

## **Guidelines for the Mortality Experience Study of the Committee on Canadian Pension Mortality Experience**

Thank you from the Committee on Canadian Pension Mortality Experience (CCPME) of the Canadian Institute of Actuaries (CIA) for participating in the Canadian Pension Mortality Experience Study data call. MIB is acting as data compiler for this study and can answer any questions you may have regarding the data call. The record format for this data call can be found at [http://www.mibsolutions.com/industry\\_studies/](http://www.mibsolutions.com/industry_studies/).

It is the objective of the CCPME to study pension experience between 1999 and 2008, inclusive. Plans that can supply years of experience prior to 1999 are encouraged to do so. Plans that can only supply a limited number of years are requested to supply their data with as many years as possible.

This specification refers to both the active and retired plan members. If you can only send either active or retired data, please send the data that you do have.

**Plan ID.** This is an administrator supplied unique number for all pension plans submitted. This should be a unique number instead of an actual name to promote confidentiality. MIB uses this code to identify individual pension plans and report on them separately.

**Year.** This is the year, either calendar year or plan year, of data being reported in this file. Please use the year-end status for all fields. Please submit a separate file or database for each year of experience from 1999 through 2008 or before.

Please inform MIB whether your data is submitted on a calendar year or a plan year basis. If submitting in plan year, please inform MIB about the beginning date of the plan year.

**Member ID.** This is an administrator supplied unique number representing a specific member of a specific plan. This should be a unique non-identifiable code to promote confidentiality.

**Sex.** The sex should be the gender of either the active employee, the pensioner receiving the payments or, when appropriate, the beneficiary receiving payments. This study considers each gender to be defined as:

- 0 = Unknown
- 1 = Male
- 2 = Female

**Member Date of Birth.** This study requires the Date of Birth of the member and should be in a DDMMYYYY format.

**Date of Hire.** For active members (Status = 1, 2, 4 or 7), this is the date a member is hired by the company participating in this plan, in DDMMYYYY format.

**Date of Retirement.** For members receiving retirement benefits (Status = 3, 5, 6 or 7) this is the date when the member retired and should be before the end of the Observation Year. This date should be coded in DDMMYYYY format.

**Date of Exit.** For terminated members only (Status = 2), this date is when a member has terminated for reasons other than death or retirement. Please submit in DDMMYYYY format.

**Date of Death.** Upon the death of a member, please submit the date of death in DDMMYYYY format, but leave blank in other cases.

**Status.** The Status is coded for all members showing their status at the end of the Year.

- 1 = Active employee
- 2 = Terminated employee
- 3 = Disabled in pay
- 4 = Disabled not in pay
- 5 = Retiree
- 6 = Beneficiary in pay
- 7 = Deceased

**Salary.** For active members (Status = 1 or 4), if a member has received salary, enter that amount. For Terminated Active Members (Status = 2), enter the last annual salary. If coding Salary, Total Monthly Pension In Pay should be left blank.

**Total Monthly Pension In Pay.** For members receiving retirement benefits (Status = 3, 5 or 6) or deceased pensioner (Status = 7), this is the monthly pension amount in whole dollars. If coding Total Monthly Pension In Pay, Salary should be left blank.

**Beneficiary Birth Date.** For the beneficiaries of deceased members, this study requires the date of birth of the beneficiary when that person is collecting the pension, and should be in a DDMMYYYY format.

**Beneficiary Benefit Start Date.** For the beneficiaries of retired members, this is the date that the beneficiary started to receive the pension.

**Form of Benefit.** For retired members, Form of Benefit is defined as:

- 0 = Unknown
- 1 = Single life
- 2 = Single life with guarantee
- 3 = Joint & survivor
- 4 = Joint & survivor with guarantee
- 5 = Other

If the member's benefit is known to be either Single Life or Joint Life, but unknown whether there are guarantees, please code the case as Single Life or Joint & Survivor, as appropriate.

**Workforce Characteristics.** Workforce Characteristics is defined as:

- 0 = Unknown
- 1 = Non-union salaried
- 2 = Non-union hourly
- 3 = Union

If the member's Workforce Characteristics have changed at any point, please code the final Salary Status at the end of the observation year, termination or death.

**Eligible for Retiree Health Benefits.** The values for Eligible for Retiree Health Benefits are:

- 1 = Yes, the member is eligible for health benefits
- 2 = No, the member is not eligible for health benefits

## **Recommended Coding Practices**

### **Joint & Survivor records**

#### **Death of Member**

Code 2 records, one for death of member and one for beneficiary.

- Death of Member
  - Code Status = 7.
  - Code Date of Death of member.
  - Code Gender and Date of Birth of member.
- Beneficiary
  - Code Status = 6.
  - Code Beneficiary Benefit Start Date as appropriate.
  - Code Gender and Beneficiary Birth Date of beneficiary.