**PROCESS MAP FOR OPTING EMPLOYEES**

**(NO GUARANTEE OF A REASONABLE JOB OFFER)**

***INFORMING EMPLOYEE OF OPTING STATUS***

**Management** to advise impacted staff members of their workforce adjustment status and provide them with opting letter.

**↓**

**Employee** should consult his/her Human Resources Advisor (name included in letter received) and the following websites for information concerning his/her entitlements in regards to his/her opting status:

<http://iservice.prv/eng/hr/cb/topics/wfa/index.shtml>

<http://iservice.prv/eng/hr/wms/employees_corner/employees_toolkit.shtml>

**↓**

**Employee** may contact Compensation and Benefits should he/she have any questions concerning his/her entitlements in regards to his/her departure from the public service:

[NA-COMP-REM-GD@hrsdc-rhdcc.gc.ca](mailto:NA-COMP-REM-GD@hrsdc-rhdcc.gc.ca)

**↓**

**Employee** to provide **Management** with option selection by completing and signing the “Workforce Adjustment Option Selection Form’’.

**Note:** Opting employees are accorded a period of 120 days during which to choose from one of three options. If the employee fails to select an option, the employee will be deemed to have selected Option (a), twelve-month surplus priority period in which to secure a reasonable job offer at the end of the 120-day window.

**↓**

**Management (Delegated Authority – Level 3)** to sign “Workforce Adjustment Option Selection Form” and provide a copy to the appropriate Regional Resourcing Unit within Human Resources Services Branch (HRSB).

**↓**

**Regional Resourcing Unit** to prepare letter approving the employee’s option selection. Letter to be signed by management (Delegated Authority – Level 2).

**Management** to provide letter to employee.

**Regional Resourcing Unit** to provide copy of final letter to Compensation and Benefits via email.

***OPTION A (12-MONTH SURPLUS PRIORITY PERIOD) SELECTED***

**Employee** to send required documentation to his/her Human Resources Advisor **as soon as possible** for registration to the Public Service Commission’s Priority Information Management System (PIMS).

**Note:** At the request of the employee, the twelve-month surplus priority period shall be extended by the unused portion of the 120-day opting period.

***IF NO REASONABLE JOB OFFER IS RECEIVED WITHIN SURPLUS PRIORITY PERIOD***

Should a reasonable job offer not be made within the employee’s time limited surplus priority period, the employee will be laid off in accordance with the *Public Service Employment Act.*

**↓**

**Regional Resourcing Unit** to issue final lay off letter if the employee has not found alternate employment in the public service.

**↓**

**Regional Resourcing Unit** to provide copy of final lay off letter to Compensation and Benefits via email.

**↓**

**Compensation and Benefits** to contact employee within 5 business days from receiving the letter.

**↓**

**Compensation and Benefits** to provide the employee with:

►letter outlining entitlement and impacts of departure on benefits;

►payment disposition form for severance pay and payment in lieu if applicable;

►other forms required depending on specific employee situation.

**Note:** Package above will be provided at the latest the week prior to departure if Compensation and Benefits received the confirmation of option letter at least three weeks prior to the departure.

**↓**

**Employee** to contact the [Government of Canada Pension Center](http://pensionetavantages-pensionandbenefits.gc.ca/cntctns-cntctus-eng.html) to inform them of departure.

**↓**

**Management** **and Employee** to complete the [Separation Clearance Process](http://iservice.prv/eng/bpi/departure/separation_clearance_process/index.shtml).

**↓**

**Employee** to complete payment disposition form that will be provided by Compensation and send a completed copy to [Compensation Services](http://iservice.prv/eng/hr/cb/contact_us/regional_comp_services.shtml).

**↓**

**Compensation and Benefits** to process transactions to stop pay and issue appropriate payments.

**Note:** Payment will be issued once the completed separation clearance certificate and payment disposition form have been received in Compensation. May take 4 to 6 weeks from the departure date to issue payment.

***IF EMPLOYEE IS AUTHORIZED PAY IN LIEU OF UNFULFILLED SURPLUS PERIOD BEFORE THE END OF THE TWELVE-MONTH SURPLUS PRIORITY PERIOD***

**Regional Resourcing Unit** to provide copy of signed request form or letter to Compensation and Benefits.

**↓**

**Compensation and Benefits** to contact employee within 5 business days from receiving the letter.

**↓**

**Compensation and Benefits** to provide the employee with:

►letter outlining entitlement and impacts of departure on benefits;

►payment disposition form for severance pay and payment in lieu if applicable;

►other forms required depending on specific employee situation.

**Note:** Package above will be provided at the latest the week prior to departure if Compensation and Benefits received the form at least three weeks prior to the departure.

**↓**

**Employee** to contact the [Government of Canada Pension Center](http://pensionetavantages-pensionandbenefits.gc.ca/cntctns-cntctus-eng.html)  to inform them of departure.

**↓**

**Management** **and Employee** to complete the [Separation Clearance Process](http://iservice.prv/eng/bpi/departure/separation_clearance_process/index.shtml).

**↓**

**Employee** to complete payment disposition form that will be provided by Compensation and send a completed copy to [Compensation Services](http://iservice.prv/eng/hr/cb/contact_us/regional_comp_services.shtml).

**↓**

**Compensation and Benefits** to process transactions to stop pay and issue appropriate payments.

**Note:** Payment will be issued once the completed separation clearance certificate and payment disposition form have been received in Compensation. May take 4 to 6 weeks from the departure date to issue payment.

***OPTION B (TRANSITION SUPPORT MEASURE) OR C(i) (EDUCATION ALLOWANCE AND RESIGNATION) SELECTED***

**Regional Resourcing Unit** to provide copy of confirmation of option letter to Compensation and Benefits via email.

**↓**

**Compensation and Benefits** to contact employee within 5 business days from receiving the letter.

**↓**

**Compensation and Benefits** to provide the employee with:

►letter outlining entitlement and impacts of departure on benefits;

►payment disposition form for severance pay and TSM (or amount equivalent to TSM);

►other forms required depending on specific employee situation.

**Note:** Package above will be provided at the latest the week prior to departure if Compensation and Benefits received the confirmation of option letter at least three weeks prior to the departure.

**↓**

**Employee** to contact the [Government of Canada Pension Center](http://pensionetavantages-pensionandbenefits.gc.ca/cntctns-cntctus-eng.html) to inform them of departure.

**↓**

**Management** **and Employee** to complete the [Separation Clearance Process](http://iservice.prv/eng/bpi/departure/separation_clearance_process/index.shtml).

**↓**

**Employee** to complete payment disposition form that will be provided by Compensation and send a completed copy to [Compensation Services](http://iservice.prv/eng/hr/cb/contact_us/regional_comp_services.shtml).

**↓**

**Compensation and Benefits** to process transactions to stop pay and issue appropriate payments.

**Note:** Payment will be issued once the completed separation clearance certificate and payment disposition form have been received in Compensation. May take 4 to 6 weeks from the departure date

***OPTION C(ii) (EDUCATION ALLOWANCE AND LWOP) SELECTED***

***BEGINNING OF LWOP***

**Regional Resourcing Unit** to provide copy of confirmation of option letter to Compensation and Benefits via email.

**↓**

**Compensation and Benefits** to contact employee within 5 business days from receiving the letter.

**↓**

**Compensation and Benefits** to provide the employee with:

►letter outlining entitlements and impacts of leave without pay on benefits;

►payment disposition form for the amount equivalent to the TSM;

►other forms required depending on specific employee situation.

**Note:** Package above will be provided at the latest the week prior to departure if Compensation and Benefits received the confirmation of option letter at least three weeks prior to the departure.

**↓**

**Employee** to complete [application for leave form](http://forms-formulaires.prv/eform99/index.cfm?App=Launch&FormID=1380&GroupID=144&LANG=E) using code 606 – other leave without pay, have it approved by the delegated authority and forward a copy to [Compensation Services](http://iservice.prv/eng/hr/cb/contact_us/regional_comp_services.shtml).

**↓**

**Management** **and Employee** to complete the [Separation Clearance Process](http://iservice.prv/eng/bpi/departure/separation_clearance_process/index.shtml).

**↓**

**Employee** to complete payment disposition form that will be provided by Compensation and returns a copy of the completed form to their [Compensation Services](http://iservice.prv/eng/hr/cb/contact_us/regional_comp_services.shtml).

**↓**

**Compensation and Benefits** to process transactions to stop pay and issue appropriate payments.

**Note:** Payment will be issued once the completed separation clearance certificate and payment disposition form have been received in Compensation. May take 4 to 6 weeks from the departure date to issue payment.

***END OF LWOP***

**Compensation and Benefits** to provide the employee with:

►letter outlining entitlements and impacts of departure on benefits;

►payment disposition form for severance pay;

►other forms required depending on specific employee situation.

**Note:** package above will be provided at the latest the week prior to departure if Compensation and Benefits received the confirmation of option letter at least three weeks prior to the departure.

**↓**

**Employee** to contact the [Government of Canada Pension Center](http://pensionetavantages-pensionandbenefits.gc.ca/cntctns-cntctus-eng.html) to inform them of departure.

**↓**

**Management** **and Employee** to complete the [Separation Clearance Process](http://iservice.prv/eng/bpi/departure/separation_clearance_process/index.shtml).

**↓**

**Employee** to complete payment disposition form that will be provided by Compensation and returns a copy of the completed form to their [Compensation services](http://iservice.prv/eng/hr/cb/contact_us/regional_comp_services.shtml).

**↓**

**Compensation and Benefits** to process transactions and issue appropriate payments.

**Note:** Payment will be issued once the completed separation clearance certificate and payment disposition form have been received in Compensation. May take 4 to 6 weeks from the departure date to issue payment.

**PROCESS FOR REIMBURSEMENT OF TUITION FEES, COSTS OF BOOKS AND MANDATORY EQUIPMENT**

**ELIGIBILITY**

Opting employees who have selected option C, the education allowance, may receive an amount varying from $7,000 to $11,000 depending on the applicable Workforce Adjustment agreement, for reimbursement of receipted expenses for tuition from a recognized learning institution and cost of books and mandatory equipment.

*Employees are encouraged to discuss potential reimbursement requests with their manager and to confirm approval* ***prior*** *to making financial commitments.*

**PROCESS**

Employees will need to pay their education expenses up front and then submit their receipts in order to get reimbursed. As an education expense is a taxable benefit, income tax will be deducted “at source”.

The Department will reimburse costs in the following manner:

***STEP (1) –*** Employee to gather required receipts and complete form [FIN2865B – Requisition for payment](http://forms-formulaires.prv/eform99/index.cfm?App=Launch&FormID=1330&GroupID=142&LANG=E).

The following fields are to be completed with these financial codes: Fund [B003]; General Ledger Account (GL) [533402].

**↓**

***STEP (2) –*** Employee’s manager to approve the request by signing Section 34 under the *Financial Administration Act (FAA).* The delegated financial authority is responsible to certify that the expenses claimed are related to the applicable Workforce Adjustment agreement. A copy of approved request to be provided to the employee for their records.

**↓**

***STEP (3) –*** Employee tosend the signed (and approved) request, along with all of the **original receipts**, to [Compensation Services](http://iservice.prv/eng/hr/cb/contact_us/regional_comp_services.shtml) for processing.

For more information about the WFA Education Allowance, consult the Frequently Asked Questions on the [Workforce Management Strategy](http://iservice.prv/eng/hr/wms/faq/faq_workforce_adjust.shtml#qa) and [Compensation and Benefits](http://iservice.prv/eng/hr/cb/topics/wfa/index.shtml#EducationAllowance) intranet sites.

**PENSION WAIVER – ELIGIBILITY AND ASSOCIATED PROCESS**

**ELIGIBILITY**

An employee covered by a Work Force Adjustment Agreement or Directive may be eligible for a waiver of the pension reduction if the deputy head or his or her delegate certifies that all of the following conditions are met:

* The employee has not received a reasonable job offer (i.e. an "opting" employee).
* The employee is between the age of 55 and 59 and has been employed in the public service for at least 10 years on the date he/she ceases employment.
* The employee has not received an educational allowance.

An alternate who chooses the Transition Support Measure (i.e. option B) and who meets the above-noted conditions may also be eligible for the pension waiver.

An executive covered by the *Directive on Career Transition for Executives* must also meet the following conditions:

* The employee has opted to leave the core public administration.
* The employee has not received a negotiated career transition agreement that included a lump- sum payment to offset his/her pension reduction.

**PROCESS**

Employee to contact Compensation and Benefits Services by sending an email to

[NA-COMP-REM-GD](mailto:NA-COMP-REM-GD@hrsdc-rhdcc.gc.ca)

to confirm years of service, if necessary

**↓**

Employee to complete form

[Pension Reduction Waiver Request (PWGSC - TPSGC 2429)](http://www.tpsgc-pwgsc.gc.ca/remuneration-compensation/form/html/2429-eng.html)

**↓**

Employee to obtain approval of delegated authority (ADM/EHSM)

(once obtained copy of approved request to be provided to employee)

**↓**

Employee to send approved request to the

[Government of Canada Pension Center](http://pensionetavantages-pensionandbenefits.gc.ca/cntctns-cntctus-eng.html) for required processing

***Note:*** *An employee who retires at or after age 60 with two or more years of pensionable service, or at or after age 55 with 30 or more years of pensionable service is entitled to an immediate annuity and may retire without penalty.*

**COUNSELLING SERVICE PROVISIONS FOR OPTING EMPLOYEES UNDER**

**WORKFORCE ADJUSTMENT AGREEMENTS**

**ELIGIBILITY**

All opting employees (employees not in receipt of a guarantee of a reasonable job offer from the Deputy Head) are entitled to up to $600.00 (including GST or HST) towards counselling services in respect of their potential re-employment or retirement. Such counselling services may include financial, and job placement counselling services.

The Department will reimburse costs in the following manner:

1. The reimbursement of counselling services is available to any employee who has been advised in writing of his/her opting status.
2. Reimbursement claims will only be accepted for counselling fees incurred up until the employee’s departure date.

**PROCESS**

Opting employees are required to pay the service provider directly for the service up front and apply for the reimbursement afterwards. Please note that these payments for counselling services in respect of the potential re-employment or retirement of the employee are non-taxable.

On completion of counselling, the employee is to complete form [FIN2865B – Request for reimbursement](http://forms-formulaires.prv/eform99/index.cfm?App=Launch&FormID=1330&GroupID=142&LANG=E) and obtain approval of delegated authority (Level 3 - e.g. Director General or Regional Executive Director). Fund B003 and General Ledger Account (GL) 533599 are to be provided as part of the financial coding indicated on the completed Request for reimbursement form. Delegated authority is responsible to certify that the expenses claimed are related to the applicable Workforce Adjustment agreement.

Payments for counselling services for re-employment or retirement, which are non-taxable are to be issued via the departmental finance office.

Once the expenses have been approved, the employee is to provide the signed form and original receipt to the attention of:

|  |  |
| --- | --- |
| Atlantic Region | **Denise Mazerolle or Sébastien Cormier**  [ATL-ACCOUNTING\_OPERATIONS-OPERATIONS\_COMPTABLES-GD@hrsdc-rhdcc.gc.ca](mailto:ATL-ACCOUNTING_OPERATIONS-OPERATIONS_COMPTABLES-GD@hrsdc-rhdcc.gc.ca) |
| Quebec Region | **François Bouchart d’Orval**  [francois.bouchartdorval@hrsdc-rhdcc.gc.ca](mailto:francois.bouchartdorval@hrsdc-rhdcc.gc.ca) |
| National Capital Region | **Stéfane Vandegraaf**  140 Promenade du Portage  Place du Portage, Phase IV  Gatineau, QC K1A 0J9  Mailstop : 117  [NC-COMPTESPAYABLES-AC-NHQ-ACCOUNTSPAYABLES-GD@hrdc-drhc.net](mailto:NC-COMPTESPAYABLES-AC-NHQ-ACCOUNTSPAYABLES-GD@hrdc-drhc.net) |
| Ontario Region | **Sergio Jorge**  [sergio.jorge@hrsdc-rhdcc.gc.ca](mailto:sergio.jorge@hrsdc-rhdcc.gc.ca) |
| Western Region | **Laura Nordine**  [laura.nordine@hrsdc-rhdcc.gc.ca](mailto:laura.nordine@hrsdc-rhdcc.gc.ca) |

Please note that only original receipts are acceptable and they must be made out in the employee’s name. Employees should retain a copy of the receipt for their records.

For additional information regarding Work Force Adjustment, please consult the [Frequently Asked Questions](http://iservice.prv/eng/hr/cb/topics/wfa/index.shtml#FAQ) on the Compensation and Benefits website.