
	Log in
	Forgot Your Password?

Enter your email address, password and click "Log in":





OPTrust Security Reminder	
When leaving this site, please ensure you click the "Sign Out" button.	
	I Understand

## FORGOT YOUR PASSWORD?

If you have forgotten your password, you can click on "Forgot Your Password" right under the Log In button.

You will be asked to enter your e-mail address. As long as a valid user e-mail address is entered you will be sent a link to get back into the system.

Once you click the link you will be asked one of your secret questions and if you enter the correct answer you will be able to reset your password and access the system.



## **TIMING OUT**

The system is designed to automatically time users out after 5 minutes of inactivity.

One minute prior to being automatically logged out you will get the following pop-up message:

	Keyword Search	Keyword Search	Keyword Search					
	Date Range	YYYY-MM-DD or Mo	onth DD, YY 📋 👔	/YYY-	MM-DD or Month DD, YY	<b>#</b>		Sea
	Inactive					×		
⊠	⊠ To					D	Date	
+	Air C 57s until your ses	sion time out!						10-A
$\bigcirc$	Air Canada Pilots	Enrolment	Enrolment	Ø	185450			05-A
	Air Canada Pilots	Member Data Update	Disability		185364			04-A
	Cabinet Office (54)	SES Conversion	Patrizia Durisotti WIN		367106			07-N

## WELCOME TO OUR NEW ONLINE SERVICES LANDING PAGE!

From here you can link to all kinds of information. Read the Online Services User Guide:





## Link to our Employer Manual:







### And easily access our employer forms:



## Other helpful links are at the bottom of the page, including our contact information:





## Additional useful links can be found on the side menu:

onlineServices			⑦ Help  Secure Messages Settings ▼ Sign out
<b>B</b> Welcome Michelle	Welcome to Online Service	es	
Air Canada Pilots         MAIN MENU         Home         Secure Messages         File Upload         Activity         User Administration	Here you can: • send and receive secure electronic message • send forms, documents and files • send payroll data files • receive reports from OPTrust Online Services is used by participating employer confidential employer/member data with OPTrus Read the Online Services User Guide	ges ers and external vendors to exchange ust.	
Resources  Pension Terms Tutorials and Videos  Attend an employer information session	Employer Manual Quick access to practical information on administering the OPSEU Pension Plan. View the Employer Manual >	Employer Update OPTrust produces an electronic news bulletin for employers to let you know about changes in our administrative policies or procedures. Read the latest employer updates >	Employer Forms Quick access to all the forms you will need. Download employer forms >
	Questions? If you have any questions, please cor Important: Please use your secure ac Pension Information	ntact the Data Management Group at (416) 681-61 count to send confidential information to OPTrus Legal Information	55. t. Information you send by regular email is not secure. <b>Contact Us</b>



## SENDING/RECEIVING SECURE MESSAGES

To start your session, use the drop-down menu at the top of the left-hand screen to select the employer you are working on (only required for users responsible for multiple organizations):

onlineServices	3	⑦ Help  Secure Messages Settings  Sign out
B Welcome Michelle	Welcome to Online Services	
Air Canada Pilots 🔹	Here you can: • send and receive secure electronic messages	
MAIN MENU	send forms, documents and files     send payroll data files	
🕋 Home	receive reports from OPTrust	
Secure Messages	Online Services is used by participating employers and external vendors to exchange confidential employer member data with OPTrust	
🔔 File Upload	connectual employermember data with of muse	
E Activity	Read the Online Services User Guide	

Secure messages can be accessed either through the "Secure Messages" button on the side menu or icon at the top of the screen. The number in the red circle at the top of the screen indicates the number of unread messages:

onlineServices	3	③ Het Secure Messages Settings ▼ Sign out
B Welcome Michelle	Welcome to Online Services	
Air Canada Pilots 👻	Here you can: • send and receive secure electronic messages	
MAIN MENU	send forms, documents and files     send payroll data files	
🕋 Home	receive reports from OPTrust	
Secure Messages	Online Services is used by participating employers and external vendors to exchange	
主 File Upload	connuentar employer/member data with or ridst.	
E Activity	Read the Online Services User Guide	
2+ User Administration		



## The messaging page looks like this:

<u> </u>		Messa	ging							
Air Canada Pilots 🛛 👻	🖴 Inbox	🖪 Sent	🖋 Drafts					Compose New Messag		
AIN MENU	To view me	essage, click o	n the Subject							
Home										
Secure Messages	Mailbox - All -					<u> </u>	View Unread Only			
File Upload	,	Keyword Search Keyword Search						view Archived		
Activity					Search					
Activity		Date Rang	e YYYY-MM-DD or M	onth DD, YY 📋 Y	(YYY	-MM-DD or Month DD, YY	<b>ii</b>	Scarch		
User Administration										
sources	⊠ To	~	From ~	Subject ~	Ø.	. Reference # Y	Emp. ID	Date		
	Air Cana	da Pilots	General Inquiry	Good Morning!		185611		07-May-2019 8:05AM		
Pension Terms	Air Cana	da Pilots	Termination	Termination		185501		10-Apr-2019 2:48PM		
Tutorials and Videos	Air Cana	da Pilots	Enrolment	Enrolment	Ø	185450		05-Apr-2019 11:45AM		
Attend an employer	Air Cana	da Pilots	Member Data Update	Disability		185364		04-Apr-2019 12:10PM		
information session	Cabinet 0	Office (54)	SES Conversion	Patrizia Durisotti WIN		367106		07-Mar-2018 12:00Al		
	Cabinet (	Office (54)	SES Conversion	RE Transfer to OPB a		363185		03-Jan-2018 12:00AN		
	Cabinet 0	Office (54)	SES Conversion	Patrizia Durisotti WIN		360241		07-Nov-2017 12:00A		
	Cabinet 0	Office (54)	SES Conversion	ACQUELYNN NEWMA		345506		22-Jun-2017 12:00AM		
	Sabinet Cabinet	Office (54)	SES Conversion	een Al Zalbak- WIN L.		345537		22-Jun-2017 12:00AN		
	Cabinet	Office (54)	SES Conversion	Jacquelynn Newman		345504		22-Jun-2017 12:00AM		
		1 / 3						1 - 10 of 24 ite		
		Pension	Information	Legal Info	rma	tion	Contact	lls		

onlineServices										⑦ Help	Secure N	lessages	Settings 🔻	Sign out
Welcome Michelle	Secu	ure Mess	agir	ng										
Air Canada Pilots 🛛 🗕	🖨 Inl	box 🖪 Sent	Ø 1	Drafts								Ø C	ompose New	Message
MAIN MENU	To vi	ew message, click	on the	Subject										
🕋 Home												willnrea	d Only	
Secure Messages		Mai	box	- All - Air Canada Pi	Air Canada Pilots					w Archiv	ed			
🔔 File Upload		Keyword Sea	arch	Cabinet Offic Carillion Cana	Cabinet Office (54) Carillion Canada									
🔲 Activity		Date Ra	nge	YYYY-MM-DD	DD or Month DD, YY			YY i	Search					
🕒 User Administration														
Resources	⊠ ~	То	~	From	~	Subject	~	<i>@</i> ~	Reference #	~	Emp. ID	~	Date	~
	$\bigcirc$	Cabinet Office (5	54)	SES Conversion		Parrie Dat	-		367106				07-Mar-2018	12:00AM
Pension Terms	$\bigcirc$	Cabinet Office (5	54)	SES Conversion		R. Lands			363185				03-Jan-2018	12:00AM
• Tutorials and Videos	$\bigcirc$	Cabinet Office (5	64)	SES Conversion		Parrow Dat			360241				07-Nov-2017	12:00AM



"Keyword Search" allows you to search messages by any word or phrase. Note: the system is unable to search for partial words, for example you can't enter "term" and see results, you need to enter "termination".

Additional search instructions can be found in Appendix A.

onlineServices	1						@ H	lelp	🜱 Secure Mes	sages	s Settings 🔻	Sign out
<b>Welcome Michelle</b>	Secu	ire Messa	agir	ng								
Air Canada Pilots 👻	🕰 Ini	oox 🖪 Sent	ø C	Drafts					[	Ø C	ompose New I	Message
MAIN MENU	To vi	ew message, click	on the	Subject								
🕋 Home									View I	Inrea	id Only	
🖂 Secure Messages		Mail	00X	- All -					View Archived			
🔔 File Upload		Keyword Sea	Keyword Search									
E Activity		Date Range YYYY-MM-DD or Month DD, YY 🗯 YYYY-MM-DD or Month DD, YY						Search				
🐣 User Administration												
Resources	$\bowtie$ ~	То	~	From ~	Subject ~	Ø ~	Reference #	Υ E	mp. ID	~	Date	~
	$\bigcirc$	Cabinet Office (5	4)	SES Conversion	Patrizia Durisotti WL		367106				07-Mar-2018	12:00AM
Pension Terms	$\bigcirc$	Cabinet Office (5	4)	SES Conversion	RE Transfer to OPB		363185				03-Jan-2018 1	2:00AM
Tutorials and Videos	$\bigcirc$	Cabinet Office (5	4)	SES Conversion	Patrizia Durisotti WL.,		360241				07-Nov-2017	12:00AM
Attend an employer		Cabinet Office (5	4)	SES Conversion	JACQUELYNN NEWM		345506				22-Jun-2017 1	2:00AM
information session		Cabinet Office (5	4)	SES Conversion	Leen Al Zalbak- WIN		345537				22-Jun-2017 1	2:00AM
		Cabinet Office (5	4)	SES Conversion	Jacquelynn Newman		345504				22-Jun-2017 1	2:00AM





Clicking on a message anywhere but the subject will open a preview of the message immediately below the list of messages:

Air Canada Pilots 👻	🖨 In	box 🖪 Sent 🤞	P Drafts					🖋 Co	mpose New Message	
MAIN MENU	To vi	ew message, click on	the Subject							
\land Home									d Oply	
Secure Messages		Mailbox	- All -				~	□ View Archived		
🔔 File Upload		Keyword Search	Keyword Search							
E Activity		Date Range	YYYY-MM-DD or Mo	onth DD, YY 📋	ΥΥΥΥ-	-MM-DD or Month DD. YY	=		Search	
🕒 User Administration		5								
Resources	⊠ To	×	From ~	Subject	Ø.,	. Reference #	Emp.	ID D	ate ~	
	🖾 Air	r Canada Pilots 📕	General Inquiry	Good Morning!		185611		0	7-May-2019 8:05AM	
Pension Terms	♠ Air	r Canada Pilots	Termination	Termination		185501		1	0-Apr-2019 2:48PM	
Tutorials and Videos	🛛 Air	r Canada Pilots	Enrolment	Enrolment	Ø	185450		0	5-Apr-2019 11:45AM	
Attend on employer	🖾 Air	r Canada Pilots	Member Data Update	Disability		185364		0	4-Apr-2019 12:10PM	
information session	© <sub>Ca</sub>	binet Office (54)	SES Conversion	Farmer Darment Will		367106		0	7-Mar-2018 12:00AM	
	☑ <sub>Ca</sub>	binet Office (54)	SES Conversion	R. Sandar to 1998 a		363185		0	3-Jan-2018 12:00AM	
	🖸 Ca	binet Office (54)	SES Conversion	Annual Surveyore and		360241		0	7-Nov-2017 12:00AM	
	🔁 Ca	binet Office (54)	SES Conversion			345506		2	2-Jun-2017 12:00AM	
	🗢 Ca	binet Office (54)	SES Conversion	een Al Zaibak- WIN L		345537		2	2-lun-2017 12:00AM	
	🗢 Ca	binet Office (54)	SES Conversion	arguelane tie		345504		2	2-lun-2017 12:00AM	
									1 10 -6 24 items	
	Thank	erstand J. Doe has tern	ninated, can you please c	onfirm2						
Air Canada Pilots -	🛥 In To vi	box 🛛 Sent 🧳	Drafts the Subject					ØC	ompose New Message	
A Home		Mailbox	- All -				~	🗆 View Unrea	id Only	
Secure Messages		Kowword Soarch	Kowword Search					View Archiv	ved	
File Upload		Reyword Search	Reyword Search						Search	
		Date Range	2018-01-01	=	2018	-12-31			Search	
Set User Administration		<b>T</b> -	Y	c. C. Line		Defense a	v F		Dete	
Resources	N Q	Cabinet Office (54)	SES Conversion	Subject	- Ø	367106	° En	ъ. Ю 🎺	07-Mar-2018 12:00AM	
Pension Terms		Cabinet Office (54)	SES Conversion	RE: Transfer to OPB.		363185			03-Jan-2018 12:00AM	
Tutorials and Videos										
Le Attend an employer										

Attend an employer information session



This will bring up the history of all messages exchanged under that reference number:

onlineServices	5		⑦ Help	😪 Secure Messa	ges Settings	Sign out
B Welcome Michelle	Record of Co	prrespondence				
Air Canada Pilots 👻	Back			Reply	Archive	🖶 Print
MAIN MENU	Reference # 3631	85				
삼 Home	From	Cabinet Office (54)		Message Read	2	
Secure Messages	To Date	SES Conversion 3-January-2018 at 12:00 AM		Archived [		
🔔 File Upload	Subject	Transfer to OPB as of August 29/17				
i≡ Activity	Hi Abida, Can you plea	ase advise how much the over contributed Pension is for September 21/17 and	d October 5	/17 pay, As I need 1	o recover to p	ay OPB. I
🕒 User Administration	had sent in the transfe	er OPT 1040 on November 27/17.				
Resources	From	SES Conversion		Message Read	ב	
Pension Terms	То	Cabinet Office (54)		Archived [		
Tutorials and Videos	Date Subject	3-January-2018 at 12:00 AM RE: Transfer to OPB as of August 29/17				
Attend an employer information session	On Sept.17 the overco	ontributed amount is \$200.89 and Oct.5 is \$216.34 for total of \$417.23				
	From	SES Conversion		Message Read	2	
	То	Cabinet Office (54)		Archived [		
	Date	3-January-2018 at 12:00 AM				
	Subject	RE: Transfer to OPB as of August 29/17				
	Your message regard	ing has been forwarded to Philip Mayers.				

onlineServices	3		⑦ Help Secure Messages Settings Sign ou
<b>Welcome Michelle</b>	Record of Co	rrespondence	
Air Canada Pilots 👻	Back		Reply Archive 🖶 Print
MAIN MENU	Reference # 3631	85	
🕋 Home	From	Cabinet Office (54)	Message Read 🛛 🗹
Secure Messages	To	SES Conversion	Archived 🗆
🔔 File Upload	Subject	Transfer to OPB as of August 29/17	
E Activity	Hi Abida, Can you ple	ase advise how much the over contributed Pension is for S	September 21/17 and October 5/17 pay, As I need to recover to pay OPB. I
2+ User Administration	had sent in the transf	er OP1 1040 on November 27/17. Thanks & regards	416-212-2612
Resources	From	SES Conversion Cabinet Office (54)	Message Read  Archived

Archive Message		×
Are you sure you want to archive this message?		
	Cancel	Confirm



## **COMPOSING A MESSAGE**

## VIDEO



Sending a Message.mp4

## **STEP BY STEP**

To send a new message, click "Compose New Message":

onlineServices								⑦ Hel	lp i	🗳 Secure Messa	iges	Settings  Sign out	
<b>e</b> Welcome Michelle	Secu	ire Mess	agir	ng									
Air Canada Pilots 🔹	🕰 Int	oox 🖌 Sent	Ø [	Drafts						e	🖍 Cor	npose New Message	
MAIN MENU	To vie	ew message, click	on the	e Subject									
😤 Home		Mail	hov						~	🗆 View Ur	nread	Only	
🖂 Secure Messages		Widi	DOX	- All -	- All -					□ View Archived			
🔔 File Upload		Keyword Sea	arch	Keyword Search	Keyword Search						_		
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Resources	⊠ ~	То	~	From	~ s	Subject ~	@~	Reference #	En	ıp. ID	~ C	Date ~	
		Cabinet Office (5	4)	SES Conversion	- (	Suy Lepage		31925			2	3-Feb-2009 12:00AM	
Pension Terms		Cabinet Office (5	4)	SES Conversion	¢	Suy Lepage		32010			2	6-Feb-2009 12:00AM	
Tutorials and Videos		Cabinet Office (5	4)	SES Conversion	- (	ORG 54 Transfer to		40262			0	08-Feb-2010 12:00AM	
Attend an employer		Cabinet Office (5	4)	SES Conversion	- 0	Siana Petersen-upo		45155			2	0-Oct-2010 12:00AM	
information session		Cabinet Office (5	4)	SES Conversion	1	eslie Hicks - has me		46142			0	08-Dec-2010 12:00AM	
		Cabinet Office (5	4)	SES Conversion	1	arge Contribution		154195			0	3-Sep-2014 12:00AM	

onlineServices	3	⑦ Help Secure Messages Settings ▼ Sign out
Welcome Michelle	New Secure Message	
Air Canada Pilots 👻	Reference #	185370
MAIN MENU	Mailbox *	Air Canada Pilots
삼 Home	Topic*	Disability
Secure Messages	Employee ID	+
🔔 File Upload	*	
E Activity	Content	B I U H1 H2 I≣ ⊞
Set User Administration		Insert text here



onlineServices	3		⑦ Help	Secure Messages	Settings 🔻	Sign out
Welcome Michelle	New Secure Message					
Air Canada Pilots	Reference #	185370				
		Choose a Mailbox				
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onlineServices	8		⑦ Help	Secure Messages	Settings 🔻	Sign out
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B Welcome Michelle	New Secure Message					
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Welcome Michelle	New Secure Message					
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主 File Upload		Leave of Absence Long Term Illness				
I≡ Activity	Content*	Mandatory Transfer into OPTrust Mandatory Transfer Out to OPB				
2+ User Administration		Member Data Update or Inquiry Pre-Patirement Death				
D		Retirement				
Resources		Termination				
Pension Terms						



If you select "General Inquiry" a "Subject" box will appear. Note: it will not appear for other mailboxes. Enter the subject:

onlineServices	3		⑦ Help	Secure Messages	Settings 🔻	Sign out
<b>B</b> Welcome Michelle	New Secure Message					
Air Canada Pilots 👻	Reference #	185370				
MAIN MENU	Mailbox*	Air Canada Pilots				~
\land Home	Topic *	General Inquiry				~
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ሷ File Upload	Freedower ID					
I Activity	Employee ID					Ŧ
2+ User Administration	Content*	B I U H₁ H₂ IΞ ≔				
Resources		Insert text here				

If available enter the "Employee ID". This will help ensure we are addressing the correct member for both OPTrust and you as the employer. Once an Employee ID is entered it will appear below the Employee ID line with a garbage can icon if it needs to be removed or corrected:

onlineServices	3		⑦ Help	Secure Messages	Settings 🔻	Sign out
Welcome Michelle	New Secure Message					
Air Canada Pilots 🔶	Reference #	185496				
MAIN MENU	Mailbox *	Air Canada Pilots				~
\land Home	Topic*	General Inquiry				~
Secure Messages	Subject*	Salary Confirmation for J. Doe				
🏦 File Upload	Employee ID					+
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🐣 User Administration		12345				
Resources	Content*	B I U H₁ H₂ i≡ ≔				
Pension Terms		Insert text here				



onlineServices	1		() Help	Secure Messages	Settings 🔻	Sign out
<b>e</b> Welcome Michelle	New Secure Message					
Air Canada Pilots 🔶	Reference #	185496				
MAIN MENU	Mailbox*	Air Canada Pilots				~
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Pension Terms		Hi,				
Tutorials and Videos		Can you please conifm the 2018 salary rate for J. Doe?				
2 Attend an employer		Thank you for your help,				
information session		Michelle				
			⑦ Help	Secure Message	s Settings	Sign out
<b>Online Services</b>	S		(?) Help	Secure Message	s Settings '	Sign out
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Velcome Michelle Air Canada Pilots	S New Secure Message Reference # Mailbox*	185496 Air Canada Pilots	@ Help	Secure Message	s Settings	Sign out
Velcome Michelle Air Canada Pilots	S New Secure Message Reference # Mailbox* Topic*	185496 Air Canada Pilots General Inquiry	() Help	Secure Message:	s Settings	<ul> <li>Sign out</li> <li>V</li> <li>V</li> </ul>
Welcome Michelle         Air Canada Pilots         MAIN MENU         Home         Secure Messages	New Secure Message Reference # Mailbox* Topic* Subject*	185496 Air Canada Pilots General Inquiry Salary Confirmation for J. Doe	(7) Help	Secure Messages	s Settings '	<ul> <li>Sign out</li> <li>V</li> <li>V</li> </ul>
Welcome Michelle         Air Canada Pilots         MAIN MENU         Home         Secure Messages         File Upload	S New Secure Message Reference # Mailbox* Topic* Subject* Employee ID	185496 Air Canada Pilots General Inquiry Salary Confirmation for J. Doe	@ Help	Secure Message:	s Settings	v Sign out
Welcome Michelle         Air Canada Pilots         MAIN MENU         Air Gure Messages         File Upload         Activity         Ulser Administration	New Secure Message Reference # Mailbox* Topic* Subject* Employee ID	185496 Air Canada Pilots General Inquiry Salary Confirmation for J. Doe 12345	(7) Help	Secure Messages	s Settings	<ul> <li>Sign out</li> <li>Sign out</li> </ul>
Velcome Michelle         Air Canada Pilots         MAIN MENU         Main MENU         Secure Messages         File Upload         Activity         User Administration         Resources	New Secure Message Reference # Mailbox * Topic * Subject * Employee ID	185496 Air Canada Pilots General Inquiry Salary Confirmation for J. Doe	(2) Help	Secure Message:	s Settings	<ul> <li>Sign out</li> <li>Sign out</li> <li>+</li> </ul>
Welcome Michelle         Air Canada Pilots         MAIN MENU         Air Canada Pilots         MAIN MENU         Home         Secure Messages         File Upload         Activity         User Administration         Resources         Pension Terms	New Secure Message Reference # Mailbox* Topic* Subject* Employee ID Content	185496 Air Canada Pilots General Inquiry Salary Confirmation for J. Doe 12345	(7) Help	Secure Messages	s Settings \	<ul> <li>Sign out</li> <li>Sign out</li> <li>+</li> </ul>
Velcome Michelle         Air Canada Pilots         MAIN MENU         Secure Messages         File Upload         Activity         Velcome Administration         Resources         Pension Terms         Tutorials and Videos	New Secure Message Reference # Mailbox* Topic* Subject* Employee ID Content	185496         Air Canada Pilots         General Inquiry         Salary Confirmation for J. Doe         12345         B       I         Hi,         Can you please confirm the 2018 salary rate for J. Doe?	(2) Help	Secure Message:	s Settings	<ul> <li>Sign out</li> <li>Sign out</li> <li>+</li> </ul>
Welcome Michelle         Air Canada Pilots         MAIN MENU         Air Canada Pilots         MAIN MENU         Secure Messages         File Upload         Activity         Secure Administration         Resources         Pension Terms         Tutorials and Videos         Attend an employer	New Secure Message Reference # Mailbox* Topic* Subject* Employee ID Content	185496 Air Canada Pilots General Inquiry Salary Confirmation for J. Doe 12345 B I U Ha Ha E E Hi, Can you please confirm the 2018 salary rate for J. Doe? Thank you for your help,	(P) Help	Secure Messages	s Settings	<ul> <li>Sign out</li> <li>Sign out</li> <li>+</li> </ul>
Welcome Michelle         Air Canada Pilots         MAIN MENU         Home         Secure Messages         File Upload         Activity         User Administration         Resources         Pension Terms         Tutorials and Videos         Attend an employer information session	New Secure Message Reference # Mailbox* Topic* Subject* Employee ID Content	185496 Air Canada Pilots General Inquiry Salary Confirmation for J. Doe 12345 B J U H <sub>1</sub> H <sub>2</sub> IE II Hi, Can you please confirm the 2018 salary rate for J. Doe? Thank you for your help, Michelle	(?) Help	Secure Messages	s Settings	<ul> <li>Sign out</li> <li>Sign out</li> <li>+</li> </ul>

## Enter your message in the "Content" box:



onlineServices	3		⑦ Help	Secure Messages	Settings 🔻	Sign out
B Welcome Michelle	New Secure Message					
Air Canada Pilots 🔹	Reference #	185496				
MAIN MENU	Mailbox *	Air Canada Pilots				~
\land Home	Topic*	General Inquiry				~
Secure Messages	Subject *	Salary Confirmation for J. Doe				
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Resources	Content*	B I U H1 H2 ∏≣ ⊞				
Pension Terms		Hi,				
Tutorials and Videos		Can you please confirm the 2018 salary rate for J. Doe?				
Attend an employer		Thank you for your help,				,
information session		Michelle				
	Drag files here or	Choose File			J	
				Delete 🛛 Save	A Send Me	essage
🖓 OPTrust	Pension Information	n Legal Information		Contact Us		

## Once your message is complete select "Send Message" to send it:

onlineServices	3		⑦ Help	Secure Messages	Settings 🔻	Sign out
Welcome Michelle	New Secure Message	2				
Air Canada Pilots 👻	Employee "12345" not found					
MAIN MENU	Reference #	185496				
\land Home	Mailbox*	Air Canada Pilots				~
Secure Messages	Topic*	General Inquiry				~
<ul> <li>File Upload</li> <li>Activity</li> </ul>	Subject*	Salary Confirmation for J. Doe				
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Pension Terms	Content*	B I U H₁ H₂ ¦≣ ≔				
Tutorials and Videos		Hi,				
Attend an employer information session		Can you please confirm the 2018 salary rate for J. Doe?				
		Thank you for your help,				
		Michelle				
	Drag files here or	Choose File				
			ť	Delete 🔀 Save	🖪 Send Me	essage

out



If this happens correct the Employee ID number or if it is not available remove the number and resend the message. Note: If you have the correct ID but the system isn't accepting it you can include it in the body of your message:

onlineServices	3		() Help	Secure Messages	Settings 🔻	Sign out
Welcome Michelle	New Secure Message					
Air Canada Pilots 👻	• Employee "12345" not found					
MAIN MENU	Reference #	185496				
삼 Home	Mailbox*	Air Canada Pilots				~
Secure Messages	Topic*	General Inquiry				~
🔔 File Upload	Subject*	Salary Confirmation for J. Doe				
Ser Administration	Employee ID					+
Resources	Content*	B I <u>U</u> H1 H2 \≣ \≡				
i Pension Terms	(	Re: Employee ID 12345				^
Tutorials and Videos		Hi,				
Attend an employer information session		Can you please confirm the 2018 salary rate for J. Doe?				
		Thank you for your help,				~
	Drag files here or	Choose File				
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OPTrust	Pension Information	n Legal Information		Contact Us		

-	onlineServices						⑦ Hel	p 🔡 Secure Message	s Settings 🕶 Sign out
6	Welcome Michelle	Sec	ure Messagii	ng					
A	Air Canada Pilots 🛛 👻	\varTheta In	box 🖈 Sent 🛷	Drafts				<i>a</i> 0	ompose New Message
MA	IN MENU	To vi	iew message, click on th	e Subject					
*	Home							View Upre	ad Only
	Secure Messages		Mailbox	- All -				View Archi	ved
<b>1</b> .	File Upload		Keyword Search	Keyword Search					
	Activity		Date Range	YYYY-MM-DD or Mor	nth DD, YY 🗯 Y	YYY-MN	1-DD or Month DD, YY	<b>#</b>	Search
<b>_</b> +	User Administration								
Res	ources	$\bowtie$ ~	To ~	From ~	Subject ~	@ ~	Reference # ~	Emp. ID ~	Date ~
			General Inquiry	Air Canada Pilots	Salary Confirmation		185496		10-Apr-2019 10:47AM
Ű	Pension Terms	$\bigcirc$	Disability	Air Canada Pilots	Disability		185363		04-Apr-2019 12:06PM
	Tutorials and Videos	$\bigcirc$	SES Conversion	Cabinet Office (54)	RE: Patrizia Durisotti		367106		07-Mar-2018 12:00AM
•=	Attend an employer	$\bigcirc$	SES Conversion	Cabinet Office (54)	Transfer to OPE as o		363185		03-Jan-2018 12:00AM
	information session	$\bigcirc$	SES Conversion	Cabinet Office (54)	RE: Leen Al Zaibak	Ø	345537		22-Jun-2017 12:00AM
		$\bigcirc$	SES Conversion	Cabinet Office (54)	RE: Guy Lepage		31925		23-Feb-2009 12:00AM
		•	۹ <u>۱</u> /1 Þ	M					1 - 6 of 6 items



If a message has been read the envelope icon will appear open:

onlineServices	3				() He	elp 🛛 Secur	re Messages Settings 👻 Sign out
Welcome Michelle	Secure Messa	ging					
Air Canada Pilots 🔹	🕰 Inbox 🛛 🧏 Sent	🖋 Drafts					🖋 Compose New Message
MAIN MENU	To view message, click or	the Subject					
🗥 Home	Mailbo	x - All -				•	View Unread Only
Secure Messages							View Archived
主 File Upload	Keyword Searc	h Keyword Search					_
i≡ Activity	Date Rang	e YYYY-MM-DD or M	Nonth DD, YY 📋	YYYY-	MM-DD or Month DD, YY	-	Search
🐣 User Administration							
Resources	⊠ To ~	From	Subject	~ <i>@</i> .	. Reference # Y	Emp. ID	Date ~
	Termination	Air Canada Pilots	Termination	Ø	185600		30-Apr-2019 1:35PM
Pension Terms	Termination	Air Canada Pilots	Termination	Ø	185599		30-Apr-2019 1:31PM
Tutorials and Videos	Enrolmont	Air Canada Pilots	Enrolment		185596		29-Apr-2019 2:16PM
Attend an employer	Dermination	Air Canada Pilots	Termination		185595		29-Apr-2019 2:12PM
information session	Termination	Air Canada Pilots	Termination		185593		29-Apr-2019 2:08PM
	Termination	Air Canada Pilots	Termination		185559		17-Apr-2019 9:38AM
	Retirement	Air Canada Pilots	Retirement		185558		17-Apr-2019 9:19AM
	Retirement	Air Canada Pilots	Retirement		185557		17-Apr-2019 9:18AM
	Termination	Air Canada Pilots	Termination	Ø	185501		10-Apr-2019 2:48PM
	Termination	Air Canada Pilots	Termination	Ø	185499		10-Apr-2019 2:25PM
							1 - 10 of 15 items
DT west	Pension	Information	Legal	Informa	tion	Contac	t Us

onlineServices	s				() H	elp 🛃 S	Secure Messages Settings  Sign
B Welcome Michelle	Secure Mess	aging					
Air Canada Pilots 🔹	🖴 Inbox 🛛 🖪 Sent	🖋 Drafts					🖋 Compose New Messa
MAIN MENU	To view message, click	c on the Subject					
🕋 Home	Mai	lbox - All -				v	View Unread Only
Secure Messages	Ivia					· _	□ View Archived
🔔 File Upload	Keyword Se	arch Keyword Search					
E Activity	Date Ra	ange YYYY-MM-DD or	Month DD, YY 📋	YYYY-	MM-DD or Month DD, YY	<b>#</b>	Search
9+ User Administration							
Resources	⊠ To	~ From	<ul><li>Subject</li></ul>	~ Ø	Reference #	Emp. ID	Date
Develop Terrer	Termination	Air Canada Pilots	Termination	Ø	185600		30-Apr-2019 1:35PM
Pension Terms	Termination	Air Canada Pilots	Termination	Ø	185599		30-Apr-2019 1:31PM
Tutorials and Videos	Enrolment	Air Canada Pilots	Enrolment		185596		29-Apr-2019 2:16PM
Attend an employer	Termination	Air Canada Pilots	Termination		185595		29-Apr-2019 2:12PM
information session	Termination	Air Canada Pilots	Termination		185593		29-Apr-2019 2:08PM
	Termination	Air Canada Pilots	Termination		185559		17-Apr-2019 9:38AM
	Retirement	Air Canada Pilots	Retirement		185558		17-Apr-2019 9:19AM
	Retirement	Air Canada Pilots	Retirement		185557		17-Apr-2019 9:18AM
	Termination	Air Canada Pilots	Termination	Ø	185501		10-Apr-2019 2:48PM
	Termination	Air Canada Pilots	Termination	Ø	185499		10-Apr-2019 2:25PM
		2 ► ►					1 - 10 of 15 iter
	Pensic	on Information	Legal	Informat	tion	Cor	itact Us



onlineServices	;	⑦ Help 🛛 Secure Messages Settings ▼ Sign out
<b>B</b> Welcome Michelle	Record of Correspondence	
Air Canada Pilots 👻	Back	Reply Archive 🖨 Print
MAIN MENU	Reference # 185496	
🗥 Home	From Air Canada Pilots	Message Read 🛛 🗹
Secure Messages	To General Inquiry Date 10-April-2019 at 11:07 AM	Archived 🗆
🏦 File Upload	Subject Salary Confirmation for J. Doe	
E Activity	Re: Employee ID 12345	
🐣 User Administration	ц;	
Resources	nı,	
Pension Terms	Can you please confirm the 2018 salary rate for J. Doe?	
Tutorials and Videos		
▲= Attend an employer information session	Thank you for your help,	
	Michelle	
ODT:	Pension Information	Legal Information Contact Us
	Information for Members	Privacy 🌴 OPTrust.com Terms of Lise 🕴 Toronto calling area: (416) 681-6155
		⑦ Help 😒 Secure Messages Settings ▾ Sign out
Onmeservices		
Welcome Michelle	Record of Correspondence	
Air Canada Pilots 👻	Back	Reply Archive 🖶 Print
MAIN MENU	Reference # 185496	
🕋 Home	From Air Canada Pilots	Message Read
Secure Messages	To General Inquiry Date 10-April-2019 at 11:07 AM	Archived 🗆
🔔 File Upload	Subject Salary Confirmation for J. Doe	
😑 Activity	Re: Employee ID 12345	
2+ User Administration		
Resources	Hi,	
Pension Terms	Can you please confirm the 2010 calary rate for L Deca	
Tutorials and Videos	can you prease commit the 2016 salary fate for J. D00?	
L ■ Attend an employer information session	Thank you for your help,	
	Michelle	

Clicking on the "Subject" of the message will allow you to view what was sent:



onlineServices	3	⑦ Help  😴 Secure Messages Setting:	Sign out
B Welcome Michelle	Reply Secure Messag	e	
Air Canada Pilots 🔹	Reference #	185496	
MAIN MENU	Mailbox*	Air Canada Pilots	~
🕋 Home	Topic*	General Inquiry	~
Secure Messages	Subject*	Re: Salary Confirmation for J. Doe	
😥 File Upload	Employee ID		+
Ser Administration	Archived		
Resources	Content*	B I U H₁ H₂ ⊞ ⊞	
Pension Terms		Insert text here	
Tutorials and Videos			
Attend an employer information session			
	Drag files here or	Choose File	
		🗓 Delete 🛛 Save 🔰 Send	Message

Clicking "Reply" will return you to the message template:

Archive Message		×
Are you sure you want to archive this message?		
	Cancel	Confirm



"Cancel" will return you to your message. Clicking "Confirm" will move the message to your Archives where you will only be able to see it if you click "View Archived" in your sent box:

onlineServices	S							(?) Hel	p 🛃 Secure Messag	es Settings▼ Sign out
Welcome Michelle	Secu	re Messa	igi	ng						
Air Canada Pilots 🔹	🖴 Inbo	x 🖌 Sent	ø (	Drafts					ø	Compose New Message
MAIN MENU	To view	v message, click	on the	e Subject						
A Home	Mailbox			- All -	All - View Unread Only					ead Only
Secure Messages	Keyword Search			Keyword Search					View Arch	nived
E Activity		Date Rar	nge	YYYY-MM-DD or M	Non	th DD, YY 📋 Y	YYY-MN	I-DD or Month DD, YY	<b> </b>	Search
Set User Administration Resources	⊠ × T	Го	~	From	~	Subject ×	@ ~	Reference # ×	Emp. ID ~	Date ~
Pension Terms		General Inquiry Disability		Air Canada Pilots Air Canada Pilots	<	Salary Confirmation Disability	>	185496 185363		10-Apr-2019 10:47AM 04-Apr-2019 12:06PM
<ul> <li>Tutorials and Videos</li> <li>Attend an employer information session</li> </ul>	2 S	ES Conversion ES Conversion ES Conversion ES Conversion ES Conversion ES Conversion ES Conversion		Cabinet Office (54) Cabinet Office (54) Cabinet Office (54) Cabinet Office (54) Cabinet Office (54) Cabinet Office (54) Cabinet Office (54)		RE: Amit Gundu- W., RE: Amit Gundu-Win, Ponja Narang- Emp., RE: Ponja Narang- W. RE: Stephen Moure-, RE: Patrola Durisotti, RE: Leen Al Zathak-, Transfer to OPB as o.	e	378966 378939 376337 376276 368446 367106 366622 363185		28-Sep-2018 12:00AM 27-Sep-2018 12:00AM 26-Jul-2018 12:00AM 25-Jul-2018 12:00AM 04-Apr-2018 12:00AM 07-Mar-2018 12:00AM 01-Mar-2018 12:00AM
		1 / 3 Pensio	▶ (	▶ I		Legal <u>Infor</u>	mati <u>o</u>	n	Contact Us	1 - 10 of 27 items

🐱 Correspondence-ReferenceNo-185496.pdf - Adobe Acrobat Pro DC File Edit View Window Help

Home Tools Document 🕒 🖶 🖂	Q O I 1/1 ConineServices Record of Correspondence Reference # 185496		
	From       Air Canada Pilots         To       General Inquiry         Date       Apr 10, 2019 11:07 AM         Subject       Salary Confirmation for J. Doe	Message Read Archived	yes no
	Re: Employee ID 12345 Hi,		
	Can you please confirm the 2018 salary rate for J. Doe? Thank you for your help,		
	Michelle		



onlineServices					⑦ Help	Secure Messages	s Settings ▼ Sign out
B Welcome Michelle	New Secure Messa	age					
Air Canada Pilots 🔹	Reference	e # 185499					
MAIN MENU	Mailb	oox <sup>*</sup> Air Canada P	ilots				~
🗥 Home	Тор	pic <sup>*</sup> Termination					~
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	Linployee						•
E Activity	Conte	ent <sup>*</sup> B I U	H1 H2 ∃Ξ Ξ				
At User Administration		Hi,					
		Attached plea	ase find the Notice of Ter	rmination for J.	Doe, Employee ID 12	3456	
Resources							
Pension Terms							
▶ Tutorials and Videos							/
L ■ Attend an employer information session	Drag files here	e or Choose File					
					〕	Delete 🔀 Save	<b>৵</b> Send Message
nt OPTrust	Pension Inform	nation	Legal Infor	mation		Contact Us	
	Information for Membe	Nors	Privacy			A OPTrust.com	
onlineServices	Toformation for Membe	ars	Priceor		() Help	Secure Messages	s Settings▼ Sign out
ConlineServices	Secure Messaging		Rhaor		@ Help	CERTURN COM	s Settings ▼ Sign out
Online Services         Owner Michelle         Air Canada Pilots	Secure Messaging	its	Ribaov		() Help	Certrust com	s Settings ▼ Sign out ompose New Message
Welcome Michelle Air Canada Pilots	Secure Messaging Infox Sent To view message, click on the Suf	hire Tisject	Rhaor		⑦ Help	CETrust com	s Settings ▼ Sign out
Welcome Michelle         Air Canada Pilots         MAIN MENU         Home	Secure Messaging	its bject	Ritaov		() Help	Secure Messages	s Settings ▼ Sign out
Online Services         Over the services         Welcome Michelle         Air Canada Pilots         MAIN MENU         Home         Secure Messages	Secure Messaging Inbox Sent Draft To view message, click on the Sut Mailbox	its ibject - All -	Privace		⑦ Help	OPTrust com     Secure Messages     OPTrust com     OPTru	s Settings ▼ Sign out ompose New Message id Only
Online Services         Welcome Michelle         Air Canada Pilots         MAIN MENU         Main MENU         Meme         Secure Messages         Image: File Upload	Secure Messaging Information for Membrid Secure Message, dick on the Suit Mailbox Keyword Search	its bject - All - Keyword Search	Rhaor		⑦ Help	CERVISE CON Secure Messages C C C Usew Unrea Uview Archiv	s Settings ▼ Sign out ompose New Message Id Only red
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Image: Secure Alichelle         Air Canada Pilots         MAIN MENU         Image: Home         Secure Messages         Image: File Upload         Image: Activity         User Administration         Descources	Secure Messaging ■ Inbox ■ Sent ■ Draft To view message, click on the Sut Mailbox = Keyword Search K Date Range Y ■ To • Fro	fts Toject - All - Keyword Search YYYY-MM-DD or Mont om	h DD, YY	YYY-MM-DD or € ~ Refer	⑦ Help       Month DD, YY       ence #	Secure Messages  Secure Messages  C C U U U U U U U U U U U U U U U U U	s Settings Version Sign out ompose New Message ad Only red Search Date Version
Image: Services         Image: Services         MAIN MENU         Image: Secure Messages         Image: File Upload         Image: Activity         Image: User Administration         Resources	Secure Messaging ■ Inbox ■ Sent ■ Draft To view message, click on the Sut Mailbox = Keyword Search K Date Range Y ■ To Fro ■ Air Canada Pilots Enr	fts bject - All - Keyword Search YYYY-MM-DD or Mont om v	h DD, YY 👛 Yi Subject v Enrolment	YYY-MM-DD or	⑦ Help       Month DD, YY       ence #        Fin	OPTost con     Secure Messages     View Unrea     View Archiv     View Archiv     Np. ID     V	s Settings Vign out Search Search Search
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Conline Services  Welcome Michelle  Air Canada Pilots  MAIN MENU  MAIN MENU  Melcome Messages  File Upload  Activity  User Administration  Resources  Pension Terms Tutorials and Videos	Secure Messaging ■ Inbox ■ Sent ■ Draft To view message, click on the Sut Mailbox = Keyword Search K Date Range Y ■ ^ To ~ Fro ■ Air Canada Pilots Enr Air Canada Pilots Me © Cabinet Office (54) SES	its ibject - All - Keyword Search YYYY-MM-DD or Mont om v s rolment ember Data Updat S Conversion	h DD, YY 📫 Y Subject × Enrolment Disability	YYY-MM-DD or	⑦ Help Month DD, YY ence # < Encipe 60 64	CERUSE CON   Secure Messages    C  C  C  C  C  C  C  C  C  C  C  C	s Settings V Sign out ompose New Message ad Only ved Search Date V 05-Apr-2019 11:45AM 04-Apr-2019 12:10PM 07-Mar-2018 12:00AM
Welcome Michelle Air Canada Pilots MAIN MENU Home Secure Messages File Upload Activity User Administration Resources Pension Terms Tutorials and Videos Attend an employer	Secure Messaging ■ Inbox ■ Sent ■ Draft To view message, click on the Sut Mailbox - Keyword Search K Date Range Y ■ ^ To ~ Fro ■ Air Canada Pilots Enr Air Canada Pilots Me © Cabinet Office (54) SES	its ibject - All - Keyword Search YYYY-MM-DD or Mont om v s rolment ember Data Updat S Conversion S Conversion	h DD, YY 🚔 Y Subject × Enrolment Disability F	YYY-MM-DD or	③ Help Month DD, YY Ence #  Ence 50 60 64 65	CERUSE CON  Secure Messages  C C C C C C C C C C C C C C C C C C	s Settings V Sign out ompose New Message ad Only red Search Date V 05-Apr-2019 11:45AM 04-Apr-2019 12:10PM 07-Mar-2018 12:00AM 03-Jan-2018 12:00AM

JACQUELYNN NEWM ...

Leen Al Zalbak- WIN...

Jacquelynn Newman...

.een Al Zaibak-Win..

Diana Petersen- WL.

Legal Information

345506

345537

345504

339695

309861

Messages can also be saved and returned to later. To do so click "Save":

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4 1

Cabinet Office (54)

/ 3 🕨 📕

Pension Information

SES Conversion

SES Conversion

SES Conversion

SES Conversion

SES Conversion

22-Jun-2017 12:00AM

22-Jun-2017 12:00AM

22-Jun-2017 12:00AM

05-May-2017 12:00AM

12-Oct-2016 12:00AM

Contact Us

1 - 10 of 22 items



onlineServices	;								@⊦	lelp 🔡 Secure	e Message	es Settings <b>-</b>	Sign out
B Welcome Michelle	Secure	Mess	aging										
Air Canada Pilots 👻	🖴 Inbox	A Sent	J Drafts								Ø	Compose New Me	essage
MAIN MENU	Please note,	the mess	ages below have no	t bee	n sent to OPTrust								
🕋 Home													
Secure Messages	То	~	From	~	Subject	×	@ ~	Reference #	~	Emp. ID	~	Date	~
🔔 File Upload			Air Canada Pilots	$\langle$	Termination	>		185499				10-Apr-2019 2:25	PM
E Activity			Air Canada Pilots		General Inquiry			185367				04-Apr-2019 12:1	5PM
2+ User Administration													
Resources													
Pension Terms													
Tutorials and Videos													
Attend an employer information session		/ 1										1 - 2 of 2	! items
OPTrust	Canada's larnest	Pensic Informati Informati	on Information on for Members on for Retirees		<b>Le</b> Priv Teri	<b>gal In</b> acy ns of Us	nforma e	tion		Contact & OPTrus	US st.com to calling are	sa: (416) 681-6155	

To continue with your message, click on the subject line:



## **REPLYING TO A MESSAGE**

## VIDEO



Replying to a Message.mp4

## **STEP BY STEP**

To reply to a message, open the message you are responding to by clicking on the "Subject":

onlineServices	5				() He	elp 🛃	Secure Messag	es Settings - Sign out
<b>B</b> Welcome Michelle	Secure Messag	ging						
Air Canada Pilots 👻	🖙 Inbox 🖪 Sent	🖋 Drafts					ø	Compose New Message
MAIN MENU	To view message, click on	the Subject						
\land Home	Mailbo	- All -				~	🗆 View Unr	ead Only
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🔝 File Upload	Keyword Search	Keyword Search						_
≅ Activity	Date Range	YYYY-MM-DD or Mo	onth DD, YY 📋 👔	/YYY-I	MM-DD or Month DD, YY	<b></b>		Search
😂 User Administration								
Resources	⊠ То ~	From ~	Subject ~	Ø	Reference #	Emp. ID		Date ~
	Air Canada Pilots	General Inquiry	Good Morning!		185611			07-May-2019 8:05AM
Pension Terms	<ul> <li>Air Canada Pilots</li> </ul>	Termination	Termination		185501			10-Apr-2019 2:48PM
Tutorials and Videos	Air Canada Pilots	Enrolment	Enrolment	Ø	185450			05-Apr-2019 11:45AM
Attend an employer	Air Canada Pilots	Member Data Update	Disability		185364			04-Apr-2019 12:10PM
information session	Cabinet Office (54)	SES Conversion	Patrizia Durisotti WIN		367106			07-Mar-2018 12:00AM
	Cabinet Office (54)	SES Conversion	RE: Transfer to OPB a		363185			03-Jan-2018 12:00AM
	Cabinet Office (54)	SES Conversion	Patrizia Durisotti WIN		360241			07-Nov-2017 12:00AM
	Cabinet Office (54)	SES Conversion	ACQUELVNN NEWMA		345506			22-Jun-2017 12:00AM
	Cabinet Office (54)	SES Conversion	Leen Al Zalbak- WIN L.		345537			22-Jun-2017 12:00AM
	Cabinet Office (54)	SES Conversion	Jacquelynn Newman		345504			22-Jun-2017 12:00AM
								1 - 10 of 24 items
ODTrust	Pension 1	nformation	Legal Info	rmat	tion	Co	ntact Us	



## Click "Reply":

onlineServices	3			⑦ Help 🛛 Secure Mess	ages Settings - Sign out
Welcome Michelle	Record of Corres	ondence			
Air Canada Pilots 🗸	Back			Rer	w Archive 🖶 Print
	Reference # 185501			inc.	y Active Brinne
		de Dilete		M	_
Secure Messages	From Air Cana To Termina	da Pilots tion		Message Read Archived	
🔔 File Upload	Subject Termina	2019 at 2:09 PM tion			
E Activity	Hi Michelle,				
2+ User Administration					
Resources	Yes, that is correct, J. Doe did te	rminate. I have attached	their Notice of Termination form.		
Pension Terms	Sincerely.				
Tutorials and Videos	,,,				
Attend an employer information session	Michelle				
	D				
	Attached Files: Doe.docx 🛓				
	From Termina	tion da Pilots		Message Read	
	Date 10-April-	2019 at 2:49 PM		Actived	
	Hi.	tion			
				@ Holo 🔊 Socura	Mossagos Sottings - Sign out
onlineServices	5			Teh Secure	Messages Settings - Sgirout
<b>B</b> Welcome Michelle	Reply Secure Me	ssage			
Air Canada Pilots 🔹	Refere	nce # 185501			
MAIN MENU	Ma	ailbox <sup>*</sup> Air Canada P	ilots		~
A Home		Topic <sup>*</sup> Termination			~
Secure Messages	Si	ibiect Re: Terminatio	n		
🔔 File Upload					
i≡ Activity	Employ	ee ID			+
🐣 User Administration	Arc	hived 🗌			
Resources	Co	ntent <sup>*</sup> B I U	H1 H2 ]Ξ ≔		
Pension Terms		Insert text he	·0		
Tutorials and Videos					
Attend an employer					
Information session					
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	Pension Info	ormation	Legal Information	Contact	Us



## Enter your message:

onlineServices	5		⑦ Help	Secure Messages	Settings 🔻	Sign out
Welcome Michelle	Reply Secure Messag	e				
Air Canada Pilots 👻	Reference #	185501				
MAIN MENU	Mailbox *	Air Canada Pilots				~
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2+ User Administration	20ntent*	B I <u>U</u> H1 H2 Ε Ξ				
Resources		Thank you for confirming this!				
Pension Terms		Sincerely,				
Tutorials and Videos		Michelle				
Attend an employer information session						
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nt OPTrust	Pension Informatio	n Legal Information		Contact Us		

onlineServices	5	0	Help 📘	Secure Messages	Settings 🔻	Sign out
Welcome Michelle	Reply Secure Messag	e				
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Resources		Thank you for confirming this!				
Pension Terms		Sincerely,				
Tutorials and Videos		Michelle				
Attend an employer information session						
	Drag files here or	Choose File				
			D D	elete 🔀 Save	🖪 Send Me	essage
OPTrust	Pension Information	n Legal Information	C	Contact Us		





If you need to return to the message later, you can save it and it will appear in your drafts:


## To open it click on the "Subject":

onlineServices							(?)	Help 🛛 🔽 Secur	e Messages Settin	igs ▼ Sign out
	Secure	Mess	aging							
Air Canada Pilots 🔹	🖴 Inbox	🖪 Sent	🖋 Drafts						🖋 Compose	New Message
MAIN MENU	Please not	e, the messa	ages below have r	not been sent to OPTrust						
🕋 Home										
Secure Messages	То	~	From	Subject	~ Ø.	. Reference #	~	Emp. ID	Date	~
🔔 File Upload	Termination		Air Canada Pilot	s Termination		185501			01-May-2	019 4:30PM
= Activity			Air Canada Pilot	No Subject	Ø	185576			25-Apr-20	019 12:53PM
i Activity			Air Canada Pilot	s Retirement		185575			25-Apr-20	019 12:48PM
			Air Canada Pilot	s Long Term Illness		185564			23-Apr-20	019 1:27PM
Resources			Air Canada Pilot	General Inquiry		185367			04-Apr-20	019 12:15PM
Pension Terms										
Tutorials and Videos										
<b>2</b> ■ Attend an employer information session	4	1 / 1								1 - 5 of 5 items
		Pensio	n Information	Leg	al Inform	nation		Contact	t Us	
							0	) Help 🛛 📌 Secu	ure Messages - Setti	ings 🗸 Sign out
onlineServices	5							. —	5	
Welcome Michelle	Reply	Secure	e Messag	e						
Air Canada Pilots 🔹			Reference #	185501						
MAIN MENU			Mailbox*	Air Canada Pilots						~
A Home			Topic*	Termination						~

Secure Messages	Employee ID		+
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🐣 User Administration	Content*	B I U H₁ H₂ ¦≣ ≔	
Resources		Thank you for confirming this!	
Pension Terms		Sincerely,	
Tutorials and Videos		Michelle	
Attend an employer information session			
	Drag files here or	Choose File	
			î Delete 🔯 Save 🖌 Send Message
A OPTerest	Pension Information	Legal Information	Contact Us



# SUBMITTING FORMS AND DOCUMENTS

To submit forms go to the "Secure Messages" section of the website.

To send a document to OPTrust, initiate a message in the Secure Messages section and select the topic relevant to your message:

onlineServices	3	③ Help	> 😪 Secure Messages	Settings 🔻	Sign out
Welcome Michelle	New Secure Message				
Air Canada Pilots 🔹	Reference #	185499			
MAIN MENU	Mailbox*	Air Canada Pilots			~
🗥 Home	Topic*	Termination			~
Secure Messages	Employee ID				+
🔔 File Upload	- *				
i≡ Activity	Content <sup>**</sup>	B I <u>U</u> H₁ H₂ Ἐ Ξ			
🕒 User Administration		Hi,			
Resources		Attached please find the Notice of Termination for J. Doe. Employee ID	123456.		
Pension Terms		Sincerely,			
Tutorials and Videos		Michelle			
Attend an employer					
information session	Drag files here or	Choose File			
		1	🗓 Delete 🛛 🕲 Save	🖪 Send Me	essage
n OPTrust	Pension Information	Legal Information	Contact Us		



## VIDEO





## **STEP BY STEP**

Documents can be attached by clicking "Choose File" and selecting them from the menu:

onlineServices	5	⑦ Help 🛛 Secure Messages Settings ▼ 🛛 Sign out	t
Welcome Michelle	New Secure Message	e	
Air Canada Pilots 🔶	Reference #	185499	
MAIN MENU	Mailbox*	Air Canada Pilots 🗸	
谷 Home	Topic*	Termination ~	
Secure Messages	Employee ID	+	
1 File Upload	Content*	B <i>I</i> U H1 H2 IΞ Ξ	
E Activity			
🐣 User Administration		Π,	
Resources		Attached please find the Notice of Termination for J. Doe. Employee ID 123456.	
Pension Terms		Sincerely,	
Tutorials and Videos		Michelle	
Attend an employer information session	Drag files here or	Choose File	
		🔟 Delete 🛛 🔀 Save 🖌 Send Message	
🖓 OPTrust	Pension Information	on Legal Information Contact Us Privacy # OPTrust.com	

#### VIDEO



Dragging and Dropping a Document.mp4

## **STEP BY STEP**

Drag a file to the section that says "Drag files here":



onlineServices	5	⑦ Help Secure Messages Settings ▼ Sign out
Welcome Michelle	New Secure Message	
Air Canada Pilots 🔹	Reference #	185499
MAIN MENU	Mailbox*	Air Canada Pilots 🗸
A Home	Topic*	Termination ¥
Secure Messages	Employee ID	+
🔔 File Upload	*	·
E Activity	Content*	B I U H₁ H₂ ⊨ ≡
Let User Administration		Hi,
Resources		Attached please find the Notice of Termination for J. Doe. Employee ID 123456.
i Pension Terms		Sincerely,
Tutorials and Videos		Michelle
Attend an employer information session	Drag files here of	Choose File
		🗊 Delete 🔞 Save 🖪 Send Message
onlineServices		
		⑦ Help Secure Messages Settings ▼ Sign out
Welcome Michelle	New Secure Message	⑦ Help Secure Messages Settings ▼ Sign out
Welcome Michelle	New Secure Message Reference #	③ Help Secure Messages Settings ✓ Sign out          185499
Welcome Michelle Air Canada Pilots MAIN MENU	New Secure Message Reference # Mailbox*	③ Help Secure Messages Settings ✓ Sign out     185499     Air Canada Pilots
Welcome Michelle Air Canada Pilots  MAIN MENU  Mone	Reference # Mailbox* Topic*	③ Help Secure Messages Settings ▼ Sign out          185499         Air Canada Pilots         Termination
Welcome Michelle Air Canada Pilots  MAIN MENU  Home Secure Messages	B New Secure Message Reference # Mailbox* Topic* Employee ID	③ Help Secure Messages Settings ✓ Sign out     185499     Air Canada Pilots     Termination     ↓
Welcome Michelle       Air Canada Pilots       MAIN MENU       Main MENU       Secure Messages       Enter File Upload	B New Secure Message Reference # Mailbox* Topic* Employee ID Content*	③ Help Secure Messages Settings ✓ Sign out          185499         Air Canada Pilots         Termination         ● <tr< th=""></tr<>
Welcome Michelle         Air Canada Pilots         MAIN MENU         Main MENU         Secure Messages         File Upload         Activity	B New Secure Message Reference # Mailbox* Topic* Employee ID Content*	③ Help Secure Messages Settings Signout          185499         Air Canada Pilots         Termination         +         B I U Ha Hz IE E         Hi,
Welcome Michelle       Air Canada Pilots       MAIN MENU       Secure Messages       File Upload       Activity       User Administration	New Secure Message Reference # Mailbox* Topic* Employee ID Content*	③ Help Secure Messages Settings ✓ Sign out          185499         Air Canada Pilots         Termination         ●         B       I         U       Ha         Ha       Hz         Hi,         Attached please find the Notice of Termination for J. Doe. Employee ID 123456.
Welcome Michelle         Air Canada Pilots         MAIN MENU         Main MENU         Secure Messages         File Upload         Activity         User Administration         Resources	New Secure Message Reference # Mailbox* Topic* Employee ID Content*	③ Help Secure Messages Settings Signout          185499         Air Canada Pilots         Termination         •         B I U Ha Ha IE E         Hi,         Attached please find the Notice of Termination for J. Doe. Employee ID 123456.         Sincerely,
Welcome Michelle         Air Canada Pilots         MAIN MENU         Secure Messages         File Upload         Activity         User Administration         Resources         Pension Terms         Tutorials and Videos	New Secure Message Reference # Mailbox* Topic* Employee ID Content*	<pre></pre>
Welcome Michelle         Air Canada Pilots         MAIN MENU         Main Menu         Secure Messages         File Upload         Activity         User Administration         Resources         Pension Terms         Tutorials and Videos         Attend an employer information session	Reference # Mailbox * Topic * Employee ID Content *	③ Help       Secure Messages       Settings       Segnet         185499         Air Canada Pilots           Termination           ● I U       Ha Ha       IE IE          Hi,       Attached please find the Notice of Termination for J. Doe. Employee ID 123456.       Sincerely,         Michelle
Welcome Michelle         Air Canada Pilots         Air Canada Pilots         MAIN MENU         Secure Messages         Secure Messages         File Upload         Activity         Veser Administration         Resources         Pension Terms         Tutorials and Videos         Attend an employer information session	New Secure Message Reference # Mailbox* Topic* Employee ID Content*	Order Secure Messages Settings Signett     185499     Air Canada Pilots     Termination     Termination     B J U Ha Hz E E   Hi,   Attached please find the Notice of Termination for J. Doe. Employee ID 123456.   Sincerely,   Michelle     Choose File



## Attached messages will appear here:

onlineServices	5	⑦ Help Secure Messages Settings ▼ Sign out
B Welcome Michelle	New Secure Message	
Air Canada Pilots 👻	Reference #	185499
MAIN MENU	Mailbox*	Air Canada Pilots 🗸
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Secure Messages	Employee ID	+
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🐣 User Administration		Hi,
Resources		Attached please find the Notice of Termination for J. Doe. Employee ID 123456.
Pension Terms		Sincerely,
Tutorials and Videos		Michelle
Attend an employer information session	Drag files here or	Choose File
	i 	
	<	Doe.docx 0.01 MB
		Delete 🕃 Save 🛃 Send Message
💜 OPTrust	Pension Information Information for Members	n Legal Information Contact Us Privacy 🎓 OPTrust.com
onlineServices	3	⑦ Help 🛛 Secure Messages Settings ▼ Sign out
<b>B</b> Welcome Michelle	New Secure Message	
Air Canada Pilots 🔶	Reference #	185499
MAIN MENU	Mailbox *	Air Canada Pilots 🗸
🐴 Home	Topic <sup>*</sup>	Termination v
Secure Messages	Employee ID	+
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E Activity	Content*	B I <u>U</u> H₁ H₂ IΞ Ξ
🕒 User Administration		Hi,
Resources		Attached please find the Notice of Termination for J. Doe. Employee ID 123456.
i Pension Terms		Sincerely,
		Michalla

nt OPTrust	Pension Information	Legal Information	Contact Us	
		Doe.docx	о.от мв П Delete 🔀 Save	Send Message
information session	Drag files here or	Choose File		4
Tutorials and Videos		Michelle		



# HOW TO ELECTRONICALLY SIGN FORMS USING DOCUSIGN

You can electronically sign and submit the following forms using DocuSign through Online Services:

- Transfer Form
- Termination Form
- Notice of Unpaid Leave of Absence
- Membership Enrolment forms

From the **Online Services** employer home page:

1. Click on Transfer Form, Termination Form, Notice of Unpaid Leave of Absence or Membership Enrolment forms.

Welcome Joseph ir Canada Pilots	elcome to Online Services Here you can:	es rs and external vendors to exchange	
N MENU Home Secure Messages	Here you can: • send and receive secure electronic messag • send forms, documents and files • send payroll data files • receive reports from OPTrust Online Services is used by participating employe confidential employer/member data with OPTru	es rs and external vendors to exchange	
N MENU Home Secure Messages	<ul> <li>send forms, documents and files</li> <li>send payroll data files</li> <li>receive reports from OPTrust</li> <li>Online Services is used by participating employe confidential employer/member data with OPTru</li> </ul>	rs and external vendors to exchange	
Home Secure Messages	<ul> <li>receive reports from OPTrust</li> <li>Online Services is used by participating employe confidential employer/member data with OPTru</li> </ul>	rs and external vendors to exchange	
Secure Messages	Online Services is used by participating employe confidential employer/member data with OPTru	rs and external vendors to exchange	0,00
	confidential employer/member data with OF nu		
File Upload		J.	
Activity	Read the Online Services User Guide	ĺ	
User Administration			
burces	Employer Manual	Employer Undate	Employer Forms
Pension Terms	Quick access to practical	OPTrust produces an electronic	Quick access to all the forms you
Tutorials and Videos	information on administering the OPSEU Pension Plan.	news bulletin for employers to let	will need.
Attend an employer information session - Test joseph	View the Employer Manual >	administrative policies or procedures. Read the latest employer updates >	Termination Form     Notice of Unpaid Leave of Absence     Membership Enrolment forms     Other Employer forms
	Questions?		
	If you have any questions, please con	tact the Data Management Group at (416) 681-615	5.

2. A new window opens: PowerForm Signer Information.

If you selected Transfer Form, Termination Form or Notice of Unpaid Leave of Absence:

- Fill in Your Name and Your Email as the Employer.
- Click on **Begin Signing**.

If you selected Membership Enrolment forms:

- Fill in Your Name and Your Email as the Employer and the Name and Email for the Employee.
- Click on **Begin Signing**.
- The Employee will be automatically notified via email to complete their section on the form (see Step 11 to see how the Employee completes the form).



@ OPTrust	BEGIN SIGNING () HELP
© OPTrust	Constant Consta
For the Enrolment form enter your name and e-mail address and the enrollees name and e-mail	the Children Sarveken. Terms of the first-lack link to CLS footer Terms of Use for member/. If I am signing as a member without an CLS account that my elegit effect, validity and enforceability as a paper-based signature, lind i on't unit to use an electronic signature to sign this document, I'vali contact CP/Troat at 1:300/2004. Of Pinal bases Monday to Thursday from Sam to Seen and Friday from Sam to Sprit. Please enter your ranse and email to begin the signing process. 1.Employer Your Name: Full Name Your Email: Email Address
address. For all only need to enter your information	Please provide information for any other signers needed for this document.  2.Employee Name: * Full Name Email: * Email Address Click on "Begin Signing"
	■Crange Language - English ▼ Terms of Une Princey Policy Copyright © Discussion, Inc. All rights reserved.

- 3. The first time you attempt to access a form online, you will be prompted to read the Electronic Record and Signature Disclosure and you must click on the box indicating I agree to use electronic records and signatures prior to gaining access to the electronic form.
- **4.** Click on **Continue**.

Please review and complete Read and Agree Plase read the Electron: Record and Spra- Plase read the Electron: Record and Spra- Design and the Electron: Record and Spra-	Are Disclosure. Natures.	Click to continue	
	Male" Female" "This informatio	an is required for actuarial valuation purposes. Date of Birth (Day Month-Year)	
	Social Insurance Number	Employee/WIN Number	
	Primary Email Address	Work Telephone Number	
	Alternate Email Address	Personal Telephone Number	



5. Form is now accessible and fillable.

If you selected Transfer Form or Termination Form:

- Fill in the **mandatory form fields highlighted with a red border** and any optional fields.
- When you are ready to sign, click on **Sign**.

If you selected Notice of Unpaid Leave of Absence:

- Fill in the **mandatory form fields highlighted with a red border** and any optional fields.
- If pregnancy/parental leave, you must fill in sub-allowance section.
   If Yes is elected for sub-allowance, you must enter in dates.
- If other **ESA-type** leave, you must select from the **drop-down list**.
- If **illness or WSIB** leave, the end date is not required, if unknown.
- When you are ready to sign, click on **Sign**.

#### If you selected Membership Enrolment form:

- Fill in the **mandatory form fields highlighted with a red border** and any optional fields under the **Employer Section** (towards the bottom of the first page).
- When you are ready to sign, click on **Sign**.

	TO BE COMPLETED BY THE EMPLOYER		
	C – Employment Information		
	Employment  Full Time Part Time Plan Membership Date (Day-Month-Year) Type: Seasonal Fixed-term contract	Continuous Employment Date (Day-Month-Year)	Complete
	Employer Name	Former Member	information, note: fields in red are
Click here	Employer Contact Name	Business Telephone	mandatory
to sign	Emp <mark>Sign.r Co</mark> ntact Signature	Date Signed (Day-Month-Year)	
	OPTrust 1005 08/20 Keep a copy of this form for your records. OPTrust is committed to creating an accessible organization. Alternate formats of this communication are availab		
Mem	par Enralment 0920 ndf		1 of 2

- Full Name (Mandatory) Type in your name to be used for your signature.
- Initials (Mandatory) Type in your initials to be used when initials are required.
- Select Style (Optional)
  - **Draw** Allows you to manually write your signature.
  - Upload Allows you to upload a pre-existing signature.
  - Change Style Allows you to select a different font for your Full Name and Initials.

When you've completed filling in the mandatory fields and any optional fields, click on **Select** and Sign.



Confirm your name, initia	is and signature.		Initial Used for initials		
Required	for Signature	Allows you to		Initiatet	
joey		manually write		J	
		your signature			
ELECT STYLE	UPLOAD	Allows Upload	of pre	Allows you to select	
REVIEW		-existing signa	ture	Signature and	Change Sty
DocuSigned by:	DS			different font	
tocy	3			styles	
B984FCA007A54	96				

**Review** the form to ensure everything has been filled out correctly. If you click Complete without review and there are mistakes on the form, you will need to create a new form and begin the electronic signing process from the start (Step 1).

▲ Review and sign document(s)×		
File Edit View Favorites Tools Help		
Please review and complete the documents below		COMPLETE OTHER ACTIONS
	Ŧ	Ν
START	Consent:     Consent:     To receive communications from OPTrust electromically and understand that I will not be provided with paper copies unless     I not receive communications from OPTrust electromically and understand that I will not be provided with paper copies unless     I not the context of the context of the second paper form; and     The second paper form; and     The totice officient and use by OPTrust of all the information on this form and all attachments and information that OPTrust     may request from me or my employer; of all the information on this form and all attachments and information in the     second paper form; and     Signature paragraphic paper form; and the paper complexes to OPTrust     administration purpose.     Signature     Date (Day-Month-Year)	Once signed click "Complete"
	TO BE COMPLETED BY THE EMPLOYER	
	C = Employment Information Employment (Juli Tim C) Part Tims Plan Membership Date Day Meenh Neal System Sasaonal C) Faed term centract Employment Neal	
	Former Member	
	Employer Contact Name Business Telephone	
	Other Contact Signature     Date Signed (Day Month Year)     Other Contact Signature     Other Contact Signat	
Me	mber Enrolment_0820 pdf 1 o	12

Once the form is electronically signed, click on **Complete**.



8. A pop-up window opens: Save a Copy of Your Document. Click on Download and open the downloaded form.

Donel Select Finish to send the completed document.		COMPLETE	OTHER ACTIONS
	Save a Copy of Your Document		
I consent: a. to receive communication mail discure messagi page form; and b. to the collection and the colleck Download TO BE COMPLETED BY THE I	Your document has been signed     If you would like a copy for your records, select Download or Print and save.       DownLOAD     PRINT		
C – Employment Info Employment © Full Time ( Type: ⊖ Seasonal ( Employer Name	Intel 2011 Part Time Plan Membership Date Day Month-New Continuous Employment Date Day Month-New Fixed-term contract 01/01/2020 01/01/2020 01/01/2020		
Ministry of Educ	ation 🗌 Former Member		

# FOR CHROME USERS:

	Your PDF is being generated. If you have your throwner set to save PDF files, you may close this wondow after the file has downloaded.	
Step 10 Download put inpolaat hard . Open ance Download & complete		



# FOR INTERNET EXPLORER AND EDGE USERS:

Your PDF is being generated. If you have your browser set to save PDF file close this window after the file has downloaded.	es, you may
	Step 10 Download will appear here, Cick Open
De you wart te open or save (1012)-joey joey@joey.com-OfTrust-Termination.pdf (314 KB) from ca.docusign.net?	Open Save Y Cancel X



## FOR FIREFOX USERS:

Your PDF is	s being generated. If you have your browser set to save PDF files, you may
close this w	vindow after the file has downloaded.
	CLOSE Opening (1012)-joey-joey@joey.com-OPTrust-Termination.pdf X You have chosen to open: which is: Adobe Acrobat Document (315 KB) from: https://ca.docusign.net What should Firefox do with this file? @Open with Adobe Acrobat Reader DC (default)

<u>≠</u> 51	Review and sign document(s).	.×								
	New tab Duplicate tab New window	Ctrl+T Ctrl+K Ctrl+N				*			CLOSE	OTHER ACTIONS
	New session Open with Microsoft Edge Open Edit Save	Ctrl+Shift+E Ctrl+O	Doutige Envelope D 1148015	roren and analytic and second and Trust MEM	BER E		I <b>T</b> 57 0024			
	Save as	Ctrl+S	locally	tre frait en.	eligiophrust.c	ors. Website option	Lorn			
	Close tab	Ctrl+W	locally	to enrol in the OPSEU Pension Plan						
>	Page setup Print Print preview	Ctrl+P	Male*   Female	e <sup>4</sup> "This information is requ	ared for act	First Name	poses.			
	Send Import and export	>	Employer Name Social Insurance Numbr			Date of Birth (Da	iy Month-Year) Number			
	Properties Exit		Primary Email Address			Work Telephone	Number	1		
			Alternate Email Address	1		Personal Teleph	one Number	1		
			Mailing Address	Su		City/Town	Province	Postal Code		



# **10.** If you selected **Transfer Form**, **Termination Form** or **Notice of Unpaid Leave of Absence**, compose a new **secure message** through *Online Services*.

- **Reference #** (Mandatory) This is automatically populated.
- Mailbox (Mandatory) This is automatically selected.
- **Topic** (Mandatory) Select the appropriate topic based on the form you are submitting from the drop-down menu.
- **Employee ID** (Optional) Add the member's employee number.
- **Content** (Mandatory) Input any information to be included with the electronic form submission.
- Drag and Drop or Choose File (Mandatory) Attach the completed and signed form.

When you've completed the above for the new secure message, click on **Send Message**.

😩 Welcome Joseph	New Secure	Message
	Reference #	MALT .
MAIN MENU	Mailbox*	I and a set of the set
😭 Home	торіс*	Termination Based on the Form, select the appropriate Topic
Secure Messages	Employee ID	+
💼 File Upload		Add Member
📰 Activity		Employee #
Resources	Content	This is a test
Pension Terms		
Tutorials and Videos		Attach
Attend an employer information session		Completed Form
	Dr	ag and drop or Choose File
		DocuSignTermination-of-Membership-(OPTrust 633MB 6
		🗊 Delete 🔀 Save 🛛 Send Message

• Employee clicks on **Review Document** from their email to open the form.





• Employee clicks on **Continue**.

OPSEU Pension Plan Trust OPSEU Pension Plan Trust P 005)OPTrust-Membership-Eor	Fund Member should re- the disclosure an- click "I agree"	ad d			Once they agreethey click "Con	click I need to itnue"
Please read the Electronic R	Secord and Signature Disclosure. c records and signatures.				CONTINUE	OTHER ACTIONS
	Male* Female* * This inform	ation is required for	actuarial valuation purp Date of Birth (Day	oses. y-Month-Year)	-	
	Social Insurance Number		Employee/WIN N	lumber	-	
	Primary Email Address		Work Telephone I	Number	-	
	Alternate Email Address		Personal Telepho	one Number	-	
	Mailing Address	Suite	City/Town	Province	Postal Code	
	Spouse's Last Name (if applicable)	Spouse's Fi	rst Name and Initial	Spouse Date	of Birth (Day-Month-Year)	

- Employee fills in the **mandatory form fields highlighted with a red border** and any optional fields under the **Employee Section**.
- When the Employee is ready to sign, they click on **Sign**.
- Employee will select their signature (see Step 6).
- Employee will be brought back to the form. Once the form is electronically signed, they click on **Complete**.

er date with format wiv/Di	2/1111		Complete	OTHER ACTIONS
		@ @ 挫∗ ③		
	Spouse's Last Name (if applicable) Member	Spouse's First Name and Initial	Spouse Date of Birth (Day-Month-Year) 15-Apr-1969	
	B – Consent and Signature			
	I consent:			
Sign FILL IN	mail if secure messaging is not av paper form; and b. to the collection and use by OPTr may request from me or my empl OPSEU Pension Plan. I also conser administration purposes. Signature	aliable. I may instruct OPTrust at anytime that I ust of all the information on this form and all att over, or that I may provide to OPTrust, in conju to OPTrust sharing my personal information v Date (Day-Month-	would prefer to receive communications in tachments and information that OPTrust sction with my participation in the with my employer(s) or others for plan Year) 09/15/2020	
	TO BE COMPLETED BY THE EMPLOYER			
	C – Employment Information			
	Employment I Full Time Part Time Type: Seasonal Fixed-tern Employer Name	Plan Membership Date (Day-Month-Year) h contract 01/09/2020	Continuous Employment Date (Day-Month-Year) 03/03/2020	
	Ministry of Education		Former Member	
	Employer Contact Name		Business Telephone	
	Wishells Kesse		4166916100	
	Michelle Kogan		4100810100	

• Once the Employee downloads/completes the form, they will automatically receive an email with a copy of the form: **View Completed Document**.



Completed: (1005)-Jon E. Membership-Enrolment Form > INXX OPSEU Pension Plan Trust Fund via DocuSign <dse@camail.docusign.net> to me \* Completed: (2 minutes ago) \* • : Vour document has been completed VIEW COMPLETED DOCUMENT

• Click on View Completed Document to open the form.





• Download the form and compose a new **secure message** through *Online Services* (see Step 10: Transfer Form, Termination Form or Notice of Unpaid Leave of Absence).

						-	
Select continue to be redirected to penweb-uat-	veb.penweb.local					CONTINUE	OTHER ACTIONS
			Ŧ				
			baolewood				
	DocuSign Envelope ID: AC108EB3-CE2	AF7EF554F4C2					
You may need	Imuct			-			
to click the	Trust	MEMBER	ENROLMEN				
down arrow to	Adefaide Street East, Suite 1200	Telephone: 416-68	31-6100 Toll-free: 1-800-63	7-0024			
Ligur Dauraland	Toronto ON MSC 3A7	Email: emailpoptr	ust.com Website: optrust.	om			
view Download	Please complete this form to enrol in the OPS	EU Pension Plan.					
button	A – Personal Information		<u>.</u>				
	Last Name Morphon	Last Name Hirst Name					
	Halat D familet This info	mation is sequired for	s actuated unbustion over				
	Employer Name	initiation is required to	Date of Birth (Da	-Month-Year)			
	Ministry of Education		01-11-1972				
	Social Insurance Number		Employee/WIN N	lumber			
	111111111		1111111				
	Primary Email Address		Work Telephone	Number			
	jonn.member@ontario.ca		Devel Televier	an Marshar			
	Autemate Email Address		416681616	1			
	Mailing Address	Suite	City/Town	Province	Postal Code		
	1 Any St.	12	Toronto	ON	M2M 2M2		
	Spouse's Last Name (if applicable)	Spouse's F	irst Name and Initial	Spouse Date	e of Birth (Day-Month-Year)		
	Member	Jackie		15-04-19	969		
	B – Consent and Signature	550					
	Iconsent						



# **RECEIVING MESSAGES**

You will be able to tell if you have any secure messages by opening your "Secure Messages" box:



onlineService	S					() He	lp 🛛 🔽 Secure Message	s Settings ▼ Sign out
B Welcome Michelle	Secure N	lessa	ging					
Air Canada Pilots 🔹	Inbox •	Sent	🖋 Drafts				J.	Compose New Message
MAIN MENU	To view messa	age, click o	n the Subject					
🗥 Home							View Unre	ad Only
🖂 Secure Messages		Mailbo	- All -				View Arch	ived
🔔 File Upload	Key	word Sear	Keyword Search					
E Activity		Dice Rang	e YYYY-MM-DD or Mor	YYYY-MM-DD or Month DD, YY				Search
🐣 User Administration								
Resources			~ From ~	Subject	~ <i>@</i> ~	Reference # ~	Emp. ID ~	Date ~
Dension Terms	Air Cana	ada Pilots	Termination	Termination		185501		10-Apr-2019 2:48PM
Pension Terms	Air Cana	ada Pilots	Enrolment	Enrolment	Ø	185450		05-Apr-2019 11:45AM
Tutorials and Videos	Air Cana	ada Pilots	Member Data Updat	Disability		185364		04-Apr-2019 12:10PM
La Attend an employer	Cabinet	Office (54)	SES Conversion	Patrizia Durisotti W	E	367106		07-Mar-2018 12:00AM
information session	Cabinet	Office (54)	SES Conversion	RE: Transfer to OPE	h	363185		03-Jan-2018 12:00AM
	☑ Cabinet	Office (54)	SES Conversion	Patrizia Durisotti W	E	360241		07-Nov-2017 12:00AM
	Cabinet	Office (54)	SES Conversion	ACQUELYNN NEW	M	345506		22-Jun-2017 12:00AM
	Cabinet	Office (54)	SES Conversion	Leen Al Zalbak- WD	B	345537		22-Jun-2017 12:00AM
	Cabinet	Office (54)	SES Conversion	acquelynn Newma	n	345504		22-Jun-2017 12:00AM
	Cabinet	Office (54)	SES Conversion	Leen Al Zalbak-Wir	tere .	339695		05-May-2017 12:00AM
		/ 3						1 - 10 of 23 items
		Pension	Information	Legal In	formati	on	Contact Us	



Messages can also be sorted by "Mailbox." Note: this is only applicable to individuals who work with more than one employer or organization:

onlineServices								⑦ He	p 🗹 Secure	Messages	s Settings 🕶	Sign out
Welcome Michelle	Sec	ure Messa	agiı	ng								
Air Canada Pilots 👻	🕰 In	box 🖪 Sent	Ø [	Drafts						Ø C	ompose New N	lessage
MAIN MENU	To vi	ew message, click	on the	e Subject								
🖀 Home		Mail	hav							/iew Unrea	ad Only	
🖂 Secure Messages		Wall	DOX	- All -						/iew Archiv	/ed	
🔔 File Upload		Keyword Sea	arch	Keyword Search								
E Activity		Date Ra	nge	YYYY-MM-DD or Mor	YYYY-MM-DD or Month DD, YY			<b> </b>		Search		
🐣 User Administration												
Resources	$\bowtie$ ~	То	~	From ~	Subject	~	<b>@</b> ~	Reference # ~	Emp. ID	~	Date	~
		Air Canada Pilots	5	Termination	Termination			185501			10-Apr-2019 2	:48PM
Pension Terms		Air Canada Pilots	5	Enrolment	Enrolment		Ø	185450			05-Apr-2019 1	1:45AM
Tutorials and Videos		Air Canada Pilots	5	Member Data Updat	Disability			185364			04-Apr-2019 1	2:10PM
Attend an employer		Cabinet Office (5	4)	SES Conversion	Patrizia Durisot	6 WI		367106			07-Mar-2018 1	2:00AM
information session		Cabinet Office (5	4)	SES Conversion	RE: Transfer to I	OP8		363185			03-Jan-2018 12	2:00AM
		Cabinet Office (5	4)	SES Conversion	Patrizia Durisot	6 WL.,		360241			07-Nov-2017 1	2:00AM
		Cabinet Office (5	4)	SES Conversion	JACQUELYNN N	EWM.,		345506			22-Jun-2017 12	2:00AM
		Cabinet Office (5	4)	SES Conversion	Leen Al Zaibak-	WIN		345537			22-Jun-2017 12	2:00AM
		Cabinet Office (5	4)	SES Conversion	jacquelynn New	man.,		345504			22-Jun-2017 12	2:00AM
		Cabinet Office (5	4)	SES Conversion	Leen Al Zaibak-	Win		339695			05-May-2017	12:00AM
		<ul> <li>▲ 1 / 3</li> </ul>		▶							1 - 10 of 2	23 items
		Pensio	n Inf	ormation	Lega	l Inf <u>o</u> r	rmati <u>o</u>	n	Cont <u>act</u>	Us		



You can also sort by "Keyword Search". Note: searches much be performed on whole words – for example you can't search "term", you must enter "termination":

onlineServices	3							() He	lp 🔽	Secure Messages	s Settings ▼	Sign out
B Welcome Michelle	Sec	ure Mess	agin	ng								
Air Canada Pilots 👻	🕰 In	box 🖪 Sent	ø D	rafts						<i>₽</i> С	ompose New	Message
MAIN MENU	To vi	iew message, click	on the	Subject								
🕋 Home									_		d Only	
Secure Messages		Mail	box	- All -		~	View Onrea	red				
🔔 File Upload		Keyword Search Keyword Search										
E Activity		Date Range YYYY-MM-DD or Month DD YY									Search	
🕒 User Administration									_			
Resources	⊠ ~	То	~	From ~	Subject	~	Ø ~	Reference # ~	Emp	. ID ×	Date	~
		Air Canada Pilot	5	Termination	Termination			185501			10-Apr-2019	2:48PM
Pension Terms		Air Canada Pilot	5	Enrolment	Enrolment		Ø	185450			05-Apr-2019	11:45AM
Tutorials and Videos		Air Canada Pilot	5	Member Data Updat	Disability			185364			04-Apr-2019	12:10PM
Attend an employer		Cabinet Office (5	4)	SES Conversion	Patrizia Durisotti W	<b>.</b>		367106			07-Mar-2018	12:00AM
information session	$\bigcirc$	Cabinet Office (5	4)	SES Conversion	RE: Transfer to OPE	١.,		363185			03-Jan-2018 ′	12:00AM
		Cabinet Office (5	4)	SES Conversion	Patrizia Durisotti W	ŧ		360241			07-Nov-2017	12:00AM
		Cabinet Office (5	4)	SES Conversion	ACQUELYNN NEWR	м.,		345506			22-Jun-2017	12:00AM
		Cabinet Office (5	4)	SES Conversion	Leen Al Zaibak- WB	N		345537			22-Jun-2017	12:00AM
		Cabinet Office (5	4)	SES Conversion	Jacquelynn Newma	n.,		345504			22-Jun-2017	12:00AM
		Cabinet Office (5	4)	SES Conversion	Leen Al Zaibak-Win			339695			05-May-2017	12:00AM
	M	▲ 1 / 3									1 - 10 of	23 items

onlineServices	;							() Help	o 🛛 🔽 Secure Message	es Settings - Sign out
Welcome Michelle	Sec	ure Mess	agiı	ng						
Air Canada Pilots 👻	🕰 In	box 🖌 Sent	Ø 1	Drafts					B	Compose New Message
MAIN MENU	To v	iew message, click	on the	e Subject						
🕋 Home		Mail	hav						View Unre	ad Only
🖂 Secure Messages		Widi	xua	- All -	View Arch	ived				
🔔 File Upload		Keyword Sea	arch	Keyword Search						
i≡ Activity		Date Ra	nae	YYYY-MM-DD or Mor	nth DD. YY	1 Y	YYY-MN	I-DD or Month DD. YY		Search
💁 User Administration										
Resources	$\bowtie$ ~	То	~	From ~	Subject	~	@~	Reference # ~	Emp. ID ~	Date ~
		Air Canada Pilot	S	Termination	Termination			185501		10-Apr-2019 2:48PM
Pension Terms		Air Canada Pilot	5	Enrolment	Enrolment		Ø	185450		05-Apr-2019 11:45AM
Tutorials and Videos		Air Canada Pilot	S	Member Data Updat	Disability			185364		04-Apr-2019 12:10PM
La Attend an employer		Cabinet Office (5	54)	SES Conversion	Patrizia Duris	otti WL		367106		07-Mar-2018 12:00AM
information session		Cabinet Office (5	54)	SES Conversion	RE: Transfer t	to OPE		363185		03-Jan-2018 12:00AM
	$\bigcirc$	Cabinet Office (5	54)	SES Conversion	Patrizia Duris	otti WL		360241		07-Nov-2017 12:00AM
		Cabinet Office (5	54)	SES Conversion	ACQUELYNN	NEWM		345506		22-Jun-2017 12:00AM
		Cabinet Office (5	54)	SES Conversion	Leen Al Zalba	e-WIN		345537		22-Jun-2017 12:00AM
		Cabinet Office (5	54)	SES Conversion	Jacquelynn N	ewman		345504		22-Jun-2017 12:00AM
		Cabinet Office (5	54)	SES Conversion	Leen Al Zalba	k-Win		339695		05-May-2017 12:00AM
		<ul> <li>1</li> <li>/ 3</li> </ul>		►I						1 - 10 of 23 items
		Pensio	n Inf	ormation	Leg	gal Inf <u>o</u> r	matio	n	Contact Us	



## Messages can be filtered by unread:

onlineServices	S							⑦ Hel	p 🛃 Secure Message	s Settings ▼ Sign out
B Welcome Michelle	Sec	ure Me	ssagiı	ng						
Air Canada Pilots 👻	🕰 In	ibox 🖪 Se	ent 🥒 [	Drafts					J C	Compose New Message
MAIN MENU	To vi	iew message,	click on the	e Subject						
🕋 Home			Mailbox	All					View Unrea	ad Only
🖂 Secure Messages			Manbox	- All -					View Archi	ved
主 File Upload		Keywor	d Search	Keyword Search						
≅ Activity		Dat	e Range	YYYY-MM-DD or Mor	nth DD, YY 📋	Y	YYY-MM	-DD or Month DD, YY	<b> </b>	Search
🐣 User Administration										
Resources		То	~	From ~	Subject	~	@ ~	Reference # ~	Emp. ID ~	Date ~
Dension Terms		Air Canada I	Pilots	Termination	Termination			185501		10-Apr-2019 2:48PM
Pension Terms		Air Canada I	Pilots	Enrolment	Enrolment		Ø	185450		05-Apr-2019 11:45AM
Tutorials and Videos		Air Canada I	Pilots	Member Data Updat	Disability			185364		04-Apr-2019 12:10PM
Attend an employer		Cabinet Offi	ice (54)	SES Conversion	JACQUELYNN NEW	W.,		345506		22-Jun-2017 12:00AM
information session		Cabinet Offi	ce (54)	SES Conversion	Leen Al Zalbak- W	IN		345537		22-Jun-2017 12:00AM
		Cabinet Offi	ice (54)	SES Conversion	Jacquelynn Newn	an.,		345504		22-Jun-2017 12:00AM
		Cabinet Offi	ce (54)	SES Conversion	Leen Al Zalbak- W	in		339695		05-May-2017 12:00AM
		Cabinet Offi	ice (54)	SES Conversion	Diana Petersen-V	đ		309861		12-Oct-2016 12:00AM
		Cabinet Offi	ce (54)	SES Conversion	*Urgent* - 2012 1	ER.,		308880		03-Oct-2016 12:00AM
		Cabinet Offi	ice (54)	SES Conversion	Termination of M	irs.,		271267		02-May-2016 12:00AM
	4	۹ 1	/ 2 🕨							1 - 10 of 20 items
<i></i>		Pei	nsion Inf	ormation	l egal I	nfor	matio	n	Contact Us	

## And you can access archived messages from here as well:

onlineServices								() He	lp 🛛 Secure Mes	sages Settings	Sign out		
<b>e</b> Welcome Michelle	Secu	ure Messa	agiı	ng									
Air Canada Pilots 👻	🖨 Inl	oox 🖪 Sent	Ø 1	Drafts						🖋 Compose N	ew Message		
MAIN MENU	To vi	ew message, click	on the	e Subject									
🕋 Home		14-11		A11					View	Jnread Only			
🖂 Secure Messages		Maii	DOX	- All -	☑ View Archived								
🔔 File Upload		Keyword Sea	rch	Keyword Search	Keyword Search								
E Activity		Date Ra	nge	YYYY-MM-DD or Month DD, YY					<b> </b>	Search			
2+ User Administration													
Resources	$\bowtie$ ~	То	~	From ~	Subject	~	@~	Reference # ~	Emp. ID	~ Date	~		
	$\bigcirc$	Air Canada Pilots		Termination	Termination			185501		10-Apr-20	19 2:48PM		
Pension Terms		Air Canada Pilots		Enrolment	Enrolment		Ø	185450		05-Apr-20	19 11:45AM		
Tutorials and Videos		Air Canada Pilots		Member Data Updat	Disability			185364		04-Apr-20	19 12:10PM		
Attend an employer		Cabinet Office (5	4)	SES Conversion	Amit Gundu-Win I	D		378966		28-Sep-20	018 12:00AM		
information session	Q	Cabinet Office (5	4)	SES Conversion	Amit Gundu-Win I			378939		27-Sep-20	018 12:00AM		
	$\Theta$	Cabinet Office (5	4)	SES Conversion	RE: Pooja Narang-	ŧ.,		376337		26-Jul-201	8 12:00AM		



Clicking on any field except the "Subject" field will trigger it to appear in a preview pane below the existing messages:

	Secure Messages		Mailbox	- All -		View Archived						
<b>1</b> .	File Upload		Keyword Search	Keyword Search								
	Activity		Date Range	YYYY-MM-DD or Mon	th DD, YY 📋	YYYY-M	M-DD or Month DD, YY	<b>#</b>	Search			
<b>_</b> +	User Administration											
Res	ources			. m ~	Subject	Ø ~	Reprence # Y	Emp. I	ID ~ te ~			
		$\bigcirc$	Air Canada Pilots	Termination	Termination		185501		10-Apr-2019 2:48PM			
i	Pension Terms		Air Canada Pilots	Enrolment	Enrolment	Ø	185450		05-Apr-2019 11:45AM			
Þ	Tutorials and Videos		Air Canada Pilots	Member Data Updat	Disability		185364		04-Apr-2019 12:10PM			
•=	Attend an employer	$\bigcirc$	Cabinet Office (54)	SES Conversion	Patrizia Durisotti WL		367106		07-Mar-2018 12:00AM			
	information session	$\bigcirc$	Cabinet Office (54)	SES Conversion	RE: Transfer to OPE.		363185		03-Jan-2018 12:00AM			
		$\bigcirc$	Cabinet Office (54)	SES Conversion	Patrizia Durisotti WL		360241		07-Nov-2017 12:00AM			
			Cabinet Office (54)	SES Conversion	ACQUELYNN NEWM		345506		22-Jun-2017 12:00AM			
			Cabinet Office (54)	SES Conversion	Leen Al Zaibak- WIN.		345537		22-Jun-2017 12:00AM			
			Cabinet Office (54)	SES Conversion	jacquelynn Newman		345504		22-Jun-2017 12:00AM			
			Cabinet Office (54)	SES Conversion	Leen Al Zaibak-Win.		339695		05-May-2017 12:00AM			
			◀ 1 / 3 ►						1 - 10 of 23 items			
		Messa	ge: Termination									
		Hi.										
		,										
		I unde	erstand J. Doe has termir	ated, can you please cor	nfirm?							
		<b>T</b> 1										
		Thank	c you,									
		Miche	lle									

onlineServices	5						() He	lp 🛃	Secure Message	s Settings 🔻	Sign out
B Welcome Michelle	Sec	ure Mess	agir	ng							
Air Canada Pilots 👻	🕰 In	box 🖪 Sent	Ø (	Drafts					<b>\$</b>	ompose New N	Message
MAIN MENU	To vi	iew message, click	on the	e Subject							
🕋 Home		Mail	hov					~	🗆 View Unrea	ad Only	
🖂 Secure Messages		Wall	DOX	- 711 -				View Archiv	/ed		
🔔 File Upload		Keyword Sea	arch	Keyword Search							
≅ Activity		Date Ra	nae	YYYY-MM-DD or Mor	nth DD. YY 🗮	YYYY-MM	1-DD or Month DD. YY	<b>#</b>		Search	
							,	_			
Resources	⊠ ~	То	~	From	Subject	~ <i>@</i> ~	Reference #	Emp. I	D ~	Date	~
	$\bigcirc$	Air Canada Pilot	5	Termination 🤇	Termination	>	185501			10-Apr-2019 2	2:48PM
Pension Terms		Air Canada Pilot	5	Enrolment	Enrolment	Ø	185450			05-Apr-2019 1	1:45AM
Tutorials and Videos		Air Canada Pilot	5	Member Data Updat	Disability		185364			04-Apr-2019 1	2:10PM
Attend an employer		Cabinet Office (5	4)	SES Conversion	Patrizia Durisotti V	ML	367106			07-Mar-2018 1	12:00AM
information session		Cabinet Office (5	4)	SES Conversion	RE: Transfer to OP	8	363185			03-Jan-2018 1	2:00AM
		Cabinet Office (5	4)	SES Conversion	Patrizia Durisotti V	ML	360241			07-Nov-2017 1	12:00AM
		Cabinet Office (5	4)	SES Conversion	JACQUELYNN NEW	M	345506			22-Jun-2017 1	2:00AM
		Cabinet Office (5	4)	SES Conversion	Leen Al Zaibak- WI	N	345537			22-Jun-2017 1	2:00AM
		Cabinet Office (5	4)	SES Conversion	Jacquelynn Newm	an	345504			22-Jun-2017 1	2:00AM
		Cabinet Office (5	4)	SES Conversion	Leen Al Zalbak- Wi	n	339695			05-May-2017	12:00AM
		<ul> <li>1</li> <li>/ 3</li> </ul>		►I						1 - 10 of 2	23 items
		Pensio	n Infe	ormation	Legal Ir	nformatio	n	Cor	ntact Us		



onlineServices	5			③ Help	Secure Messages Settings
B Welcome Michelle	Record of Co	prrespondence			
Air Canada Pilots 👻	Back				Reply Archive 🖶 Print
MAIN MENU	Reference # 185	501	-		
🕋 Home	From	Termination			Message Read
Secure Messages	Date	Air Canada Pilots 10-April-2019 at 2:49 PM			
🔔 File Upload	Subject	Termination			
E Activity	Hi,				
💁 User Administration					
Resources	I understand J. Doe h	as terminated, can you please confirm?			
Pension Terms	Thank you				
Tutorials and Videos	mank you,				
Attend an employer information session	Michelle				
PTrust	Pensi	on Information	Legal Information		Contact Us
	Informa	tion for Members	Privacy		A OPTrust.com

From here you can see the entire message and "Reply", should it be required:

onlineServices	i		⑦ Help Secure Messages Settings Sign out
B Welcome Michelle	Record of Co	rrespondence	
Air Canada Pilots 👻	Back		Reply Archive 🖶 Print
MAIN MENU	Reference # 3671	06	
🕋 Home	From	SES Conversion	Message Read 🛛 🗹
Secure Messages	To Date	Cabinet Office (54) 29-July-2018 at 12:00 AM	Archived 🗌
🔔 File Upload	Subject	RE: Patr	
E Activity	Hello,		
🐣 User Administration	The request below is s	till outstanding:	
Resources	We have no record of	\$19.74 for the final contributions being submitted. Contribution	s should have been submitted through the termination date, and a
Pension Terms	reversal of \$54.28 was	submitted on the 25-A0G-2016 paydate.	
Tutorials and Videos	Based on the expected advise when the outst	l amount of \$19.74 you have indicated, there still needs to be \$7 anding contributions will be submitted.	74.02 submitted for the member's outstanding contributions. Please
La Attend an employer information session	Thank you,		
	Anna Davis		
	From To Date Subject	SES Conversion Cabinet Office (54) 17-April-2018 at 12:00 AM RE: Patr	Message Read 🛛 Archived 🗆
	Hello Suky,		
	We have no record of	\$19.74 for the final contributions being submitted. Contribution	s should have been submitted through the termination date, and a



Once you click "Reply" the message template will come up. You will be able to change the "Mailbox" but not the "Topic". Please enter the "Employee ID" if it is available and not yet entered:

onlineServices	5		⑦ Help	Secure Messages	Settings  Sign out
Welcome Michelle	Reply Secure Messag	je			
Air Canada Pilots 👻	Reference #	185501			
MAIN MENU	Mailbox*	Air Canada Pilots			~
A Home	Topic*	Termination			~
Secure Messages	Employee ID				+
🔔 File Upload	Archived				
E Activity					
🐣 User Administration	Content*	B I U H₁ H₂ i≣ ≔			
Resources		Insert text here			
Pension Terms					
▶ Tutorials and Videos					
Attend an employer information session					
	Drag files here or	Choose File			
	h		٥	) Delete 🛛 🕲 Save	🖌 Send Message
	Pension Informatio	on Legal Information		Contact Us	

Type your message in the "Content" area; multiple formatting tools are available if you choose:

onlineServices	3		⑦ Help	Secure Messages	Settings 🔻	Sign out
Welcome Michelle	Reply Secure Messag	e				
Air Canada Pilots 👻	Reference #	185501				
MAIN MENU	Mailbox *	Air Canada Pilots				~
🕋 Home	Topic*	Termination				~
Secure Messages	Employee ID					+
File Upload	Archived					
Set User Administration	Content*	B I U H₁ H₂ ΙΞ Ξ				
Resources		Insert text here				
Pension Terms						
Tutorials and Videos						
▲ ■ Attend an employer information session						
	Drag files here or	Choose File				
			创	Delete 🕲 Save	🖪 Send Me	essage
n OPTrust	Pension Informatio	n Legal Information		Contact Us		



<i>e</i> Choose File to Upload						×		
← → ~ ↑ 📙 > Onel	Drive - OPTrust > AAA - drag and drop			ڻ v	Search AAA - drag and drop	Q	✓ S Certificate error	C Search
Organize 🔻 New folder					iii ▼ 🔲	()		
🕹 Downloads 🖈 ^	Name	Date modified	Туре	Size		^		
📰 Pictures 🛛 🖈	🔊 Doe	4/10/19 2:38 PM	Microsoft Word D	12 K	R		() Hel	Sign out
Dashboards	2 v	2/27/19 12:13 PM	Adobe Acrobat D	338 K	(B		0.10	betare messages betangs
DMG	Lana talla	2/13/19 2:41 PM	Adobe Acrobat D	77 K	(8			
Penweb	🔂 desam	12/06/18 9:30 AM	Adobe Acrobat D	405 K	B			
Screenpresso	S Nortes	11/08/18 2:06 PM	Adobe Acrobat D	49 K	(B			
- seccentresso	😹 Saaan	10/29/18 2:47 PM	JPG File	77 K	(8			
Y 🔗 OneDrive - OPTru	👼 Similar	10/29/18 2:47 PM	Adobe Acrobat D	127 K	B			
> 🛃 .CitrixStuff	👼 Similar	10/29/18 2:46 PM	Adobe Acrobat D	155 K	(8			
🦣 .jinit	👼 Similar	10/29/18 2:46 PM	Adobe Acrobat D	118 K	(B			~
AAA - drag and	S. Vision	9/24/18 2:25 PM	Adobe Acrobat D	111 K	(B			
AAA - from Toas	🔁 P	9/24/18 2:23 PM	Adobe Acrobat D	111 K	(8			
Attachments	S. R.	9/24/18 2:17 PM	Adobe Acrobat D	111 K	(B			~
Auto Recover	Canada and	9/24/18 1:26 PM	Adobe Acrobat D	111 K	(B			
	a L	9/21/18 11:23 AM	Adobe Acrobat D	111 K	(8			+
CEBS	CHE Repotation Form Canadian Carrie	9/18/18 1:38 PM	Adobe Acrobat D	125 K	(B			
Contact US	<b>R</b> . (1997)	9/17/18 2-23 PM	Adobe Acrobat D	11 <u>4</u> K	R	_		
File nan	ne:			~	All Files (*.*)	~		
					Open Canc	el		
				conte	<u> </u>	<b>n</b> 1 <b>n</b> 2		
	Resources				Insert text her	e		
	Pension Terms							
	Tutorials and Videos							
	Attend an employer information session							
			Drag f	iles here	or Choose File			
								🛍 Delete 🚯 Save 🖌 Send Message
			Pension	Inform	ation		Legal Information	Contact Us

You can attach a document by clicking "Choose File" and selecting the file from your explorer drive:

You can also drag and drop a file by selecting it and moving the cursor until the "Drag files here" box becomes enabled. Note: On some monitors (such as the one used for these screen captures) the change to the drag and drop area is extremely subtle and can be hard to see. It is often easier to see if you step back from the monitor a bit or look at it from the side:

onlineServices	3		() Help	Secure Messages	Settings 🔻	Sign out
Welcome Michelle	Reply Secure Messag	e				
Air Canada Pilots 🔹	Reference #	185501				
MAIN MENU	Mailbox*	Air Canada Pilots				~
\land Home	Topic*	Termination				~
Secure Messages	Employee ID					+
<ul> <li>▲ File Upload</li> <li>IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII</li></ul>	Archived					
	Content*	B <i>I</i> <u>U</u> H1 H2 ¦≣ ≔				
Resources		Insert text here				
Pension Terms						
Tutorials and Videos     Attend an employer     information session	Drag files here or > Move	Choose File	Ű	] Delete 안 Save	<b>∢</b> Send Me	essage
ne op Trust	Pension Informatio	n Legal Information				



onlineServices	5	⑦ Help Secure Messages Settings ▼	Sign out
Welcome Michelle	Reply Secure Messag	e	
Air Canada Pilots 👻	Reference #	185501	
MAIN MENU	Mailbox *	Air Canada Pilots	~
🗥 Home	Topic *	Termination	~
Secure Messages	Employee ID		+
1 File Upload	Archived		
Activity	Content*		
Resources	X	Hi Michelle,	
Pension Terms		Yes, that is correct, J. Doe did terminate. I have attached their Notice of Termination form.	
Tutorials and Videos		Sincerely,	
Attend an employer information session		Michelle	
	tran files have as		
	rag hes here or	Choose Hie	
		Doe.docx 0.01 MB	Û
		Delete 🔀 Save 🖈 Send Mes	sage
	Pension Informatio	n Legal Information Contact Us	

## Attached documents will appear at the bottom of the message:

Welcome Michelle   Air Canada Pilots   MAIN MENU   Mailbox*   Air Canada Pilots   Mailbox*   Air Canada Pilots   Topic*   Termination   Secure Messages   Employee ID   Employee ID   Archived	onlineServices	nlineServices	③ Help	ピ Secure Messages	Settings 🔻	Sign out
Air Canada Pilots   MAIN MENU   Mailbox*   Air Canada Pilots   Mailbox*   Topic*   Termination   Secure Messages   Employee ID   File Upload   Activity	Welcome Michelle	Welcome Michelle Reply Secure Messag	e			
MAIN MENU Mailbox* Air Canada Pilots   Mailbox* Topic* Termination   Secure Messages Employee ID +   File Upload Archived +	ir Canada Pilots 👻	anada Pilots	185501			
Home Topic*   Secure Messages   Employee ID   File Upload	IN MENU	MENU Mailbox*	Air Canada Pilots			~
✓ Secure Messages     Employee ID     +            ★ File Upload      Archived     +	Home	me Topic*	Termination			~
File Upload     Archived     Archived	Secure Messages	cure Messages Employee ID				+
	File Upload	2 Upload Archived				
2+ User Administration Content <sup>*</sup> B <i>I</i> U H₁ H₂ ΙΞ Ξ	User Administration	er Administration Content*	B <i>I</i> <u>U</u> H₁ H₂ ΙΞ :Ξ			
Resources Hi Michelle,	ources	rces	Hi Michelle,			
Pension Terms     Yes, that is correct, J. Doe did terminate. I have attached their Notice of Termination form.	Pension Terms	nsion Terms	Yes, that is correct, J. Doe did terminate. I have attached their Notice of Term	mination form.		
Tutorials and Videos     Sincerely,	Tutorials and Videos	torials and Videos	Sincerely,			
Attend an employer Michelle Michelle	Attend an employer information session	end an employer ormation session	Michelle			
Drag files here or Choose File		Drag files here or	Choose File	~		
Doe.docx OOT MB OO MB			Doe.docx	о.от мв relete 🕲 Save	A Send Me	essage



onlineServices	3	⑦ Help 🛛 Secure Messages Settings ▼	Sign out
Welcome Michelle	Reply Secure Messag	e	
Air Canada Pilots 👻	Reference #	185501	
MAIN MENU	Mailbox *	Air Canada Pilots	~
🗥 Home	Topic*	Termination	~
Secure Messages	Employee ID		+
File Upload	Archived		
	Content*	B I U H1 H2 i≡ ≔	
Resources		Hi Michelle,	
Pension Terms		Yes, that is correct, J. Doe did terminate. I have attached their Notice of Termination form.	
Tutorials and Videos		Sincerely,	
La≡ Attend an employer information session		Michelle	
	Drag files here or	Choose File	
		Doe.docx	
		Delete Save A Send Mess	sage
ODT	Pension Information	n Legal Information Contact Us	

If you would like to complete your message later, you can select "Save":

onlineServices					3	Help 🛛 Secure Messag	es Settings 👻 Sign out
<b>Welcome Michelle</b> Air Canada Pilots	Secure Mess	aging Prafts				I	Compose New Message
MAIN MENU	Please note, the mess	ages below have not b	een sent to OPTrust				
🕋 Home							
Secure Messages	To ~	From	<ul> <li>Subject</li> </ul>	~ @ ~	Reference # ~	Emp. ID ~	Date ~
🐽 File Upload	Termination	Air Canada Pilots	Termination	Ø	185501		15-Apr-2019 1:50PM
≣ Activity		Air Canada Pilots	General Inquiry		185367		04-Apr-2019 12:15PM
🚑 User Administration							
Resources							
Pension Terms							
Tutorials and Videos							
Attend an employer information session							1 - 2 of 2 items
	Pensio	on Information	Le	egal Informa	ition	Contact Us	



onlineServices	5	⑦ Help Secure Messages Settings ▼	Sign out
B Welcome Michelle	Reply Secure Messag	e	
Air Canada Pilots 🔹	Reference #	185501	
MAIN MENU	Mailbox*	Air Canada Pilots	~
🕋 Home	Topic*	Termination	~
Secure Messages	Employee ID		+
1. File Upload	Archived		
Liser Administration	Content*	B I <u>U</u> H1 H2 IΞ Ξ	
Resources		Hi Michelle,	
Pension Terms		Yes, that is correct, J. Doe did terminate. I have attached their Notice of Termination form.	
Tutorials and Videos		Sincerely,	
Attend an employer information session		Michelle	
			1
	Drag files here or	Choose File	
		Doe.docx 0.01 MB	Ū
		🔟 Delete 🛛 🔀 Save 🖉 A Send Mess	age
	Pension Informatio	n Legal Information Contact Us	

When you are ready to send your message click "Send Message":

Your message will be sent, and you will be returned to your Secure Messaging inbox. If you click on the "Subject" the original message along with your response will come up:

onlineServices							⑦ He	lp 📘	Secure Message	s Settings 🕶 🚦	Sign out
left Welcome Michelle	Sec	ure Messa	ngir	ng							
Air Canada Pilots 👻	🕰 In	box 🖪 Sent	🖋 D	rafts					ø c	ompose New Me	essage
MAIN MENU	To vi	ew message, click	on the	Subject							
🗥 Home		Maill	000	- All -				~	🗆 View Unrea	id Only	
🖂 Secure Messages		Walls		- 700 -					View Archiv	ved	
1. File Upload		Keyword Sea	rch	Keyword Search							
E Activity		Date Rar	ige	YYYY-MM-DD or Mor	ith DD, YY 📋	YYYY-MN	1-DD or Month DD, YY			Search	
2+ User Administration						1					
Resources	$\bowtie$ ~	То	~	From ~	Subject	<u> </u>	Reference # ~	Em	p. ID ~	Date	~
	+	Air Canada Pilots		Termination 🤇	Termination	>	185501			10-Apr-2019 2:4	i8PM
Pension Terms		Air Canada Pilots		Enrolment	Enrolment	Ø	185450			05-Apr-2019 11	:45AM
Tutorials and Videos		Air Canada Pilots		Member Data Updat	Disability		185364			04-Apr-2019 12	:10PM
Attend an employer		Cabinet Office (54	1)	SES Conversion	Patrizia Durisotti V	e	367106			07-Mar-2018 12	:00AM
information session		Cabinet Office (54	1)	SES Conversion	RE: Transfer to OP		363185			03-Jan-2018 12:	MA00
	$\bigcirc$	Cabinet Office (54	1)	SES Conversion	Patrizia Durisotti V	e.,	360241			07-Nov-2017 12	:00AM
		Cabinet Office (54	1)	SES Conversion	JACQUELYNN NEW	м	345506			22-Jun-2017 12:	MA00
		Cabinet Office (54	1)	SES Conversion	Leen Al Zalbak- WI	N	345537			22-Jun-2017 12:	MA00
		Cabinet Office (54	1)	SES Conversion	Jacquelynn Newm	en	345504			22-Jun-2017 12:	MA00
		Cabinet Office (54	1)	SES Conversion	Leen Al Zalbak- Wi	n.,	339695			05-May-2017 12	:00AM
		<ul> <li>▲ 1 / 3</li> </ul>		►I						1 - 10 of 23	items
		Pensio	n Infc	ormation	Legal Ir	nformatio	n	(	Contact Us		



onlineServices		⑦ Help	Secure Mes	sages	Settings 🔻	Sign out
Air Canada Pilots	Record of Correspondence		Rep	bly .	Archive	🖶 Print
MAIN MENU	Reference # 185501					
<ul> <li>Home</li> <li>Secure Messages</li> <li>File Upload</li> <li>Activity</li> <li>User Administration</li> <li>Resources</li> <li>Pension Terms</li> <li>Tutorials and Videos</li> <li>Attend an employer information session</li> </ul>	From       Air Canada Pilots         To       Termination         Date       15-April-2019 at 2:09 PM         Subject       Termination         Hi Michelle,         Yes, that is correct, J. Doe did terminate. I have attached their Notice of Termination form.         Sincerely,         Michelle		Message Read Archived			
	Attached Files: Doe.docx From Termination To Air Canada Pilots Date 10-April-2019 at 2:49 PM Subject Termination Hi, I understand J. Doe has terminated, can you please confirm?		Message Read Archived			



# **UPLOADING A FILE**

Please refer to the File Upload Guide for complete instructions on uploading files.

# **Resetting Your Password**

#### **VIDEO**



Password Change.mp4

## **STEP BY STEP**

It is recommended that you change your password every three months or if you feel it has been compromised for any reason. To change your password or security questions click on the "Settings" drop down menu in the top right-hand section of your screen:





To change your password, select "Change Password":

onlineServices	3	⑦ Help Secure Messages Settings Sign out Change Paceword
Welcome Michelle	Welcome to Online Services	Security Questions
Air Canada Pilots 🔹	Here you can:	
MAIN MENU	<ul> <li>send and receive secure electronic messages</li> <li>send forms, documents and files</li> <li>send payroll data files</li> </ul>	
🕋 Home	receive reports from OPTrust	
Secure Messages	Online Services is used by participating employers and external vendors to exchar confidential employer/member data with OPTrust	
🛕 File Upload		
III Activity	Read the Online Services User Guide	
🐣 User Administration		
Resources	Employer Manual	Employer Forms
Pension Terms	Quick access to practical	nic Quick access to all the forms you
Tutorials and Videos	information on administering the news bulletin for employers OPSFI Pension Plan	to let will need.

Change Password	×
Current Password *	Current Password
Password *	Password
Confirm Password *	Confirm Password
	Close Save

Change Password	×
Current Password *	
Password *	
Confirm Password*	
	Close Save



Change Password		×
Password successfully char	nged	
Current Password *	Current Password	
Password *🕚	Password	
Confirm Password *	Confirm Password	
	Close Save	e

You will get the following message indicating your password has been successfully changed:

Change Password		×
Password successfully char	nged	
Current Password *	Current Password	
Password *	Password	
Confirm Password *	Confirm Password	
	Close	e



# **CHANGING YOUR SECURITY QUESTIONS**

#### VIDEO

----

Updating Security Questions.mp4

#### **STEP BY STEP**

To change your Security questions, click "Settings" at the top right of the screen and select "Security Questions"



Security Questions		×
Security question 1 $^{*}$	Select	~
	Security Answer	
Security question 2 <sup>*</sup>	Select	~
	Security Answer	
Security question 3 <sup>*</sup>	Select	~
	Security Answer	
		Close Save



Select your security questions from the drop-down boxes and enter the answers. Ensure the answers are easy for you to remember but not obvious to anyone else:

Security Questions			×
Security question 1 <sup>*</sup>	Select What is your favourite colour?		
Security question 2 <sup>*</sup>	What was your first pet's name? What was the model of your first car? What is your mother's maiden name? What is your father's middle name? What is the name of the street where you grew up? What is the name of your fayourite sports team?		
Security question 3 <sup>*</sup>	What is the name of your best friend in high school?		
	Security Answer		
		Close	Save

Security Questions		×
Security question 1 <sup>*</sup>	What is your favourite colour?	~
	green	
Security question 2 <sup>*</sup>	What was your first pet's name?	~
	Fido	
Security question 3 $*$	What is your mother's maiden name?	~
	Smith	
	Close	e Save



Security Questions		×
Security Questions success	sfully changed	
Security question 1*	Select	~
	Security Answer	
Security question 2 <sup>*</sup>	Select	~
	Security Answer	
Security question 3 <sup>*</sup>	Select	~
	Security Answer	
	Close	Save

A message indicating your security questions have successfully changed will appear:



# **USER ADMINISTRATION**

A senior contact within each employer will have access to the User Administration function. This will allow employers to self administer, adding users, assigning and changing roles and revoking access if required.

To start click "User Administration" from the left-hand menu:





# **ADDING A USER**

onlineServices		⑦ Help Secure Messages Settings ▼ Sign out
Welcome Michelle          Air Canada Pilots	User Administration	Details
MAIN MENU	Username Email Name	
🕋 Home	employer@t employer@testdata.com testdata, employer	
Secure Messages	philip@opt.ca philip@opt.ca Mayers, Philip	
🔔 File Upload	joe@opt.ca joe@opt.ca Doe, Joe	
E Activity	testnnn@tes testnnn@test.com Cho, Abhi2	
	test11@gma test11@gmail.com test11, test11	
Resources	testn@opt.c testn@opt.com test, Abhi	
	michelle@o michelle@opt.ca Kogan, Michelle	
Pension Terms	michelle@e michelle@employer.ca Employer, Michelle	
Tutorials and Videos	test3@optru test3@optrust.com Choubey, Abhishek	
Attend an employer	testn1@opt testn1@opt.com test, Abhi2	
mornation session	Previous Page 1 of 1 Next	
	Pension Information Legal Info	ormation Contact Us

From there you will be brought to the following screen. Click "Add" to add a new user:

Create User			×
•	-0		
Security	Search	Create	Result
Email <sup>*</sup>			
Organization	Select		~
		Cancel	Next


Enter the new user's email address and the organization they will be working on. Note that if an individual works on a few different organizations you will be able to add the other organizations later:

Create User			×
•	-0		
Security	Search	Create	Result
Email *	jim@opt.ca		
Organization	Air Canada Pilots (9150)		~
			Cancel Next

Create User			×
•	O		
Security	Search	Create	Result
Email*	jim@opt.ca		
Organization	Air Canada Pilots (9150)		Ý
			Cancel Next

-



On the next screen enter the user's First Name and Last Name. Middle Name is optional, and "Locale" is "en":

Create User			×
•	•	-0	
Security	Search	Create	Result
First Name	Jim		
Middle Name			
Last Name <sup>*</sup>	East		
Locale	Select en		
			Cancel Save





Create User			×
•	•	•	O
Security	Search	Create	Result
Security Group ID	ORGANIZATION 143092		
First Name	Jim		
Last Name	East		
Username	jim@opt.ca		
Email	jim@opt.ca		
Status	CREATED		
Locale	en		
Organizations	Air Canada Pilots (9150)		
User Groups			
			Close

The system will confirm your entries. Verify the content and click "Close":

onlineServices			③ Help Secure Messages Settings ▼ Sign out
Welcome Michelle Air Canada Pilots	User Administration	Q Add	Details
MAIN MENU	Username Email	Name	
🕋 Home	employer@t employer@testdata.com	testdata, employer	
Secure Messages	philip@opt.ca philip@opt.ca	Mayers, Philip	
🔔 File Upload	joe@opt.ca joe@opt.ca	Doe, Joe	
E Activity	testnnn@tes testnnn@test.com	Cho, Abhi2	
+ User Administration	test11@gma test11@gmail.com	test11, test11	
Pasourcas	testn@opt.c testn@opt.com	test, Abhi	
Resources	michelle@o michelle@opt.ca	Kogan, Michelle	
Pension Terms	michelle@e michelle@employer.ca	Employer, Michelle	
Tutorials and Videos	test3@optru test3@optrust.com	Choubey, Abhishek	
Attend an employer	testn1@opt testn1@opt.com	test, Abhi2	
information session	Previous Page 1	of 1 Next	
	Pension Information	Legal Information	Contact Us



To refresh the results, click "F5" or refresh on your keyboard. You can now see your new user.

onlineServices					@ Help	Secure Messages	Settings 🔻	Sign out
Welcome Michelle          Air Canada Pilots	User Adn	ninistration		Q Add	Details			
MAIN MENU	Username	Email	Name					
🗥 Home	jim@opt.ca	jim@opt.ca	East, Jim					
Secure Messages								
主 File Upload								
E Activity								
2+ User Administration								
Resources								
Pension Terms								
Tutorials and Videos								
Attend an employer information session	Previo	IIS Page 2	of 2 Ne	txe				
	, revio	raye Z						
		Pension Information	Legal In	formation		Contact Us		

onlineServices	3						() Help 🛛 🛃 S	ecure Messages Settings 🔻 Sign out
Welcome Michelle Air Canada Pilots	User Adn	ninistrat	ion			Q Add	Details	
MAIN MENU	Username		Email		Name			Edit Lock Reset Password
<ul> <li>Home</li> <li>Secure Messages</li> <li>File Upload</li> <li>Activity</li> <li>User Administration</li> <li>Resources</li> <li>Pension Terms</li> <li>Tutorials and Videos</li> <li>Attend an employer</li> </ul>	jim@opt.ca	jim@opt.ca		East, Jim			Security Group ID First Name Last Name Username Email Status Locale Organizations User Groups	ORGANIZATION 143092 Jim East jim@opt.ca CREATED en Add Air Canada Pilots (9150)
information session	Previo	us Pension Info	Page 2	of 2	Nex Legal Info	ormation	Con	tact Us



You can see they are assigned to the Organization you designated for them. If you need to provide access to additional organizations, you can do so by clicking on "Add":

onlineServices	;							() Help 🛛 🛃 S	ecure Messages Settings - Sign out
Welcome Michelle	User Adn	ninistr	ation				Q Add	Details	
MAIN MENU	Username		Email			Name			Edit Lock Reset Password
<ul> <li>Home</li> <li>Secure Messages</li> <li>File Upload</li> <li>Activity</li> <li>User Administration</li> <li>Resources</li> <li>Pension Terms</li> <li>Tutorials and Videos</li> <li>Attend an employer</li> </ul>	jim@opt.ca	jim@opt.c	a		East, Jir	n		Security Group ID First Name Last Name Username Email Status Locale Organizations User Groups	ORGANIZATION 143092 Jim East jim@opt.ca jim@opt.ca CREATED en Air Canada Pilots (9150)
information session	Previo	us	Page	2	of 2	Ne	xt		
OPT west	1	Pension Ir	nformation	1		Legal Inf	formation	Con	tact Us

And selecting the appropriate organizations from the drop-down menu. *Note: You will have to do this separately for each organization, and you will only be able to add people to the organizations for which you have access.* 

Add Organization		×
Organization *	Select	~
		Iancel Save

1



Air Canada Pilots	User Adn	ninistr	ation		0	Add	Dotails	
IAIN MENU	Username		Email		Name	Add	Details	Edit Lock Reset Passwor
🚯 Home	jim@opt.ca	jim@opt.ca	a	East,	Jim	•	Security Group	OPGANIZATION
Secure Messages							ID	143092
File Upload							First Name Last Name	Jim East
Activity							Username Email	jim@opt.ca jim@opt.ca
+ User Administration							Status	CREATED
esources							Locale Organizations	en Ad
Pension Terms								Air Canada Pilots (9150)
Tutorials and Videos							User Groups	Ad
Attend an employer								
information session	Previo	us	Page	2 of 2	Next			

To remove an Organization, click the red "x":

Remove Organization	I	×
Organization	Air Canada Pilots (9150)	~
		Cancel Remove



onlineServices	5						() Help 🛛 🔡 S	ecure Messages Settings 👻 Sign out
<b>B</b> Welcome Michelle	User Adn	ninistrati	on					
Air Canada Pilots 👻	Users				(	Add	Details	
MAIN MENU	Username	E	mail		Name			Edit Lock Reset Password
🕋 Home	jim@opt.ca	jim@opt.ca		East, Jim		Þ	Security Group	ORGANIZATION
🖂 Secure Messages							ID First Name	143092
🔔 File Upload							Last Name	East
E Activity							Username Email	jim@opt.ca jim@opt.ca
2+ User Administration							Status	CREATED
Resources							Organizations	Add
i Pension Terms								Air Canada Pilots (9150) 🛛 🗙
Tutorials and Videos							User Groups	Add
Attend an employer								
mornation session	Previo	us	Page 2	of 2	Next			
nt OPTrust	1	Pension Inform	mation	Le	egal Info	rmation	Con	tact Us DPTrust.com

To do so click "Add" in the User Group category:

Add User Group	×
User Group*	Select Administrator (9150) Communications (9150) File Upload (9150)
	Cancel Save



1

### **USER ROLES**

The user roles are as follows:

Communications: This role allows the users to send and receive secure messages.

File Upload: This role incorporates the Communications role but includes the ability to upload files.

Administrator: This role incorporates the Communications and File Upload roles but also allows the user to set up new users, change access and revoke access. It should be designated to a senior official within the organization.

Select the correct role and click "Save":

Add User Group			×
User Group <sup>*</sup>	File Upload (9150)		~
		Cancel	Save

#### You can now see the User Group:

onlineServices	5						🕐 Help 🛛 🛃 S	ecure Messages – Settings 🔻	Sign out
Welcome Michelle	User Adn	ninistrat	ion		Q /	Add D	etails		
MAIN MENU	Username	1	Email		Name			Edit Lock Reset P	assword
<ul> <li>Home</li> <li>Secure Messages</li> <li>File Upload</li> <li>Activity</li> <li>User Administration</li> <li>Resources</li> <li>Pension Terms</li> <li>Tutorials and Videos</li> </ul>	jim@opt.ca	jim@opt.ca		East, Jim			Security Group ID First Name Last Name Username Email Status Locale Organizations	ORGANIZATION 143092 Jim East jim@opt.ca jim@opt.ca CREATED en Air Canada Pilots (9150)	Add X
Attend an employer information session	Previo	us Pension Infor	Page 2	of 2	Next Legal Informat	ion	Con	File Upload (9150)	×



The final step is to set up a temporary password for the new user. To do so click "Reset Password":

onlineServices						🕲 Help 🛛 🛃 S	ecure Messages Settings	Sign out
Welcome Michelle	User Adn	ninistration						
	Users			Q	Add	Details		
MAIN MENU	Username	Email		Name			Edit Lock Reset	Password
🕋 Home	jim@opt.ca	jim@opt.ca	East, Jim	ı	•	Security Group	ORGANIZATION	
🖂 Secure Messages						ID First Name	143092	
主 File Upload						Last Name	East	
E Activity						Username Email	jim@opt.ca jim@opt.ca	
						Status	CREATED	
Resources						Organizations	en	Add
Pension Terms							Air Canada Pilots (9150)	×
Tutorials and Videos						User Groups		Add
Attend an employer							File Upload (9150)	×
information session	Previo	us Page	2 of 2	Next				
췒 OPTrust	 1	Pension Information		Legal Inforr	nation	Con	tact Us	

Reset Password		×
New Password *		
Confirm Password		
	Cancel	Reset Password



Enter the temporary password in both fields. If you enter a password that does not conform to our security requirements you will be notified, and the password won't be accepted:

Reset Password		×
Password must be at le	east 8 characters long.	
Password must contain	a lower case, upper case, number, and symbol character.	
New Password*	•••••	
Confirm Password	•••••	
	Cancel Reset Passwor	d

### **OPERATIONAL NOTE**

-

The system does NOT notify users of their password, they must be advised what it is. Best practice would be to provide the new user with instructions to log in using their email separately from their password, limiting the chances of both pieces of information falling into the wrong hands together.

Changing a user's name or email address is done by calling them up in User Administration and clicking on their "Name":

onlineServices						🕐 Help 🛛 💙	Secure Messages Settings - Sign out	
Welcome Michelle	User Adn	ninistra	tion		QA	dd Details		
MAIN MENU	Username		Email		Name		Edit Lock Reset Password	
<ul> <li>☆ Home</li> <li>Secure Messages</li> <li>☆ File Upload</li> <li>Activity</li> <li>▲ User Administration</li> <li>Resources</li> <li>ŷ Pension Terms</li> </ul>	jim@opt.ca	jim@opt.ca		East, Jim		Security Group ID First Name Last Name Username Email Status Locale Organizations	ORGANIZATION 143092 Jim East jim@opt.ca jim@opt.ca ACTIVE e en Add Air Canada Pilots (9150)	
Tutorials and Videos						User Groups	Add	
Attend an employer information session	Previo	us	Page 2	of 2	Next		File Upload (9150) X	
nt OPTrust	1	Pension Inf	ormation		Legal Informati	ion Co	ntact Us	



### Click "Edit":

onlineServ	vices						@ Help 🛛 🛃 S	ecure Messages Settings	Sign out
<b>Welcome Miche</b> Air Canada Pilots	User Adr	ministrati	ion			Q Add	Details		
MAIN MENU	Username	E	Email		Name			Edit Lock Reset	Password
<ul> <li>Home</li> <li>Secure Messages</li> <li>File Upload</li> <li>Activity</li> <li>User Administration</li> <li>Resources</li> <li>Pension Terms</li> </ul>	jim@opt.ca	jim@opt.ca		Eas	t, jim	•	Security Group ID First Name Last Name Username Email Status Locale Organizations	ORGANIZATION 143092 Jim East jim@opt.ca jim@opt.ca CREATED en Air Canada Pilots (9150)	Add X
<ul> <li>Tutorials and Vide</li> </ul>	os						User Groups		Add
Attend an employ information session	er n Previo	Dus	Page 2	of 2	Л	lext		File Upload (9150)	×
nterview (1977) (19777) (1977) (19777) (19777) (19777) (19777) (197777) (197777) (1977777) (197777777) (19777777777777777777777777777777777777		Pension Infor	mation		Legal I	nformation	Con	tact Us	

Edit	×
First Name	Jim
Middle Name	
Last Name* (	West
Email *	jim@opt.ca
Locale	en 🗸
	Cance Save



B Welcome Michelle	User Adn	ninist	ration						
Air Canada Pilots 👻	Users				Q	Add	Details		
AIN MENU	Username		Email		Name			Edit Lock Reset I	Password
<ul> <li>Home</li> <li>Secure Messages</li> <li>File Upload</li> <li>Activity</li> <li>User Administration</li> <li>esources</li> <li>Pension Terms</li> </ul>	jim@opt.ca	jim@opt.	ca	West,	lim		Security Group ID First Name Last Name Username Email Status Locale Organizations	ORGANIZATION 143092 Jim West jim@opt.ca Jim@opt.ca ACTIVE en Air Canada Pilots (9150)	Ado
Tutorials and Videos							User Groups		Ad
Attend an employer information session	Previo	JS	Page	2 of 2	Next			File Upload (9150)	3

You can see the information has now been updated:



# **REVOKING ACCESS**

Revoking a user's access is done by calling them up in User Administration and clicking on their "Name":

Welcome Michelle	User Adn	ninistration					
ir Canada Pilots 🛛 👻	Users			Q Add	Details		
IN MENU	Username	Email		Name		Edit Lock Reset	Password
Home	jim@opt.ca	jim@opt.ca	West, Jim	۱.	Security Group	ORGANIZATION	
Secure Messages					ID	143092	
File Upload					Last Name	Jim West	
Activity					Username Email	jim@opt.ca jim@opt.ca	
User Administration					Status	ACTIVE	
ources					Organizations		Ade
Pension Terms						Air Canada Pilots (9150)	>
Tutorials and Videos					User Groups		Ade
Attend an employer						File Upload (9150)	>
	Previo	us Page	2 of 2	Next			
ODT		Pension Information	Le	egal Information	Соп	tact Us	
ODT	1	Pension Information	Le	egal Information	Соп	tact Us	
ODT		Pension Information	Le	egal Information	Con @ Help 💕 S	tact Us	▼ Sign
ODT	User Adn	Pension Information	Lo	egal Information	Con ⑦ Help 💽 S	tact Us	▼ Sig
Welcome Michelle	Users	Pension Information	Lo	egal Information	ি Help 💽 S	tact Us	▼ Sig
ODT: onlineServices Welcome Michelle r Canada Pilots	Users Username	Pension Information	Lo	egal Information	© Help ≥ S	tact Us secure Messages Settings	✓ Sign Passwor
NODEnt onlineServices Welcome Michelle r Canada Pilots N MENU Home	User Adn Users Username jim@opt.ca	Pension Information ninistration Email jim@opt.ca	Lo West, Jim	egal Information	© Help ≥ S Details	tact Us secure Messages Settings	✓ Sign Passwort
NODE or None Services Welcome Michelle r Canada Pilots N MENU Home Secure Messages	User Adn Users Username jim@opt.ca	Pension Information	Le West, Jim	egal Information	The p       Security Group         ID       ID	tact Us Secure Messages Settings Ecit Lock Reset ORGANIZATION 143092	✓ Sign Passworn
ODT:	Users Username Jim@opt.ca	Pension Information	Le West, Jim	egal Information	© Help Security Group ID First Name Last Name	tact Us Secure Messages Settings Etit Lock Reset ORGANIZATION 143092 Jim West	✓ Sign Passworr
Welcome Michelle ir Canada Pilots N MENU Home Secure Messages File Upload Activity	Users Users Username jim@opt.ca	Pension Information	Le West, Jim	egal Information	© Help	tact Us secure Messages Settings EECIE Lock Reset ORGANIZATION 143092 Jim West jim@opt.ca	▼ Sigt
ODTOWN ODTOWN	User Adn Users Username jim@opt.ca	Pension Information	Lo West, Jim	egal Information	© Help	tact Us secure Messages Settings Edit Lock Reset ORGANIZATION 143092 Jim West jim@opt.ca jim@opt.ca jim@opt.ca	▼ Sig
Nelcome Michelle Canada Pilots NMENU Home Secure Messages File Upload Activity User Administration	Users Username Jim@opt.ca	Pension Information	Le West, Jim	egal Information	© Help ♥ Help ♥ Security Group 10 First Name Last Name Username Email Status Locale Organizations	tact Us Gecure Messages Settings EKIL Lock Reset ORGANIZATION 143092 Jim West Jim@opt.ca Jim@opt.ca Jim@opt.ca Jim@opt.ca Jim@opt.ca	✓ Sigi Passwor
N MENU Home Secure Messages File Upload Activity User Administration Durces Pension Terms	Users Username Jim@opt.ca	Pension Information ninistration Email jim@opt.ca	Le West, Jim	egal Information	© Help	tact Us secure Messages Settings Effect Lock Reset ORGANIZATION 143092 Jim West Jim@opt.ca Jim@opt.ca ACTIVE en Air Canada Pilots (9150)	✓ Sign Passwor Add 3
Welcome Michelle ir Canada Pilots Welcome Michelle ir Canada Pilots IN MENU Home Secure Messages File Upload Activity User Administration ources Pension Terms Tutorials and Videos	Users Users Jim@opt.ca	Pension Information	West, Jim	egal Information	© Help	tact Us Secure Messages Settings CORGANIZATION 143092 Jim West jim@opt.ca jim@opt.ca ACTIVE en Air Canada Pilots (9150)	✓ Sign Password Add 3 3

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 Information for Members
 Privacy
 # OPTrust.com

 Information for Relisor
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 Toronto cellinga versi (dil) 681 6155

You will be asked to enter a reason for locking the account:



Lock		×
Lock Reason	Select Terminated Deceased Unusual Activity Other	







The account can be unlocked by clicking "Unlock" and then "unlock" again on the pop-up that appears:

Unlock		×
Lock Reason	Terminated	
		Cancel Unlock

onlineServices	1						🕐 Help 🛛 🗹 S	ecure Messages Settings 🔻	Sign out
Welcome Michelle          Air Canada Pilots	User Adn	ninistratio	n			Q Add	Details		
MAIN MENU	Username	Ema	il		Name			Edit Lock Reset Pas	ssword
<ul> <li>Home</li> <li>Secure Messages</li> <li>File Upload</li> <li>Activity</li> <li>User Administration</li> <li>Resources</li> <li>Pension Terms</li> <li>Tutorials and Videos</li> <li>Attend an employer information session</li> </ul>	jim@opt.ca	jim@opt.ca		West, Jim			Security Group ID First Name Last Name Username Email Status Locale Organizations	ORGANIZATION 143092 Jim West Jim@opt.ca Jim@opt.ca ACTIVE en Air Canada Pilots (9150) File Upload (9150)	Add X Add X
	Previo	Pension Informa	age 2 tion	of 2	Nex Legal Info	ormation	Con	tact Us	



# **ACTIVITY LOG**

⑦ Help Secure Messages Settings ▼ Sign out onlineServices Welcome Michelle Welcome to Online Services Air Canada Pilots Here you can: Å send and receive secure electronic messages MAIN MENU · send forms, documents and files send payroll data files • receive reports from OPTrust 삼 Home Online Services is used by participating employers and external vendors to exchange 🖂 Secure Messages confidential employer/member data with OPTrust. 💼 🛛 File Upload Read the Online Services User Guide I Activity 斗 User Administration Resources Employer Manual **Employer Update Employer Forms** B 0 B Pension Terms Quick access to practical OPTrust produces an electronic Quick access to all the forms you information on administering the news bulletin for employers to let will need. Tutorials and Videos OPSEU Pension Plan. you know about changes in our Download employer forms > Attend an employer administrative policies or procedures. View the Employer Manual > information session Read the latest employer updates > Questions? If you have any questions, please contact the Data Management Group at (416) 681-6155. Important: Please use your secure account to send confidential information to OPTrust. Information you send by regular email is not secure. Pension Information Legal Information Contact Us

#### To view a log of your activities, click on "Activity" on the left-hand menu:

onlineServices	3	🕑 Help 🛛 Secu	re Messages Settings 👻 Sign out
B Welcome Michelle	Activity		
Air Canada Pilots 👻	Keyword Search Keyword		
MAIN MENU	Date Range YYYY-MM-DI	D or Month DD, YYYY 🗎 YYYY-MM-DD or Mo	nth DD, YYYY
🕋 Home			Export to EXCEL
Secure Messages	Date	<ul> <li>Transaction</li> </ul>	~
主 File Upload	30-Apr-2019 17:47:14	Secure Message Inbox	
😑 Activity	30-Apr-2019 17:44:52	Activate User	
🔍 User Administration	30-Apr-2019 17:41:41 30-Apr-2019 17:39:06	Deactivate User Edit User	
	30-Apr-2019 17:37:51	Edit User	
Resources	30-Apr-2019 17:35:06	Edit User	
Pension Terms	30-Apr-2019 16:57:42	Add a user	
Tutorials and Videos	30-Apr-2019 16:30:31	Security Questions Changed	
Attend on smallerer	30-Apr-2019 16:28:19	Security Questions Changed	
information session	30-Apr-2019 16:26:57	Security Questions Changed	
			1 - 10 of 125 items
nt OPTrust	Pension Information	Legal Information Contac	t Us



onlineServices	3		⑦ Help	Secure Messages Settings
<b>B</b> Welcome Michelle	Activity			
Air Canada Pilots 👻	Keyword Search	Keyword		
MAIN MENU	Date Range	YYYY-MM-DD or Month DD, YYYY	🗯 Үүүү-ММ	I-DD or Month DD, YYYY
🕋 Home				Export to EXCEL
Secure Messages	Date	~	Transaction	· ·
💼 File Upload	30-Apr-2019 17:47:14		Secure Message Inbox	
	30-Apr-2019 17:44:52		Activate User	
	30-Apr-2019 17:41:41		Deactivate User	
🐣 User Administration	30-Apr-2019 17:39:06		Edit User	
Resources	30-Apr-2019 17:37:51		Edit User	
Resources	30-Apr-2019 17:35:06		Edit User	
Pension Terms	30-Apr-2019 16:57:42		Add a user	
Tutorials and Videos	30-Apr-2019 16:30:31		Security Questions Changed	
	30-Apr-2019 16:28:19		Security Questions Changed	
Attend an employer	30-Apr-2019 16:26:57		Security Questions Changed	
mormation session				1 - 10 of 125 items
n OPTrust	Pension Informatio	on Legal Info	rmation	Contact Us

Do you want to open or save activities.csv from penweb-uat-web.penweb.local?	Open S	Save 🔻	Cancel	×

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Pa	ste	Cut Cop Forn	y ∓ natP	ainter	Ca B	libri I	<u>u</u> -	- 1 ## -	1 -	A • A	A <sup>*</sup>	≡ ≡	: =   : =	≫ • 	) ) Elign
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1	User		ОРТ	rust I	[ Dat	e	Tran	sactio	n						
2	miche	elle@	em	ploye	201	9-04-3	Secu	ure Me	essag	e Inb	ох				
3	miche	elle@	0em	ploye	201	9-04-3	Acti	vate U	lser						
4	miche	elle@	9em	ploye	201	9-04-3	Dea	ctivate	e Use	r					
5	miche	elle@	Pem	ploye	1201	9-04-3	Edit	User							
6	miche	elle@	9em	ploye	1201	9-04-3	Edit	User							
7	miche	elle@	9em	ploye	201	9-04-3	(Edit	User							
8	miche	elle@	0em	ploye	201	9-04-3	Add	a use	r						
9	miche	elle@	9em	ploye	201	9-04-3	Secu	urity C	uesti	ions C	han	ged			
10	miche	elle@	Pem	ploye	201	9-04-3	Secu	urity C	luesti	ions C	Chan	ged			
11	miche	elle@	2em	ploye	201	9-04-3	Secu	urity O	uesti	ions C	Chan	ged			
12	miche	elle@	Pem	ploye	1201	9-04-3	Pass	sword	Chan	ged					
10		11.20			- 2010	0.04.0	( D		ole						



## **TIMING OUT**

To help protect our members' information the system will automatically time out sessions that have been inactive for 5 minutes:

onlineServices		⑦ Help
	Your session has expired due to inactivity	
	Welcome to the OPTrust Secure Portal	
This is a secure site to send messages and atta	achments to OPTrust. If you have any questions please contact us at employerservice@optrust.com or 1-800-637-0024 or (416) 681	-6100
Please sign in		
Email*	Email Address	
Password*	Password	
	Log in	
	Forgot Your Password?	

# LOGGING OUT

To log out once you are done click "Sign out":

onlineServices	5		⑦ Help Secure Messages Settings Sign out
<b>B</b> Welcome Michelle	Welcome to Online Service	S	
Air Canada Pilots 👻	Here you can: • send and receive secure electronic message	aç	
MAIN MENU	<ul> <li>send forms, documents and files</li> <li>send payroll data files</li> </ul>	ſ	
🕋 Home	receive reports from OPTrust		
Secure Messages	Online Services is used by participating employe	rs and external vendors to exchange	
🔔 File Upload		st.	
E Activity	Read the Online Services User Guide	Í	
2+ User Administration			
Resources	Employer Manual	Employer Update	Employer Forms
Pension Terms	Quick access to practical	OPTrust produces an electronic	Quick access to all the forms you
Tutorials and Videos	information on administering the OPSEU Pension Plan.	news bulletin for employers to let you know about changes in our	will need.
Attend an employer information session	View the Employer Manual >	administrative policies or procedures. Read the latest employer updates >	Download employer forms >



## CONCLUSION

While we are very proud of the changes made in this upgrade, please remember that with any new system there can be bugs and challenges. If you notice any odd behavior, please contact us immediately at 1-800-637-0024 and ask for the Data Management Group. This is the first step in a journey that OPTrust has undertaken to upgrade our overall systems to provide the best possible experience to you and our members.



### **APPENDIX A**

### **Search Instructions**

The default search only searches full words, if you are searching for an email address you must enter the full email address or use wildcards. See Wildcard Searches section below for details.

The default operator is OR. Entering *John Doe* in the search it will return users with the name John or Doe. Entering *John AND Doe* in the search it will return users with the name John Doe. See Boolean Operators section below for details.

### SINGLE TERMS AND PHRASES

- A single term is a single word such as "member" or "staff"
- A phrase is a group of words surrounded by double quotes such as "organization admin"

Multiple terms can be combined together with Boolean operators to form more complex queries (as described below).

### WILDCARD SEARCHES

Single and multiple character wildcard searches can be used within single terms. Wildcard characters can be applied to single terms, but not to search phrases.

Wildcard Search Type	Special Character	Example
Single character (matches a single character)	?	The search string te?t would match both test and text.
Multiple characters (matches zero or more sequential characters)	*	The wildcard search: tes* would match test, testing, and tester. You can also use wildcard characters in the middle of a term. For example: te*t would match test and text. *est would match pest and test.



### **BOOLEAN OPERATORS**

Boolean operators allow you to apply Boolean logic to queries, requiring the presence or absence of specific terms or conditions in fields in order to match documents. The table below summarizes the Boolean operators supported by the standard query parser.

Boolean Operator	Alternative Symbol	Description
AND	&&	Requires both terms on either side of the Boolean operator to be present for a match.
NOT	!	Requires that the following term not be present.
OR		Requires that either term (or both terms) be present for a match.

Boolean operators allow terms to be combined through logic operators.

### THE BOOLEAN OPERATOR OR ("||")

The OR operator is the default conjunction operator. This means that if there is no Boolean operator between two terms, the OR operator is used. The OR operator links two terms and finds a matching document if either of the terms exist in a document. The symbol || can be used in place of the word OR.

To search for records that contain either "Kathy" or just "Katherine" use the query:

Kathy Katherine

or

Kathy OR Katherine

#### THE BOOLEAN OPERATOR AND ("&&")

The AND operator matches records where both terms exist. The symbol && can be used in place of the word AND.

To search for records that contain "John" and "Doe" use either of the following queries:

"John" AND "Doe"

"John" && "Doe"



### THE BOOLEAN OPERATOR NOT ("!")

The NOT operator excludes records that contain the term after NOT. The symbol ! can be used in place of the word NOT.

The following queries search for documents that contain the phrase "Organization" but do not contain the phrase "Admin":

"Organization" NOT "Admin"

"Organization" !"Admin"

### **GROUPING TERMS TO FORM SUB-QUERIES**

This can be very useful if you want to control the Boolean logic for a query.

The query below searches for either "John" or "Jane" and "Doe":

(john OR jane) AND doe

This adds precision to the query, requiring that the term "Doe" exist, along with either term "John" and "Jane."



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