



OPTRUST SECURE PORTAL

User Guide

TABLE OF CONTENTS

BACKGROUND	4
QUICK HITS	5
INITIAL LOG IN	6
SUBSEQUENT LOG INS	10
VIDEO	10
STEP BY STEP	10
FORGOT YOUR PASSWORD?	11
TIMING OUT	12
WELCOME TO OUR NEW ONLINE SERVICES LANDING PAGE!	12
SENDING/RECEIVING SECURE MESSAGES	16
COMPOSING A MESSAGE	21
VIDEO	21
STEP BY STEP	21
REPLYING TO A MESSAGE	33
VIDEO	33
STEP BY STEP	33
SUBMITTING FORMS AND DOCUMENTS	38
BROWSING TO A FILE.....	38
VIDEO	38
STEP BY STEP	39
DRAGGING AND DROPPING A DOCUMENT	39
VIDEO	39
HOW TO ELECTRONICALLY SIGN FORMS USING DOCUSIGN	42
RECEIVING MESSAGES	53
UPLOADING A FILE	65
Resetting Your Password	65
VIDEO	65
STEP BY STEP	65
CHANGING YOUR SECURITY QUESTIONS	68
VIDEO	68
STEP BY STEP	68

USER ADMINISTRATION	71
ADDING A USER	72
USER ROLES	80
OPERATIONAL NOTE	82
REVOKING ACCESS	85
ACTIVITY LOG	88
TIMING OUT	90
LOGGING OUT	90
CONCLUSION	91
APPENDIX A	92
Search Instructions	92
SINGLE TERMS AND PHRASES	92
WILDCARD SEARCHES	92
BOOLEAN OPERATORS	93
THE BOOLEAN OPERATOR OR (" ")	93
THE BOOLEAN OPERATOR AND ("&&")	93
THE BOOLEAN OPERATOR NOT ("!")	94
GROUPING TERMS TO FORM SUB-QUERIES	94

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 through 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:



[Help](#)

Welcome to the OPTrust Secure Portal

This is a secure site to send messages and attachments 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*

Password*

[Forgot Your Password?](#)



[Help](#)

Welcome to the OPTrust Secure Portal


This is a secure site to send messages and attachments 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*

Password*

[Forgot Your Password?](#)



[Help](#)

Choosing My Security Questions

Please select three security questions to meet the new security standards.

Security question 1*

Security question 2*

Security question 3*

Choose questions that only you will know the answer to:

Choosing My Security Questions


Please select three security questions to meet the new security standards.

Security question 1 *	<div style="border: 1px solid #ccc; padding: 5px;"><p>Select</p><p>What is your favourite colour?</p><p>What was your first pet's name?</p><p>What was the model of your first car?</p><p>What is your mother's maiden name?</p><p>What is your father's middle name?</p><p>What is the name of the street where you grew up?</p><p>What is the name of your favourite sports team?</p><p>What is the name of your best friend in high school?</p><p>Select</p></div>	
Security question 2 *		
Security question 3 *		
<input type="text" value="Security Answer"/>		
<input type="button" value="Cancel"/> <input type="button" value="Continue"/>		

Choosing My Security Questions

Please select three security questions to meet the new security standards.

Security question 1 *	What is your favourite colour? <input type="text" value="blue"/>
Security question 2 *	What was your first pet's name? <input type="text" value="Fido"/>
Security question 3 *	What was the model of your first car? <input type="text" value="Toyota"/>
<input type="button" value="Cancel"/> <input type="button" value="Continue"/>	



Review the Terms & Conditions and click “Accept” to continue:



[Help](#)

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 you 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 convention 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

Our security settings have changed. Please reset your password to meet the new security standards.

Your password must include all of the following:

- Uppercase (ABC)
- Lowercase (abc)
- Alphanumeric (a-z and 0-9)
- Symbol (!@#%&*()_+)=)
- Minimum of 8 characters

Current Password*

Password*

Confirm Password*

Reset My Password

Our security settings have changed. Please reset your password to meet the new security standards.


Your password must include all of the following:

- Uppercase (ABC)
- Lowercase (abc)
- Alphanumeric (a-z and 0-9)
- Symbol (!@#%&*()_+)=)
- Minimum of 8 characters

Current Password*

Password*

Confirm Password*



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



VIDEO



Logging in.mp4

STEP BY STEP

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



© Help

Welcome to the OPTrust Secure Portal

This is a secure site to send messages and attachments 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 *	<input type="text" value="Email Address"/>
Password *	<input type="password" value="Password"/>

[Forgot Your Password?](#)

Enter your email address, password and click “Log in”:

Welcome to the OPTrust Secure Portal


This is a secure site to send messages and attachments 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 *

Password *

[Forgot Your Password?](#)



OPTrust Security Reminder

When leaving this site, please ensure you click the "Sign Out" button.

FORGOT YOUR PASSWORD?

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

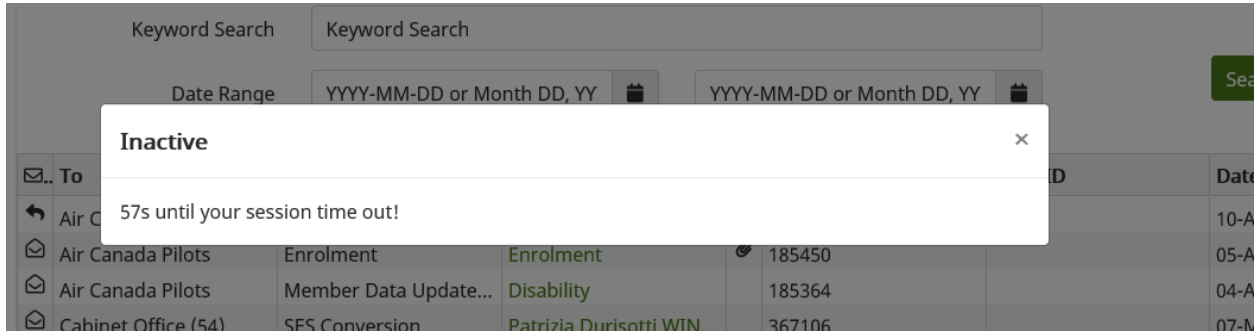
You will be asked to enter your e-mail address. As long as a valid user e-mail address is entered you will be sent a link to get back into the system.

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

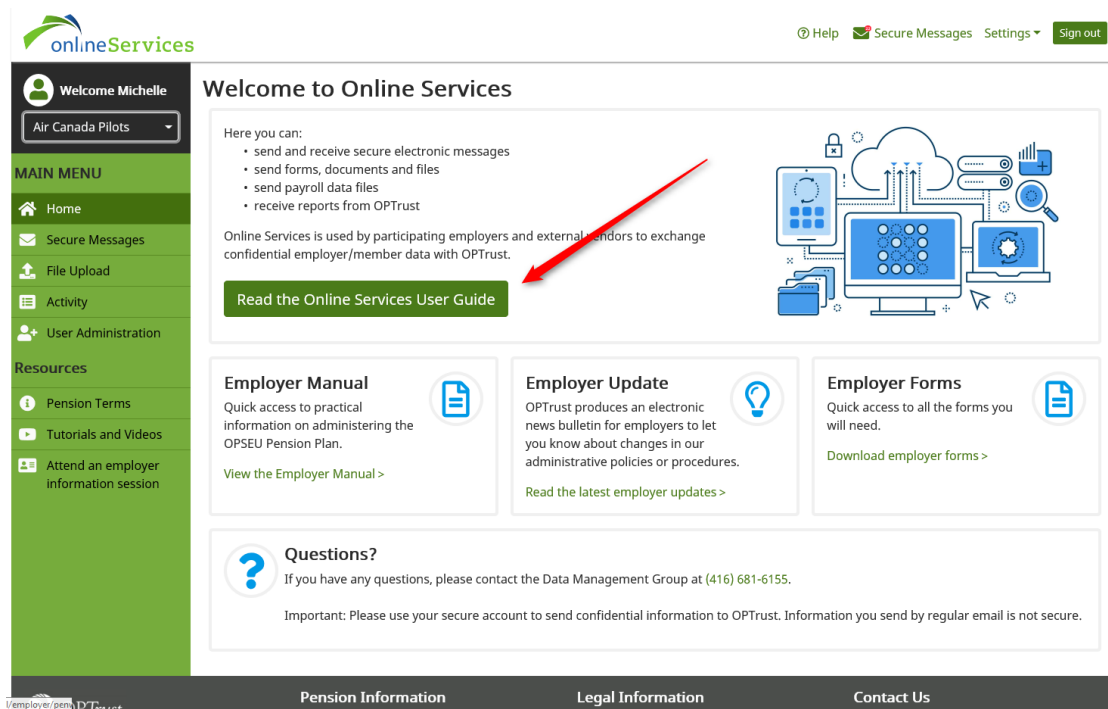
The system is designed to automatically time users out after 5 minutes of inactivity.

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



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:

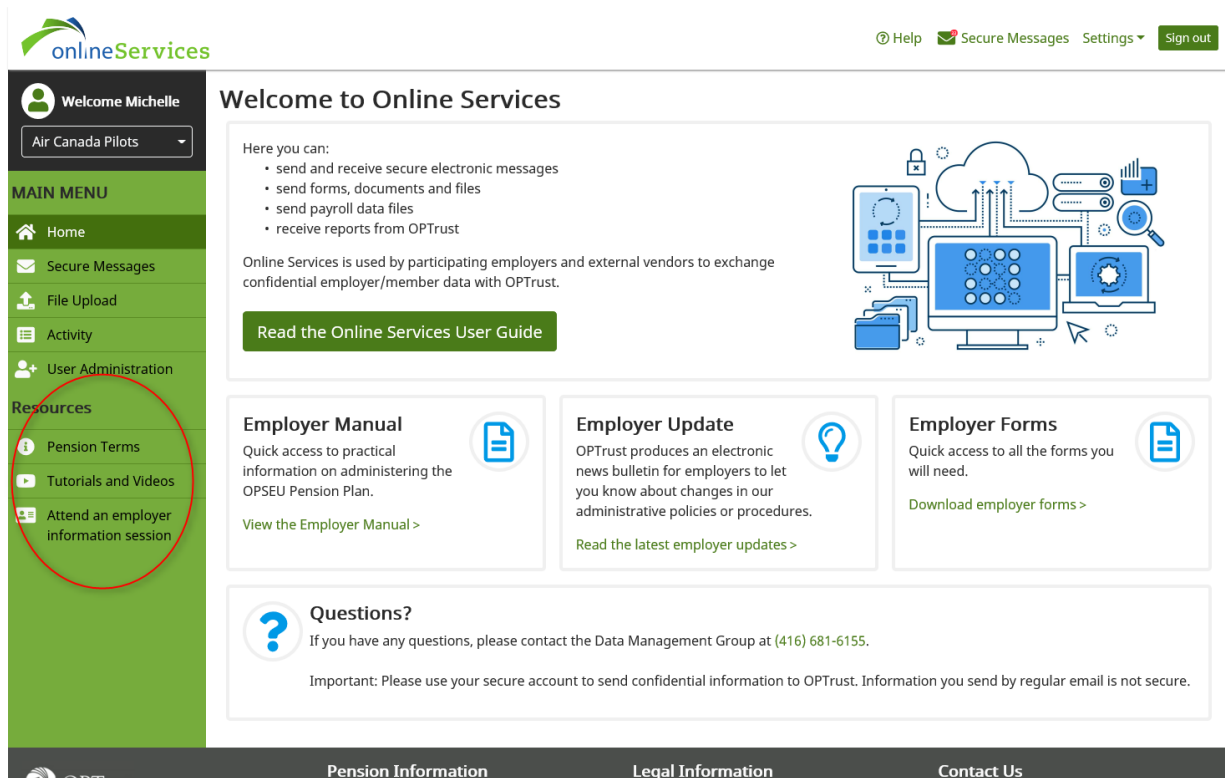
The screenshot shows the OPTrust Online Services portal. The top navigation bar includes 'Help', 'Secure Messages', 'Settings', and 'Sign out'. The user is logged in as 'Michelle' from 'Air Canada Pilots'. The main content area is titled 'Welcome to Online Services' and lists capabilities such as sending and receiving secure electronic messages, sending forms, documents, and files, and receiving reports from OPTrust. A prominent green button labeled 'Read the Online Services User Guide' is visible. Below this, three main sections are displayed: 'Employer Manual' (with a document icon and a red arrow pointing to the 'View the Employer Manual >' link), 'Employer Update' (with a lightbulb icon and a red arrow pointing to the 'Read the latest employer updates >' link), and 'Employer Forms' (with a document icon and a red arrow pointing to the 'Download employer forms >' link). A 'Questions?' section at the bottom provides contact information for the Data Management Group at (416) 681-6155. The footer contains links for 'Pension Information', 'Legal Information', and 'Contact Us'.

This screenshot is identical to the one above, but with a red arrow pointing to the 'Employer Update' section. The arrow points to the text 'Read the latest employer updates >' within the 'Employer Update' card. The 'Employer Manual' and 'Employer Forms' sections are also visible, with their respective links and icons.

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 Help Secure Messages Settings Sign out

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

Welcome to Online Services

Here you can:

- send and receive secure electronic messages
- send forms, documents and files
- send payroll data files
- receive reports from OPTrust

Online Services is used by participating employers and external vendors to exchange confidential employer/member data with OPTrust.

[Read the Online Services User Guide](#)

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?

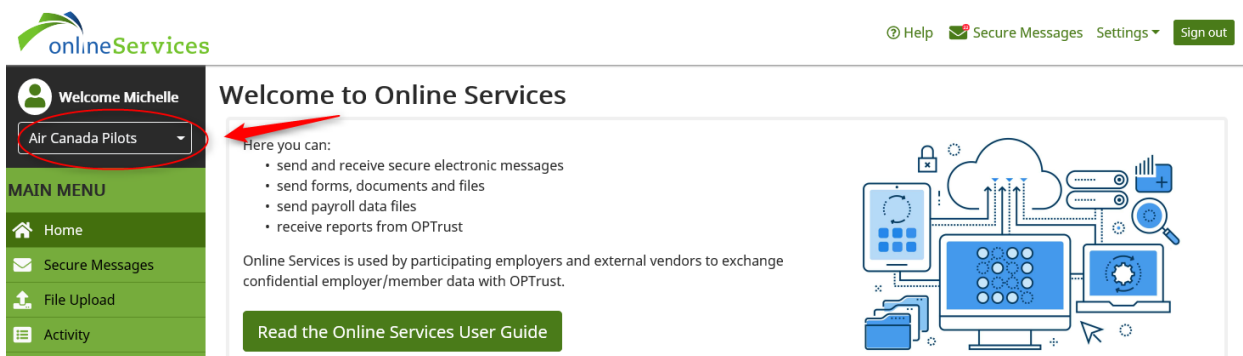
If you have any questions, please contact the Data Management Group at (416) 681-6155.

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](#)

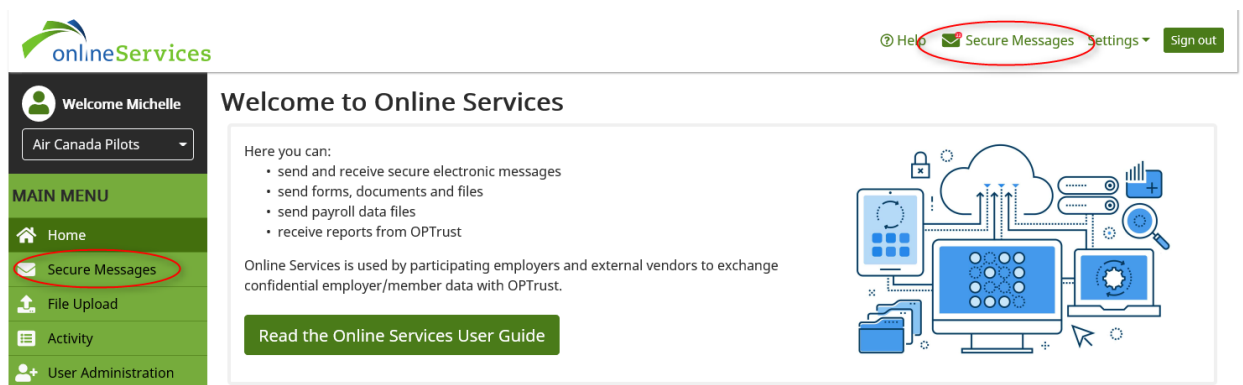
SENDING/RECEIVING SECURE MESSAGES

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):



The screenshot shows the OPTrust Online Services interface. At the top right, there are links for Help, Secure Messages (with a notification icon), Settings, and Sign out. On the left, a sidebar contains a user profile for Michelle and a dropdown menu currently set to "Air Canada Pilots", which is circled in red with a red arrow pointing to it. Below the profile is a "MAIN MENU" with options: Home, Secure Messages, File Upload, and Activity. The main content area is titled "Welcome to Online Services" and lists functions: send and receive secure electronic messages, send forms, documents and files, send payroll data files, and receive reports from OPTrust. A "Read the Online Services User Guide" button is present. An illustration of a computer workstation with a cloud and various icons is on the right.

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:



This screenshot shows the same OPTrust Online Services interface. In this view, the "Secure Messages" link in the top navigation bar is circled in red. In the left sidebar, the "Secure Messages" option in the "MAIN MENU" is also circled in red. The rest of the interface, including the user profile, dropdown menu, and main content area, remains the same as in the previous screenshot.

The messaging page looks like this:

The screenshot shows the OPTrust onlineServices Secure Messaging interface. At the top, there is a navigation bar with 'Help', 'Secure Messages', 'Settings', and 'Sign out'. Below this is a user profile section for 'Michelle' with a dropdown menu for 'Air Canada Pilots'. A 'MAIN MENU' sidebar on the left contains links for Home, Secure Messages, File Upload, Activity, User Administration, Pension Terms, and Tutorials and Videos. The main content area is titled 'Secure Messaging' and includes tabs for 'Inbox', 'Sent', and 'Drafts', along with a 'Compose New Message' button. A search section contains a 'Mailbox' dropdown (set to '- All -'), a 'Keyword Search' field, and 'Date Range' filters. A table of messages is displayed with columns for To, From, Subject, Reference #, Emp. ID, and Date. The table contains 10 rows of message data. At the bottom, there is a footer with 'Pension Information', 'Legal Information', and 'Contact Us' links.

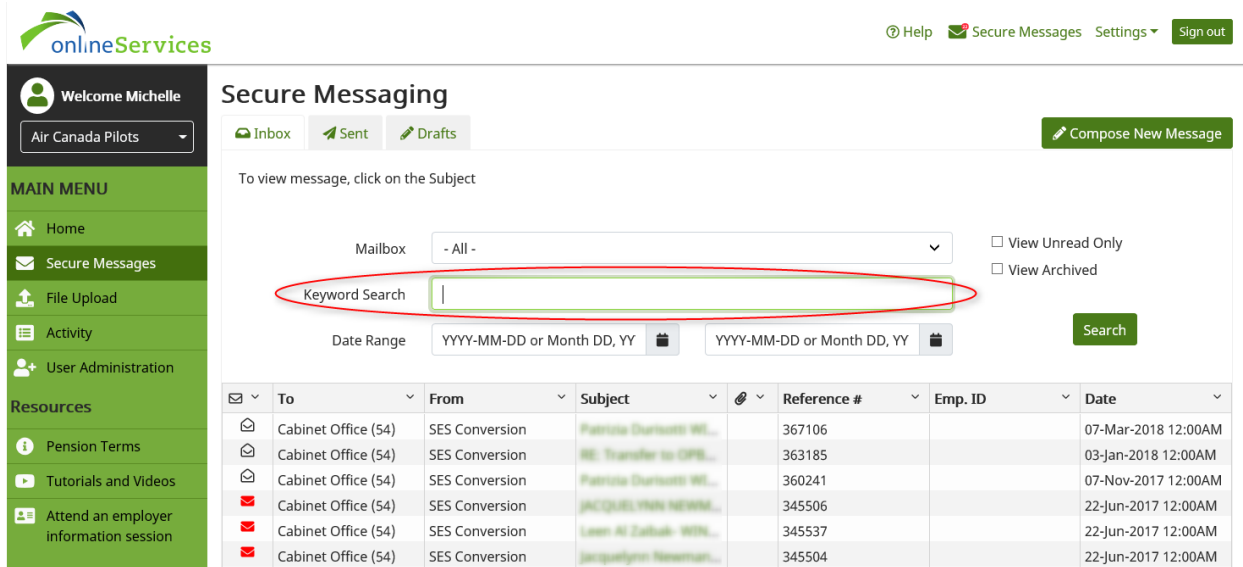
To	From	Subject	Reference #	Emp. ID	Date
Air Canada Pilots	General Inquiry	Good Morning!	185611		07-May-2019 8:05AM
Air Canada Pilots	Termination	Termination	185501		10-Apr-2019 2:48PM
Air Canada Pilots	Enrolment	Enrolment	185450		05-Apr-2019 11:45AM
Air Canada Pilots	Member Data Update...	Disability	185364		04-Apr-2019 12:10PM
Cabinet Office (54)	SES Conversion	Ferrisia Durkovic WIL...	367106		07-Mar-2018 12:00AM
Cabinet Office (54)	SES Conversion	Re: Transfer to OPS a...	363185		03-Jan-2018 12:00AM
Cabinet Office (54)	SES Conversion	Ferrisia Durkovic WIL...	360241		07-Nov-2017 12:00AM
Cabinet Office (54)	SES Conversion	JANIQUE VAN NEEVEN...	345506		22-Jun-2017 12:00AM
Cabinet Office (54)	SES Conversion	Loren Al Zabala WIL...	345537		22-Jun-2017 12:00AM
Cabinet Office (54)	SES Conversion	Jacqueline Newman...	345504		22-Jun-2017 12:00AM

This screenshot is similar to the one above but shows the 'Mailbox' dropdown menu open. The menu lists 'Air Canada Pilots', 'Cabinet Office (54)', and 'Carillion Canada'. The 'Mailbox' label and the dropdown arrow are circled in red. The message table below shows only three messages from 'Cabinet Office (54)'. The rest of the interface, including the sidebar and top navigation, remains the same.

To	From	Subject	Reference #	Emp. ID	Date
Cabinet Office (54)	SES Conversion	Ferrisia Durkovic WIL...	367106		07-Mar-2018 12:00AM
Cabinet Office (54)	SES Conversion	Re: Transfer to OPS a...	363185		03-Jan-2018 12:00AM
Cabinet Office (54)	SES Conversion	Ferrisia Durkovic WIL...	360241		07-Nov-2017 12:00AM

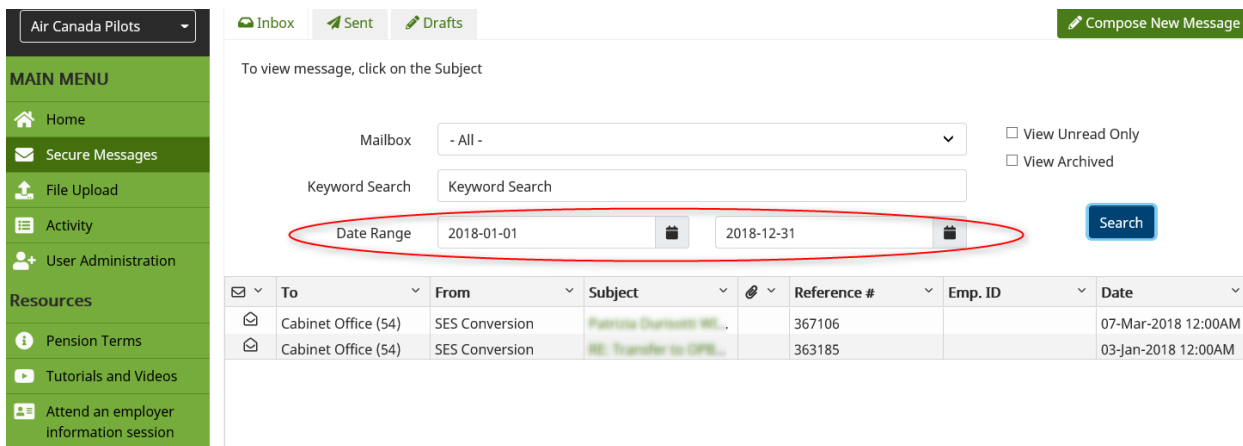
“Keyword Search” allows you to search messages by any word or phrase. Note: the system is unable to search for partial words, for example you can’t enter “term” and see results, you need to enter “termination”.

Additional search instructions can be found in Appendix A.



The screenshot shows the 'Secure Messaging' interface. At the top, there is a navigation bar with 'Help', 'Secure Messages', 'Settings', and 'Sign out'. Below this is a user profile section for 'Michelle' with a dropdown menu for 'Air Canada Pilots'. A 'MAIN MENU' sidebar on the left lists options like Home, Secure Messages, File Upload, Activity, User Administration, Pension Terms, Tutorials and Videos, and Attend an employer information session. The main content area is titled 'Secure Messaging' and includes tabs for 'Inbox', 'Sent', and 'Drafts', along with a 'Compose New Message' button. A search section contains a 'Mailbox' dropdown set to '- All -', a 'Keyword Search' input field (circled in red), and a 'Date Range' section with two date pickers. A 'Search' button is located to the right of the date range. Below the search section is a table of messages with columns for 'To', 'From', 'Subject', 'Reference #', 'Emp. ID', and 'Date'.

To	From	Subject	Reference #	Emp. ID	Date
Cabinet Office (54)	SES Conversion	Patricia Dursoott WI...	367106		07-Mar-2018 12:00AM
Cabinet Office (54)	SES Conversion	RE: Transfer to OPS...	363185		03-Jan-2018 12:00AM
Cabinet Office (54)	SES Conversion	Patricia Dursoott WI...	360241		07-Nov-2017 12:00AM
Cabinet Office (54)	SES Conversion	JACQUES YVES NEWMAN...	345506		22-Jun-2017 12:00AM
Cabinet Office (54)	SES Conversion	Loren Al Zabak WI...	345537		22-Jun-2017 12:00AM
Cabinet Office (54)	SES Conversion	Jacqueline Newman...	345504		22-Jun-2017 12:00AM



This screenshot is similar to the one above but shows a different search configuration. The 'Keyword Search' input field now contains the text 'Keyword Search'. The 'Date Range' section is circled in red and shows two date pickers set to '2018-01-01' and '2018-12-31'. The 'Search' button is now blue. The table below shows the results of this search, with only two messages displayed.

To	From	Subject	Reference #	Emp. ID	Date
Cabinet Office (54)	SES Conversion	Patricia Dursoott WI...	367106		07-Mar-2018 12:00AM
Cabinet Office (54)	SES Conversion	RE: Transfer to OPS...	363185		03-Jan-2018 12:00AM

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

Air Canada Pilots | [Inbox](#) | [Sent](#) | [Drafts](#) | [Compose New Message](#)

To view message, click on the Subject

Mailbox: - All - | View Unread Only | View Archived

Keyword Search: Keyword Search

Date Range: YYYY-MM-DD or Month DD, YY | YYYY-MM-DD or Month DD, YY | [Search](#)

To	From	Subject	Reference #	Emp. ID	Date
Air Canada Pilots	General Inquiry	Good Morning!	185611		07-May-2019 8:05AM
Air Canada Pilots	Termination	Termination	185501		10-Apr-2019 2:48PM
Air Canada Pilots	Enrolment	Enrolment	185450		05-Apr-2019 11:45AM
Air Canada Pilots	Member Data Update...	Disability	185364		04-Apr-2019 12:10PM
Cabinet Office (54)	SES Conversion	Patricia Dumont's W...	367106		07-Mar-2018 12:00AM
Cabinet Office (54)	SES Conversion	RE: Transfer to OPB...	363185		03-Jan-2018 12:00AM
Cabinet Office (54)	SES Conversion	J. ...	360241		07-Nov-2017 12:00AM
Cabinet Office (54)	SES Conversion	J. ...	345506		22-Jun-2017 12:00AM
Cabinet Office (54)	SES Conversion	Loren Al Zababeh - W...	345537		22-Jun-2017 12:00AM
Cabinet Office (54)	SES Conversion	J. ...	345504		22-Jun-2017 12:00AM

Message: Termination

Hi,

I understand J. Doe has terminated, can you please confirm?

Thank you,

Air Canada Pilots | [Inbox](#) | [Sent](#) | [Drafts](#) | [Compose New Message](#)

To view message, click on the Subject

Mailbox: - All - | View Unread Only | View Archived

Keyword Search: Keyword Search

Date Range: 2018-01-01 | 2018-12-31 | [Search](#)

To	From	Subject	Reference #	Emp. ID	Date
Cabinet Office (54)	SES Conversion	Patricia Dumont's W...	367106		07-Mar-2018 12:00AM
Cabinet Office (54)	SES Conversion	RE: Transfer to OPB...	363185		03-Jan-2018 12:00AM

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

COMPOSING A MESSAGE

VIDEO



Sending a Message.mp4

STEP BY STEP

To send a new message, click “Compose New Message”:

The screenshot shows the 'Secure Messaging' page. On the left is a sidebar with a 'MAIN MENU' containing: Home, Secure Messages, File Upload, Activity, and User Administration. The main content area has tabs for 'Inbox', 'Sent', and 'Drafts'. A red arrow points to a green 'Compose New Message' button in the top right. Below the tabs are search filters: Mailbox (set to '- All -'), Keyword Search, and Date Range. A table of messages is visible at the bottom.

	To	From	Subject	Reference #	Emp. ID	Date
✉	Cabinet Office (54)	SES Conversion	Copy Language	31925		23-Feb-2009 12:00AM
✉	Cabinet Office (54)	SES Conversion	Copy Language	32010		26-Feb-2009 12:00AM
✉	Cabinet Office (54)	SES Conversion	Copy Language	40262		08-Feb-2010 12:00AM
✉	Cabinet Office (54)	SES Conversion	Language Transfer - app...	45155		20-Oct-2010 12:00AM
✉	Cabinet Office (54)	SES Conversion	Language Transfer - app...	46142		08-Dec-2010 12:00AM
✉	Cabinet Office (54)	SES Conversion	Language Transfer - app...	154195		03-Sep-2014 12:00AM

The screenshot shows the 'New Secure Message' form. Fields include: Reference # (185370), Mailbox (Air Canada Pilots), Topic (Disability), and Employee ID. A red arrow points to a dropdown arrow on the Mailbox field, which is circled in red. Below these fields is a rich text editor for the message content.

onlineServices Help Secure Messages Settings Sign out

Welcome Michelle
Air Canada Pilots

New Secure Message

Reference # 185370

Mailbox*
Air Canada Pilots
 Cabinet Office (54)
 Carillion Canada

Topic*

Employee ID

Content* **B I U H₁ H₂**

onlineServices Help Secure Messages Settings Sign out

Welcome Michelle
Air Canada Pilots

New Secure Message

Reference # 185370

Mailbox*

Topic*

Employee ID

Content* **B I U H₁ H₂**

onlineServices Help Secure Messages Settings Sign out

Welcome Michelle
Air Canada Pilots

New Secure Message

Reference # 185370

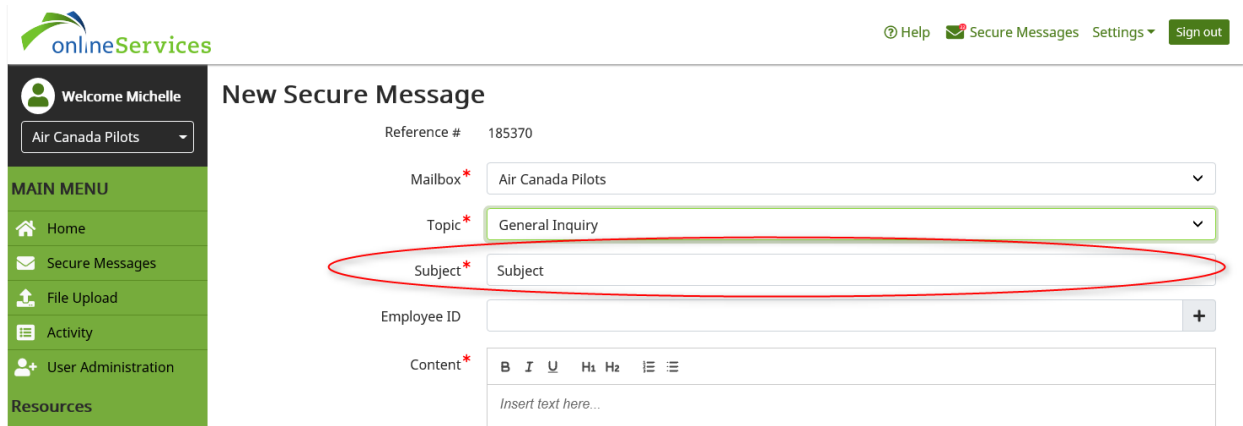
Mailbox*

Topic*
Disability
 Enrolment
 General Inquiry
 Leave of Absence
 Long Term Illness
 Mandatory Transfer into OPTrust
 Mandatory Transfer Out to OPB
 Member Data Update or Inquiry
 Pre-Retirement Death
 Retirement
 Termination

Employee ID

Content*

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



onlineServices Help Secure Messages Settings Sign out

Welcome Michelle
Air Canada Pilots

New Secure Message


Reference # 185370

Mailbox * Air Canada Pilots

Topic * General Inquiry

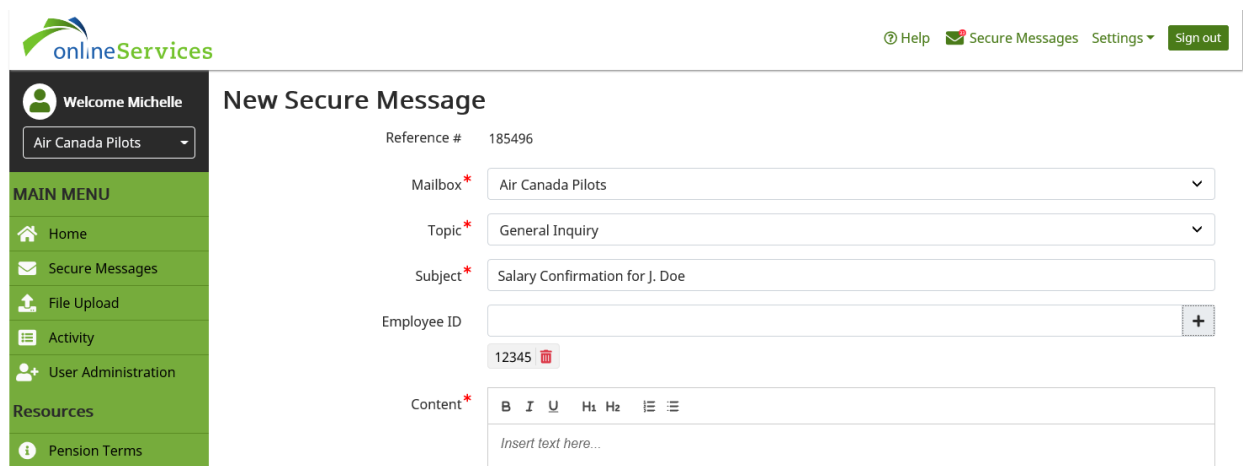
Subject * Subject

Employee ID +

Content * **B I U H₁ H₂** 

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 Help Secure Messages Settings Sign out

Welcome Michelle
Air Canada Pilots

New Secure Message


Reference # 185496


Mailbox * Air Canada Pilots

Topic * General Inquiry

Subject * Salary Confirmation for J. Doe

Employee ID +

12345 

Content * **B I U H₁ H₂** 

Insert text here...

Enter your message in the “Content” box:

onlineServices Help Secure Messages Settings Sign out

Welcome Michelle
Air Canada Pilots

New Secure Message

Reference # 185496

Mailbox* Air Canada Pilots

Topic* General Inquiry

Subject* Salary Confirmation for J. Doe

Employee ID

Content* **B I U H1 H2**

Hi,
Can you please confirm the 2018 salary rate for J. Doe?
Thank you for your help,
Michelle

onlineServices Help Secure Messages Settings Sign out

Welcome Michelle
Air Canada Pilots

New Secure Message

Reference # 185496

Mailbox* Air Canada Pilots

Topic* General Inquiry

Subject* Salary Confirmation for J. Doe

Employee ID

Content* **B I U H1 H2**

Hi,
Can you please confirm the 2018 salary rate for J. Doe?
Thank you for your help,
Michelle

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

onlineServices

Welcome Michelle
Air Canada Pilots

New Secure Message

Reference # 185496

Mailbox* Air Canada Pilots

Topic* General Inquiry

Subject* Salary Confirmation for J. Doe

Employee ID
12345

Content*
Hi,
Can you please confirm the 2018 salary rate for J. Doe?
Thank you for your help,
Michelle

Drag files here or [Choose File](#)

[Delete](#) [Save](#) [Send Message](#)

Pension Information | Legal Information | Contact Us

onlineServices

Welcome Michelle
Air Canada Pilots

New Secure Message

Employee "12345" not found

Reference # 185496

Mailbox* Air Canada Pilots

Topic* General Inquiry

Subject* Salary Confirmation for J. Doe

Employee ID
12345

Content*
Hi,
Can you please confirm the 2018 salary rate for J. Doe?
Thank you for your help,
Michelle

Drag files here or [Choose File](#)

[Delete](#) [Save](#) [Send Message](#)

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 Help Secure Messages Settings Sign out

Welcome Michelle
Air Canada Pilots

New Secure Message

❗ Employee "12345" not found

Reference # 185496

Mailbox * Air Canada Pilots

Topic * General Inquiry

Subject * Salary Confirmation for J. Doe

Employee ID +

Content *

B I U H1 H2

Re: Employee ID 12345

Hi,

Can you please confirm the 2018 salary rate for J. Doe?

Thank you for your help,

Drag files here or

Pension Information Legal Information Contact Us

onlineServices Help Secure Messages Settings Sign out

Welcome Michelle
Air Canada Pilots

Secure Messaging

To view message, click on the Subject

Mailbox - All -

Keyword Search

Date Range

To	From	Subject	Reference #	Emp. ID	Date
<input checked="" type="checkbox"/>	Air Canada Pilots	Salary Confirmation...	185496		10-Apr-2019 10:47AM
<input type="checkbox"/>	Air Canada Pilots	Disability	185363		04-Apr-2019 12:06PM
<input type="checkbox"/>	Cabinet Office (54)	RE: Patricia Durbin...	367106		07-Mar-2018 12:00AM
<input type="checkbox"/>	Cabinet Office (54)	Transfer to OPR an...	363185		03-Jan-2018 12:00AM
<input type="checkbox"/>	Cabinet Office (54)	RE: Laverie Al Zabala...	345537		22-Jun-2017 12:00AM
<input type="checkbox"/>	Cabinet Office (54)	RE: Guy Lavigne	31925		23-Feb-2009 12:00AM

1 - 6 of 6 items

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

onlineServices

Welcome Michelle

Air Canada Pilots

Secure Messaging

Inbox Sent Drafts

Compose New Message

To view message, click on the Subject

Mailbox: - All -

Keyword Search: Keyword Search

Date Range: YYYY-MM-DD or Month DD, YY

View Unread Only

View Archived

To	From	Subject	Reference #	Emp. ID	Date
Termination	Air Canada Pilots	Termination	185600		30-Apr-2019 1:35PM
Termination	Air Canada Pilots	Termination	185599		30-Apr-2019 1:31PM
Enrolment	Air Canada Pilots	Enrolment	185596		29-Apr-2019 2:16PM
Termination	Air Canada Pilots	Termination	185595		29-Apr-2019 2:12PM
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	185501		10-Apr-2019 2:48PM
Termination	Air Canada Pilots	Termination	185499		10-Apr-2019 2:25PM

1 - 10 of 15 items

Pension Information Legal Information Contact Us

onlineServices

Welcome Michelle

Air Canada Pilots

Secure Messaging

Inbox Sent Drafts

Compose New Message

To view message, click on the Subject

Mailbox: - All -

Keyword Search: Keyword Search

Date Range: YYYY-MM-DD or Month DD, YY

View Unread Only

View Archived

To	From	Subject	Reference #	Emp. ID	Date
Termination	Air Canada Pilots	Termination	185600		30-Apr-2019 1:35PM
Termination	Air Canada Pilots	Termination	185599		30-Apr-2019 1:31PM
Enrolment	Air Canada Pilots	Enrolment	185596		29-Apr-2019 2:16PM
Termination	Air Canada Pilots	Termination	185595		29-Apr-2019 2:12PM
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	185501		10-Apr-2019 2:48PM
Termination	Air Canada Pilots	Termination	185499		10-Apr-2019 2:25PM

1 - 10 of 15 items

Pension Information Legal Information Contact Us

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

The screenshot shows the OPTrust onlineServices portal. At the top right, there are links for Help, Secure Messages, Settings, and Sign out. The user is logged in as Michelle, and the current organization is Air Canada Pilots. The page title is "Record of Correspondence" with a "Back" button. Below this, there are buttons for Reply, Archive, and Print. The main content area shows a message with the following details:

- From:** Air Canada Pilots
- To:** General Inquiry
- Date:** 10-April-2019 at 11:07 AM
- Subject:** Salary Confirmation for J. Doe

Message status: Message Read , Archived

Re: Employee ID 12345

Hi,

Can you please confirm the 2018 salary rate for J. Doe?

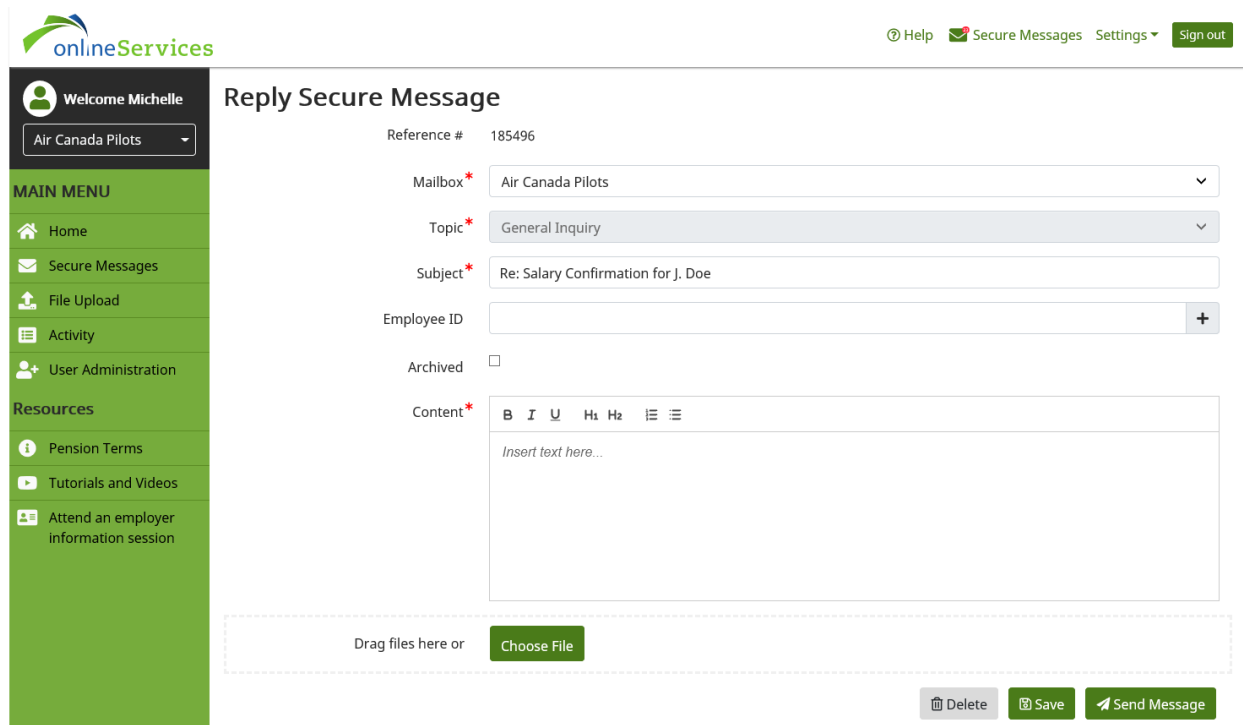
Thank you for your help.

Michelle

At the bottom of the page, there is a footer with links for Pension Information, Legal Information, and Contact Us.

This screenshot is identical to the one above, but with a red arrow pointing to the "Reply" button, which is circled in red. This highlights the action that allows the user to view the message content.

Clicking “Reply” will return you to the message template:



onlineServices

Welcome Michelle

Air Canada Pilots

Reply Secure Message

Reference # 185496



Mailbox* Air Canada Pilots

Topic* General Inquiry

Subject* Re: Salary Confirmation for J. Doe

Employee ID

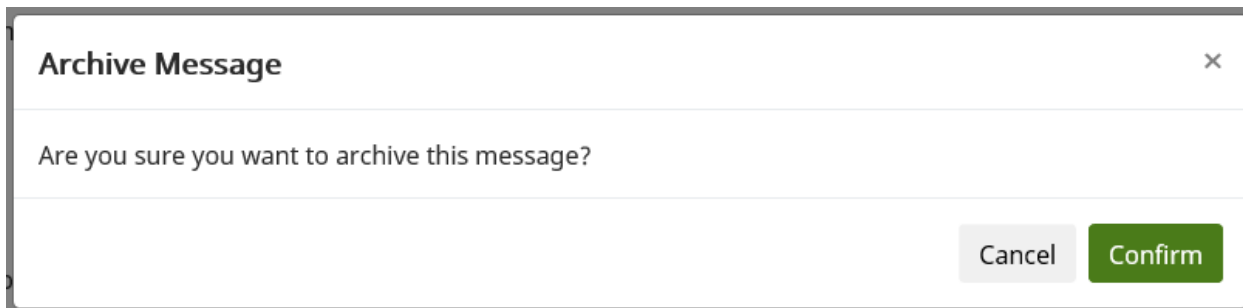
Archived

Content* **B I U H₁ H₂**  

Insert text here...

Drag files here or [Choose File](#)

[Delete](#) [Save](#) [Send Message](#)



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:

Record of Correspondence

Reference # 185496

From	Air Canada Pilots	Message Read	yes
To	General Inquiry	Archived	no
Date	Apr 10, 2019 11:07 AM		
Subject	Salary Confirmation for J. Doe		

Re: Employee ID 12345

Hi,

Can you please confirm the 2018 salary rate for J. Doe?

Thank you for your help,

Michelle

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

onlineServices Help Secure Messages Settings Sign out

Welcome Michelle
Air Canada Pilots

New Secure Message

Reference # 185499

Mailbox* Air Canada Pilots

Topic* Termination

Employee ID

Content*
 B I U H1 H2 | |
 Hi,
 Attached please find the Notice of Termination for J. Doe. Employee ID 123456

Drag files here or Choose File

Delete Save Send Message

Pension Information Legal Information Contact Us

onlineServices Help Secure Messages Settings Sign out

Welcome Michelle
Air Canada Pilots

Secure Messaging

Inbox Sent Drafts Compose New Message

To view message, click on the Subject

Mailbox - All - View Unread Only
 View Archived

Keyword Search

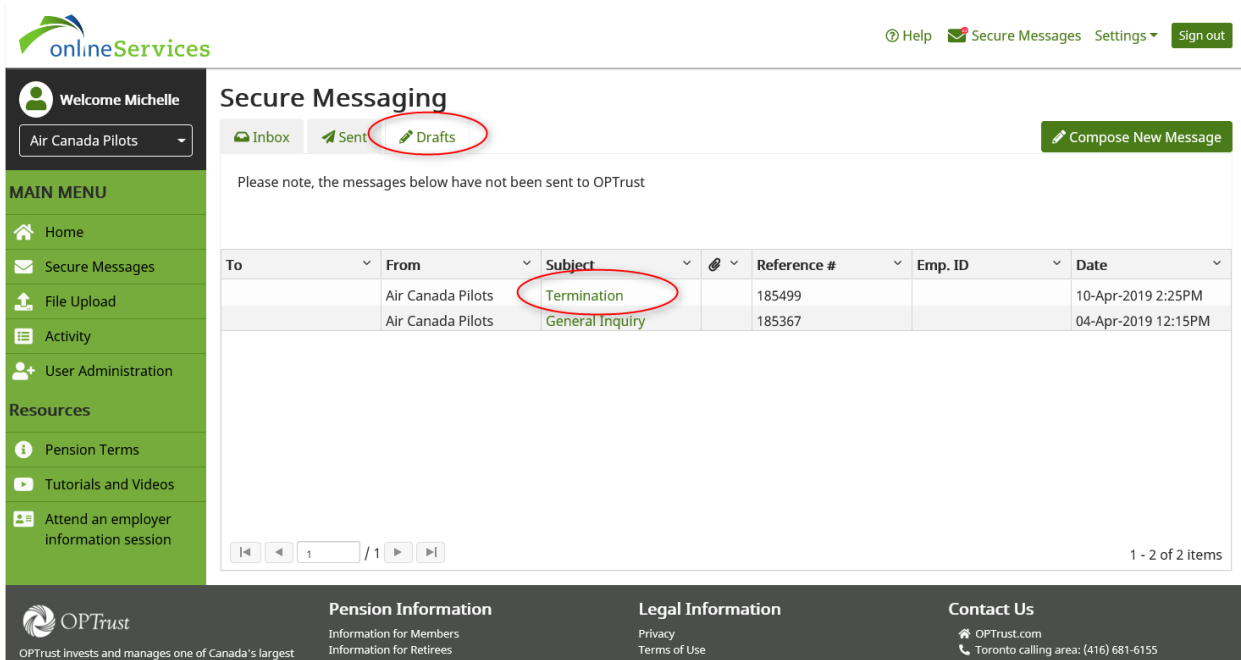
Date Range Search

	To	From	Subject		Reference #	Emp. ID	Date
✉	Air Canada Pilots	Enrolment	Enrolment	📎	185450		05-Apr-2019 11:45AM
✉	Air Canada Pilots	Member Data Updat...	Disability		185364		04-Apr-2019 12:10PM
✉	Cabinet Office (54)	SES Conversion	F... (Notice of Termination)...		367106		07-Mar-2018 12:00AM
✉	Cabinet Office (54)	SES Conversion	F... Transfer to OPS...		363185		03-Jan-2018 12:00AM
✉	Cabinet Office (54)	SES Conversion	F... (Notice of Termination)...		360241		07-Nov-2017 12:00AM
✉	Cabinet Office (54)	SES Conversion	J... (Notice of Termination)...		345506		22-Jun-2017 12:00AM
✉	Cabinet Office (54)	SES Conversion	L... (Notice of Termination)...		345537		22-Jun-2017 12:00AM
✉	Cabinet Office (54)	SES Conversion	J... (Notice of Termination)...		345504		22-Jun-2017 12:00AM
✉	Cabinet Office (54)	SES Conversion	L... (Notice of Termination)...		339695		05-May-2017 12:00AM
✉	Cabinet Office (54)	SES Conversion	L... (Notice of Termination)...		309861		12-Oct-2016 12:00AM

1 - 10 of 22 items

Pension Information Legal Information Contact Us

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



onlineServices Help Secure Messages Settings Sign out

Welcome Michelle
Air Canada Pilots

Secure Messaging

Inbox Sent **Drafts** Compose New Message

Please note, the messages below have not been sent to OPTrust

To	From	Subject	Reference #	Emp. ID	Date
	Air Canada Pilots	Termination	185499		10-Apr-2019 2:25PM
	Air Canada Pilots	General Inquiry	185367		04-Apr-2019 12:15PM

1 - 2 of 2 items

OPTrust Pension Information Legal Information Contact Us
Information for Members Information for Retirees Privacy Terms of Use
OPTrust.com Toronto calling area: (416) 681-6155

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”:

The screenshot shows the OPTrust Secure Messaging interface. The user is logged in as Michelle. The interface includes a main menu on the left with options like Home, Secure Messages, File Upload, Activity, and User Administration. The main content area displays a list of messages. A red arrow points to the 'Termination' subject in the second row of the message list.

To	From	Subject	Reference #	Emp. ID	Date
Air Canada Pilots	General Inquiry	Good Morning!	185611		07-May-2019 8:05AM
Air Canada Pilots	Termination	Termination	185501		10-Apr-2019 2:48PM
Air Canada Pilots	Enrolment	Enrolment	185450		05-Apr-2019 11:45AM
Air Canada Pilots	Member Data Update...	Disability	185364		04-Apr-2019 12:10PM
Cabinet Office (54)	SES Conversion	Francine Durieux WIN...	367106		07-Mar-2018 12:00AM
Cabinet Office (54)	SES Conversion	File Transfer to OPS a...	363185		03-Jan-2018 12:00AM
Cabinet Office (54)	SES Conversion	Francine Durieux WIN...	360241		07-Nov-2017 12:00AM
Cabinet Office (54)	SES Conversion	JACQUELYNNE NEWMAN...	345506		22-Jun-2017 12:00AM
Cabinet Office (54)	SES Conversion	Leen Al Zabab WIN L...	345537		22-Jun-2017 12:00AM
Cabinet Office (54)	SES Conversion	Jacquelyn Newman...	345504		22-Jun-2017 12:00AM

Click "Reply":

Record of Correspondence

Welcome Michelle
Air Canada Pilots

Back Reply Archive Print

Reference # 185501

From: Air Canada Pilots
To: Termination
Date: 15-April-2019 at 2:09 PM
Subject: Termination

Message Read
Archived

Hi Michelle,

Yes, that is correct, J. Doe did terminate. I have attached their Notice of Termination form.

Sincerely,

Michelle

Attached Files: Doe.docx

From: Termination
To: Air Canada Pilots
Date: 10-April-2019 at 2:49 PM
Subject: Termination

Message Read
Archived

Hi,

Reply Secure Message

Welcome Michelle
Air Canada Pilots

Reference # 185501

Mailbox* Air Canada Pilots

Topic* Termination

Subject Re: Termination

Employee ID

Archived

Content* **B I U H1 H2**

Insert text here...

Drag files here or [Choose File](#)

Delete Save Send Message

Pension Information Legal Information Contact Us

Enter your message:

onlineServices

Welcome Michelle

Air Canada Pilots

Reference # 185501

Mailbox * Air Canada Pilots

Topic * Termination

Employee ID

Archived

Content *
B I U H₁ H₂

Thank you for confirming this!

Sincerely,

Michelle

Drag files here or [Choose File](#)

Delete Save Send Message

Pension Information Legal Information Contact Us

onlineServices

Welcome Michelle

Air Canada Pilots

Reference # 185501

Mailbox * Air Canada Pilots

Topic * Termination

Employee ID

Archived

Content *
B I U H₁ H₂

Thank you for confirming this!

Sincerely,

Michelle

Drag files here or [Choose File](#)

Delete Save Send Message

Pension Information Legal Information Contact Us

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

Reply Secure Message

Reference # 185501

Mailbox* Air Canada Pilots

Topic* Termination

Employee ID

Archived

Content*

B I U H1 H2

Thank you for confirming this!

Sincerely,

Michelle

Drag files here or [Choose File](#)

[Delete](#) [Save](#) [Send Message](#)

Secure Messaging

[Inbox](#) [Sent](#) [Drafts](#) [Compose New Message](#)

To view message, click on the Subject

Mailbox - All -

Keyword Search Keyword Search

Date Range YYYY-MM-DD or Month DD, YY YYYY-MM-DD or Month DD, YY [Search](#)

View Unread Only

View Archived

To	From	Subject	Reference #	Emp. ID	Date
Air Canada Pilots	General Inquiry	Good Morning!	185611		07-May-2019 8:05AM
Air Canada Pilots	Termination	Termination	185501		10-Apr-2019 2:48PM
Air Canada Pilots	Enrolment	Enrolment	185450		05-Apr-2019 11:45AM
Air Canada Pilots	Member Data Update...	Disability	185364		04-Apr-2019 12:10PM
Cabinet Office (54)	SES Conversion	Patricia Durso... WITH...	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	Patricia Durso... WITH...	360241		07-Nov-2017 12:00AM
Cabinet Office (54)	SES Conversion	JACQUES-YVES NEWMAN...	345506		22-Jun-2017 12:00AM
Cabinet Office (54)	SES Conversion	Leen Al Zahabi- WITH L...	345537		22-Jun-2017 12:00AM
Cabinet Office (54)	SES Conversion	Jacqueline Newman...	345504		22-Jun-2017 12:00AM

1 - 10 of 24 items

To open it click on the "Subject":

onlineServices

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

Secure Messaging

Inbox Sent Drafts

Compose New Message

Please note, the messages below have not been sent to OPTrust

To	From	Subject	Reference #	Emp. ID	Date
Termination	Air Canada Pilots	Termination	185501		01-May-2019 4:30PM
	Air Canada Pilots	No Subject	185576		25-Apr-2019 12:53PM
	Air Canada Pilots	Retirement	185575		25-Apr-2019 12:48PM
	Air Canada Pilots	Long Term Illness	185564		23-Apr-2019 1:27PM
	Air Canada Pilots	General Inquiry	185367		04-Apr-2019 12:15PM

1 - 5 of 5 items

Pension Information Legal Information Contact Us

onlineServices

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

Reply Secure Message

Reference # 185501

Mailbox* Air Canada Pilots

Topic* Termination

Employee ID

Archived

Content*

B I U H1 H2

Thank you for confirming this!

Sincerely,

Michelle

Drag files here or Choose File

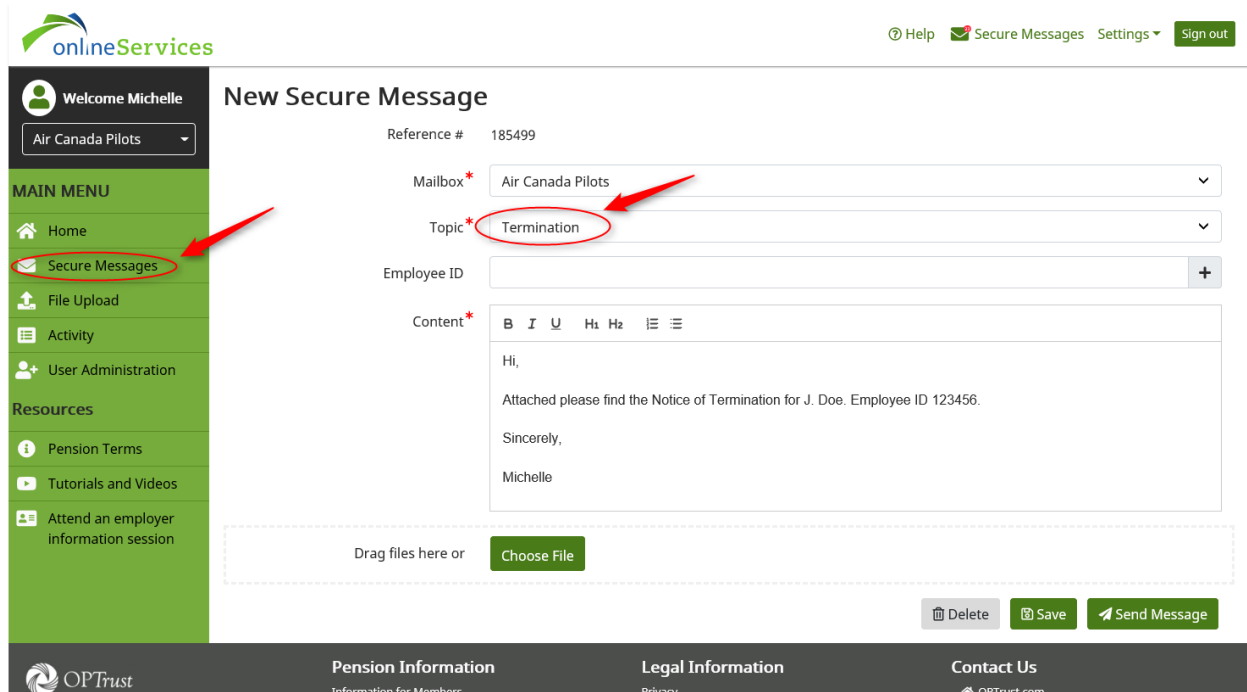
Delete Save Send Message

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:



The screenshot shows the 'New Secure Message' interface. On the left, the 'MAIN MENU' includes 'Home', 'Secure Messages' (circled in red), 'File Upload', 'Activity', 'User Administration', and 'Resources'. The 'Resources' section includes 'Pension Terms', 'Tutorials and Videos', and 'Attend an employer information session'. The main form area is titled 'New Secure Message' and includes a 'Reference #' of 185499, a 'Mailbox' dropdown set to 'Air Canada Pilots', and a 'Topic' dropdown set to 'Termination' (circled in red). Below these is an 'Employee ID' field with a plus sign. The 'Content' area has a rich text editor with the text: 'Hi, Attached please find the Notice of Termination for J. Doe. Employee ID 123456. Sincerely, Michelle'. At the bottom of the form, there is a 'Drag files here or Choose File' button and 'Delete', 'Save', and 'Send Message' buttons.

Browsing to a file

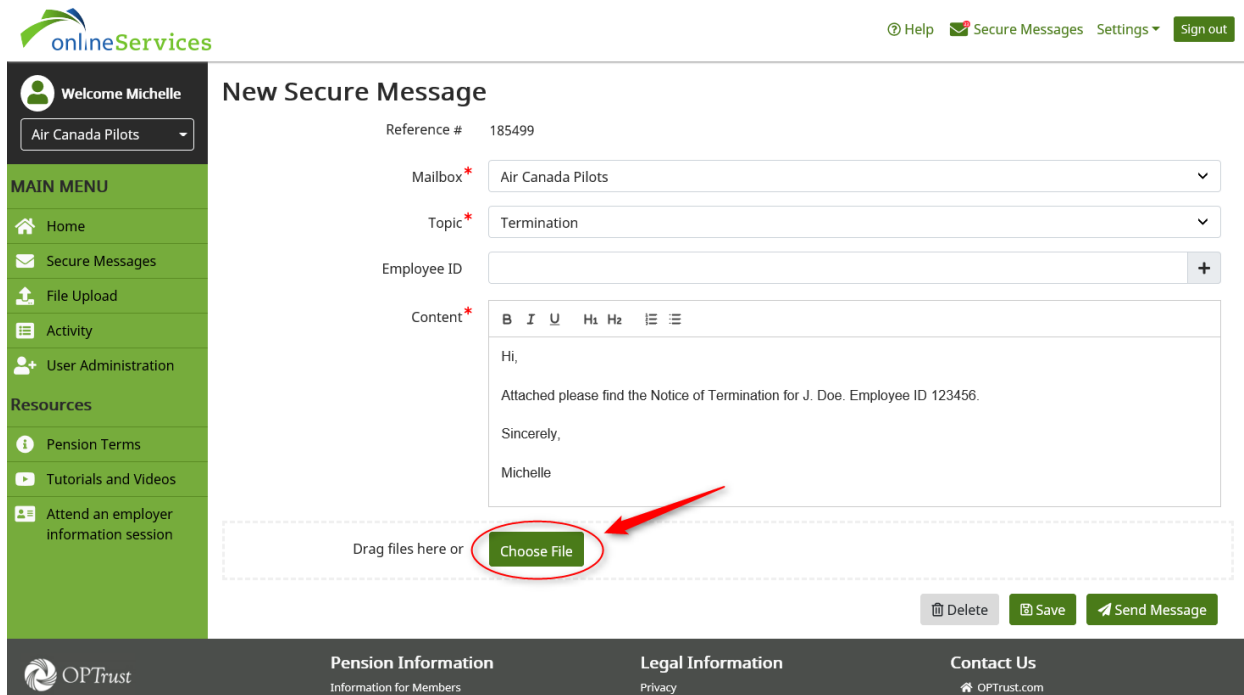
VIDEO



Browsing to a Document.mp4

STEP BY STEP

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



The screenshot shows the 'New Secure Message' interface. At the top left is the 'onlineServices' logo. The user is logged in as 'Michelle' and is in the 'Air Canada Pilots' mailbox. The form includes fields for Reference # (185499), Mailbox (Air Canada Pilots), Topic (Termination), and Employee ID. The content area contains a message: 'Hi, Attached please find the Notice of Termination for J. Doe. Employee ID 123456. Sincerely, Michelle'. Below the content area is a dashed box with the text 'Drag files here or' and a green 'Choose File' button. A red circle highlights the 'Choose File' button, and a red arrow points to it from the right. At the bottom right of the form are buttons for 'Delete', 'Save', and 'Send Message'. The footer contains 'Pension Information', 'Legal Information', and 'Contact Us' links.

VIDEO



Dragging and Dropping a Document.mp4

STEP BY STEP

Drag a file to the section that says “Drag files here”:

onlineServices Help Secure Messages Settings Sign out

Welcome Michelle
Air Canada Pilots

New Secure Message

Reference # 185499

Mailbox* Air Canada Pilots

Topic* Termination

Employee ID

Content*
B I U H1 H2

Hi,
Attached please find the Notice of Termination for J. Doe. Employee ID 123456.
Sincerely,
Michelle

Drag files here or

Pension Information Legal Information Contact Us

onlineServices Help Secure Messages Settings Sign out

Welcome Michelle
Air Canada Pilots

New Secure Message

Reference # 185499


Mailbox* Air Canada Pilots

Topic* Termination

Employee ID

Content*
B I U H1 H2

Hi,
Attached please find the Notice of Termination for J. Doe. Employee ID 123456.
Sincerely,
Michelle

 Drag files here or

Pension Information Legal Information Contact Us

Attached messages will appear here:

The screenshot shows the 'New Secure Message' form in the OPTrust portal. The form includes fields for Reference # (185499), Mailbox (Air Canada Pilots), Topic (Termination), and Employee ID. The content area contains a message: 'Hi, Attached please find the Notice of Termination for J. Doe. Employee ID 123456. Sincerely, Michelle'. Below the content area is a file upload section with a 'Choose File' button. A file named 'Doe.docx' (0.01 MB) is shown with a red circle around the file name and a red arrow pointing to the delete icon. The footer contains links for Pension Information, Legal Information, and Contact Us.

This screenshot is identical to the one above, but with a red arrow pointing to the delete icon (trash can) next to the file 'Doe.docx' (0.01 MB) in the file upload section.

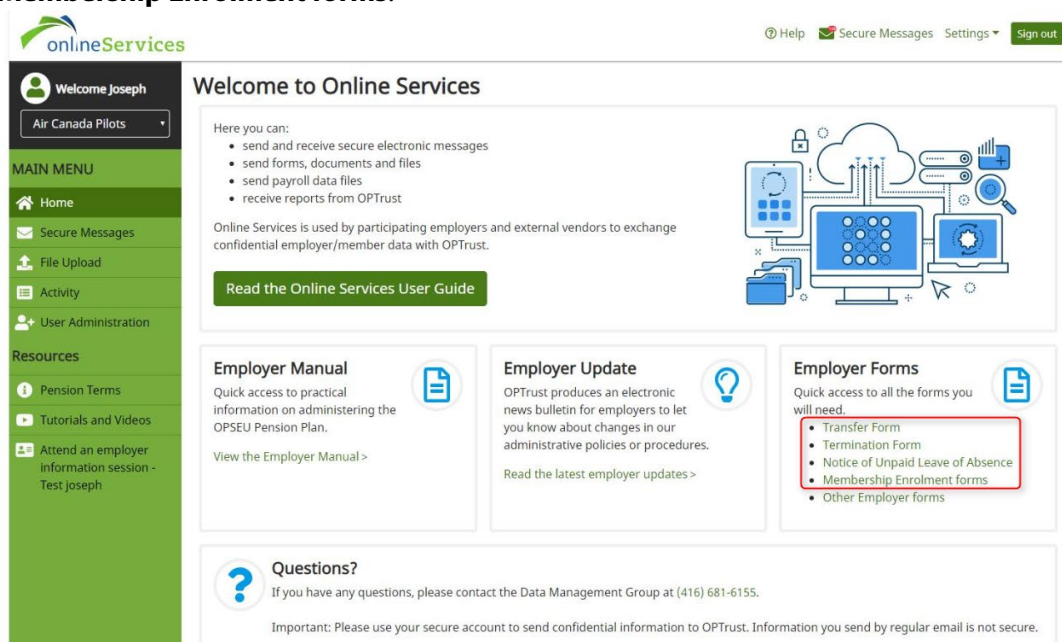
HOW TO ELECTRONICALLY SIGN FORMS USING DOCUSIGN

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**.



The screenshot shows the 'onlineServices' interface. At the top right, there are links for Help, Secure Messages, Settings, and Sign out. The main content area is titled 'Welcome to Online Services' and lists several actions: 'send and receive secure electronic messages', 'send forms, documents and files', 'send payroll data files', and 'receive reports from OPTrust'. Below this, there is a 'Read the Online Services User Guide' button. The 'Employer Forms' section is highlighted with a red box and lists: 'Transfer Form', 'Termination Form', 'Notice of Unpaid Leave of Absence', 'Membership Enrolment forms', and 'Other Employer forms'.

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).

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**.

5. Form is now accessible and fillable.

If you selected **Transfer Form** or **Termination Form**:

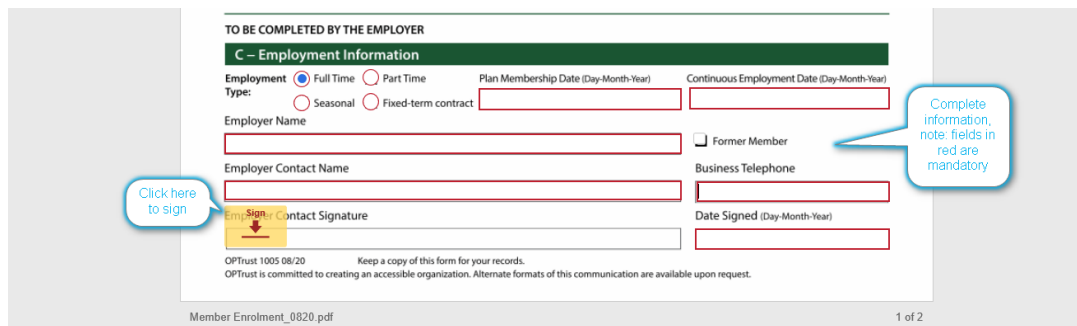
- Fill in the **mandatory form fields highlighted with a red border** and any optional fields.
- When you are ready to sign, click on **Sign**.

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 Type: Full Time Part Time Seasonal Fixed-term contract

Plan Membership Date (Day-Month-Year)

Continuous Employment Date (Day-Month-Year)

Employer Name

Employer Contact Name

Business Telephone

Date Signed (Day-Month-Year)

Former Member

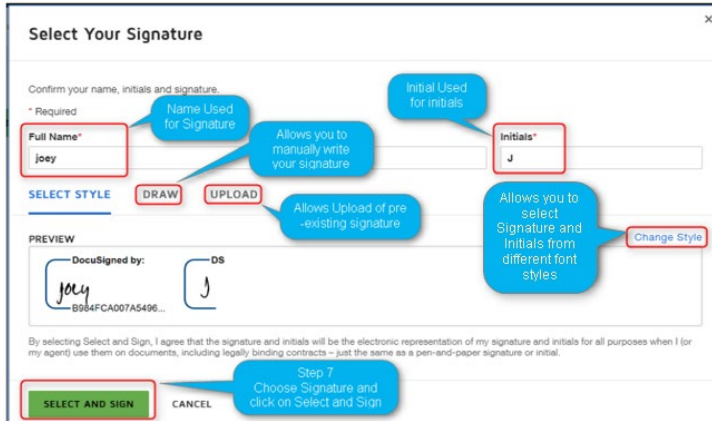
Contact Signature

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 available upon request.

Member Enrolment_0820.pdf 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**.



Select Your Signature



Confirm your name, initials and signature.

* Required

Full Name* Initials*

SELECT STYLE **DRAW** **UPLOAD**

PREVIEW

DocuSigned by:  DS 

B984FCA007A5496...

By selecting Select and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

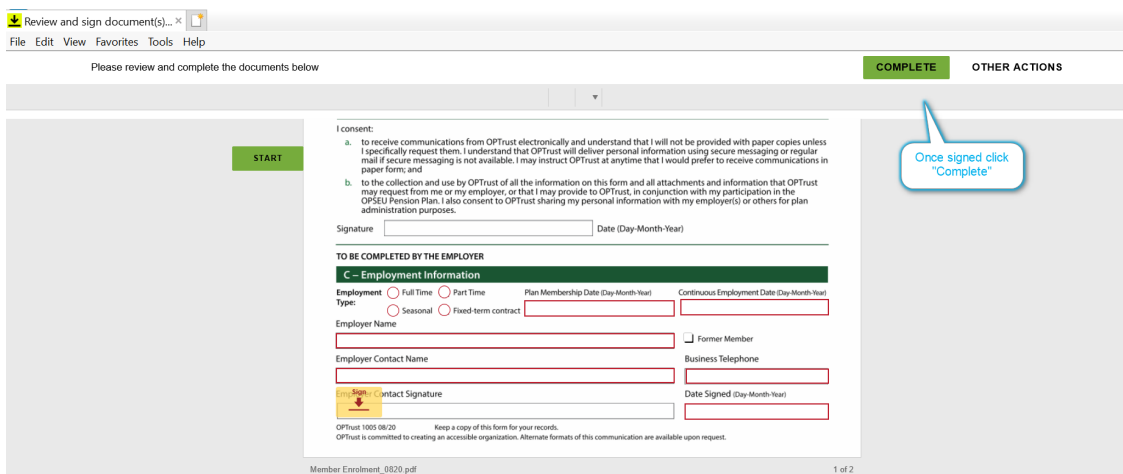
SELECT AND SIGN CANCEL

Callouts:

- Name Used for Signature
- Initial Used for initials
- Allows you to manually write your signature
- Allows Upload of pre-existing signature
- Allows you to select Signature and Initials from different font styles
- Change Style
- Step 7: Choose Signature and click on Select and Sign

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).

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



Review and sign document(s)... x

File Edit View Favorites Tools Help

Please review and complete the documents below

COMPLETE OTHER ACTIONS

START

I consent:

- to receive communications from OPTrust electronically and understand that I will not be provided with paper copies unless I specifically request them. I understand that OPTrust will deliver personal information using secure messaging or regular mail if secure messaging is not available. I may instruct OPTrust at anytime that I would prefer to receive communications in paper form; and
- to the collection 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, or that I may provide to OPTrust, in conjunction with my participation in the OPSEU Pension Plan. I also consent to OPTrust sharing my personal information with my employer(s) or others for plan administration purposes.

Signature: Date (Day-Month-Year)

TO BE COMPLETED BY THE EMPLOYER

C - Employment Information

Employment Full Time Part Time Plan Membership Date (Day-Month-Year) Continuous Employment Date (Day-Month-Year)

Type: Seasonal Fixed-term contract

Employer Name Former Member

Employer Contact Name Business Telephone

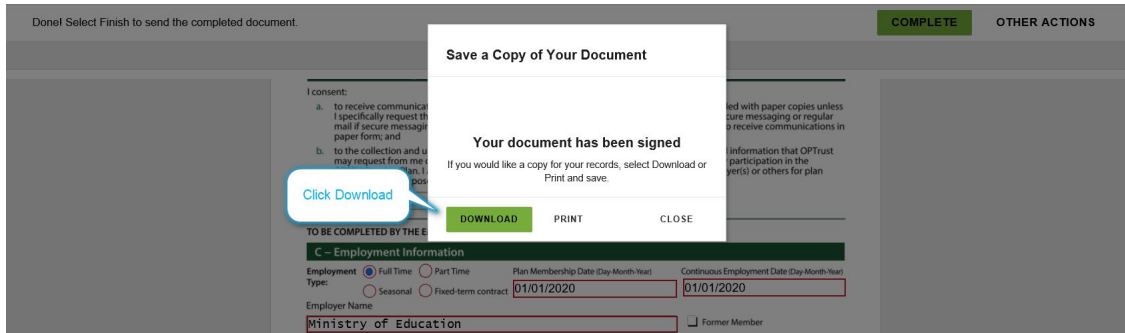
Employer Contact Signature Date Signed (Day-Month-Year)

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 available upon request.

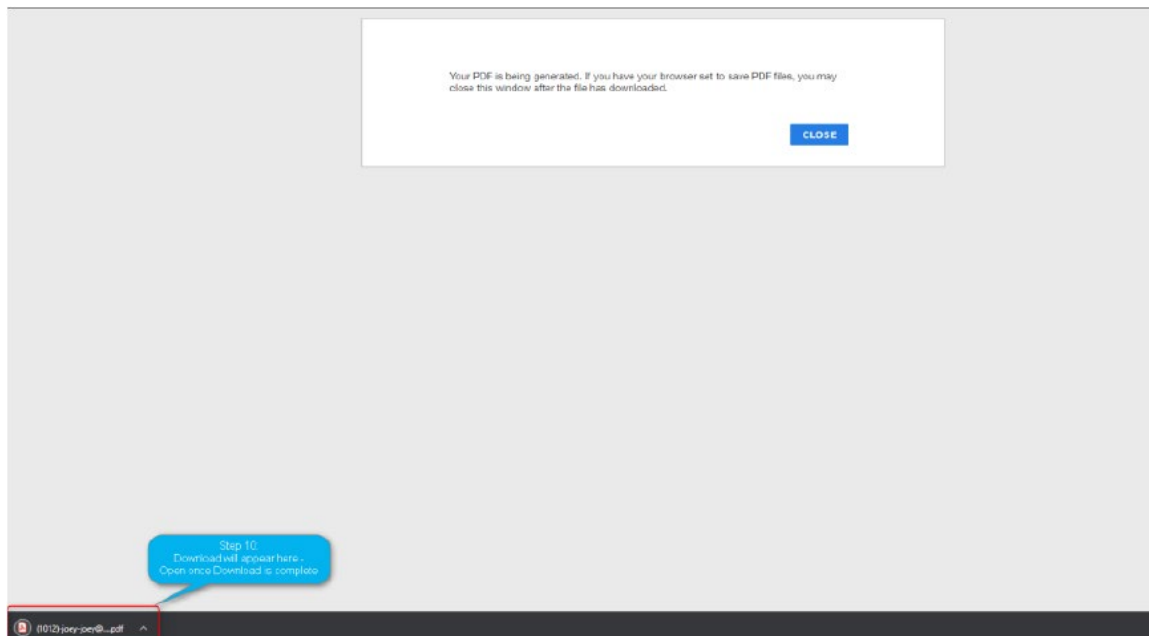
Member Enrollment_0820.pdf 1 of 2

Callout: Once signed click "Complete"

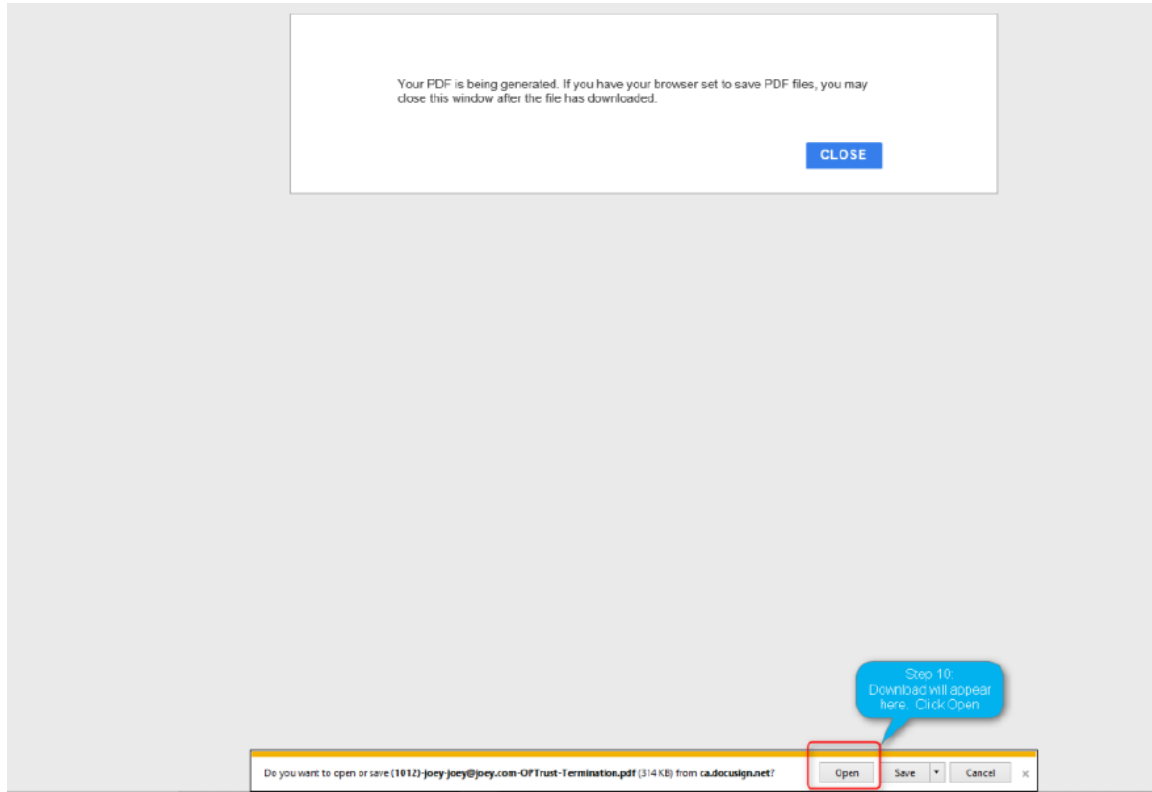
- A pop-up window opens: **Save a Copy of Your Document**. Click on **Download** and open the downloaded form.



FOR CHROME USERS:



FOR INTERNET EXPLORER AND EDGE USERS:




FOR FIREFOX USERS:

Your PDF is being generated. If you have your browser set to save PDF files, you may close this window after the file has downloaded.

[CLOSE](#)

Opening (1012)-joey-joe@joey.com-OPTrust-Termination.pdf

You have chosen to open:

 (1012)-joey-joe@joey.com-OPTrust-Termination.pdf
 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) ▾

Save File

Do this automatically for files like this from now on.

Settings can be changed using the Applications tab in Firefox's Options.

[OK](#) [Cancel](#)

Step 10
Click OK to Open Document

Review and sign document(s)...
[CLOSE](#) OTHER ACTIONS

DocuSign Envelope ID: 1148D19D-F921-469F-8644-4FAE380836A5

MEMBER ENROLMENT

Telephone: 416-661-6100 Toll-free: 1-800-657-0024
 Email: enrol@opstrust.com Website: opstrust.com

Please enroll in the OPSIU Pension Plan.

Information

First Name

Male* Female* * This information is required for actuarial valuation purposes.

Employer Name

Date of Birth (Day-Month-Year)

Social Insurance Number

Employee/WIN Number

Primary Email Address

Work Telephone Number

Alternate Email Address

Personal Telephone Number

Mailing Address Suite City/Town Province Postal Code

Save locally

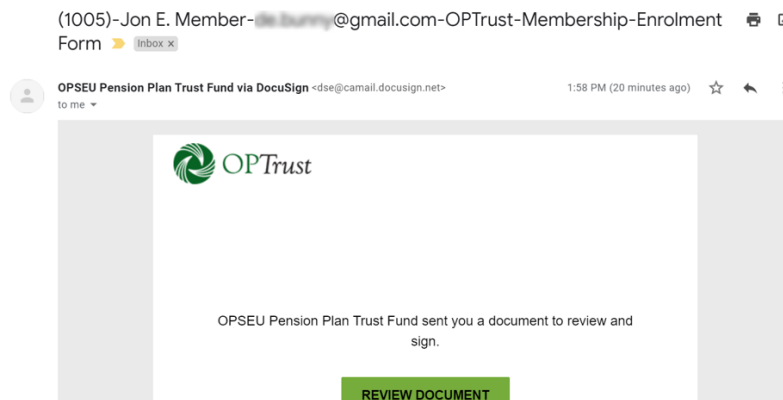
10. If you selected **Transfer Form**, **Termination Form** or **Notice of Unpaid Leave of Absence**, compose a new **secure message** through *Online Services*.

- **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**.



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




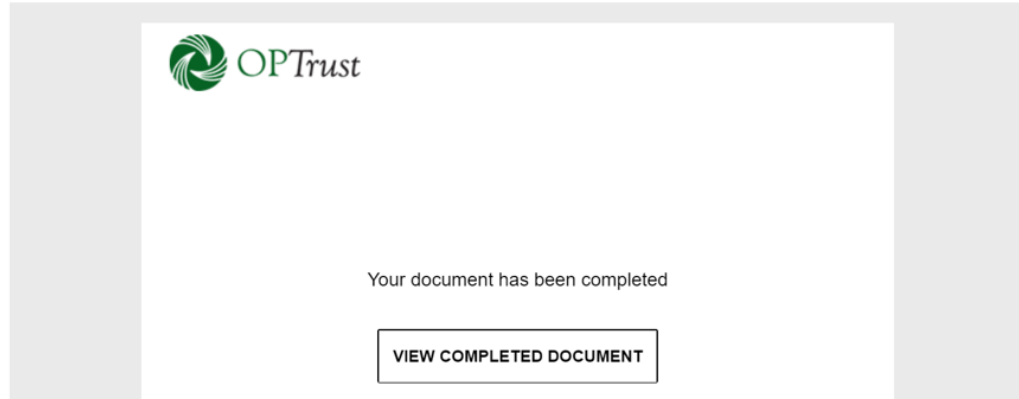
- Employee clicks on **Continue**.

- 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**.

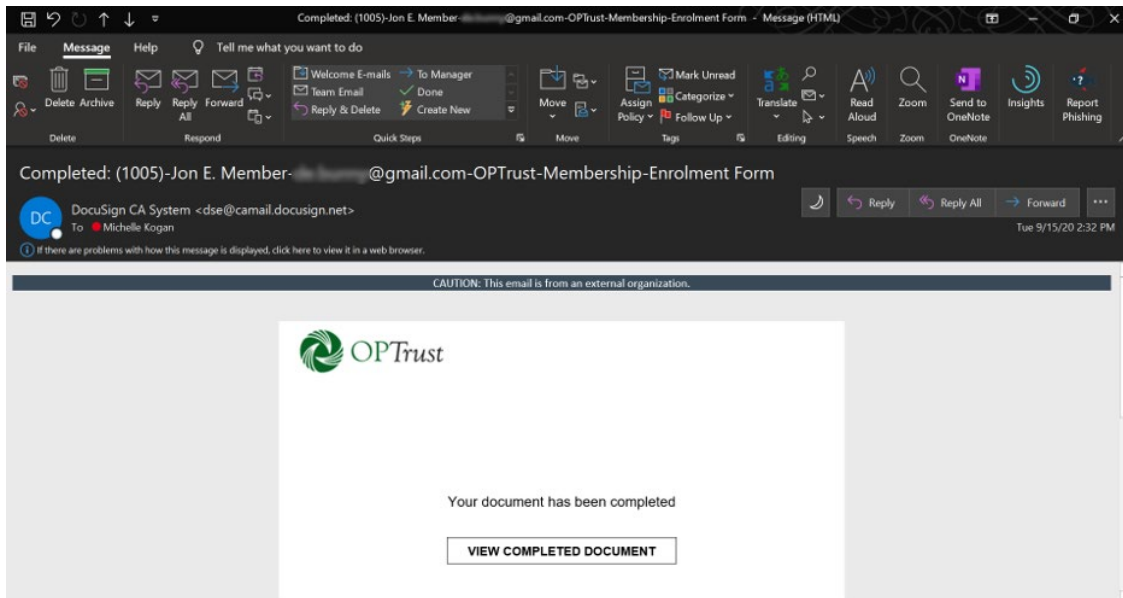
- Once the Employee downloads/completes the form, they will automatically receive an email with a copy of the form: **View Completed Document**.

Completed: (1005)-Jon E. Member- [redacted]@gmail.com-OPTrust-Member
ship-Enrolment Form 🖨️ 📧

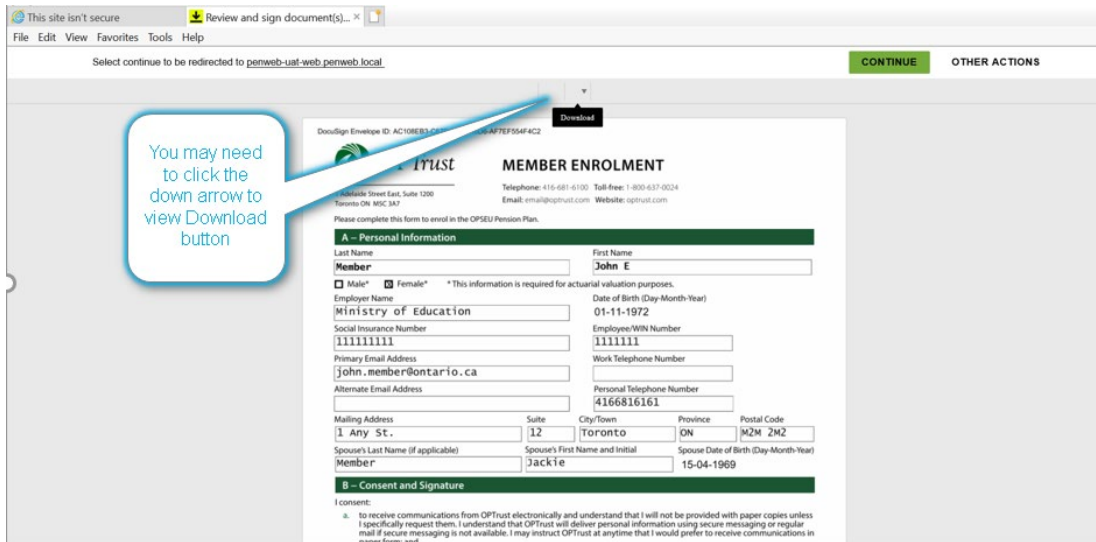
 **OPSEU Pension Plan Trust Fund via DocuSign** <dse@camail.docusign.net> 2:32 PM (2 minutes ago) ☆ ↶ ⋮
to me ▾



- 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).



This site isn't secure Review and sign document(s)... X

File Edit View Favorites Tools Help

Select continue to be redirected to penweb-uat-web.penweb.local

CONTINUE OTHER ACTIONS

Download

MEMBER ENROLMENT

Telephone: 416-681-6100 Toll-free: 1-800-637-0024
 Email: email@optrust.com Website: optrust.com

Please complete this form to enrol in the OPSEU Pension Plan.

A – Personal Information

Last Name: Member First Name: John E

Male* Female* * This information is required for actuarial valuation purposes.

Employer Name: Ministry of Education Date of Birth (Day-Month-Year): 01-11-1972

Social Insurance Number: 111111111 Employee/WIN Number: 11111111

Primary Email Address: john.member@ontario.ca Work Telephone Number:

Alternate Email Address: Personal Telephone Number: 4166816161

Mailing Address: Suite: 12 City/Town: Toronto Province: ON Postal Code: M2M 2H2

Spouse's Last Name (if applicable): Member Spouse's First Name and Initial: Jackie Spouse Date of Birth (Day-Month-Year): 15-04-1969

B – Consent and Signature

I consent:

a. to receive communications from OPTrust electronically and understand that I will not be provided with paper copies unless I specifically request them. I understand that OPTrust will deliver personal information using secure messaging or regular mail if secure messaging is not available. I may instruct OPTrust at anytime that I would prefer to receive communications in paper form; and

RECEIVING MESSAGES

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

onlineServices Help Secure Messages Settings Sign out

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

Welcome to Online Services

Here you can:

- send and receive secure electronic messages
- send forms, documents and files
- send payroll data files
- receive reports from OPTrust

Online Services is used by participating employers and external vendors to exchange confidential employer/member data with OPTrust.

[Read the Online Services User Guide](#)

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 >](#)

onlineServices Help Secure Messages Settings Sign out

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

Secure Messaging

Inbox Sent Drafts [Compose New Message](#)

To view message, click on the Subject

Mailbox: - All - View Unread Only View Archived

Keyword Search: Keyword Search

Date Range: YYYY-MM-DD or Month DD, YY YYYY-MM-DD or Month DD, YY [Search](#)

	From	Subject	Reference #	Emp. ID	Date
<input checked="" type="checkbox"/>	Air Canada Pilots	Termination	Termination	185501	10-Apr-2019 2:48PM
<input checked="" type="checkbox"/>	Air Canada Pilots	Enrolment	Enrolment	185450	05-Apr-2019 11:45AM
<input checked="" type="checkbox"/>	Air Canada Pilots	Member Data Updat...	Disability	185364	04-Apr-2019 12:10PM
<input type="checkbox"/>	Cabinet Office (54)	SES Conversion	Patricia Durstelo WL...	367106	07-Mar-2018 12:00AM
<input type="checkbox"/>	Cabinet Office (54)	SES Conversion	RE: Transfer to OPS...	363185	03-Jan-2018 12:00AM
<input type="checkbox"/>	Cabinet Office (54)	SES Conversion	Patricia Durstelo WL...	360241	07-Nov-2017 12:00AM
<input checked="" type="checkbox"/>	Cabinet Office (54)	SES Conversion	JACQUELYNNE NEWMAN...	345506	22-Jun-2017 12:00AM
<input checked="" type="checkbox"/>	Cabinet Office (54)	SES Conversion	Loren Al Zabluk WL...	345537	22-Jun-2017 12:00AM
<input checked="" type="checkbox"/>	Cabinet Office (54)	SES Conversion	Jacquelyne Newman...	345504	22-Jun-2017 12:00AM
<input checked="" type="checkbox"/>	Cabinet Office (54)	SES Conversion	Loren Al Zabluk WL...	339695	05-May-2017 12:00AM

1 - 10 of 23 items

Pension Information Legal Information 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:

The screenshot shows the OPTrust onlineServices interface. The user is logged in as Michelle, and the current organization is Air Canada Pilots. The main menu includes Home, Secure Messages, File Upload, Activity, and User Administration. The Secure Messaging section is active, displaying a list of messages. A red oval highlights the 'Mailbox' dropdown menu, which is currently set to '- All -'. Below the dropdown are search and date range filters. The message list includes various communications from Air Canada Pilots and Cabinet Office (54).

	To	From	Subject	Reference #	Emp. ID	Date
✉	Air Canada Pilots	Termination	Termination	185501		10-Apr-2019 2:48PM
✉	Air Canada Pilots	Enrolment	Enrolment	185450		05-Apr-2019 11:45AM
✉	Air Canada Pilots	Member Data Updat...	Disability	185364		04-Apr-2019 12:10PM
✉	Cabinet Office (54)	SES Conversion	Patricia Durawski WL...	367106		07-Mar-2018 12:00AM
✉	Cabinet Office (54)	SES Conversion	RE: Transfer to OPB...	363185		03-Jan-2018 12:00AM
✉	Cabinet Office (54)	SES Conversion	Patricia Durawski WL...	360241		07-Nov-2017 12:00AM
✉	Cabinet Office (54)	SES Conversion	JACQUELYNNE NEWMAN...	345506		22-Jun-2017 12:00AM
✉	Cabinet Office (54)	SES Conversion	Leen Al Zabak- Win...	345537		22-Jun-2017 12:00AM
✉	Cabinet Office (54)	SES Conversion	Jacquelyn Newman...	345504		22-Jun-2017 12:00AM
✉	Cabinet Office (54)	SES Conversion	Leen Al Zabak- Win...	339695		05-May-2017 12:00AM

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

The screenshot shows the 'Secure Messaging' interface. The 'Keyword Search' field is highlighted with a red oval and contains the text 'Keyword Search'. Below it, a table lists messages with columns for To, From, Subject, Reference #, Emp. ID, and Date. The first message is from 'Air Canada Pilots' with the subject 'Termination' and reference number 185501.

To	From	Subject	Reference #	Emp. ID	Date
Air Canada Pilots	Termination	Termination	185501		10-Apr-2019 2:48PM
Air Canada Pilots	Enrolment	Enrolment	185450		05-Apr-2019 11:45AM
Air Canada Pilots	Member Data Updat...	Disability	185364		04-Apr-2019 12:10PM
Cabinet Office (54)	SES Conversion	Patricia Dunscomb WL...	367106		07-Mar-2018 12:00AM
Cabinet Office (54)	SES Conversion	RE: Transfer to OPE...	363185		03-Jan-2018 12:00AM
Cabinet Office (54)	SES Conversion	Patricia Dunscomb WL...	360241		07-Nov-2017 12:00AM
Cabinet Office (54)	SES Conversion	JACQUELYNNE NEWMAN...	345506		22-Jun-2017 12:00AM
Cabinet Office (54)	SES Conversion	Leen Al Zabbak WL...	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 Zabbak WL...	339695		05-May-2017 12:00AM

The screenshot shows the 'Secure Messaging' interface. The 'Date Range' field is highlighted with a red oval and contains the text 'YYYY-MM-DD or Month DD, YY'. Below it, a table lists messages with columns for To, From, Subject, Reference #, Emp. ID, and Date. The first message is from 'Air Canada Pilots' with the subject 'Enrolment' and reference number 185450.

To	From	Subject	Reference #	Emp. ID	Date
Air Canada Pilots	Termination	Termination	185501		10-Apr-2019 2:48PM
Air Canada Pilots	Enrolment	Enrolment	185450		05-Apr-2019 11:45AM
Air Canada Pilots	Member Data Updat...	Disability	185364		04-Apr-2019 12:10PM
Cabinet Office (54)	SES Conversion	Patricia Dunscomb WL...	367106		07-Mar-2018 12:00AM
Cabinet Office (54)	SES Conversion	RE: Transfer to OPE...	363185		03-Jan-2018 12:00AM
Cabinet Office (54)	SES Conversion	Patricia Dunscomb WL...	360241		07-Nov-2017 12:00AM
Cabinet Office (54)	SES Conversion	JACQUELYNNE NEWMAN...	345506		22-Jun-2017 12:00AM
Cabinet Office (54)	SES Conversion	Leen Al Zabbak WL...	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 Zabbak WL...	339695		05-May-2017 12:00AM

Messages can be filtered by unread:

The screenshot shows the 'Secure Messaging' interface. On the left is a sidebar with a 'MAIN MENU' and 'Resources'. The main area has filters for Mailbox, Keyword Search, and Date Range. A red arrow points to the 'View Unread Only' checkbox, which is checked. Below the filters is a table of messages.

To	From	Subject	Reference #	Emp. ID	Date
Air Canada Pilots	Termination	Termination	185501		10-Apr-2019 2:48PM
Air Canada Pilots	Enrolment	Enrolment	185450		05-Apr-2019 11:45AM
Air Canada Pilots	Member Data Updat...	Disability	185364		04-Apr-2019 12:10PM
Cabinet Office (54)	SES Conversion	JACQUELYNNE NEWMAN...	345506		22-Jun-2017 12:00AM
Cabinet Office (54)	SES Conversion	Leen Al Zabak - 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 Zabak - Win...	339695		05-May-2017 12:00AM
Cabinet Office (54)	SES Conversion	Diana Peterson - W...	309861		12-Oct-2016 12:00AM
Cabinet Office (54)	SES Conversion	"Mingus" - 2012 TR...	308880		03-Oct-2016 12:00AM
Cabinet Office (54)	SES Conversion	Termination of Mem...	271267		02-May-2016 12:00AM

And you can access archived messages from here as well:

The screenshot shows the 'Secure Messaging' interface with the 'View Archived' checkbox selected. A red arrow points to this checkbox. The table below shows a different set of messages.

To	From	Subject	Reference #	Emp. ID	Date
Air Canada Pilots	Termination	Termination	185501		10-Apr-2019 2:48PM
Air Canada Pilots	Enrolment	Enrolment	185450		05-Apr-2019 11:45AM
Air Canada Pilots	Member Data Updat...	Disability	185364		04-Apr-2019 12:10PM
Cabinet Office (54)	SES Conversion	Amit Gunda - Win ID...	378966		28-Sep-2018 12:00AM
Cabinet Office (54)	SES Conversion	Amit Gunda - Win ID...	378939		27-Sep-2018 12:00AM
Cabinet Office (54)	SES Conversion	RE: Praga Narang - E...	376337		26-Jul-2018 12:00AM

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

Mailbox: - All - View Unread Only
 View Archived

Keyword Search: Keyword Search

Date Range: YYYY-MM-DD or Month DD, YY YYYY-MM-DD or Month DD, YY

To	From	Subject	Reference #	Emp. ID	Date
Air Canada Pilots	Termination	Termination	185501		10-Apr-2019 2:48PM
Air Canada Pilots	Enrolment	Enrolment	185450		05-Apr-2019 11:45AM
Air Canada Pilots	Member Data Updat...	Disability	185364		04-Apr-2019 12:10PM
Cabinet Office (54)	SES Conversion	Patricia Duranetti WL...	367106		07-Mar-2018 12:00AM
Cabinet Office (54)	SES Conversion	RE: Transfer to OPB...	363185		03-Jan-2018 12:00AM
Cabinet Office (54)	SES Conversion	Patricia Duranetti WL...	360241		07-Nov-2017 12:00AM
Cabinet Office (54)	SES Conversion	JACQUELYN NEWMAN...	345506		22-Jun-2017 12:00AM
Cabinet Office (54)	SES Conversion	Leen Al Zababk - WIL...	345537		22-Jun-2017 12:00AM
Cabinet Office (54)	SES Conversion	Jacquelyn Newman...	345504		22-Jun-2017 12:00AM
Cabinet Office (54)	SES Conversion	Leen Al Zababk - WIL...	339695		05-May-2017 12:00AM

Message: Termination

Hi,

I understand J. Doe has terminated, can you please confirm?

Thank you,

Michelle

onlineServices

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

Secure Messaging

Inbox Sent Drafts

To view message, click on the Subject

Mailbox: - All - View Unread Only
 View Archived

Keyword Search: Keyword Search

Date Range: YYYY-MM-DD or Month DD, YY YYYY-MM-DD or Month DD, YY

To	From	Subject	Reference #	Emp. ID	Date
Air Canada Pilots	Termination	Termination	185501		10-Apr-2019 2:48PM
Air Canada Pilots	Enrolment	Enrolment	185450		05-Apr-2019 11:45AM
Air Canada Pilots	Member Data Updat...	Disability	185364		04-Apr-2019 12:10PM
Cabinet Office (54)	SES Conversion	Patricia Duranetti WL...	367106		07-Mar-2018 12:00AM
Cabinet Office (54)	SES Conversion	RE: Transfer to OPB...	363185		03-Jan-2018 12:00AM
Cabinet Office (54)	SES Conversion	Patricia Duranetti WL...	360241		07-Nov-2017 12:00AM
Cabinet Office (54)	SES Conversion	JACQUELYN NEWMAN...	345506		22-Jun-2017 12:00AM
Cabinet Office (54)	SES Conversion	Leen Al Zababk - WIL...	345537		22-Jun-2017 12:00AM
Cabinet Office (54)	SES Conversion	Jacquelyn Newman...	345504		22-Jun-2017 12:00AM
Cabinet Office (54)	SES Conversion	Leen Al Zababk - WIL...	339695		05-May-2017 12:00AM

Pension Information Legal Information Contact Us

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

onlineServices Help Secure Messages Settings Sign out

Welcome Michelle
Air Canada Pilots

Record of Correspondence

Back Reply Archive Print

Reference # 185501

From	Termination	Message Read	<input checked="" type="checkbox"/>
To	Air Canada Pilots	Archived	<input type="checkbox"/>
Date	10-April-2019 at 2:49 PM		
Subject	Termination		

Hi,

I understand J. Doe has terminated, can you please confirm?

Thank you,

Michelle

MAIN MENU

- Home
- Secure Messages
- File Upload
- Activity
- User Administration

Resources

- Pension Terms
- Tutorials and Videos
- Attend an employer information session

OPTrust Pension Information Legal Information Contact Us

onlineServices Help Secure Messages Settings Sign out

Welcome Michelle
Air Canada Pilots

Record of Correspondence

Back Reply Archive Print

Reference # 367106

From	SES Conversion	Message Read	<input checked="" type="checkbox"/>
To	Cabinet Office (54)	Archived	<input type="checkbox"/>
Date	29-July-2018 at 12:00 AM		
Subject	RE: Patricia Davidson WFN ID 432311		

Hello,

The request below is still outstanding:

We have no record of \$19.74 for the final contributions being submitted. Contributions should have been submitted through the termination date, and a reversal of \$54.28 was submitted on the 25-AUG-2016 paydate.

Based on the expected amount of \$19.74 you have indicated, there still needs to be \$74.02 submitted for the member's outstanding contributions. Please advise when the outstanding contributions will be submitted.

Thank you,

Anna Davis

From	SES Conversion	Message Read	<input checked="" type="checkbox"/>
To	Cabinet Office (54)	Archived	<input type="checkbox"/>
Date	17-April-2018 at 12:00 AM		
Subject	RE: Patricia Davidson WFN ID 432311		

Hello Suky,

We have no record of \$19.74 for the final contributions being submitted. Contributions should have been submitted through the termination date, and a

MAIN MENU

- Home
- Secure Messages
- File Upload
- Activity
- User Administration

Resources

- Pension Terms
- Tutorials and Videos
- Attend an employer information session

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

Welcome Michelle

Air Canada Pilots

Reply Secure Message

Reference # 185501

Mailbox * Air Canada Pilots

Topic * Termination

Employee ID

Archived

Content * **B I U H1 H2**

Insert text here...

Drag files here or [Choose File](#)

[Delete](#) [Save](#) [Send Message](#)

[Pension Information](#) [Legal Information](#) [Contact Us](#)

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

onlineServices

Welcome Michelle

Air Canada Pilots

Reply Secure Message

Reference # 185501

Mailbox * Air Canada Pilots

Topic * Termination

Employee ID

Archived

Content * **B I U H1 H2**

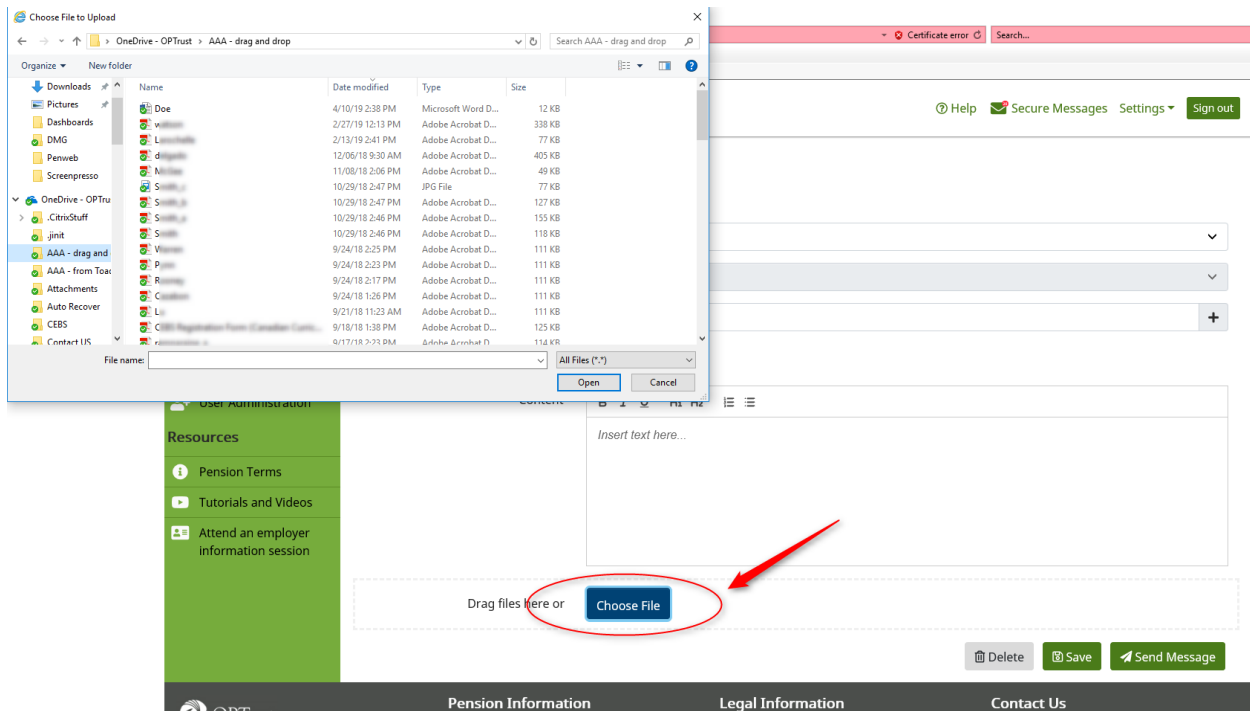
Insert text here...

Drag files here or [Choose File](#)

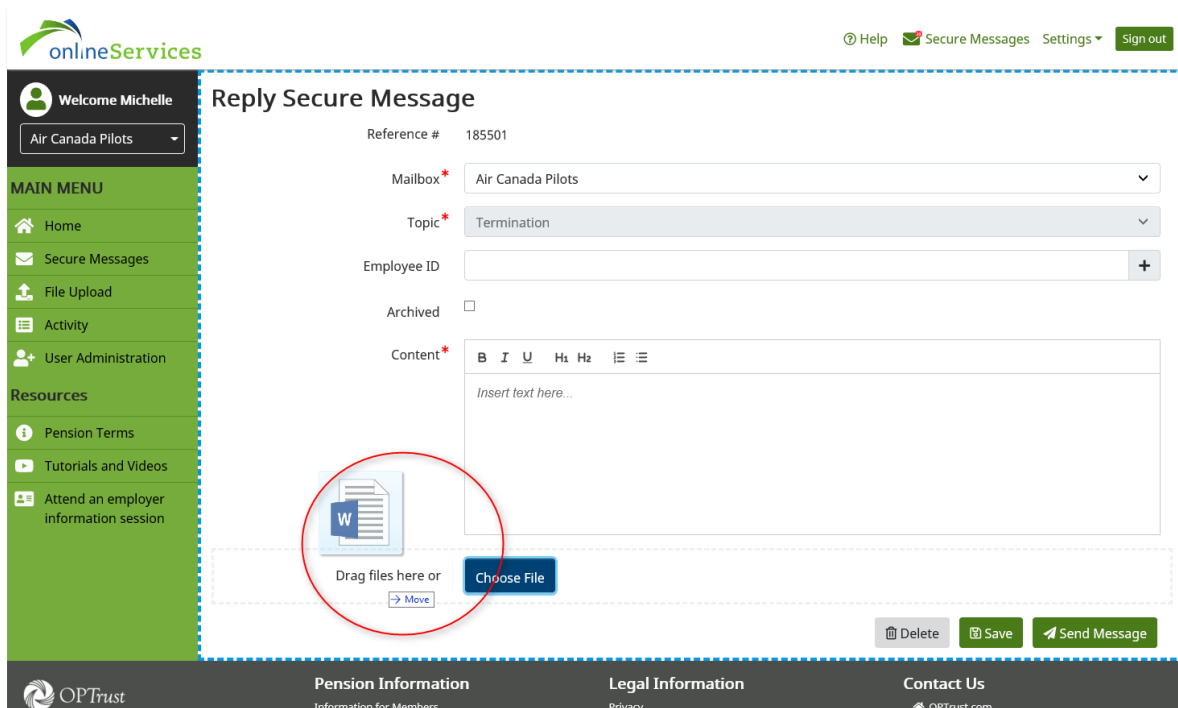
[Delete](#) [Save](#) [Send Message](#)

[Pension Information](#) [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:



Attached documents will appear at the bottom of the message:

onlineServices

Welcome Michelle

Air Canada Pilots

Reply Secure Message

Reference # 185501

Mailbox* Air Canada Pilots

Topic* Termination

Employee ID

Archived

Content*

Hi Michelle,
Yes, that is correct, J. Doe did terminate. I have attached their Notice of Termination form.
Sincerely,
Michelle

Drag files here or [Choose File](#)

Doe.docx 0.01 MB

Delete Save Send Message

Pension Information Legal Information Contact Us

onlineServices

Welcome Michelle

Air Canada Pilots

Reply Secure Message

Reference # 185501

Mailbox* Air Canada Pilots

Topic* Termination

Employee ID

Archived

Content*

Hi Michelle,
Yes, that is correct, J. Doe did terminate. I have attached their Notice of Termination form.
Sincerely,
Michelle

Drag files here or [Choose File](#)

Doe.docx 0.01 MB

Delete Save Send Message

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

onlineServices

Welcome Michelle

Air Canada Pilots

Reply Secure Message

Reference # 185501

Mailbox* Air Canada Pilots

Topic* Termination

Employee ID

Archived

Content*

Hi Michelle,

Yes, that is correct, J. Doe did terminate. I have attached their Notice of Termination form.

Sincerely,

Michelle

Drag files here or [Choose File](#)

Doe.docx 0.01 MB

[Delete](#) [Save](#) [Send Message](#)

Pension Information Legal Information Contact Us

onlineServices

Welcome Michelle

Air Canada Pilots

Secure Messaging

[Inbox](#) [Sent](#) [Drafts](#) [Compose New Message](#)

Please note, the messages below have not been sent to OPTrust

To	From	Subject	Reference #	Emp. ID	Date
Termination	Air Canada Pilots	Termination	185501		15-Apr-2019 1:50PM
	Air Canada Pilots	General Inquiry	185367		04-Apr-2019 12:15PM

1 - 2 of 2 items

Pension Information Legal Information Contact Us

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

Reply Secure Message

Reference # 185501

Mailbox * Air Canada Pilots

Topic * Termination

Employee ID

Archived

Content *

Hi Michelle,

Yes, that is correct, J. Doe did terminate. I have attached their Notice of Termination form.

Sincerely,

Michelle

Drag files here or [Choose File](#)

Doe.docx 0.01 MB

[Delete](#) [Save](#) [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:

Secure Messaging

[Inbox](#) [Sent](#) [Drafts](#) [Compose New Message](#)

To view message, click on the Subject

Mailbox - All - View Unread Only

Keyword Search Keyword Search View Archived

Date Range YYYY-MM-DD or Month DD, YY YYYY-MM-DD or Month DD, YY [Search](#)

To	From	Subject	Reference #	Emp. ID	Date
Air Canada Pilots	Termination	Termination	185501		10-Apr-2019 2:48PM
Air Canada Pilots	Enrolment	Enrolment	185450		05-Apr-2019 11:45AM
Air Canada Pilots	Member Data Updat...	Disability	185364		04-Apr-2019 12:10PM
Cabinet Office (54)	SES Conversion	Patricia Duranetti W...	367106		07-Mar-2018 12:00AM
Cabinet Office (54)	SES Conversion	RE: Transfer to OPS...	363185		03-Jan-2018 12:00AM
Cabinet Office (54)	SES Conversion	Patricia Duranetti W...	360241		07-Nov-2017 12:00AM
Cabinet Office (54)	SES Conversion	JACQUES PAUL M...	345506		22-Jun-2017 12:00AM
Cabinet Office (54)	SES Conversion	Loren Al Zabala W...	345537		22-Jun-2017 12:00AM
Cabinet Office (54)	SES Conversion	Jacqueline Newman ...	345504		22-Jun-2017 12:00AM
Cabinet Office (54)	SES Conversion	Loren Al Zabala W...	339695		05-May-2017 12:00AM

1 - 10 of 23 items

Welcome Michelle
Air Canada Pilots

Record of Correspondence

Back

Reply Archive Print

MAIN MENU

- Home
- Secure Messages
- File Upload
- Activity
- User Administration

Resources

- Pension Terms
- Tutorials and Videos
- Attend an employer information session

Reference # 185501

From Air Canada Pilots
To Termination
Date 15-April-2019 at 2:09 PM
Subject Termination

Message Read
Archived

Hi Michelle,

Yes, that is correct, J. Doe did terminate. I have attached their Notice of Termination form.

Sincerely,

Michelle

Attached Files: Doe.docx

From Termination
To Air Canada Pilots
Date 10-April-2019 at 2:49 PM
Subject Termination

Message Read
Archived

Hi,

I understand J. Doe has terminated, can you please confirm?

UPLOADING A FILE

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

Resetting Your Password

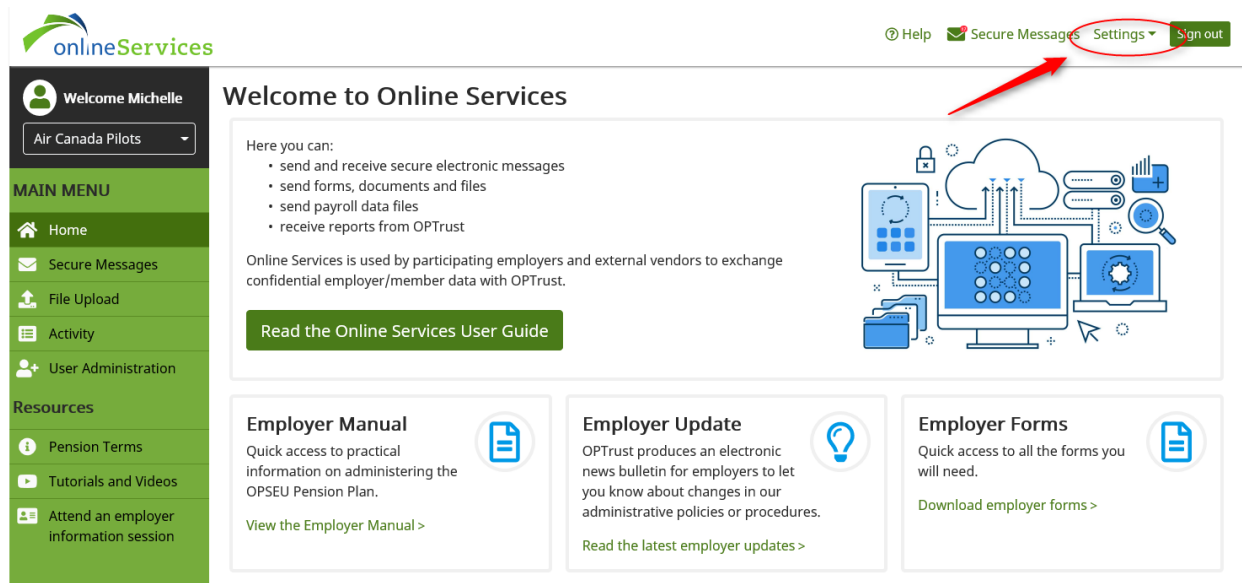
VIDEO



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:



The screenshot shows the OPTrust Online Services portal. In the top right corner, there is a navigation bar with the following items: a Help icon, a Secure Messages icon, a Settings dropdown menu (highlighted with a red circle and a red arrow), and a Sign out button. The main content area is titled "Welcome to Online Services" and includes a list of actions: "send and receive secure electronic messages", "send forms, documents and files", "send payroll data files", and "receive reports from OPTrust". Below this, there is a "Read the Online Services User Guide" button. The bottom section features three quick access tiles: "Employer Manual", "Employer Update", and "Employer Forms".

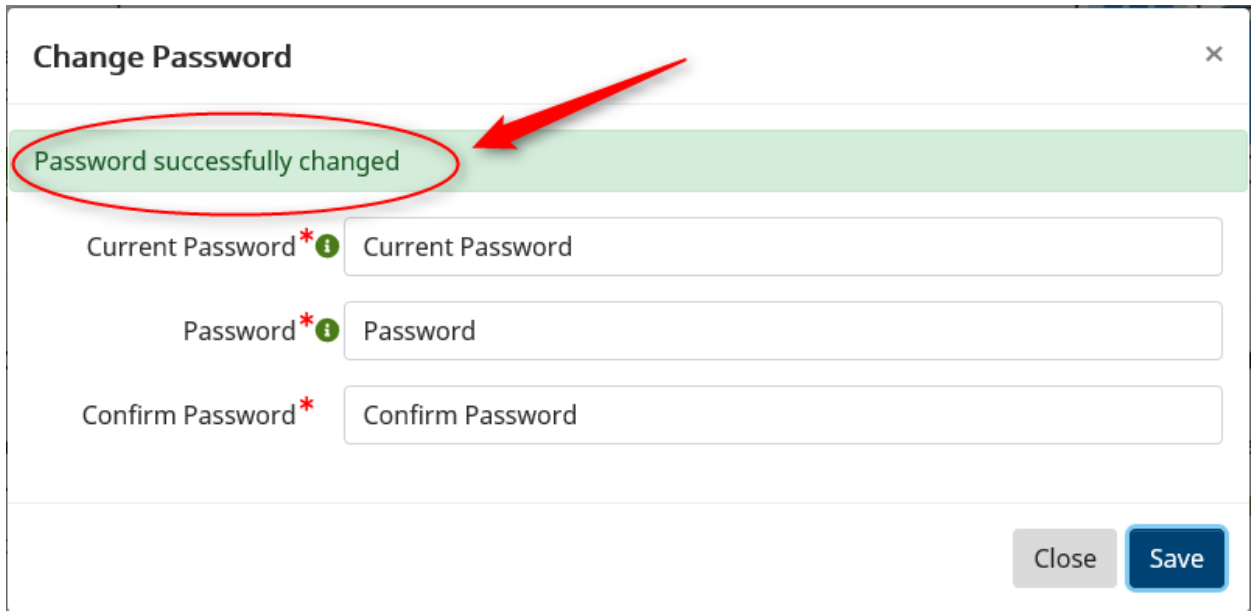
To change your password, select “Change Password”:

The screenshot shows the OPTrust Online Services dashboard. At the top right, there is a navigation bar with 'Help', 'Secure Messages', 'Settings', and 'Sign out'. The 'Settings' dropdown menu is open, showing 'Change Password' and 'Security Questions'. A red arrow points to the 'Change Password' option. The main content area includes a welcome message, a list of actions, and a 'Read the Online Services User Guide' button. Below this are three sections: 'Employer Manual', 'Employer Update', and 'Employer Forms'.

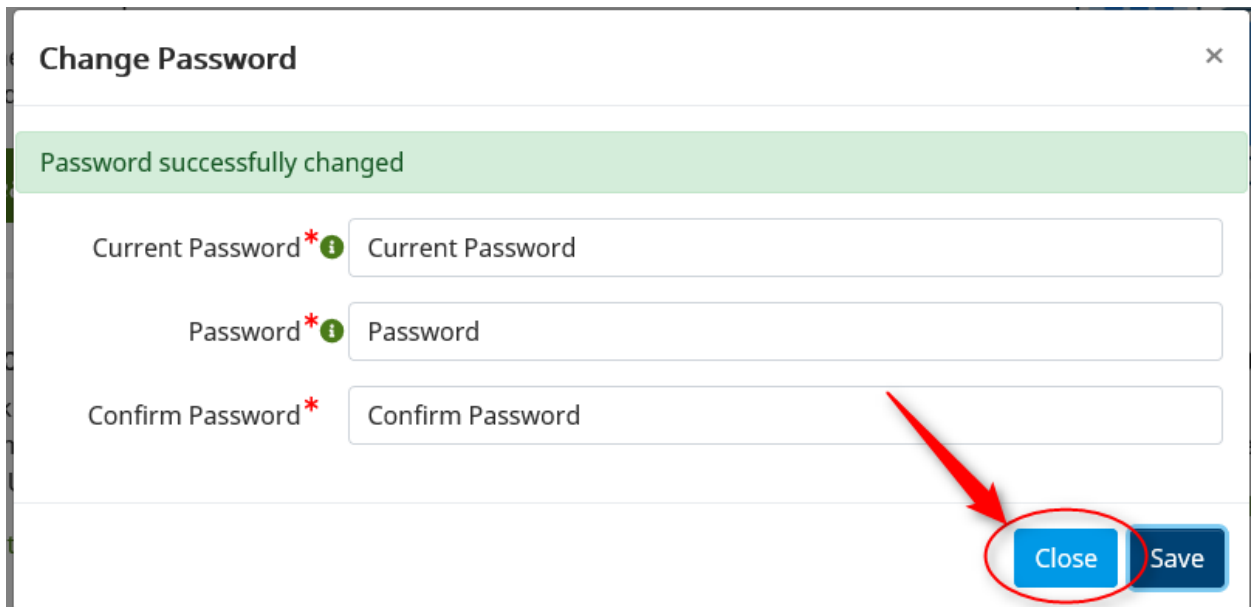
The 'Change Password' form has three input fields: 'Current Password', 'Password', and 'Confirm Password'. Each field has a red asterisk and an information icon. The 'Current Password' field contains the text 'Current Password'. The 'Password' field contains the text 'Password'. The 'Confirm Password' field contains the text 'Confirm Password'. At the bottom right, there are 'Close' and 'Save' buttons.

The 'Change Password' form is shown with the password fields masked with dots. The 'Confirm Password' field is highlighted with a green border. The 'Current Password' field contains ten dots, the 'Password' field contains eight dots, and the 'Confirm Password' field contains ten dots. At the bottom right, there are 'Close' and 'Save' buttons.

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



The screenshot shows a dialog box titled "Change Password" with a close button (X) in the top right corner. A green banner at the top contains the text "Password successfully changed", which is circled in red. A red arrow points to this banner. Below the banner are three input fields: "Current Password" with a red asterisk and an information icon, "Password" with a red asterisk and an information icon, and "Confirm Password" with a red asterisk. At the bottom right, there are two buttons: "Close" (disabled) and "Save" (active).



This screenshot is identical to the one above, but with a red circle around the "Close" button and a red arrow pointing to it. The "Close" button is now active and highlighted in blue, while the "Save" button is disabled and greyed out.

CHANGING YOUR SECURITY QUESTIONS

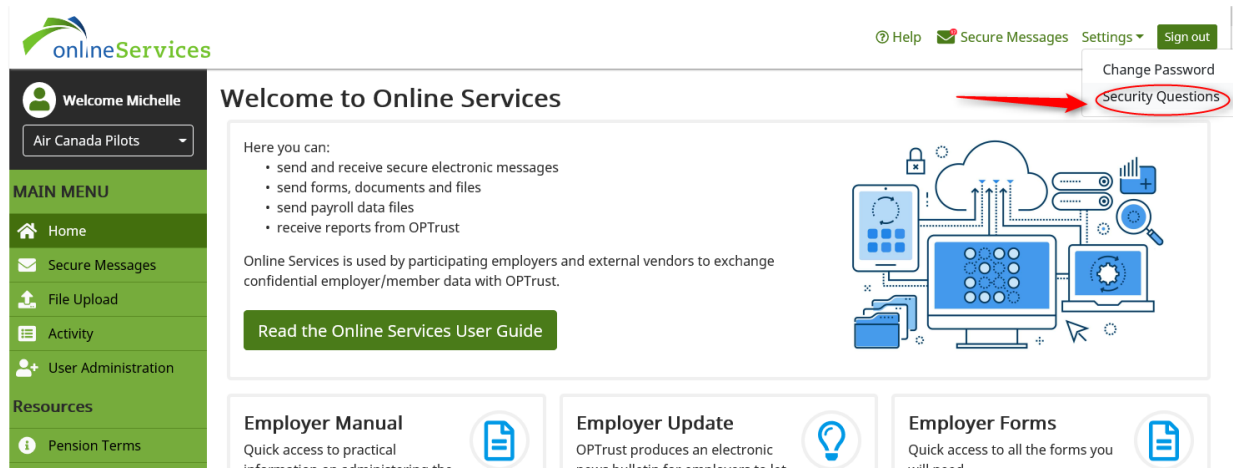
VIDEO



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”



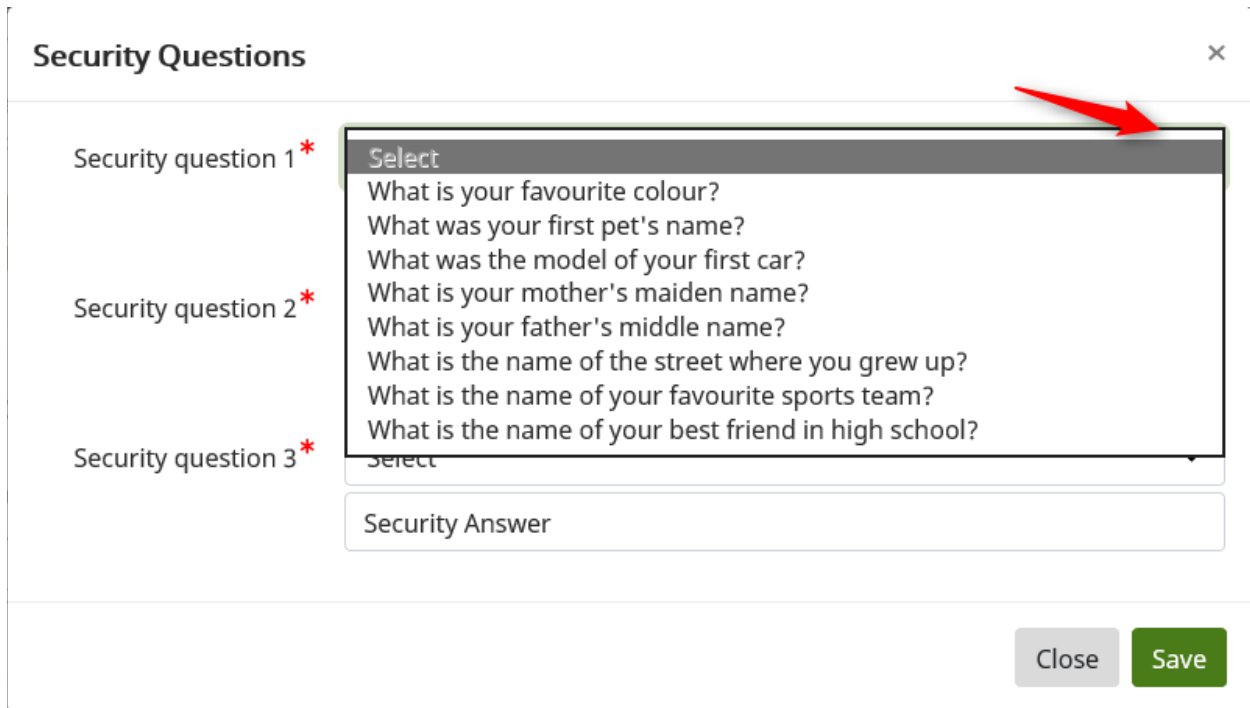
Security Questions ✕

Security question 1 * ▼

Security question 2 * ▼

Security question 3 * ▼

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:



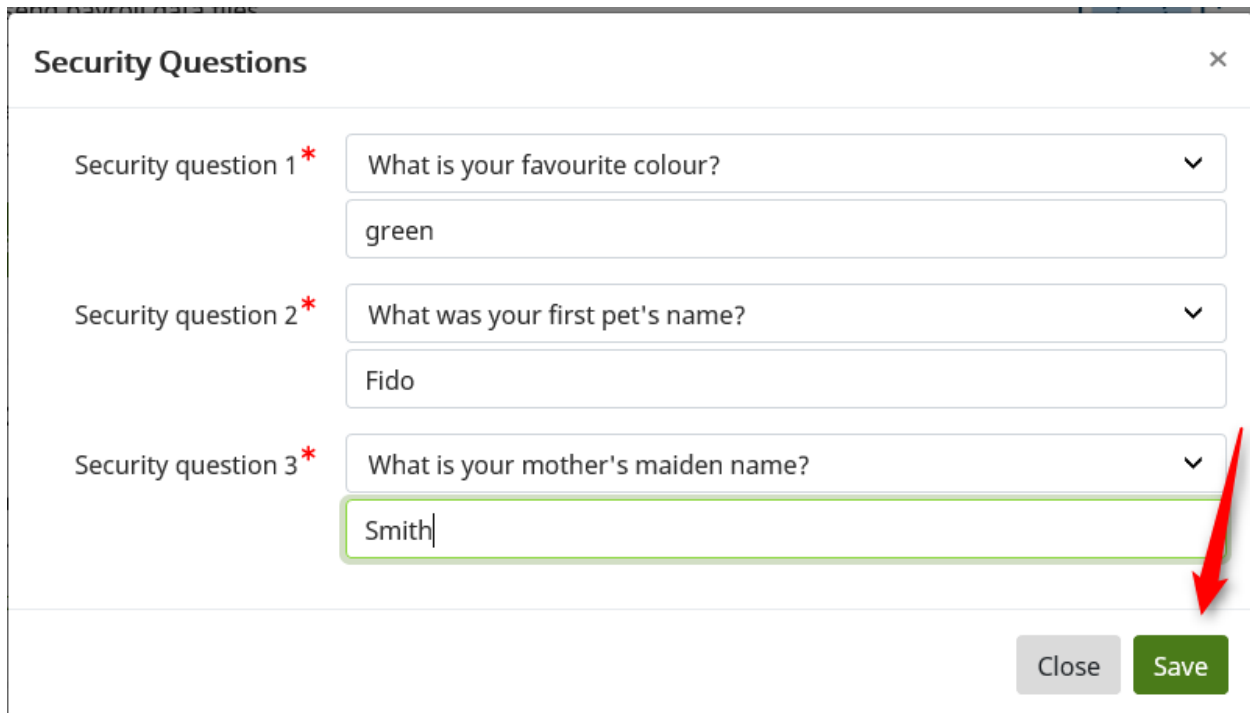
Security Questions [Close]

Security question 1 *

Security question 2 *

Security question 3 *

[Close] [Save]



Security Questions [Close]

Security question 1 *

Security question 2 *

Security question 3 *

[Close] [Save]

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

Security Questions ×

Security Questions successfully changed

Security question 1 * ▼

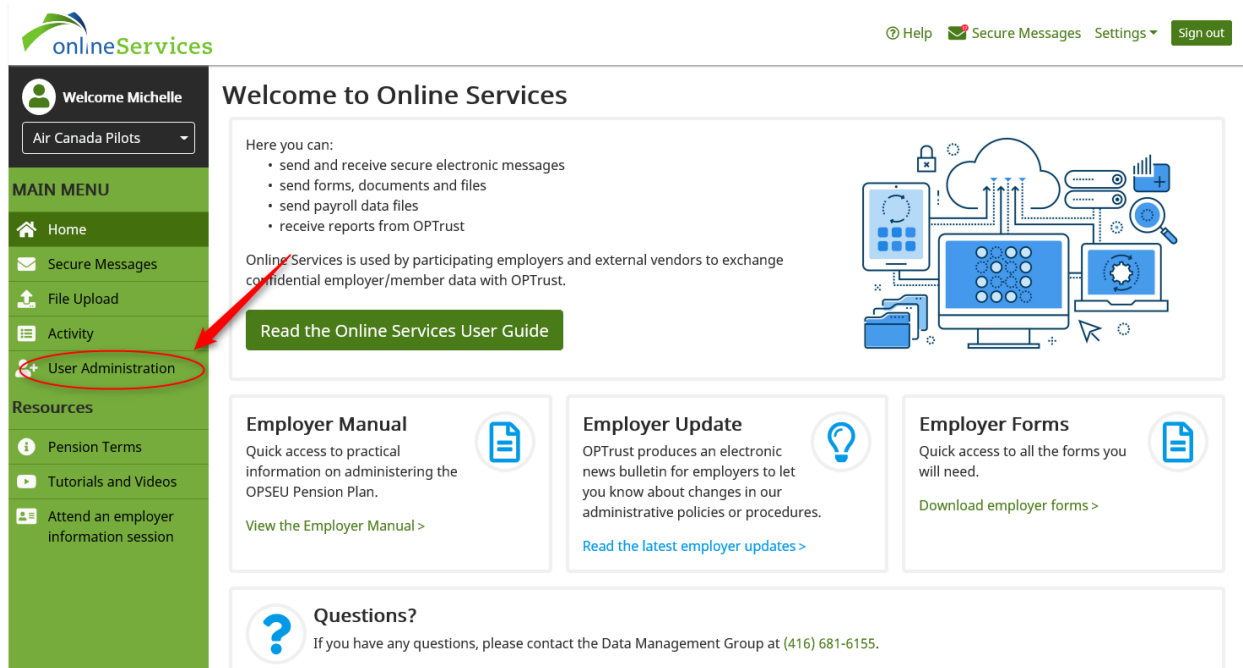
Security question 2 * ▼

Security question 3 * ▼

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:



The screenshot shows the OPTrust Online Services portal interface. At the top left is the 'onlineServices' logo. To the right are links for 'Help', 'Secure Messages', 'Settings', and a 'Sign out' button. Below the logo is a user profile section for 'Michelle' with a dropdown menu currently showing 'Air Canada Pilots'. A green sidebar menu titled 'MAIN MENU' contains the following items: Home, Secure Messages, File Upload, Activity, **User Administration** (circled in red with a red arrow pointing to it), Resources, Pension Terms, Tutorials and Videos, and Attend an employer information session. The main content area is titled 'Welcome to Online Services' and includes a list of functions: 'send and receive secure electronic messages', 'send forms, documents and files', 'send payroll data files', and 'receive reports from OPTrust'. Below this is a 'Read the Online Services User Guide' button. Further down are three boxes: 'Employer Manual' (with a 'View the Employer Manual >' link), 'Employer Update' (with a 'Read the latest employer updates >' link), and 'Employer Forms' (with a 'Download employer forms >' link). At the bottom is a 'Questions?' section with contact information for the Data Management Group at (416) 681-6155.

ADDING A USER

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

User Administration

Users **Add** Details

Username	Email	Name
employer@t...	employer@testdata.com	testdata, employer
philip@opt.ca	philip@opt.ca	Mayers, Philip
joe@opt.ca	joe@opt.ca	Doe, Joe
testnnn@tes...	testnnn@test.com	Cho, Abhi2
test11@gma...	test11@gmail.com	test11, test11
testn@opt.c...	testn@opt.com	test, Abhi
michelle@o...	michelle@opt.ca	Kogan, Michelle
michelle@e...	michelle@employer.ca	Employer, Michelle
test3@optru...	test3@optrust.com	Choubey, Abhishek
testn1@opt....	testn1@opt.com	test, Abhi2

Previous Page 1 of 1 Next

Pension Information Legal Information Contact Us

Create User

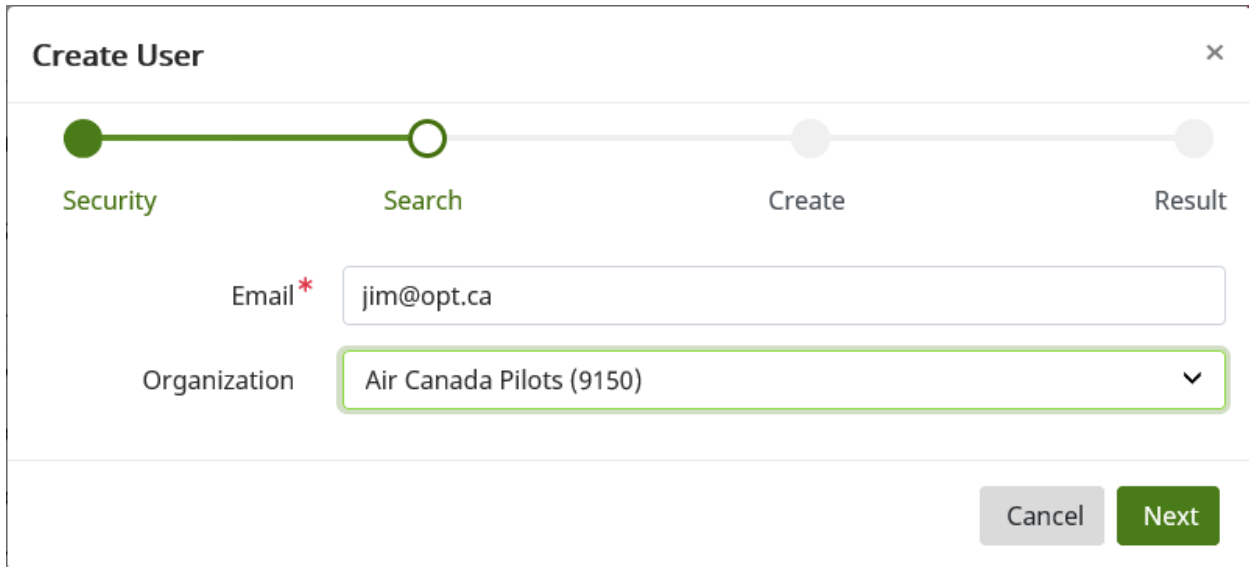
Security Search Create Result

Email*

Organization

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:

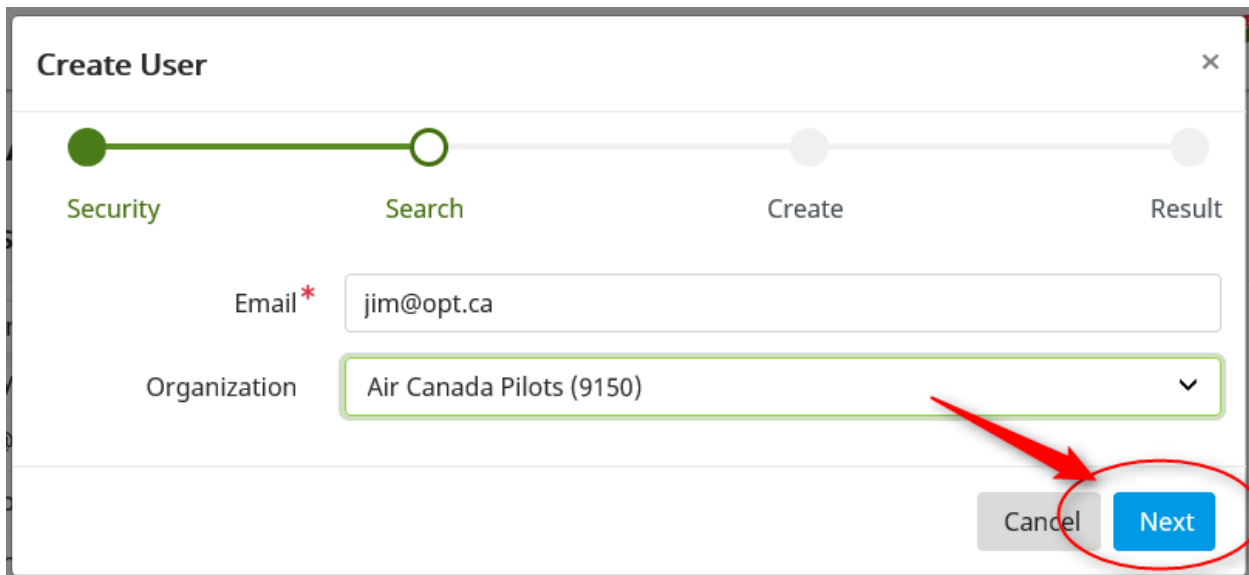


Create User [Close]

Progress: Security (Completed) | Search (Current) | Create | Result

Email*

Organization



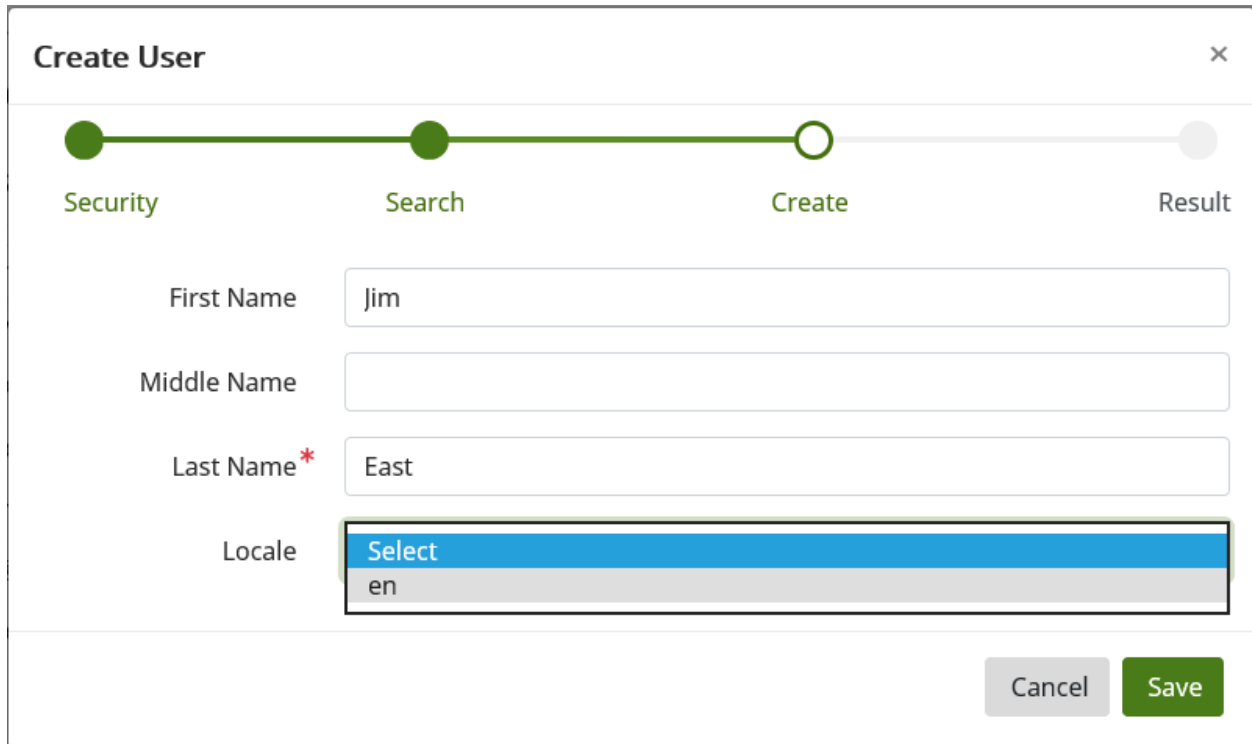
Create User [Close]

Progress: Security (Completed) | Search (Current) | Create | Result

Email*

Organization

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




The screenshot shows a 'Create User' dialog box with a progress bar at the top. The progress bar has four steps: 'Security' (filled green), 'Search' (filled green), 'Create' (empty circle), and 'Result' (empty circle). Below the progress bar are four input fields: 'First Name' with the value 'jim', 'Middle Name' (empty), 'Last Name*' with the value 'East', and 'Locale' with a dropdown menu. The dropdown menu is open, showing 'Select' and 'en'. At the bottom right are 'Cancel' and 'Save' buttons.



The screenshot shows the same 'Create User' dialog box. The progress bar is identical. The 'Locale' dropdown menu is now closed and shows the selected value 'en'. A red arrow points from the 'en' dropdown to the 'Save' button, which is circled in red. The 'Cancel' button is also visible.


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

Create User ✕



Security Group ORGANIZATION
ID 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



[Help](#) [Secure Messages](#) [Settings](#) [Sign out](#)

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

User Administration

Users

Username	Email	Name
employer@t...	employer@testdata.com	testdata, employer
philip@opt.ca	philip@opt.ca	Mayers, Philip
joe@opt.ca	joe@opt.ca	Doe, Joe
testnnn@tes...	testnnn@test.com	Cho, Abhi2
test11@gma...	test11@gmail.com	test11, test11
testn@opt.c...	testn@opt.com	test, Abhi
michelle@o...	michelle@opt.ca	Kogan, Michelle
michelle@e...	michelle@employer.ca	Employer, Michelle
test3@optru...	test3@optrust.com	Choubey, Abhishek
testn1@opt...	testn1@opt.com	test, Abhi2

Page 1 of 1

[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 Administration

Users

Username	Email	Name
jim@opt.ca	jim@opt.ca	East, Jim

Previous Page 2 of 2 Next

Pension Information Legal Information Contact Us

onlineServices Help Secure Messages Settings Sign out

Welcome Michelle
Air Canada Pilots

User Administration

Users

Username	Email	Name
jim@opt.ca	jim@opt.ca	East, Jim

Previous Page 2 of 2 Next

Details

Security Group ID ORGANIZATION 143092

First Name Jim

Last Name East

Username jim@opt.ca

Email jim@opt.ca

Status CREATED

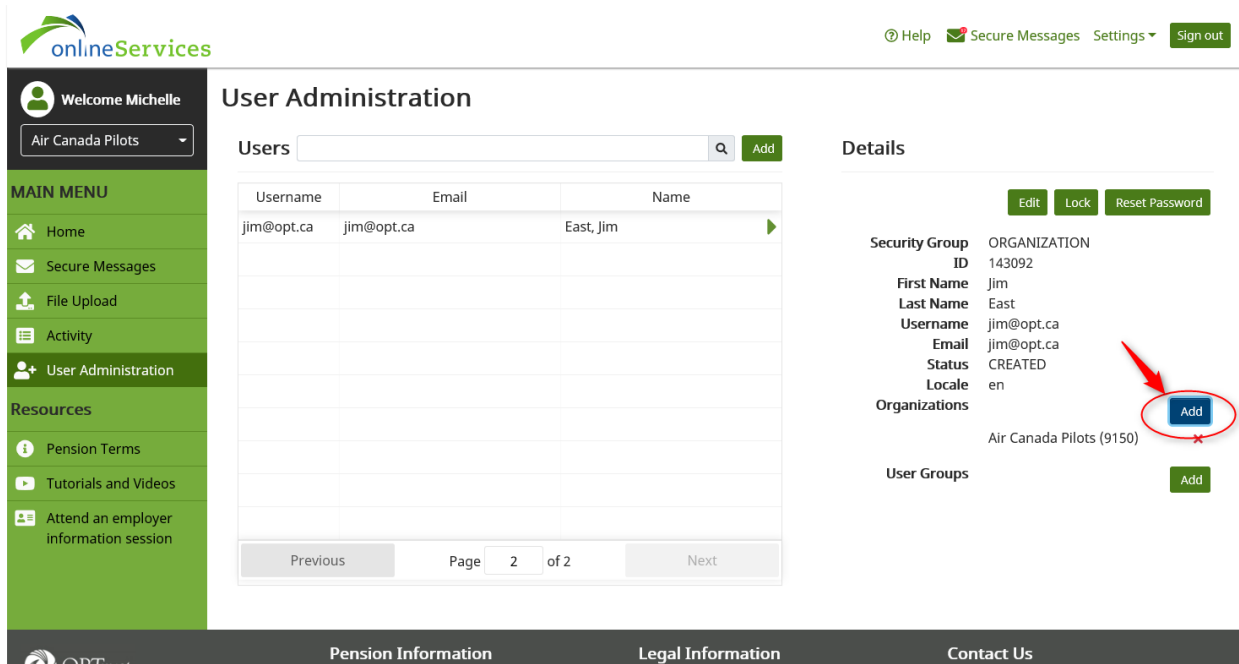
Locale en

Organizations Air Canada Pilots (9150)

User Groups

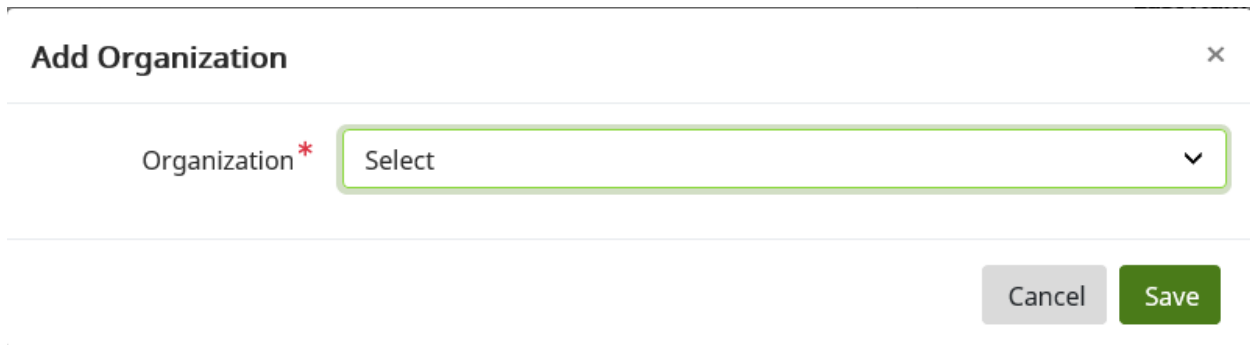
Pension Information Legal Information Contact Us

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”:



The screenshot shows the 'User Administration' page. On the left is a 'MAIN MENU' with options like Home, Secure Messages, File Upload, Activity, and User Administration. The main content area has a 'Users' table with columns for Username, Email, and Name. Below the table is a pagination control showing 'Page 2 of 2'. To the right is a 'Details' panel for a user named Jim East, with fields for Security Group, ID, First Name, Last Name, Username, Email, Status, and Locale. Under the 'Organizations' section, there is a dropdown menu showing 'Air Canada Pilots (9150)' and an 'Add' button, which is highlighted with a red circle and a red arrow.

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.*



The screenshot shows a modal dialog box titled 'Add Organization'. It has a close button (X) in the top right corner. The main content is a form with a label 'Organization *' followed by a dropdown menu that currently displays 'Select' and a downward arrow. At the bottom right of the dialog are two buttons: 'Cancel' and 'Save'.

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

The screenshot shows the 'User Administration' page. On the left is a navigation menu with 'User Administration' selected. The main area has a 'Users' table with one entry: 'jim@opt.ca' with email 'jim@opt.ca' and name 'East, Jim'. To the right is a 'Details' panel for this user, showing fields like Security Group, ID, First Name, Last Name, Username, Email, Status, and Locale. Under the 'Organizations' section, 'Air Canada Pilots (9150)' is listed with a red 'x' icon next to it, highlighted by a red circle and arrow.

The 'Remove Organization' dialog box is shown. It has a title bar with a close button. Below the title, there is a label 'Organization' and a dropdown menu currently showing 'Air Canada Pilots (9150)'. At the bottom right, there are two buttons: 'Cancel' and 'Remove'. A red arrow points to the 'Remove' button, which is circled in red.

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

The screenshot shows the 'User Administration' page. On the left is a navigation menu with 'User Administration' selected. The main area has a 'Users' table with one entry: jim@opt.ca, jim@opt.ca, East, Jim. To the right is a 'Details' panel for this user, showing fields like Security Group ID, First Name, Last Name, Username, Email, Status, and Locale. Under the 'Organizations' section, 'Air Canada Pilots (9150)' is listed with an 'Add' button. A red arrow points to this 'Add' button, which is also circled in red.

The 'Add User Group' dialog box is shown. It has a title bar with a close button. The main content area has a label 'User Group*' followed by a dropdown menu. The dropdown menu is open, showing the following options: 'Select' (highlighted in blue), 'Administrator (9150)', 'Communications (9150)', and 'File Upload (9150)'. At the bottom right of the dialog are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted in green.

USER ROLES

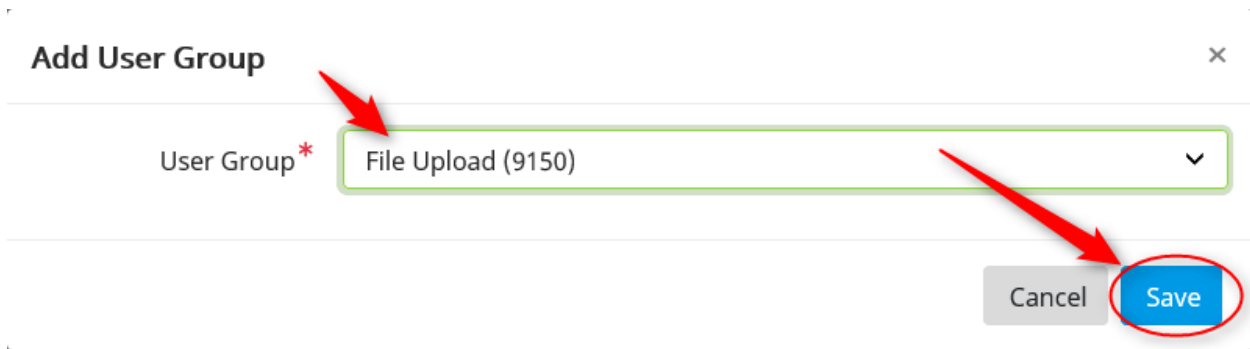
The user roles are as follows:

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

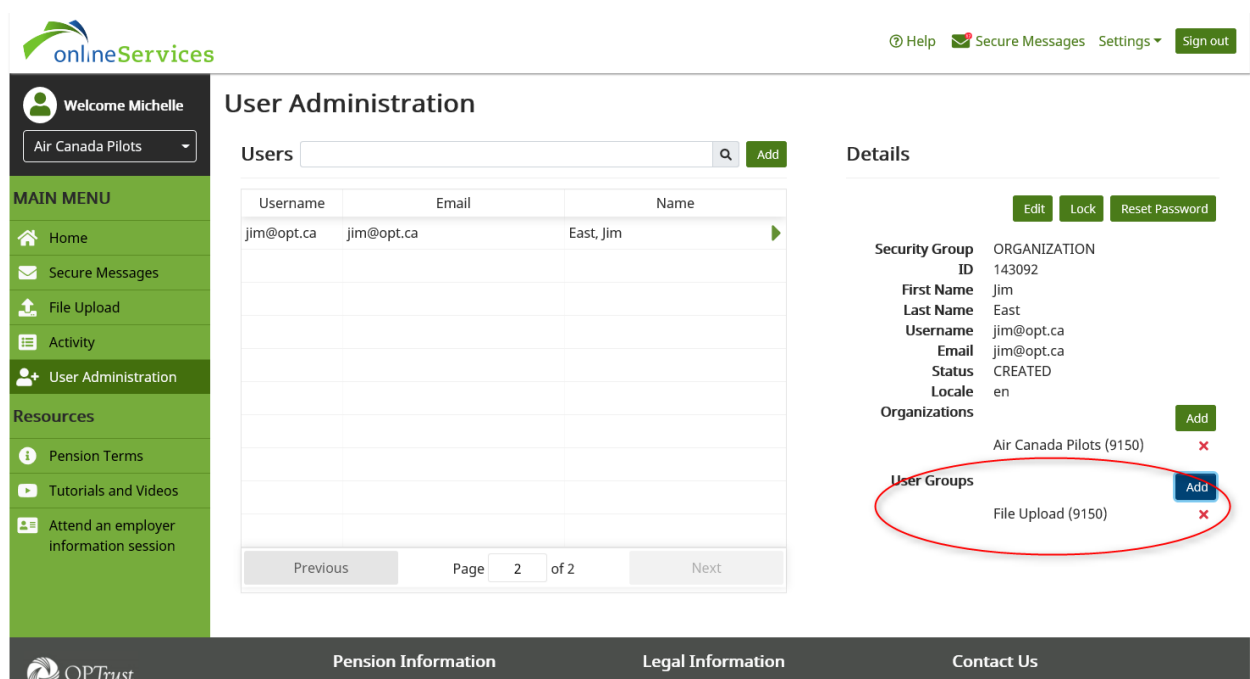
File Upload: This role incorporates the Communications role but includes the ability to upload files.

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":



You can now see the User Group:



onlineServices Help Secure Messages Settings Sign out

Welcome Michelle
Air Canada Pilots

User Administration

Users Add

Username	Email	Name
jim@opt.ca	jim@opt.ca	East, Jim

Previous Page 2 of 2 Next

Details

Edit Lock Reset Password

Security Group ORGANIZATION
ID 143092
First Name Jim
Last Name East
Username jim@opt.ca
Email jim@opt.ca
Status CREATED
Locale en

Organizations
Air Canada Pilots (9150) Add X

User Groups
File Upload (9150) Add X

Pension Information Legal Information Contact Us

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

The screenshot shows the 'User Administration' page. On the left is a 'MAIN MENU' with options like Home, Secure Messages, File Upload, Activity, and User Administration. The main area has a 'Users' table with columns for Username, Email, and Name. A single user 'jim@opt.ca' is listed. To the right, the 'Details' section for this user is shown, with buttons for 'Edit', 'Lock', and 'Reset Password'. A red arrow points to the 'Reset Password' button, which is also circled in red. Below the table are 'Previous', 'Page 2 of 2', and 'Next' navigation buttons. At the bottom, there are links for 'Pension Information', 'Legal Information', and 'Contact Us'.

The 'Reset Password' dialog box is shown. It has a title bar with a close button (X). Below the title are two input fields: 'New Password*' and 'Confirm Password'. At the bottom right, there are two buttons: 'Cancel' and '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 least 8 characters long.

! Password must contain a lower case, upper case, number, and symbol character.

New Password*


Confirm Password

Cancel
Reset Password

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":



[Help](#)
[Secure Messages](#)
[Settings](#)
[Sign out](#)

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

User Administration

Users

🔍 Add

Username	Email	Name
jim@opt.ca	jim@opt.ca	East, Jim

Previous
Page 2 of 2
Next

Details

Edit
Lock
Reset Password

Security Group ORGANIZATION

ID 143092

First Name Jim

Last Name East

Username jim@opt.ca

Email jim@opt.ca

Status ACTIVE


Locale en

Organizations

- Air Canada Pilots (9150) Add
- ✕

User Groups

- File Upload (9150) Add
- ✕


Pension Information
Legal Information
Contact Us

Click "Edit":

onlineServices

Welcome Michelle

Air Canada Pilots

User Administration

Users

Username	Email	Name
jim@opt.ca	jim@opt.ca	East, Jim

Previous Page 2 of 2 Next

Details

Security Group ORGANIZATION
ID 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
File Upload (9150)

Pension Information Information for Members | Legal Information Privacy | Contact Us OPTrust.com

Edit

First Name

Middle Name

Last Name *

Email *

Locale

You can see the information has now been updated:

[Help](#)
[Secure Messages](#)
[Settings](#)
[Sign out](#)

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

User Administration

Username	Email	Name
jim@opt.ca	jim@opt.ca	West, Jim

Previous
Page 2 of 2
Next

Details

Security Group ORGANIZATION

ID 143092

First Name Jim

Last Name West

Username jim@opt.ca

Email jim@opt.ca

Status ACTIVE

Locale en

Organizations

- Air Canada Pilots (9150) ✗

User Groups

- File Upload (9150) ✗

OPTrust
Pension Information
Legal Information
Contact Us

REVOKING ACCESS

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

onlineServices Help Secure Messages Settings Sign out

Welcome Michelle
Air Canada Pilots

User Administration

Users Add

Username	Email	Name
jim@opt.ca	jim@opt.ca	West, Jim

Previous Page 2 of 2 Next

Details

Edit Lock Reset Password

Security Group ORGANIZATION
ID 143092
First Name Jim
Last Name West
Username jim@opt.ca
Email jim@opt.ca
Status ACTIVE
Locale en

Organizations Add
 Air Canada Pilots (9150) X

User Groups Add
 File Upload (9150) X

Pension Information Legal Information Contact Us

onlineServices Help Secure Messages Settings Sign out

Welcome Michelle
Air Canada Pilots

User Administration

Users Add

Username	Email	Name
jim@opt.ca	jim@opt.ca	West, Jim

Previous Page 2 of 2 Next

Details

Edit Lock Reset Password

Security Group ORGANIZATION
ID 143092
First Name Jim
Last Name West
Username jim@opt.ca
Email jim@opt.ca
Status ACTIVE
Locale en

Organizations Add
 Air Canada Pilots (9150) X

User Groups Add
 File Upload (9150) X

Pension Information Legal Information Contact Us

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

Lock [X]

Lock Reason

- Select
- Terminated
- Deceased
- Unusual Activity
- Other

Lock [X]

Lock Reason: Terminated

Cancel [Lock]

onlineServices

Welcome Michelle

Air Canada Pilots

Help Secure Messages Settings Sign out

User Administration

Users [Search] [Add]

Username	Email	Name
jim@opt.ca	jim@opt.ca	West, Jim

Previous Page 2 of 2 Next

Details

[Edit] [Unlock] [Reset Password]

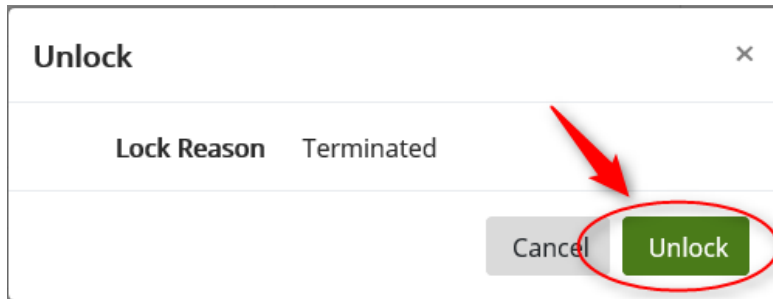
Security Group: ORGANIZATION
 ID: 143092
 First Name: Jim
 Last Name: West
 Username: jim@opt.ca
 Email: jim@opt.ca
 Status: **LOCKED**
 Lock Reason: **Terminated**
 Locale: en

Organizations: Air Canada Pilots (9150) [Add] [X]

User Groups: File Upload (9150) [Add] [X]

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



onlineServices

Welcome Michelle
Air Canada Pilots

User Administration

Users

Username	Email	Name
jim@opt.ca	jim@opt.ca	West, Jim

Details

Security Group ORGANIZATION
ID 143092
First Name Jim
Last Name West
Username jim@opt.ca
Email jim@opt.ca
Status ACTIVE
Locale en

Organizations
Air Canada Pilots (9150)

User Groups
File Upload (9150)

Previous Page 2 of 2 Next

Pension Information Legal Information Contact Us

ACTIVITY LOG

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

onlineServices Help Secure Messages Settings Sign out

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

Welcome to Online Services

Here you can:

- send and receive secure electronic messages
- send forms, documents and files
- send payroll data files
- receive reports from OPTrust

Online Services is used by participating employers and external vendors to exchange confidential employer/member data with OPTrust.

[Read the Online Services User Guide](#)

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 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

onlineServices Help Secure Messages Settings Sign out

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

Activity

Keyword Search

Date Range

[Export to EXCEL](#)

Date	Transaction
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
30-Apr-2019 17:39:06	Edit User
30-Apr-2019 17:37:51	Edit User
30-Apr-2019 17:35:06	Edit User
30-Apr-2019 16:57:42	Add a user
30-Apr-2019 16:30:31	Security Questions Changed
30-Apr-2019 16:28:19	Security Questions Changed
30-Apr-2019 16:26:57	Security Questions Changed

1 - 10 of 125 items

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Welcome Michelle
Air Canada Pilots

Activity

Keyword Search:

Date Range:

[Export to EXCEL](#)

Date	Transaction
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
30-Apr-2019 17:39:06	Edit User
30-Apr-2019 17:37:51	Edit User
30-Apr-2019 17:35:06	Edit User
30-Apr-2019 16:57:42	Add a user
30-Apr-2019 16:30:31	Security Questions Changed
30-Apr-2019 16:28:19	Security Questions Changed
30-Apr-2019 16:26:57	Security Questions Changed

1 - 10 of 125 items

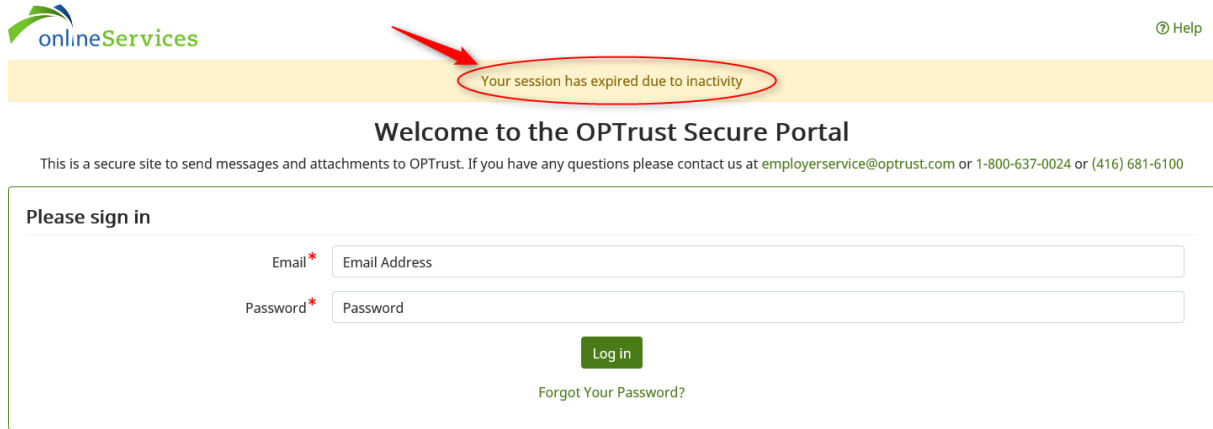
Pension Information Legal Information Contact Us

Do you want to open or save activities.csv from penweb-uat-web.penweb.local? [Open](#) [Save](#) [Cancel](#)

User	OPTrust ID	Date	Transaction
michelle@employer	2019-04-30	Secure Message Inbox	
michelle@employer	2019-04-30	Activate User	
michelle@employer	2019-04-30	Deactivate User	
michelle@employer	2019-04-30	Edit User	
michelle@employer	2019-04-30	Edit User	
michelle@employer	2019-04-30	Edit User	
michelle@employer	2019-04-30	Add a user	
michelle@employer	2019-04-30	Security Questions Changed	
michelle@employer	2019-04-30	Security Questions Changed	
michelle@employer	2019-04-30	Security Questions Changed	
michelle@employer	2019-04-30	Password Changed	
michelle@employer	2019-04-30	Password Changed	

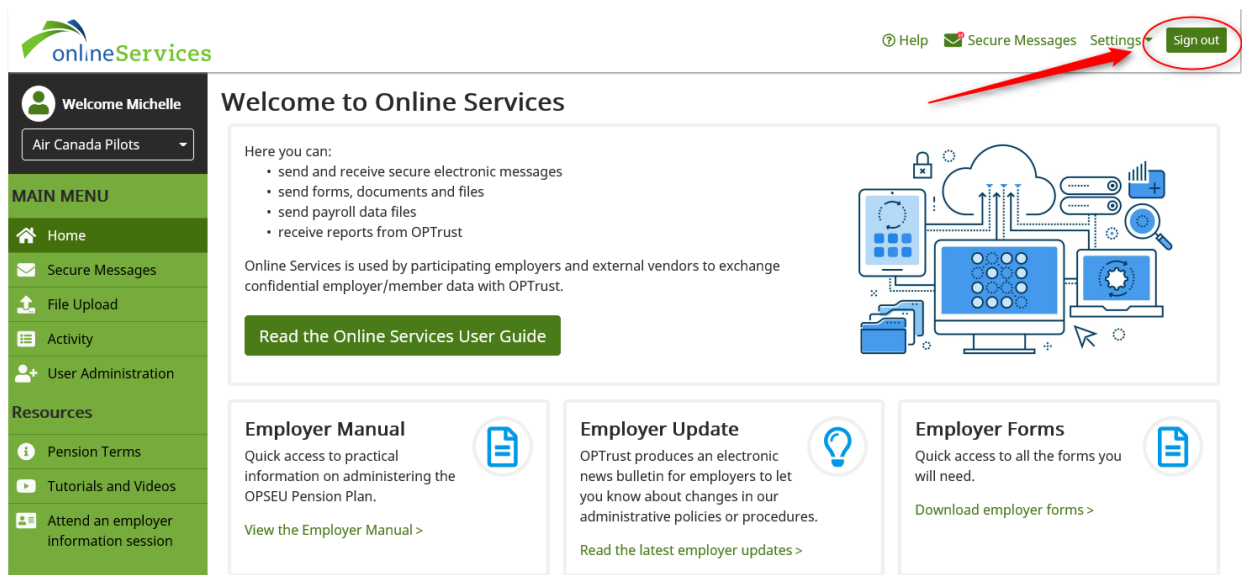
TIMING OUT

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



LOGGING OUT

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



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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