

Notice of Termination



SHEPP
People. Pensions. Results.

FORM ID: 010 CASE ID: _____

1 Personal Information

☐ First Notice ☐ Amendment to original dated (dd/mm/yyyy) _____

Member Information

First Name _____ Middle _____ Last Name _____

SIN _____ Date of Birth (dd/mm/yyyy) _____ Member ID# _____

Address and Contact Information

Address _____ City _____

Province _____ Postal Code _____ Country _____

Phone _____ Email _____

2 Employment Details

Employer Number _____ Employer Name _____

Termination Details

Reason for terminating Plan membership: ☐ Retirement ☐ Termination ☐ Death

Date membership ended (dd/mm/yyyy) _____ Final payroll month (dd/mm/yyyy) _____

Annual full-time hours _____

Payroll Information See page 2 for instructions.	Pensionable Earnings	Member Required Contributions	Pensionable Hours	Calendar Hours
Final Payroll Month				

Was the member receiving 3sHealth disability benefits on the date of termination? ☐ Yes ☐ No

Is the member going to work for another SHEPP employer? ☐ Yes ☐ No

If yes, provide Employer Name _____

Comments:

3 Authorisation

Employer Authorisation

Contact Name _____

Title _____

Phone _____ Fax _____

Email _____

Contact Signature

Date (dd/mm/yyyy)

Instructions

- ✓ Submit this form to SHEPP
- ✓ Provide a copy to the member
- ✓ Keep a copy for your files

SHEPP recognises and respects the importance of your privacy. Personal information collected is used for the purpose of administering your benefits under the Plan.

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Notice of Termination of Plan Membership Instructions

1. Original or Amended Notice

Indicate whether this is a first notice of termination or an amended notice. If an amended notice, provide the date of the first notice.

2. Member Record

Provide the member's name, SIN, date of birth and contact information.

3. Employment Details

Definitions:

Final Payroll Month: The last payroll month in which the employee receives pensionable earnings.

Date Membership Ended: The member's date of retirement, termination or death.

Example One: Notice of Termination with 'spill over'

- Mary retired on January 31, 2019
- The final payroll cut-off day in January 2019 was January 27
- Mary will get paid for hours worked from January 28 to 31 in February 2019

Enter the following under Employment Details:

1. **Date Membership Ended:** January 31, 2019
2. **Final Payroll Month:** February 2019
3. **Annual Full-Time Hours:** Pensionable hours in the payroll year if member was full-time and worked the full year.
4. Enter **Pensionable Earnings/Member Required Contributions/Pensionable Hours** to be paid for **Final Payroll Month** of February (January 28 - February 24.)

Example Two: Notice of Termination with no 'spill over'

- Mary quit her job on February 17, 2019
- The final payroll cutoff day in February 2019 was February 24
- Mary's final payroll month is February 2019.

Enter the following under Employment Details:

1. **Date Membership Ended:** February 17, 2019
2. **Final Payroll Month:** February 2019
3. **Annual Full-Time Hours:** Pensionable hours in the payroll year if member was full-time and worked the full year.
4. Enter **Pensionable Earnings/Member Required Contributions/Pensionable Hours** to be paid in **Final Payroll Month** of February (January 28 - February 24).

Example Three: Member on Leave before Termination (i.e. so final payroll month was a year ago and term date is present date)

- Mary went on an LOA beginning December 17, 2018
- Mary's LOA was to end on December 17, 2019
- Instead, she resigned effective December 15, 2019

Enter the following under Employment Details:

1. **Date Membership Ended:** December 15, 2019
 2. **Final Payroll Month:** December 2018
 3. **Annual Full-Time Hours:** Pensionable hours in the payroll year if member was full-time and worked the full year
- * Please leave the **Payroll Information** blank and SHEPP will use the final payroll data that was downloaded from the ADV/MDR back in December 2018.

Example Four: Casual did not work before termination

- Mary quit her job on March 20, 2019
- Mary hasn't worked since January 19, 2019
- Mary's final payroll month is January 2019

Enter the following under Employment Details:

1. **Date Membership Ended:** March 20, 2019
 2. **Final Payroll Month:** January 2019
 3. **Annual Full-Time Hours:** Pensionable hours in the payroll year if member was full-time and worked the full year.
- *Please leave the **Payroll Information** blank and SHEPP will use the final payroll data that was downloaded from the ADV/MDR in January 2019.

Member Grieves Termination

In the event a grievance is filed contesting a member's termination, the employer must notify SHEPP via email of the termination and the fact that it is subject of a grievance. SHEPP will terminate the member's record and place the benefit calculation and payment in abeyance pending further written notification from the employer of the resolution of the grievance.

4. Authorisation

Provide your contact information, sign and date the form.