

CIA CCMPE Study	Version 1.1
Canadian Pension Plan Study Plan ID & Characteristics FAQ	Date: 01/12/2010

Canadian Pension Plan Study Plan ID & Characteristics FAQ

What is the Plan ID and how is it assigned?

The Plan ID is a unique code assigned by those organizations or companies submitting the pension data. Data for more than one Plan may be submitted in a single file, but the Plan ID needs to be unique for each Plan. Multi-employer plans will use a single Plan ID for the whole plan.

What is the Member ID and how is it assigned?

The Member ID is also a unique code assigned by the organizations or companies submitting the pension data but the Member ID refers to the individual members of the Plan, either active or retired. Both Plan ID and Member ID are required and should hold different values.

What if another Submitter uses the same Plan ID I use?

MIB will be assigning a unique Submitter Code to each organization or company submitting data. Internally, the Submitter Code and Plan ID will be combined to create a unique code. The Submitter Code does not need to be included in the data record as MIB will add it to the record.

Do I need to know my Submitter Code?

Your Submitter Code will be communicated to you when you receive your Validation Reports and will be used to label those reports.

Do I need to let MIB know what my Plan ID's are?

MIB will be sending you a Plan Characteristics Survey. You can either fill it in as is, fill it in on-line or someone from MIB will contact you to discuss your answers on the phone.

What information will you be looking for in the Plan Survey?

The questions on this survey will be used to define the characteristics of each plan included in your submission to the study. It will be looking for information such as the industry covered by the Plan, the provinces where the members live, number of members in the Plan, characteristics of the Plan and the age ranges defined for retirement.

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Why are you looking for the information on the Plan Characteristics Survey?

These plan characteristics will contribute important information about the characteristics of the plan members included in the study. For example, such characteristics will allow the committee to compare the mortality experience of plans comprised of miners to those of teachers or compare the proportion of the study population between the provinces.

What if my Plan covers people in more than one industry or province?

There are 3 ways to deal with this situation:

- You can break-up a single plan into multiple plans for the purpose of reporting your data for this study, such as making Plan ID 'ABC' into Plan ID's 'ABC-ON' and 'ABC-BC' if the plan covers members living in both provinces. Plan members residing in Ontario would be reported with a Plan ID of "ABC-ON" so as to differentiate the mortality of this group from that of the plan members residing in BC. Most of the reports you will be receiving will allow you to review your results by each Plan ID included, and by all Plans combined.
- You can add industry or province information to the end of each Plan detail record starting in column 102. For example, you could specify the provinces for Plan 'ABC' by placing either 'ON' or 'BC' in columns 102-103. Please inform us if you choose this method, so we can correctly process your submission with a minimum of confusion.
- On the survey, you can report the relative proportion of each industry or province by specifying the ratios on the survey, such as noting that approximately 60% of the members are residents of Ontario and 40% are residents of British Columbia.

When do I need to report my Plan Survey to MIB?

While we can process your data without the survey information, we would prefer to receive the Plan Survey before or with your data. If you would prefer to review your survey with MIB, please contact Jan Palmbach at jpalmbach@mib.com or 781-751-6128.

What about Data Security and Confidentiality?

MIB has set the insurance industry standard for confidentiality of individually identifiable medical information. Data contributors that participate in an experience study by submitting data to MIB Solutions have a strong assurance that their data will not be disclosed in any individually identifiable form. Only MIB will have access to individual contributor data or identifiable contributor results. Data contributions may only be used for the purposes for which such data was originally submitted, including procedures which validate data and results, and quality assurance procedures that verify conformance of data to defined requirements. MIB

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procedures conform to all CIA confidentiality policies. As in other engagements, MIB Solutions will work with study participants to address their security needs and concerns.

Who can I contact to obtain the data specifications for reporting participant mortality experience?

You can contact Jan Palmbach of MIB Solutions, or you can download the study documentation from the MIB Solutions website at http://www.mibsolutions.com/cia_pension_study/.

Who can I contact with questions about my Plan ID or Survey?

You can contact Jan Palmbach of MIB Solutions with any question you have about assigning your Plan IDs or filling out the Plan Survey.

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