Service Canada College • Collège Service Canada

Canada Pension Plan Online Retirement Application – Internet

RELEASE 3.0
PARTICIPANTS GUIDE

Service Canada

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Section 1 – Introduction

1.1 Motivation

As a Canada Pension Plan (CPP) Service Delivery Officer (SDO), Citizen Service Officer (CSO) and Payment Service Officer (PSO) you want to provide the best possible service to your clients. This becomes more challenging as the Canadian population ages and more and more clients submit Retirement (RTR) Applications and need your expert guidance.

This Training Guide has been up-dated to familiarize you with the recent changes impacting the online CPP RTR Application.

1.2 Background

For more than a decade, the Government of Canada has been working to create better ways to deliver services to Canadians. Every step of the way improvements have been made in order to keep up with the changing needs of Canadians.

In September 2005 Service Canada was launched. Service Canada integrates services from a number of federal departments to form an easy-to-access service delivery network.

This network brings together over 600 points of service in communities throughout Canada; a national 1-800-O-Canada (1-800-622-6232) telephone service providing Canadians with information about all federal government services, and a range of online services at www.servicecanada.gc.ca. Service Canada's mandate is to provide better service to more Canadians in more communities through customer-centered service delivery and knowledgeable service delivery staff.

The service delivery functions for Canada Pension Plan (CPP) and Old Age Security (OAS) programs are now part of Service Canada and are in step with Service Canada's client centered service delivery mandate.

In 2001, CPP and OAS programs became active partners in a five year initiative called Modernizing Service for Canadians (MSC). MSC is a plan to ensure that better, more responsive and more efficient programs, policies and services are developed and provided to Canadians. MSC will fundamentally change the way government thinks about what it does and how it delivers service.

As part of its MSC commitment, CPP and OAS Programs have undertaken several initiatives to transform themselves into a more client-centric organization. One such initiative is the Acceleration Project.

This project has two phases.

Acceleration Project Phase 1

Acceleration Project Phase 1 had two main objectives:

- The first was to simplify the existing CPP Retirement (CPP RTR) and OAS application forms and information sheets;
- The second was to make the new simplified forms available online in a fillable, printable format.

The CPP RTR application form and information sheet were the first to be simplified. These new products were tested in a pilot that ran from July 3 to September 30, 2003. The simplified CPP RTR application and information sheet were converted to an online fillable, printable format that is now available on the Internet.

The OAS forms and information sheets were simplified. Fillable, printable OAS forms were piloted for three months beginning in March 2004.

Acceleration Project Phase 2

Acceleration Project Phase 2 had one objective and it was to take the new simplified CPP RTR and OAS application forms and make it possible for clients to fill these out online and submit them to CPP and OAS Programs electronically over the Internet.

CPP RTR Phase 2 (online version) was launched on March 19, 2004. Currently, clients are able to fill out a CPP RTR application online and submit the completed application over the Internet. However, due to current technological and legislative limitations, clients applying for this benefit using the Phase 2 process are:

- able to fill out and submit an application online; but
- are required to print a ***Signature Page***, sign it, and mail it to CPP with all other required supporting documents (e.g. a void cheque to support the request for the direct deposit of benefits).

At this time, no date has been set for launching OAS Phase 2.

1.3 System Functionality

The Internet application allows a client to submit part 1 of a CPP RTR application online in a secure manner. In addition to submitting the electronic application, the client must print, sign and mail a ***Signature Page,*** along with any other documentation (e.g. void cheque) required to complete the application process.

The ***Signature Page*** features a unique confirmation number and date stamp which will be used by service delivery officers (SDOs) or by payment service officers (PSOs) to follow-up on the online application.

1.4 Advantages of the Online Application

The CPP Retirement application allows CPP contributors to apply for a CPP RTR pension online from anywhere in the world over the Internet.

It will also:

- Reduce the number of paper-based RTR application forms used by clients;
- Offer this service 24 hours a day, 7 days a week;
- Offer this service in both official languages;
- Increase the level of client satisfaction by providing more choices to match their preferred mode of service;
- Notify clients about possible eligibility for provisional benefits (for example, pension sharing), so application packages should be more complete when received.

1.4.1 Effect of Change

Front line and designated payment service officers will be affected by this new online service as follows:

- As a front line CSO, you will be impacted by additional phone calls from contributors asking about this new mode of service and how it works.
- You will also need to know how to access the Intranet database on the Information Technology Renewal Delivery System (ITRDS) in order to search for, view, and print online applications.

- As a designated SDO/PSO, you will need to know how to process and follow-up on applications received through the Phase 2 process. While applications received through the Phase 2 process will automatically be coded into the Intranet database, there are some additional processing steps required before the SDO/PSO can adjudicate the application. They include:
  - Monitoring and changing the status of the ***Signature Page***;
  - Printing a process summary when the ***Signature Page*** has been received and matched to the online application;
  - Coding the application in the appropriate system (e.g. ITRDS or CPP Legacy).

1.4.2 Target Audience

Although this training guide is useful for all CPP staff who interact with clients in any mode of service (Service Canada Call Centres, Service Canada Centres, or Service Canada Mail Processing Centres) it is primarily intended for:

- Service delivery officers, citizen service officers and payment service officers who are expected to answer questions related to the online CPP RTR Application; and
- Designated SDOs/PSOs who will access, update and use the Intranet database of all submitted online CPP RTR applications.

1.4.3 Objectives

After completion of this training guide, you will be able to:

- Recognize the steps for locating the CPP RTR Online Application from the Service Canada Internet site;
- Assist a client who has questions related to the completion of the online CPP RTR application;
- Recognize the steps the client must follow to complete the online CPP RTR application;
- Define the following terms:
  - Error Message,
  - Hurdle page;
- Recognize how to access the information sheet; and
- Identify the information that is included on the information sheet.

1.5 Prerequisites

Before you begin, ensure that you have completed these modules:

- How to Use the Self-Directed Learning Packages
- Orientation to Income Security Programs (ISP)
- Legislative Overview
- CPP Overview
- Overview of Work tools
- Acts, Regulations and Policy Products
- Navigating the Benefit Procedures Manual
- International Social Security Agreements
- Earnings and Contributions
- Proof of Age
- RTR Benefit Pension

1.6 Using this Guide

The Internet application overview outlines the steps the client must take to complete the online Internet version of the CPP RTR Application. This will enable the front line staff to guide their client as they complete the online application.

Included are samples of screen shots with detailed explanations of the process and other related information. Some of the screen shots have been cut to fit the guide, so in certain cases the entire screen is not visible.

If you have any comments or suggestions about this module, please send an email to the Operational Training Group at Service Canada College at the following email address:

NC-OTG_INQUIRIES-GFO_DEMANDES-GD

1.7 Tool Kits

- Online Application for RTR Pension Form
- Online ***Signature Page***

1.8 Completion Time

This module will take you approximately three hours to complete.

1.9 References

Functional Guidance and Procedures

CPP Operations Manual, Section 2-2

Modernizing Service for Canadians Acceleration Phase 2:
Instructions for Dealing with Online Applications and Qs and As are covered in the SDA Assist tool

SDB-100 Canada Pension Plan Retirement Application - Simplified

Now let's get started!

Section 2 – Online Application

2.1 Objectives

After studying this section, you will be able to:

- Recognize the steps for locating the CPP RTR Application on the Service Canada Internet site;
- Assist a client who has questions related to the completion of the online CPP RTR application;
- Recognize the steps the client must follow to complete the online CPP RTR application;
- Define the following terms:
  - Error Message,
  - Hurdle page;
- Recognize how to access the information sheet; and
- Identify the information that is included on the information sheet.

2.2 Access the Online Application

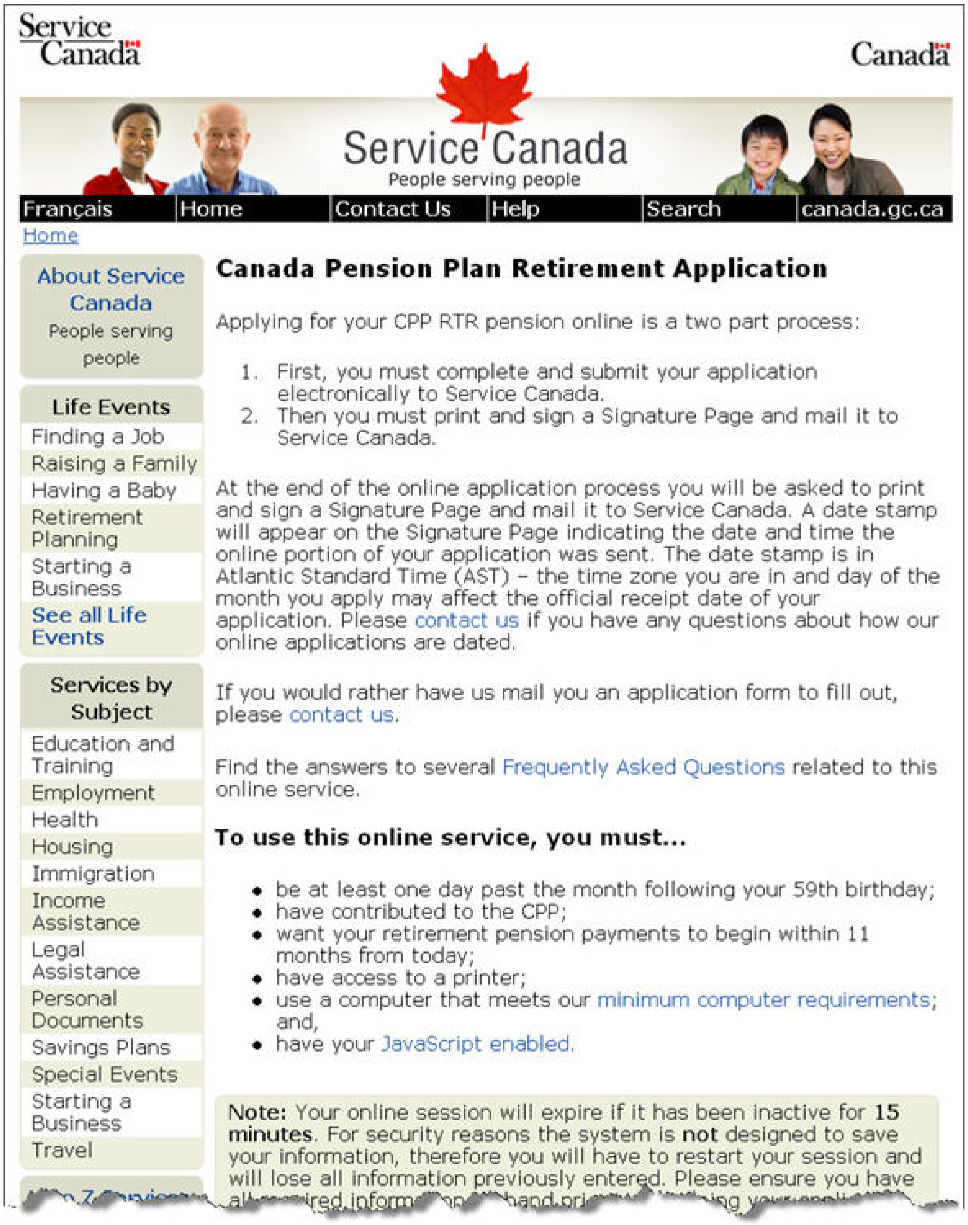
Service Canada is the online access point to services for Canadians. The online CPP RTR Application can be found on the Service Canada Internet site at www.servicecanada.gc.ca.

First the client must select their official language of choice.

The client can access the ***Canada Pension Plan Retirement Application*** screen by selecting the **Apply for the Canada Pension Plan Retirement Pension** link.

2.3 Canada Pension Plan Retirement Application

The next screen that the client will see is the ***Canada Pension Plan Retirement Application*** screen.

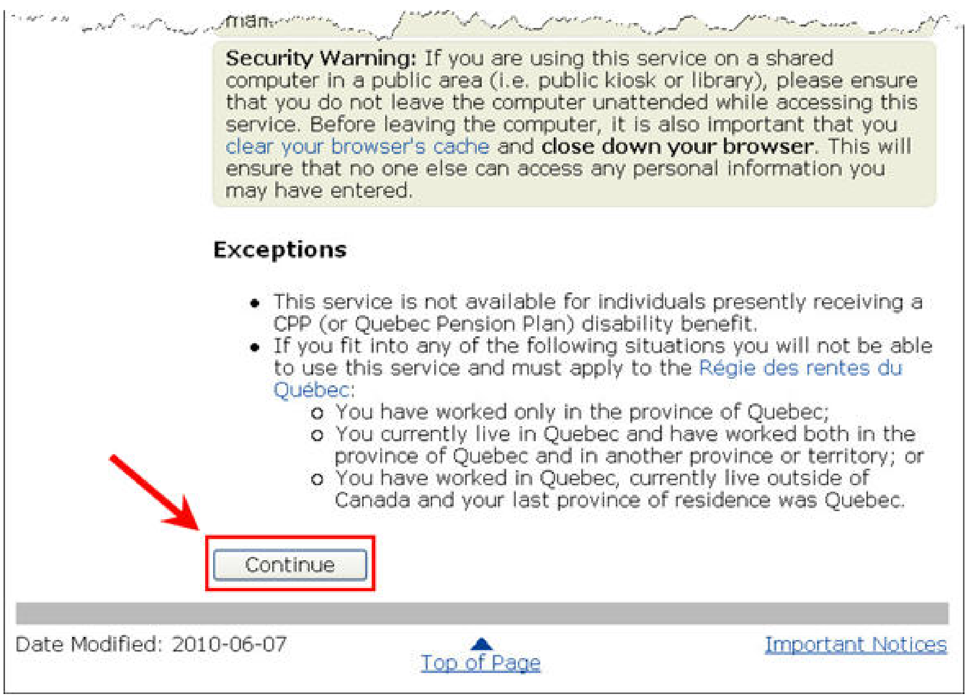


This screen outlines:

- Who can use this service;
- Information the client is required to provide; and
- Exceptions to this service.

The client will also find links to the Frequently Asked Questions (FAQs), minimum computer requirements, and the Régie des rentes du Québec (RRQ).

To go to the next page, the client must scroll down to the bottom of this page and select the **Continue** button.



2.4 Information Sheet

The next screen the client will be directed to is the ***Information Sheet*** screen. It provides the client with all the information they will need to apply for a CPP RTR online.

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Canada Pension Plan Retirement Application

Your CPP Retirement Application

Information Sheet

This information sheet provides information on how to apply for a Canada Pension Plan (CPP) retirement pension. If there are any differences between what is in the information sheet and the CPP legislation, the legislation prevails. This information sheet is also meant to help you decide when you would like your retirement pension to start. You may be able to receive your pension at any time after the month of your 60th birthday. If you wish, you may also use the Canadian Retirement Income Calculator. It will give you information on Canada's public pensions and help you estimate how much income you may need for your retirement, according to your personal financial situation.

- When do you want your pension to start?
- How to decide when to take your retirement pension?
- What happens if you don't work after the age of 60 and delay receiving your pension until you turn 65?
- When to apply
- Proof of birth
- Children born after 1958
- Certified photocopies of original documents
- Taxes and your pension
- Disability
- Unable to apply
- Privacy and Security

When do you want your pension to start?

You can start to receive your retirement pension at any time between

Once all the information has been read, the client must select the **Continue** button located at the bottom of the page to start the application process.

If the client has problems or questions while they are completing the online application, they can select the **Help** link located on the top navigation bar.

If the client would like assistance from a Service Canada officer, they can go to the **Contact Us** link also located on the top navigation bar.

2.5 Online Application

The client will have to go through 8 different steps in order to successfully complete their online application.

After each step, the client must select the **Continue** button to go to the next step.

Some of the fields in each page of the online application are mandatory. Mandatory fields are not identified but if the client does not fill a mandatory field on any given page, they will not be able to move to the next page. An error message box will appear at the top of the screen indicating which field needs to be corrected, as shown below.

By selecting the error message hyperlink, the client will be directed to the field that needs to be corrected. Once the correction is made, the client will be able to move to the next page of the application by selecting **Continue** located at the bottom of the page.

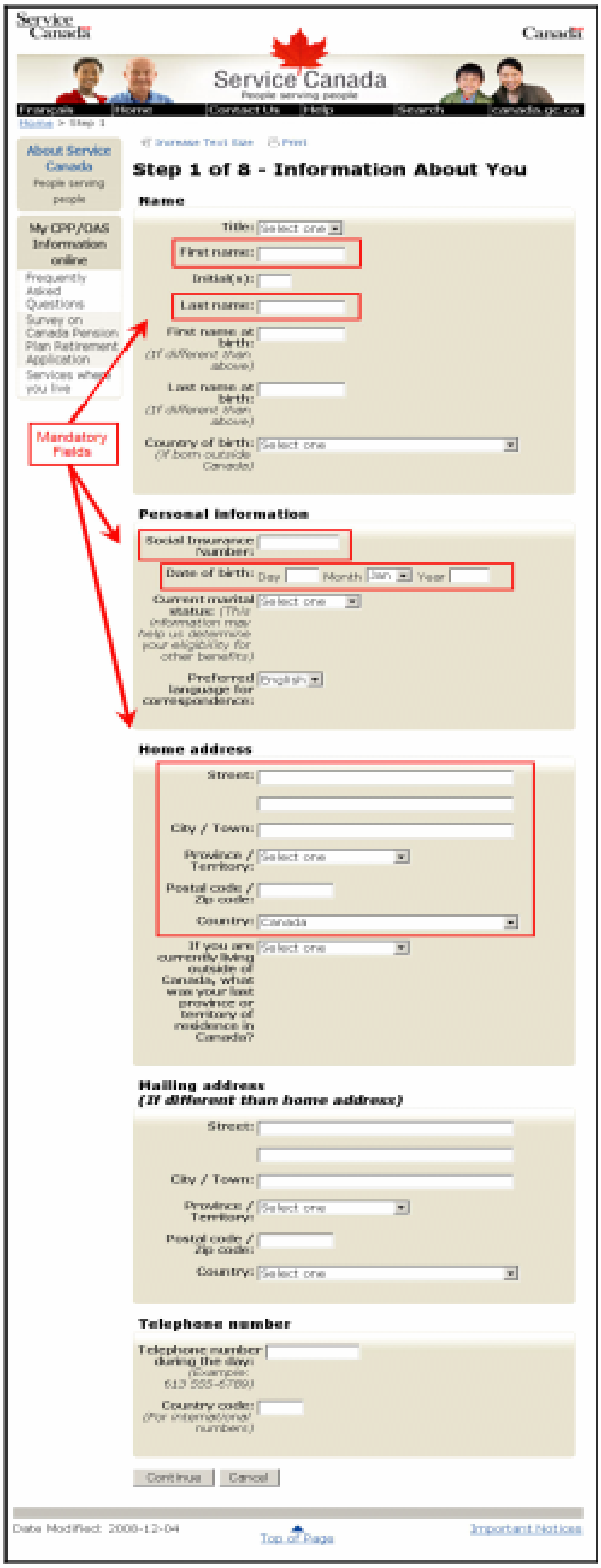
2.5.1 Application Completion Steps

Step 1 of 8 – Information About You

The first step is the ***Information About You*** screen. This screen is divided into five blocks:

- Name
- Personal information
- Home address
- Mailing address (if different than home address)
- Telephone number

The client is asked to provide personal information such as: name, address, Social Insurance Number, etc. Many fields appearing on this page are not mandatory. However, there are some fields that the client MUST complete such as the **First name** and **Last name** fields, the **Social Insurance Number** field, the **Date of birth** field and the **Home address** field.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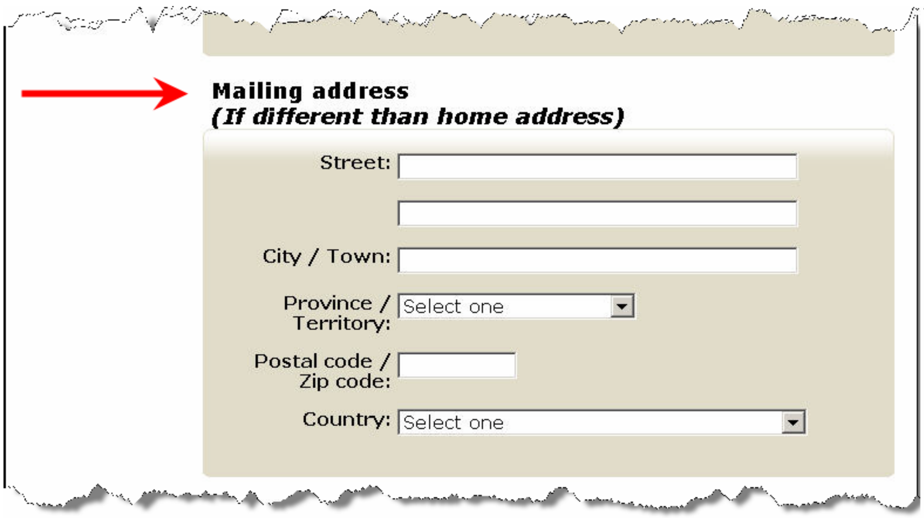
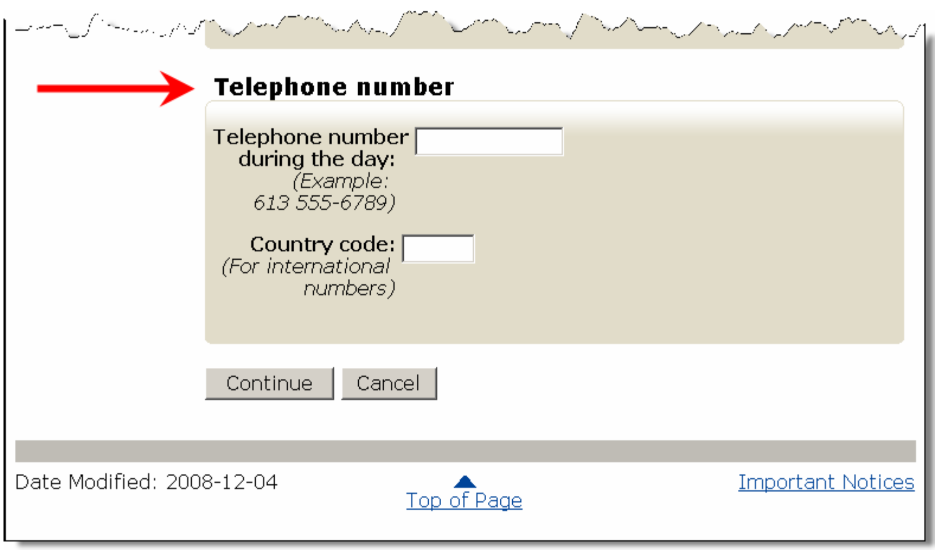
Step 1 of 8 - Information About You
Name
Title:
First name:
Initial(s):
Last name:
First name at birth: (If different than above)
Last name at birth: (If different than above)
Country of birth: (If born outside Canada)
Mandatory Fields
Personal information
Social Insurance Number:
Date of birth:
Current marital status:
Preferred language for correspondence:
Home address
Street:
City / Town:
Province / Territory:
Postal code / Zip code:
Country:
Mailing address (If different than home address)
Telephone number
Continue
Cancel
Top of Page
Important Notices

If the client's mailing address is different from their home address, they must fill out the **Mailing Address** block.



In the **Telephone number** block, the client should enter the **Telephone number during the day** field.



Once all the information has been entered, the client must select the **Continue** button located at the bottom of the page to go to Step 2 of the application process.

Hurdle Page

A hurdle page appears whenever a client provides an answer to a question related to the pension start date that conflicts with a specific business rule related to the age of the client and/or the pension start date.

When a hurdle page appears, the client is given the choice to either:

- provide a different answer (e.g., enter a different date of birth) by selecting **Re-enter date of birth**; or
- select the **Continue** button, in which case the original start date the client entered will be kept; or
- select the **Cancel** button to cancel the application.

In Step 1, there is one hurdle page. If the date of birth the client entered does not comply with business rules, a hurdle page will be displayed asking that the date of birth be re-entered, as seen here.

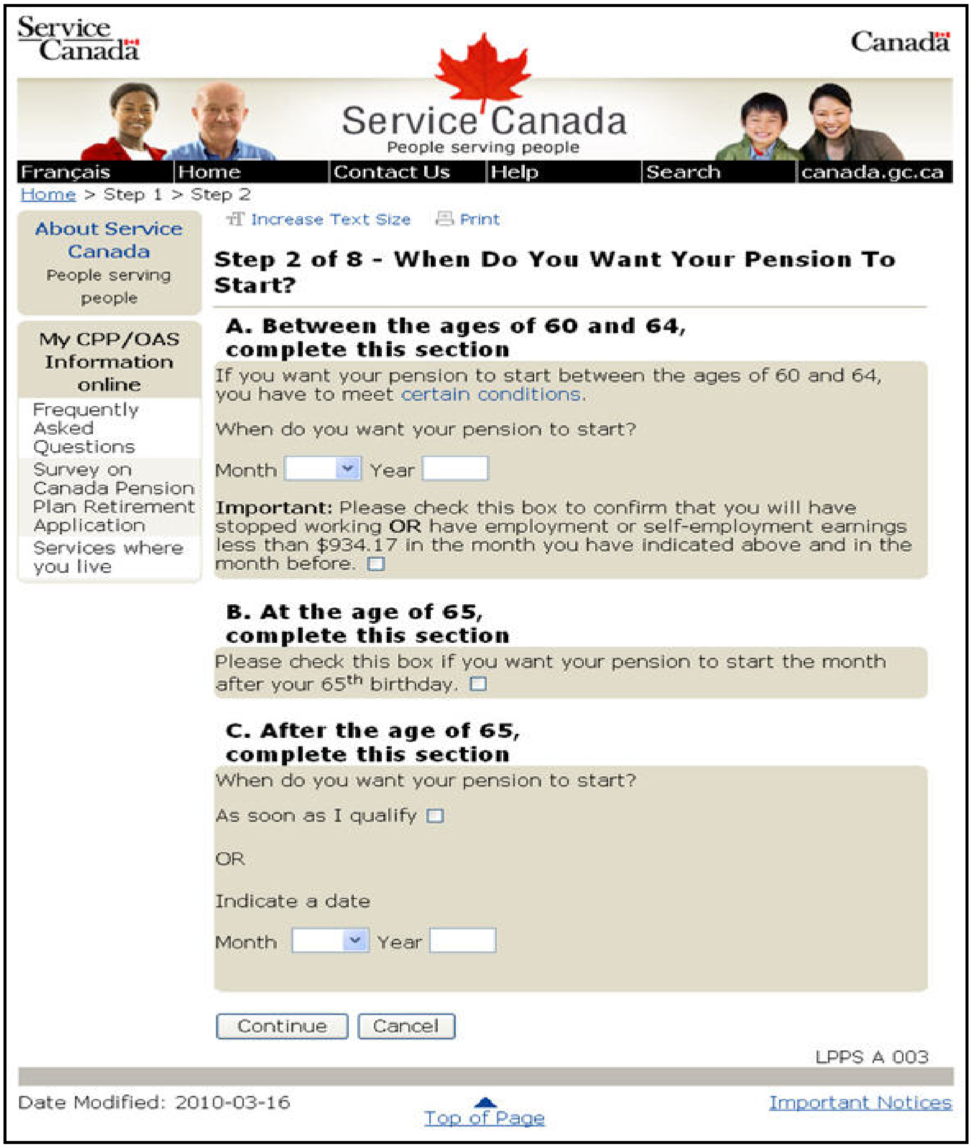
However, the client can continue with the date as entered by selecting **Continue** from the ***Step 1 – Date of Birth*** page.

Take Note: *This is NOT an error message. An error message appears when a client fails to complete a mandatory field or makes a mistake in filling out a field and it must be corrected, e.g. invalid SIN. An error must be corrected before the client can go to the next page, but a client can choose to ignore a hurdle page and continue with their application.*

Take Note: *When processing the application, the processing SDO/PSO must adhere to the information submitted by the client but must also take into account the existing business rules in qualifying for a CPP RTR pension. For detailed information related to processing a CPP RTR application, refer to the NTP CPP Retirement Pension – Participant's Guide*

Step 2 of 8 – When Do You Want Your Pension To Start?

In this step, the client must choose at what age they want their pension to start.



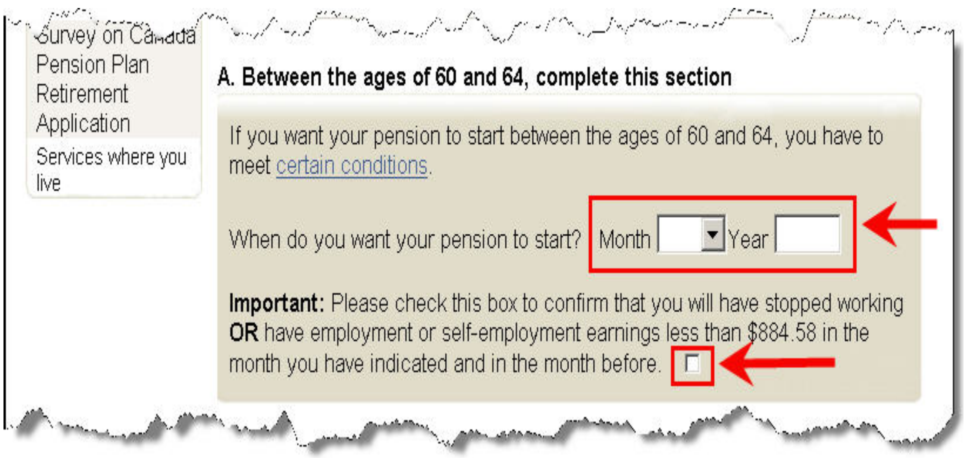
Three choices are offered:

- Option A: Between the ages of 60 to 64;
- Option B: At 65; or
- Option C: After the age of 65.

Option A: Between the Ages of 60 to 64:

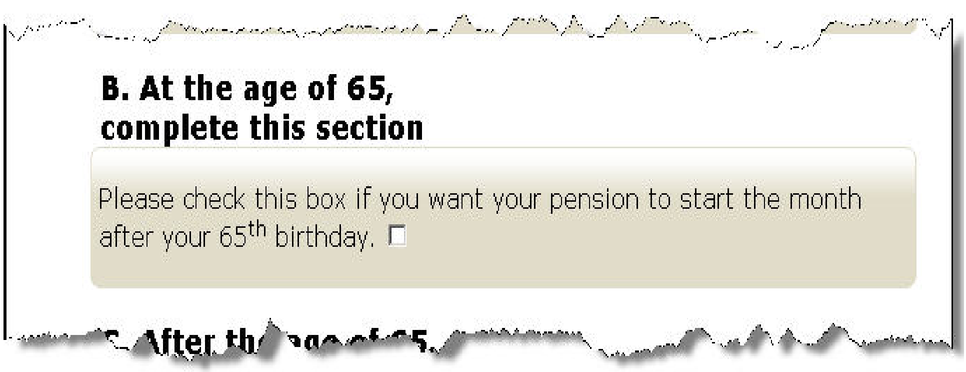
If the client chooses option A, they must:

- Indicate the year and month the pension is to start; and
- Select the box that confirms they will have stopped working, **OR** have employment or net self-employment earnings that are less than the maximum CPP RTR pension (payable at age 65) in the month before the CPP pension is to start, and in the month it starts.



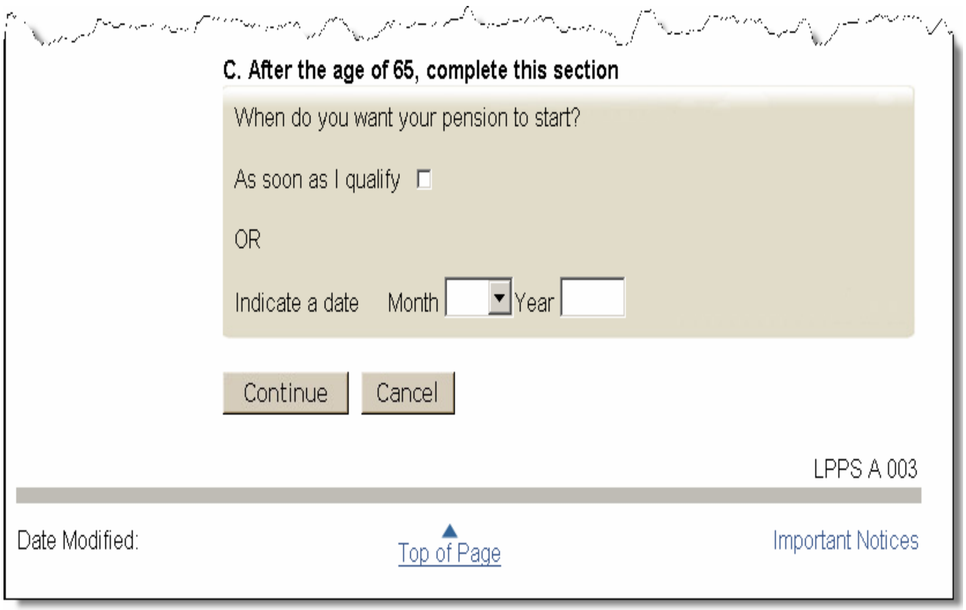
Option B: At 65:

If the client chooses option B, the pension will start the month after their 65th birthday.



Option C: After the Age of 65:

If the client chooses option C, they select the **As soon as I qualify** box OR indicate the month and year the pension is to start.



Hurdle Page

In Step 2, there are a total of three hurdle pages. As mentioned before, they will appear only if the start date does not comply with the business rules.

The three hurdle pages in Step 2 are very similar. The only difference between them is the 2nd paragraph. Here is an example of one of them:

The client will need to select **Re-enter start date** and re-enter a new date.

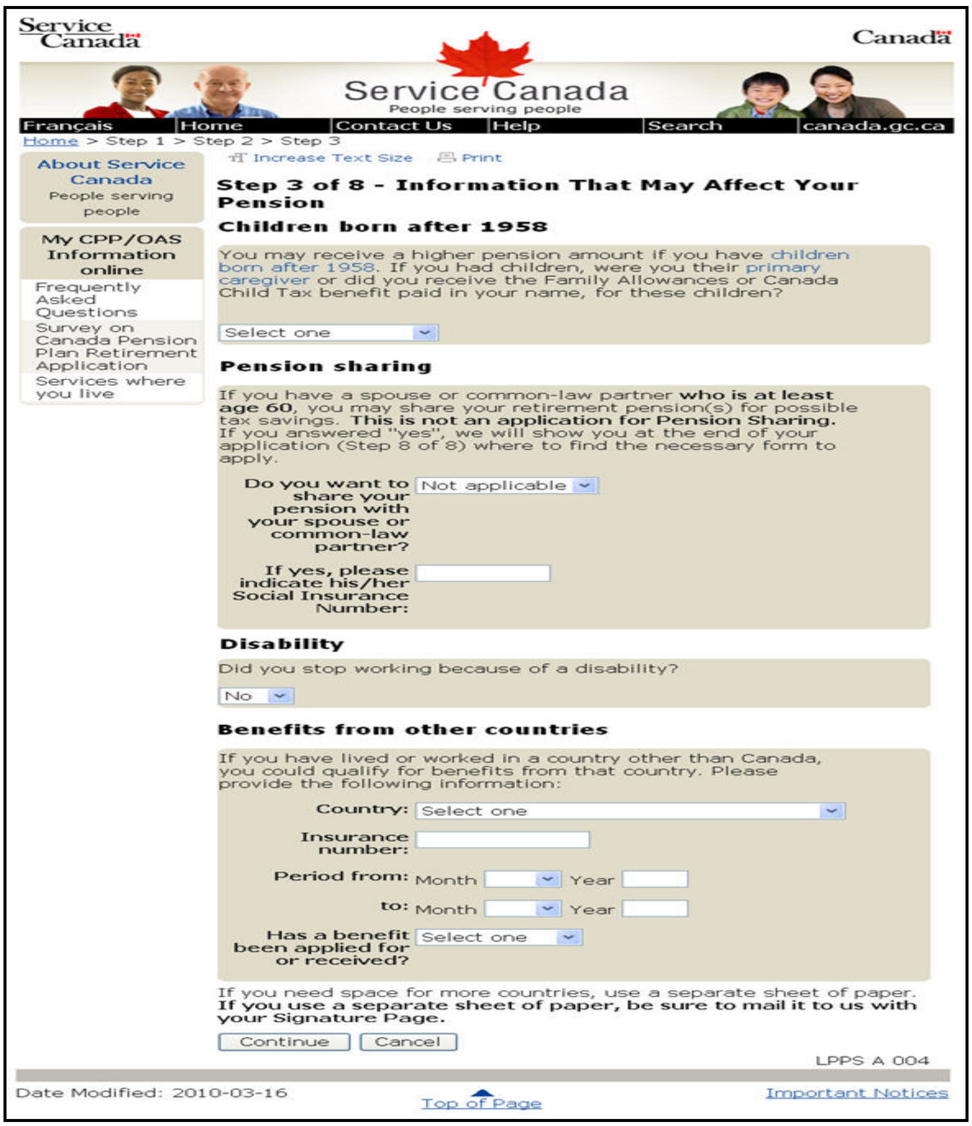
However, clients can continue with the date as entered by selecting **Continue**.

Step 3 of 8 – Information That May Affect Your Pension

A client's pension amount can be affected by a number of things. In step 3, the client is asked to provide information on:

- Children born after 1958;
- Pension sharing;
- Disability; and/or
- Benefits from other countries.

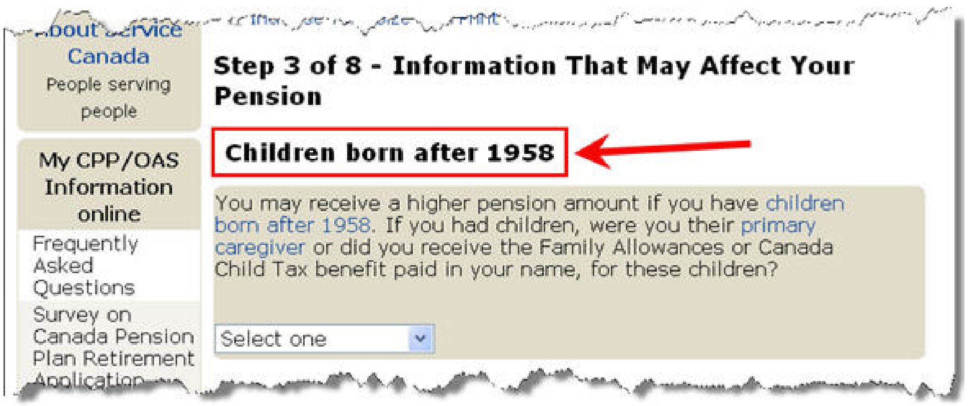
The client would complete the sections that are applicable to their situation.



Let's look at each section of Step 3:

Children Born After 1958

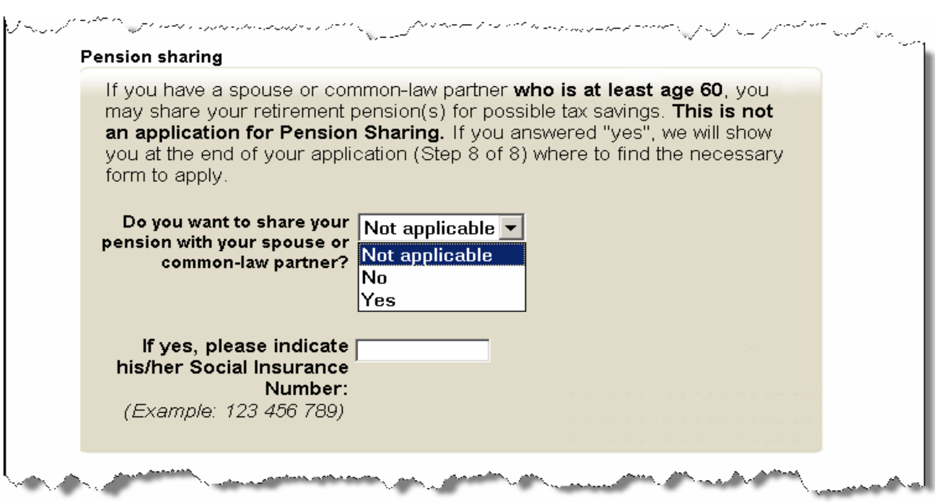
This information is used to establish eligibility for the Child Rearing Provision (CRP). The client is asked to provide information for each child born after 1958 (e.g. name, SIN, DOB etc) if applicable.



If the client has children who were born after 1958, they will be able to submit detailed information related to these children later on in Step 3 (Hurdle page).

Pension Sharing/Assignment

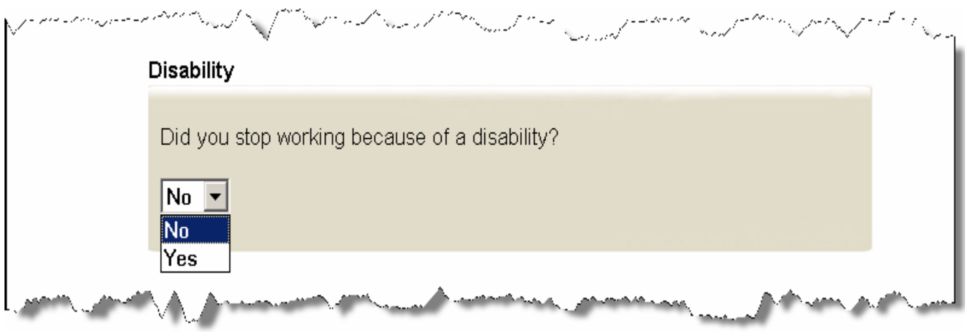
The client may wish to share their RTR pension(s) with their spouse or common-law partner, as it may represent tax savings for both of them.



When the client indicates a desire to share their pension, messages will appear (Step 7 and 8) advising them to complete the pension sharing form if they wish to start a pension sharing arrangement.

In Step 8, the client will be able to select a link that will bring them directly to the appropriate Pension sharing application form located on the Internet.

Disability
The client must indicate if they stopped working because of a disability.



Benefits from other countries

In this section, the client can provide the name of the country, the Insurance Number, the period of residence or work and if a benefit has been applied for under that country's social programs.

When the client has lived or worked in more than one country, they are requested to use a separate piece of paper to list any additional countries and submit it along with the ***Signature Page***.


Benefits from other countries

If you have lived or worked in a country other than Canada, you could qualify for benefits from that country. Please provide the following information:

Country: Select one

Insurance number:

Period from: Month Year

to: Month Year

Has a benefit been applied for or received? Select one

If you need space for more countries, use a separate sheet of paper. **If you use a separate sheet of paper, be sure to mail it to us with your Signature Page.**

Continue Cancel

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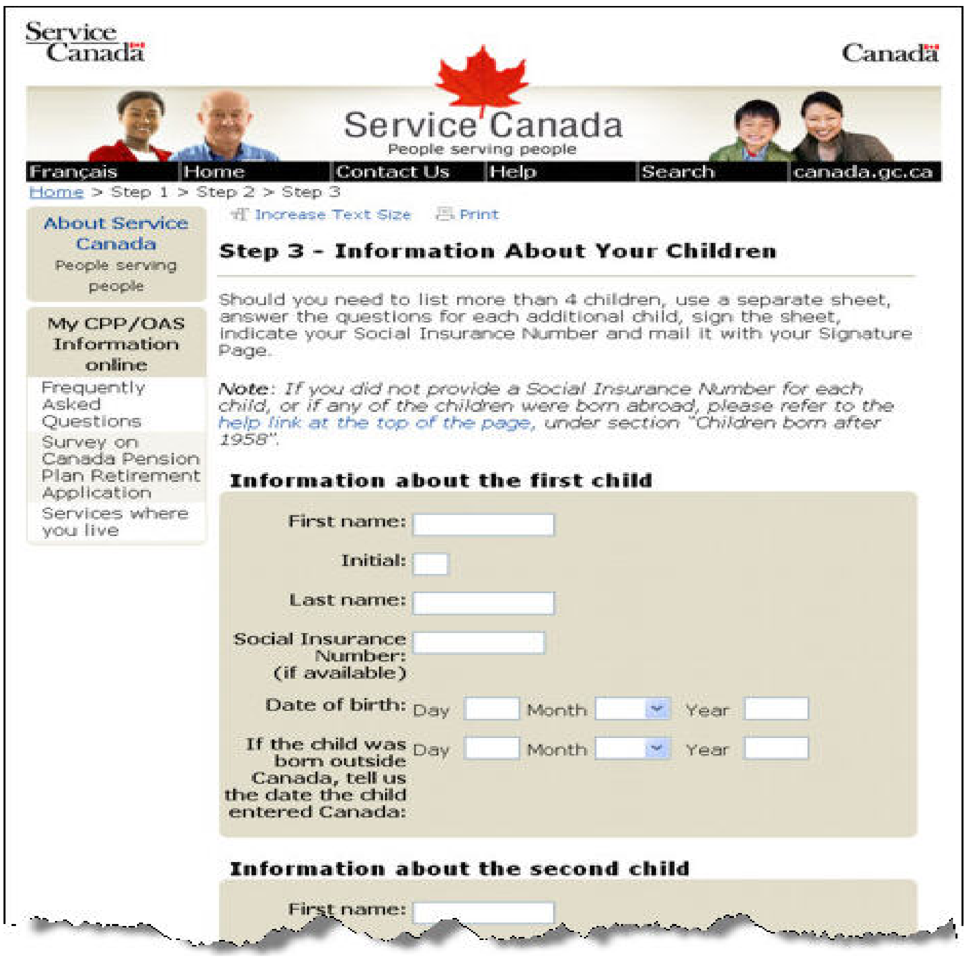
Take Note: *If a client provides information in this section, a message appears in Steps 7 and 8 advising them to complete an application for foreign benefits. In Step 8, the client will be able to select a link that will bring them directly to the appropriate foreign benefit application form located on the Internet.*

Once the client has completed Step 3, they must select **Continue** to move to the next section.

Hurdle Page

In Step 3, there is only one hurdle page and it will appear if the client answered yes to having children born after 1958. On this page, the client must fill out the information about the child or children:

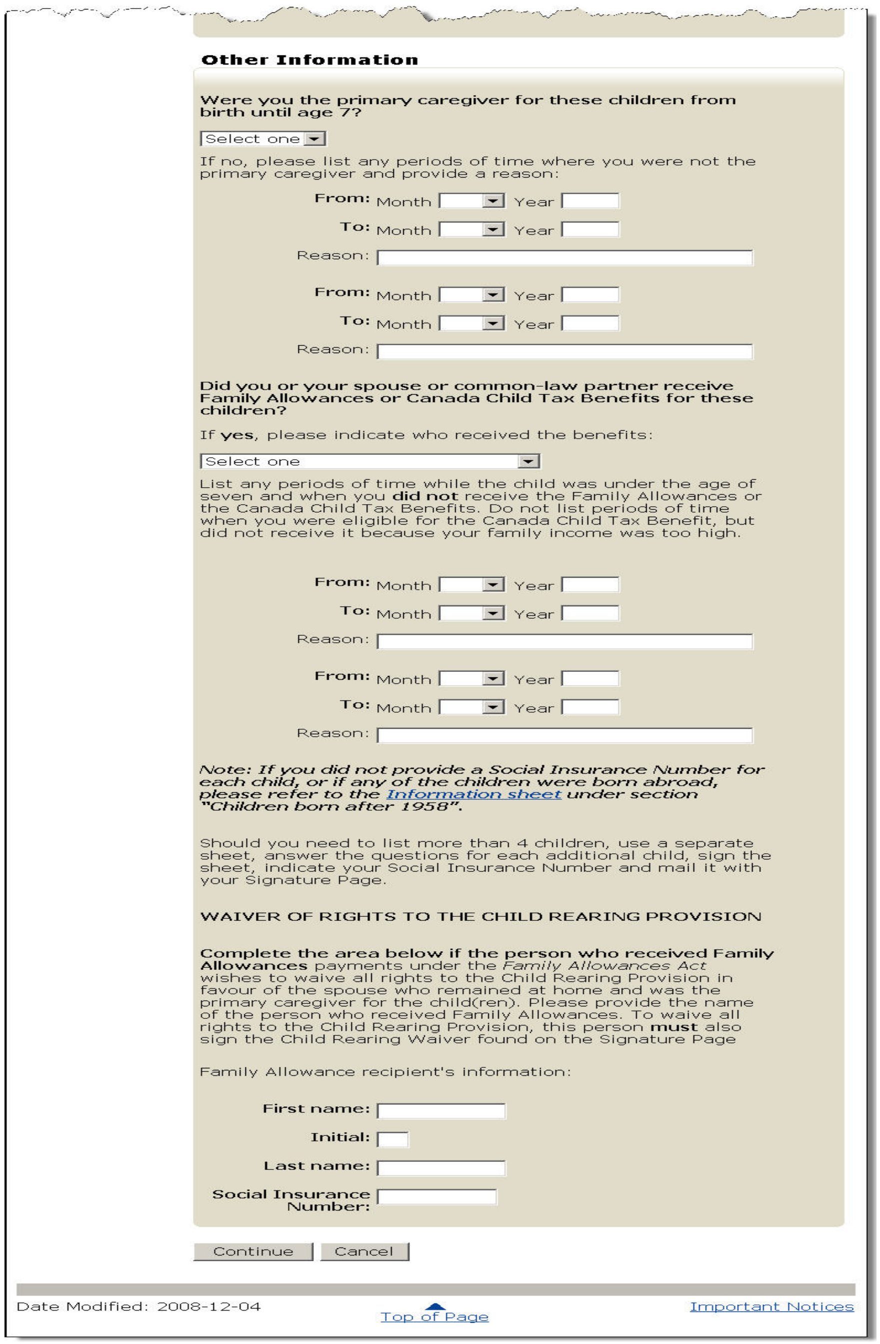
- First name;
- Last Name;
- SIN (if applicable);
- Date of birth.



The client can enter information for up to 4 children. If they have more than 4 children, they can use a separate sheet and answer the above questions for each additional child. They can submit this sheet along with the ***Signature Page***.

Other Information

The client **must** also answer the questions under the **Other Information** section then select **Continue**.



Other Information

Were you the primary caregiver for these children from birth until age 7?

Select one

If no, please list any periods of time where you were not the primary caregiver and provide a reason:

From: Month Year
To: Month Year
Reason:

From: Month Year
To: Month Year
Reason:

Did you or your spouse or common-law partner receive Family Allowances or Canada Child Tax Benefits for these children?

If **yes**, please indicate who received the benefits:

Select one

List any periods of time while the child was under the age of seven and when you **did not** receive the Family Allowances or the Canada Child Tax Benefits. Do not list periods of time when you were eligible for the Canada Child Tax Benefit, but did not receive it because your family income was too high.

From: Month Year
To: Month Year
Reason:

From: Month Year
To: Month Year
Reason:

Note: If you did not provide a Social Insurance Number for each child, or if any of the children were born abroad, please refer to the Information sheet under section "Children born after 1958".

Should you need to list more than 4 children, use a separate sheet, answer the questions for each additional child, sign the sheet, indicate your Social Insurance Number and mail it with your Signature Page.

WAIVER OF RIGHTS TO THE CHILD REARING PROVISION

Complete the area below if the person who received Family Allowances payments under the *Family Allowances Act* wishes to waive all rights to the Child Rearing Provision in favour of the spouse who remained at home and was the primary caregiver for the child(ren). Please provide the name of the person who received Family Allowances. To waive all rights to the Child Rearing Provision, this person **must** also sign the Child Rearing Waiver found on the Signature Page

Family Allowance recipient's information:

First name:
Initial:
Last name:
Social Insurance Number:

Continue Cancel

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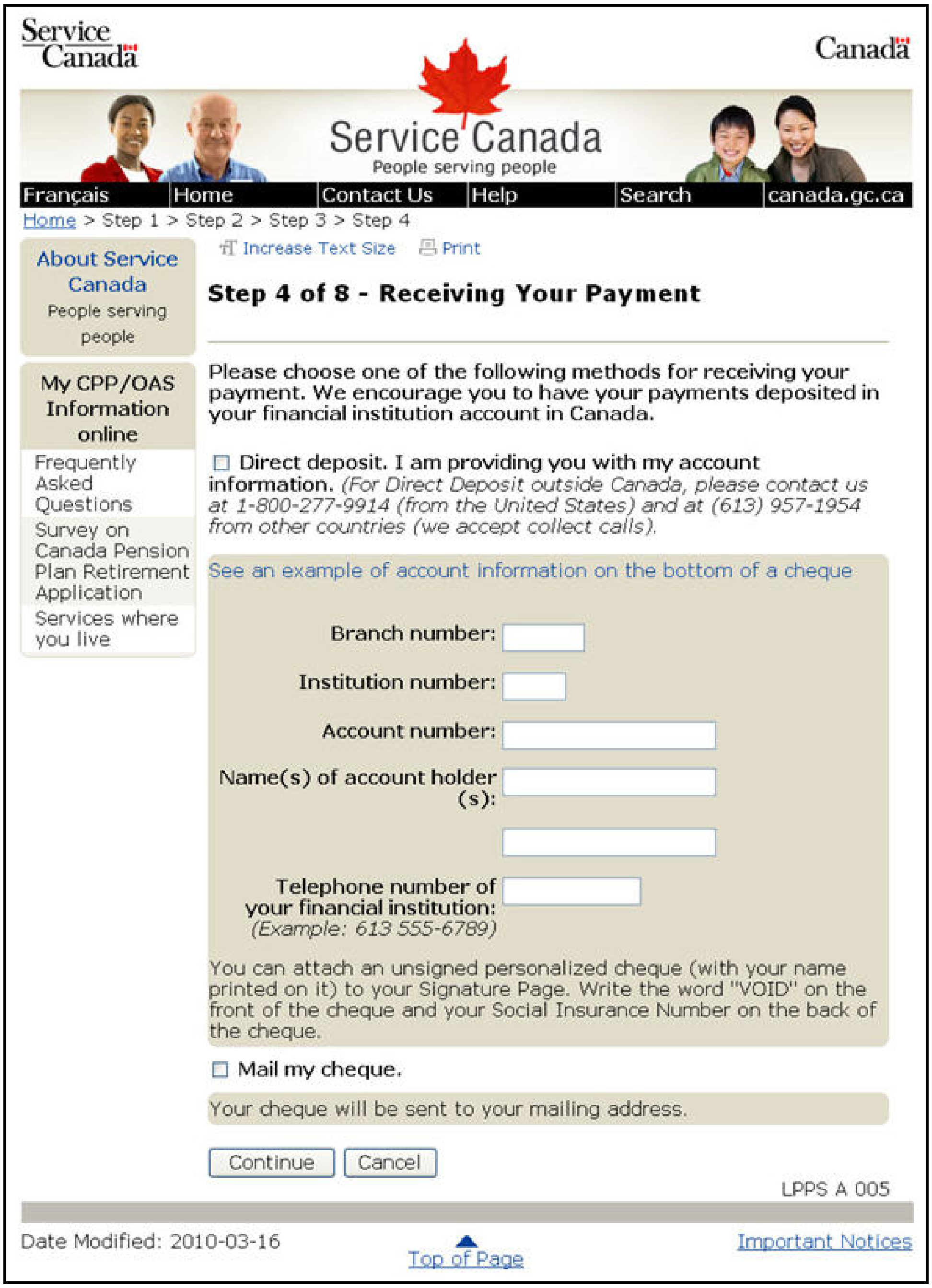
Step 4 of 8 – Receiving Your Payment

On this step, the client selects their preferred payment method. The client can select direct deposit or receive their monthly cheque in the mail. If direct deposit is chosen, the client must either send a void cheque with their ***Signature Page*** or provide their account information.



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Step 4 of 8 - Receiving Your Payment

Please choose one of the following methods for receiving your payment. We encourage you to have your payments deposited in your financial institution account in Canada.

☐ **Direct deposit. I am providing you with my account information.** *(For Direct Deposit outside Canada, please contact us at 1-800-277-9914 (from the United States) and at (613) 957-1954 from other countries (we accept collect calls).*

See an example of account information on the bottom of a cheque

Branch number:

Institution number:

Account number:

Name(s) of account holder (s):

Telephone number of your financial institution:
(Example: 613 555-6789)

You can attach an unsigned personalized cheque (with your name printed on it) to your Signature Page. Write the word "VOID" on the front of the cheque and your Social Insurance Number on the back of the cheque.

☐ Mail my cheque.

Your cheque will be sent to your mailing address.

Continue | Cancel

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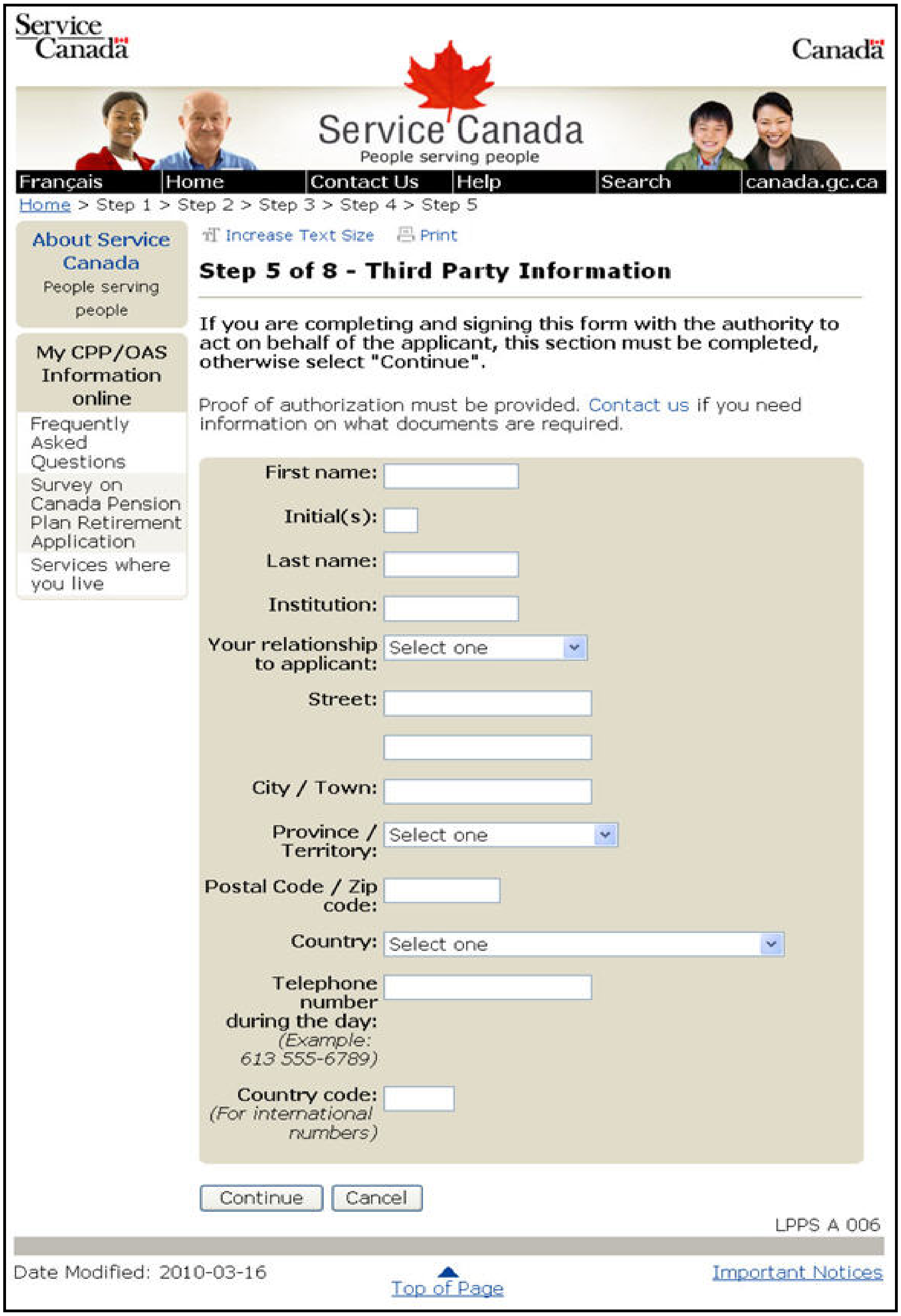
The client must select the **Continue** button to move to the next step.

Step 5 of 8 – Third Party Information

This step must be completed ONLY if the application is being completed by someone who has the authority to act on behalf of the client. Otherwise, the client can simply select the **Continue** button at the bottom of the screen.

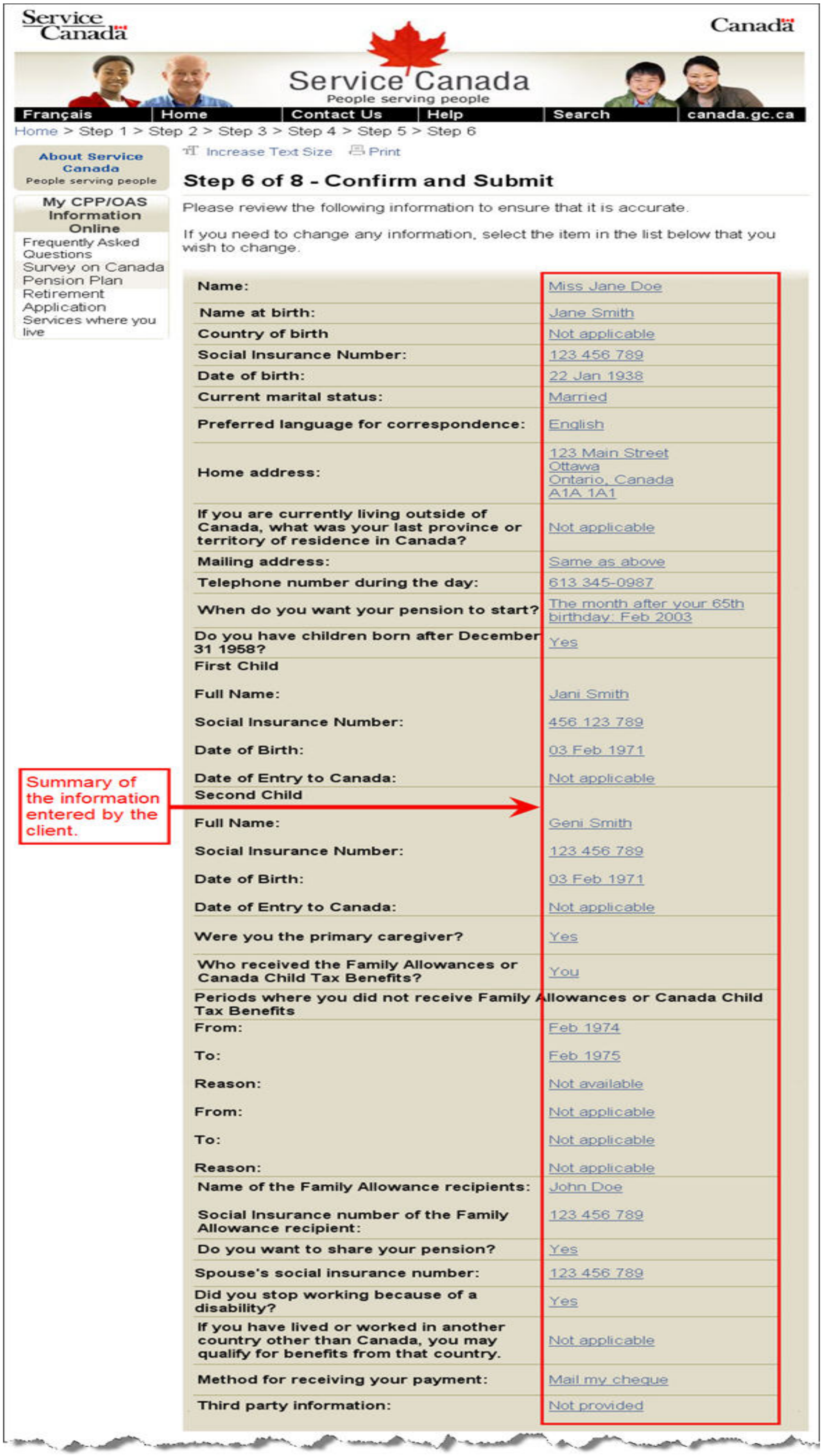


Step 6 of 8– Confirm and Submit

The ***Confirm and Submit*** screen provides a summary of all the information the client entered in Steps 1 to 5.

If the client notices inaccurate information, they must select the item that needs to be changed from the list in the right-hand column, and make the correction.

Once the change has been made, the client selects the **Continue** button to return to the ***Confirm and Submit*** screen.



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Survey on Canada Pension Plan Retirement Application
Services where you live

Increase Text Size Print

Step 6 of 8 - Confirm and Submit

Please review the following information to ensure that it is accurate.

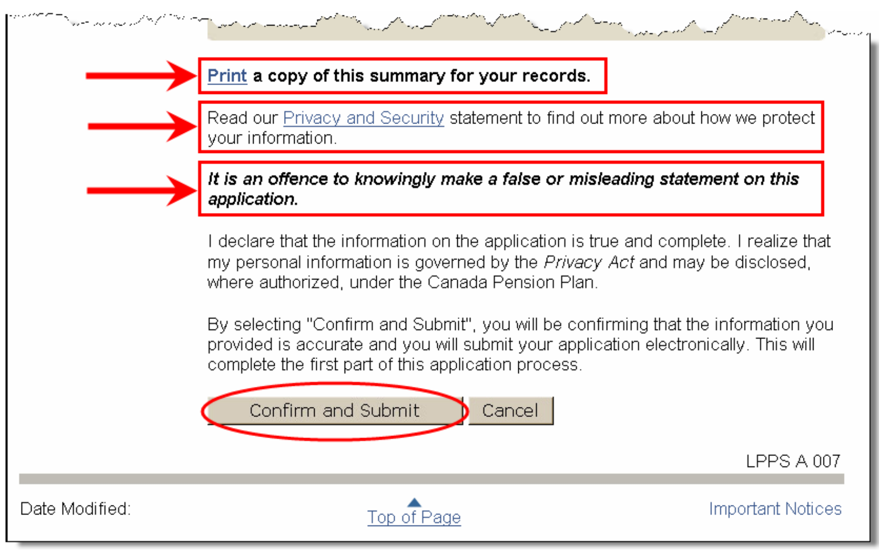
If you need to change any information, select the item in the list below that you wish to change.

Name:	Miss Jane Doe
Name at birth:	Jane Smith
Country of birth	Not applicable
Social Insurance Number:	123 456 789
Date of birth:	22 Jan 1938
Current marital status:	Married
Preferred language for correspondence:	English
Home address:	123 Main Street Ottawa Ontario, Canada A1A 1A1
If you are currently living outside of Canada, what was your last province or territory of residence in Canada?	Not applicable
Mailing address:	Same as above
Telephone number during the day:	613 345-0987
When do you want your pension to start?	The month after your 65th birthday: Feb 2003
Do you have children born after December 31 1958?	Yes
First Child	
Full Name:	Jani Smith
Social Insurance Number:	456 123 789
Date of Birth:	03 Feb 1971
Date of Entry to Canada:	Not applicable
Second Child	
Full Name:	Geni Smith
Social Insurance Number:	123 456 789
Date of Birth:	03 Feb 1971
Date of Entry to Canada:	Not applicable
Were you the primary caregiver?	Yes
Who received the Family Allowances or Canada Child Tax Benefits?	You
Periods where you did not receive Family Allowances or Canada Child Tax Benefits	
From:	Feb 1974
To:	Feb 1975
Reason:	Not available
From:	Not applicable
To:	Not applicable
Reason:	Not applicable
Name of the Family Allowance recipients:	John Doe
Social Insurance number of the Family Allowance recipient:	123 456 789
Do you want to share your pension?	Yes
Spouse's social insurance number:	123 456 789
Did you stop working because of a disability?	Yes
If you have lived or worked in another country other than Canada, you may qualify for benefits from that country.	Not applicable
Method for receiving your payment:	Mail my cheque
Third party information:	Not provided

Summary of the information entered by the client.

Once the client reviews that the summary information is correct, they are advised to print a copy of this page for their records. The client can print this summary by selecting the **Print** link provided at the bottom of the page.

The client is also advised to read our **Privacy and Security Statement** and is reminded that it is an offence to knowingly make a false or misleading statement on this application**.**



After printing a copy, the client can select the **Confirm and Submit** button at the bottom of the page. This action sends the online application to the RTR database and brings the client to Step 7, which is the ***Signature Page***.

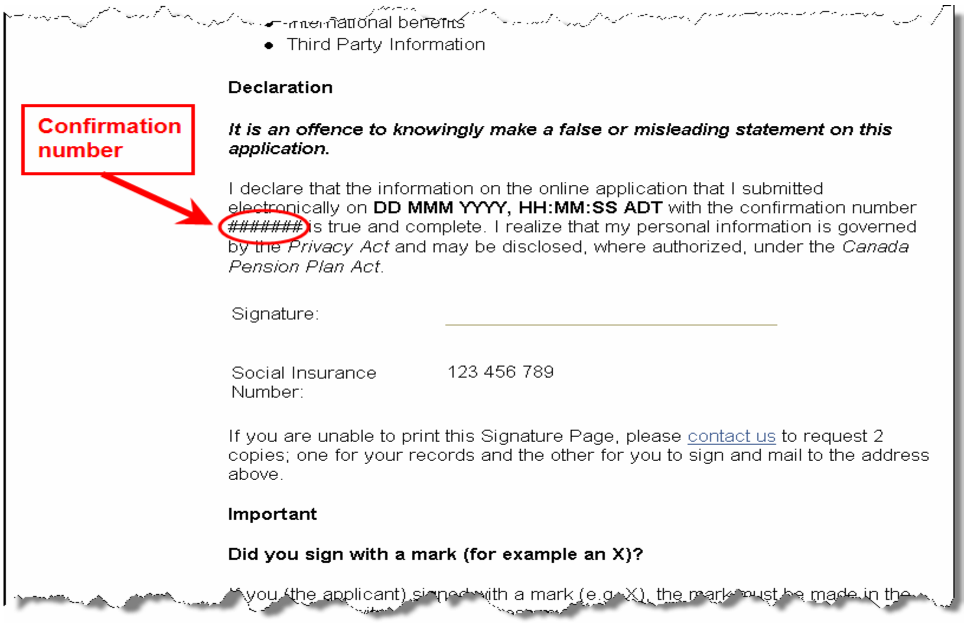
Take Note: *The protected receipt date is the date that the client submitted the online part of the application and NOT the date the* ***Signature Page*** *was received in the Service Canada Mail Processing Center.*

Step 7 of 8 – Signature page

The client is advised to print 2 copies of the ***Signature Page***. To do this, they must select the **Print** link located in the list of items the client must do in order to complete their application.

The client must sign one copy of the ***Signature Page*** and mail it along with any applicable documents (e.g., void cheque) to the address noted on the ***Signature Page***. They are directed to keep the second copy for their records.

The information submitted using the online application is recorded in the RTR database. Using the Intranet, SDOs/PSOs will be able to retrieve a client's application using the **SIN** or the **Confirmation Number** that appears near the bottom of the ***Signature Page***.


- International benefits
- Third Party Information

Declaration

It is an offence to knowingly make a false or misleading statement on this application.

I declare that the information on the online application that I submitted electronically on **DD MMM YYYY, HH:MM:SS ADT** with the confirmation number ####### is true and complete. I realize that my personal information is governed by the *Privacy Act* and may be disclosed, where authorized, under the *Canada Pension Plan Act*.

Signature:

Social Insurance Number: 123 456 789

If you are unable to print this Signature Page, please contact us to request 2 copies; one for your records and the other for you to sign and mail to the address above.

Important

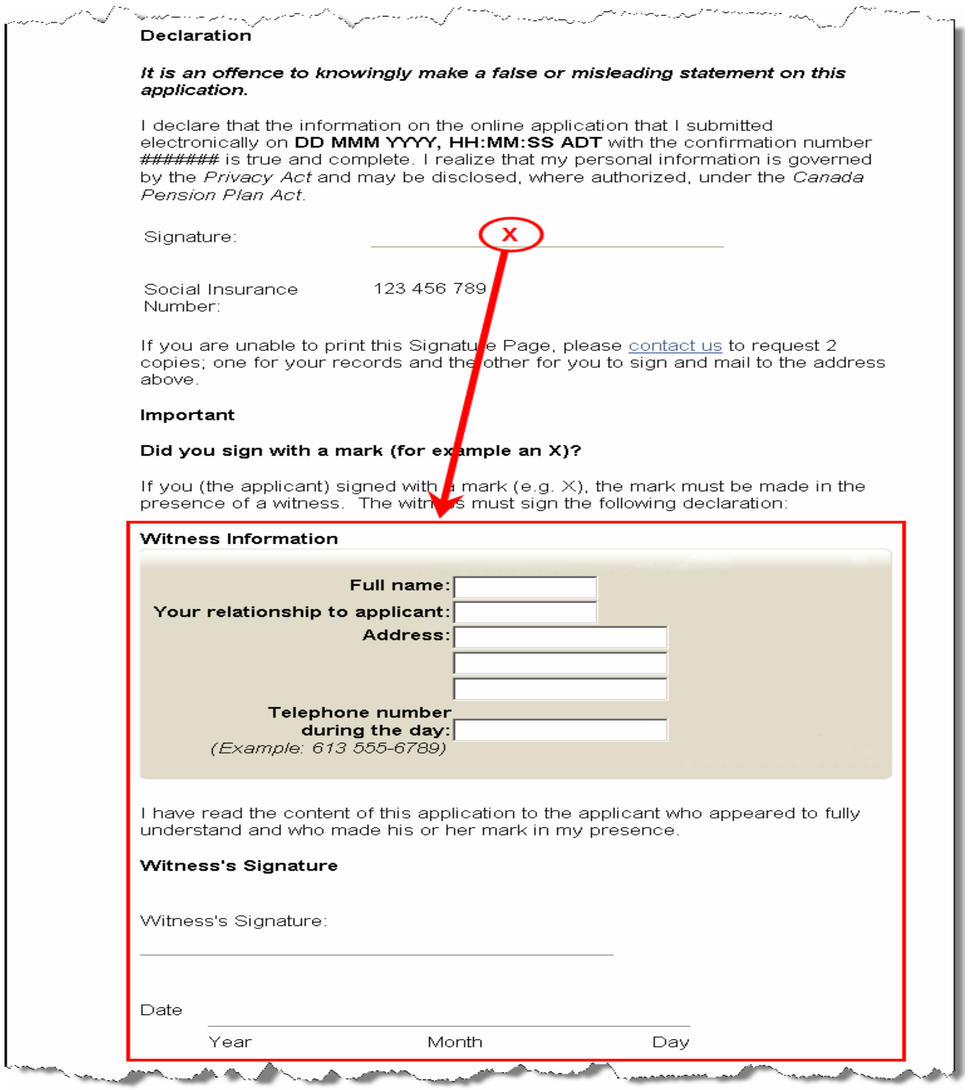
Did you sign with a mark (for example an X)?

If you (the applicant) signed with a mark (e.g. X), the mark must be made in the

A client can apply for a CPP RTR benefit up to three times using the online application. As a result, it is highly recommended that you use the client's SIN to perform a search as this will capture all of that client's applications in the database. In contrast, a search using an application specific **Confirmation Number** would retrieve the one application linked to the ***Signature Page*** with that specific **Confirmation Number**.

The ***Signature Page*** also includes the Service Canada Mail Processing Centre address. It is determined by the system according to the home postal code entered by the client in Step 1. If the client applies from outside of Canada, the last Canadian province of residence for the client will be used to direct the application to that province's responsible Service Canada Mail Processing Center.

Still on the ***Signature Page***, the client must fill in the **Witness information** block if they signed the application using a mark (i.e. X) in the presence of a witness. The witness MUST sign the ***Signature Page***.



Declaration

It is an offence to knowingly make a false or misleading statement on this application.

I declare that the information on the online application that I submitted electronically on **DD MMM YYYY, HH:MM:SS ADT** with the confirmation number ####### is true and complete. I realize that my personal information is governed by the *Privacy Act* and may be disclosed, where authorized, under the *Canada Pension Plan Act*.

Signature: X

Social Insurance Number: 123 456 789

If you are unable to print this Signature Page, please contact us to request 2 copies; one for your records and the other for you to sign and mail to the address above.

Important

Did you sign with a mark (for example an X)?

If you (the applicant) signed with a mark (e.g. X), the mark must be made in the presence of a witness. The witness must sign the following declaration:

Witness Information

Full name:
Your relationship to applicant:
Address:
Telephone number during the day:
(Example: 613 555-6789)

I have read the content of this application to the applicant who appeared to fully understand and who made his or her mark in my presence.

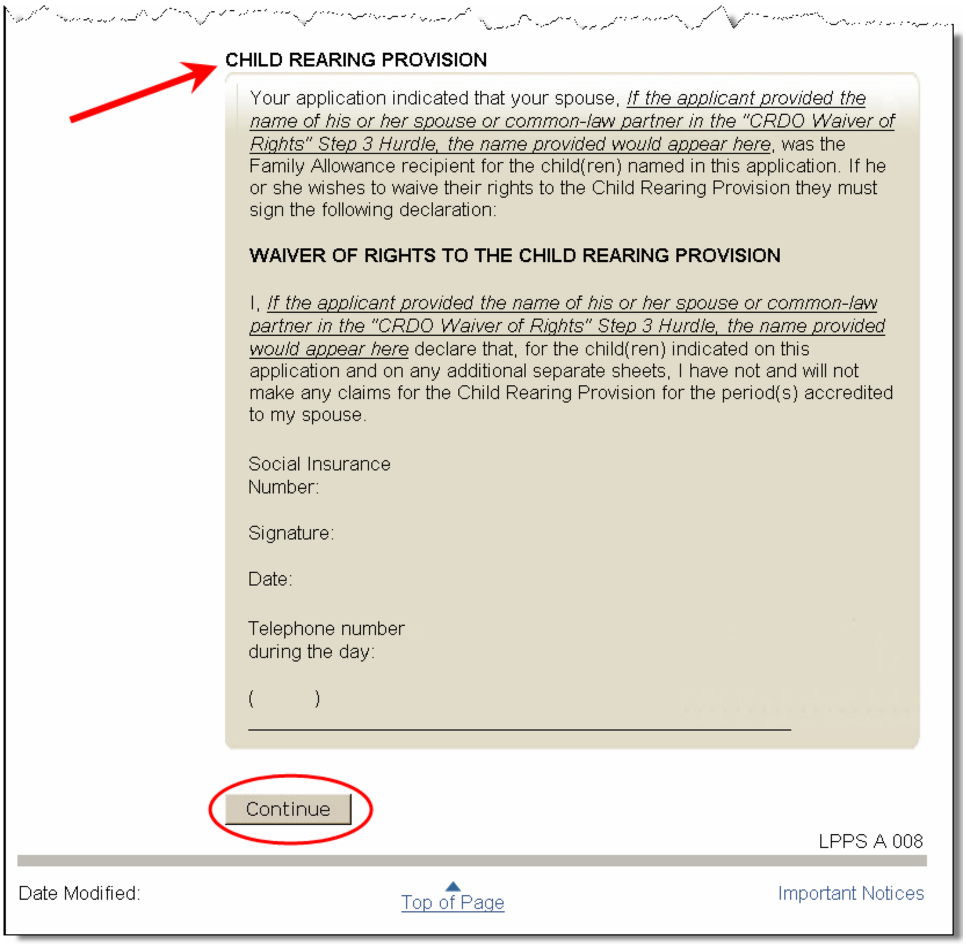
Witness's Signature

Witness's Signature:

Date

Year Month Day

The last part of the ***Signature Page*** is the **Child Rearing Provision** block. If the client's spouse was the recipient of the Family Allowance and wishes to waive their rights to the Child Rearing Provision, they must sign the following declaration:



CHILD REARING PROVISION

Your application indicated that your spouse, *If the applicant provided the name of his or her spouse or common-law partner in the "CRDO Waiver of Rights" Step 3 Hurdle, the name provided would appear here*, was the Family Allowance recipient for the child(ren) named in this application. If he or she wishes to waive their rights to the Child Rearing Provision they must sign the following declaration:

WAIVER OF RIGHTS TO THE CHILD REARING PROVISION

I, *If the applicant provided the name of his or her spouse or common-law partner in the "CRDO Waiver of Rights" Step 3 Hurdle, the name provided would appear here* declare that, for the child(ren) indicated on this application and on any additional separate sheets, I have not and will not make any claims for the Child Rearing Provision for the period(s) accredited to my spouse.

Social Insurance Number:

Signature:

Date:

Telephone number during the day:

( )

Continue

LPPS A 008

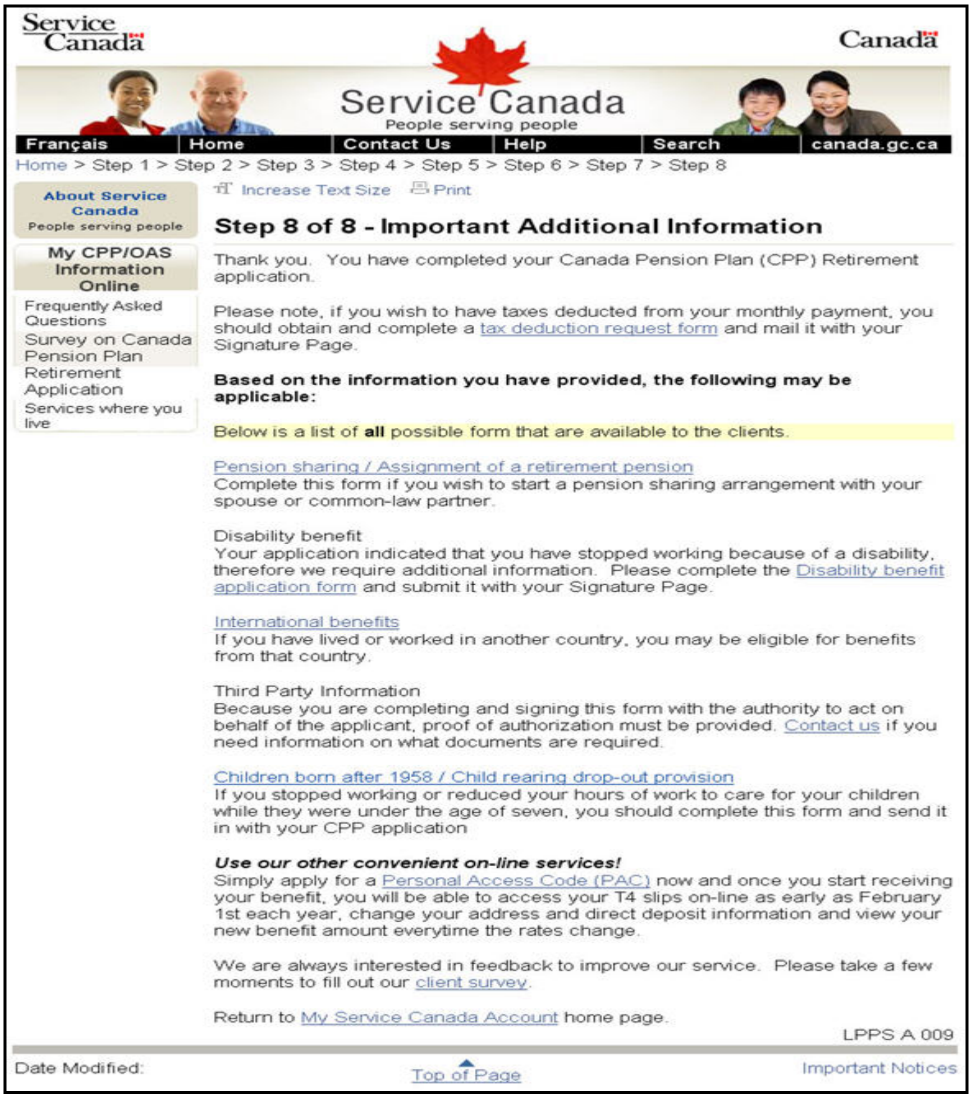
Date Modified: Top of Page Important Notices

Once the ***Signature Page*** is completed, the client must select the **Continue** button to move on to the last step.

Step 8 of 8– Important Additional Information

Step 8 is the last step in the application process. Based on the information the client provided in Steps 1 to 5, the system will provide information on provisional forms that the client should complete and submit with the ***Signature Page***. The links take the client to the necessary forms (e.g., *tax deduction request form*) located on the Internet.

On this screen, the client is also invited to fill out a Client Survey and provide feedback on the new online service.



Service Canada   Canada

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About Service Canada
People serving people

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Step 8 of 8 - Important Additional Information

Thank you. You have completed your Canada Pension Plan (CPP) Retirement application.

Please note, if you wish to have taxes deducted from your monthly payment, you should obtain and complete a tax deduction request form and mail it with your Signature Page.

Based on the information you have provided, the following may be applicable:

Below is a list of **all** possible form that are available to the clients.

Pension sharing / Assignment of a retirement pension
Complete this form if you wish to start a pension sharing arrangement with your spouse or common-law partner.

Disability benefit
Your application indicated that you have stopped working because of a disability, therefore we require additional information. Please complete the Disability benefit application form and submit it with your Signature Page.

International benefits
If you have lived or worked in another country, you may be eligible for benefits from that country.

Third Party Information
Because you are completing and signing this form with the authority to act on behalf of the applicant, proof of authorization must be provided. Contact us if you need information on what documents are required.

Children born after 1958 / Child rearing drop-out provision
If you stopped working or reduced your hours of work to care for your children while they were under the age of seven, you should complete this form and send it in with your CPP application.

Use our other convenient on-line services!
Simply apply for a Personal Access Code (PAC) now and once you start receiving your benefit, you will be able to access your T4 slips on-line as early as February 1st each year, change your address and direct deposit information and view your new benefit amount everytime the rates change.

We are always interested in feedback to improve our service. Please take a few moments to fill out our client survey.

Return to My Service Canada Account home page.

LPPS A 009

Date Modified: Top of Page   Important Notices

The client can then select **My Service Canada Account** to return to My Service Canada Account home page.

Congratulations you have completed the Online Retirement Application training guide.

Want to test what you have learned? A workbook has been created to help you do that. You can access it at the following location:

http://intracom.hq-ac.prv/isp-psr/learning/it/gol_e.shtml

Good luck!

September 2010

Canada Pension Plan Online Retirement Application – Internet
Participant Feedback Questionnaire

The Operational Training Group, NHQ, is committed to providing you with quality training products. In order to do that, we need your assistance.

Our purpose in requesting you to participate in the evaluation of this training is twofold: First, we would like your immediate reaction to the training you have just received; and second, your involvement in our continuous improvement process by providing your feedback once you have had an opportunity to apply the knowledge you have just received on the job.

Immediate Reaction Section
Your answers to the questions below will assist us in evaluating this course or module in a number of areas such as: instructional methods and content.

1. The content of this course or module was:

   - ☐ Comprehensive
   - ☐ Adequately covered
   - ☐ Missing information (please provide specific examples such as page numbers along with what you feel should have been added)

   ____

2. The vocabulary of the module was:

☐ Easy to understand.

☐ Overly sophisticated.

(Please provide examples, such as wording was too complex, not clear or lacked conciseness.) Please reference page numbers, citing specific examples.

____
____
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____
____
____

3. The structure of the course or module was:

☐ Practical (the flow made sense)

☐ Easy to follow (references and links to each topic were made)

☐ Logical (Common Sense Approach)

☐ Confusing (difficult to follow – please provide examples so changes can be considered)

Check as many points as you feel apply.

____
____
____
____
____

4. I will be able to do my job better as a result of this training.

☐ Yes

☐ No

Please expand on the reasons for your answer.

____

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Continuous Improvement Section
We would like to contact you in three to six months time, to complete another survey on this particular training product. You will be contacted by one of our staff members who will ask you five to ten questions, similar to the ones you just completed. This survey will take approximately 10-15 minutes of your time. All replies are kept confidential. Please assist us in making this training the best it can be by completing the following information.

Name: _______________________________________

Region: _______________________________________

Position Title: _______________________________________

Return this Questionnaire to:
Quality Officer
Operational Training Group, NHQ
333 North River Road
Place Vanier, Tower A, 18th Floor
Ottawa, ON K1A 0L1

Fax: (613) 948-8358