Canada Pension Plan Retirement Application Online (CPP RTRa)

RELEASE 2.0
WORKBOOK

Service
Canada

Table of Contents

Exercises

Exercise 1 – Accessing the CPP RTR Online Application

Learning Objective

- Recognize the steps for locating the CPP RTR Application on the Service Canada Internet site.

List of Steps for Locating the CPP RTR Online Application from the Service Canada Internet Site	Place a Number in Each Box to Show the Correct Step Sequence
Go to the Service Canada Internet site.	
Select the **Apply for the Canada Pension Plan Retirement Pension** link.	
Choose your official language of choice.	

Exercise 2 – Using and Accessing the CPP RTR Application Information Sheet

Learning Objectives

- Identify the information that is included on the information sheet; and

- Recognize how to access the information sheet.

1. The CPP RTR information sheet provides general information about the CPP RTR pension.

    ☐ True

    ☐ False

2. The CPP RTR information sheet also provides information related to when you want your CPP RTR and your Old Age Security pensions to start.

    ☐ True

    ☐ False

3. Our clients can access the information sheet at any time while completing their application by selecting the **Contact Us** link on the top navigation bar.

    ☐ True

    ☐ False

Exercise 3 – Completion of the CPP RTR Online Application

Learning Objectives

- Recognize the steps the client must follow to complete the online CPP RTR application;

- Assist a client who has questions related to the completion of the online CPP RTR application;

- Define the following terms:

  - Error Message; and

  - Hurdle page.

1. Choose the answer which correctly outlines the steps for completing an online CPP RTR application:

   a) Information about You → When Do You Want Your Pension to Start? → Information that May Affect Your Pension → Confirm and Submit → Signature Page → Important Additional Information

   b) Information about You → When Do You Want Your Pension to Start? → Information that May Affect Your Pension → Receiving Your Payment → Third Party Information → Confirm and Submit → Signature Page → Important Additional Information

   c) Information about You → Information that May Affect Your Pension → Receiving Your Payment → Third Party Information → Confirm and Submit → Signature Page → Important Additional Information

2. Fill in the blanks with the correct words.

    a) If a client does not fill in a mandatory field or they complete it incorrectly, a/an

        _____ _____ will appear at the top of the screen indicating which field needs to

        be corrected/ filled.

    b) A/an_____ _____ appears whenever the client provides an answer to a

        question related to their pension start date that conflicts with a specific business rule

        related to the age of the client and/or the pension start date.

Answers

Exercise 1 – Accessing the CPP RTR Online Application

List of Steps for Locating the CPP RTR Online Application from the Service Canada Internet Site	Place a Number in Each Box to Show the Correct Step Sequence
Go to the Service Canada Internet site.	**1**
Select the **Apply for the Canada Pension Plan Retirement Pension** link.	**3**
Choose your official language of choice.	**2**

Exercise 2 – Using and Accessing the CPP RTR Application Information Sheet

1. The CPP RTR information sheet provides general information about the CPP RTR pension.

   ☑ **True**

   ☐ False

2. The CPP RTR information sheet also provides information related to when you want your CPP RTR and your Old Age Security pensions to start.

   ☐ True

   ☑ **False**

   The information sheet does not provide information about the start date for the Old Age Security Pension. It does provide information about the start date for the CPP RTR.

3. Our clients can access the information sheet at any time while completing their application by selecting the **Contact Us** link on the top navigation bar.

	True
✓	**False**

If clients have problems or questions while they are completing the online application, they can return to the information sheet to get information by selecting the **Help** link located on the top navigation bar.

If the client feels the need to speak to a Service Canada Officer, they can reach us by selecting the **Contact Us** link also located on the top navigation bar.

Exercise 3 – Completion of the CPP RTR Online Application

1. Choose the answer which correctly outlines the steps for completing an online CPP RTR application.

   a) Information about You → When Do You Want Your Pension to Start? → Information that May Affect Your Pension → Confirm and Submit → Signature Page → Important Additional Information

   b) **Information about You → When Do You Want Your Pension to Start? → Information that May Affect Your Pension → Receiving Your Payment → Third Party Information → Confirm and Submit → Signature Page → Important Additional Information**

   c) Information about You → Information that May Affect Your Pension → Receiving Your Payment → Third Party Information → Confirm and Submit → Signature Page → Important Additional Information

   ANSWER: **b)**

2. Fill in the blanks with the correct words.

   If a client does not fill in a mandatory field or they complete it incorrectly, you would tell them that an **error message** will appear at the top of the screen indicating which field needs to be corrected/filled.

   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.