

# Drainage Transition to EPCOR Update

July 20, 2017



*This newsletter is the primary source for updates on the transition. Look for it every Thursday.*

## Key Messages in this Edition

- Transferring employees need to use any remaining Health Care Spending Account credits by August 31, 2017.
- Employees will select their EPCOR benefit options between September 1 and October 1, 2017.
- EPCOR will provide detailed, after-hours benefits information sessions to help you learn the details of the program.
- Email and mobile devices will now be converted to EPCOR on September 4, 2017 and not when your PC/laptop is converted.
- For high volume email users, only email sent or received from January 1, 2015 onward will move with you to your EPCOR email account. For low volume email users, no emails will move with you to EPCOR.
- High volume email users must clean their email of any non-Drainage or HR-related records by July 28, 2017. All users must clean their Google Drive by August 25, 2017.

## Taking Action on Health Care Spending Accounts

All transferring employees, whether union, management or out-of-scope, will be covered under EPCOR's Advantage Benefits program effective September 1, 2017. This means that coverage under the City's benefit plans, including the Health Care Spending Account benefit, shall cease effective the end of day on August 31.

**Transferring employees need to use any remaining Health Care Spending Account (HCSA) credits by August 31, 2017.** Here's what you need to know:

- Your participation in the City's Health Care Spending Account benefit will cease on August 31, 2017. This means that all expenses/receipts (e.g. for the purchase of new eyeglasses) that you wish to submit for reimbursement must be incurred/dated no later than August 31, 2017.
- Dental treatments must be completed by August 31, 2017 and claims need to be received within 90 days.
- Major Medical expense claims need to be received by April 30, 2018.
- The full amount of your HCSA is available to you; it is not pro-rated even though the transfer occurs part way through the benefits year.
- Any unused credits left in your HCSA will be forfeited effective September 1, 2017.

If you do not have specific items to claim against the HCSA, the City encourages you to claim Dental and Major Medical plan employee premiums deducted from your paycheques between December 11, 2016 (start of pay period 26) and August 31 (pay period 18). Please use your last pay advice from the City (pay date September 12) as it includes your final year-to-date premium totals.

- A sample claim form is attached with instructions on how to claim reimbursement of your Major Medical and Dental premiums. You must attach a copy of your pay advice, highlighting the total premiums paid that you are claiming.

- You are encouraged to submit your claim for reimbursement of premiums as soon as possible after the transfer date, but it must be received no later than April 30, 2018. Claims received after this date will not be eligible for reimbursement.

Look for the Alberta Blue Cross Health Care Spending Account Claim form at:

[https://onecity.edmonton.ca/working\\_for\\_the\\_city/working-for-the-city-forms-requests.aspx](https://onecity.edmonton.ca/working_for_the_city/working-for-the-city-forms-requests.aspx). Submit your claim form online through the Alberta Blue Cross website - [www.ab.bluecross.ca](http://www.ab.bluecross.ca).

You can view your account online at: [www.ab.bluecross.ca](http://www.ab.bluecross.ca) on the “Plan member, Group, Sign-in” page. If you have questions, you can call Blue Cross at 780-498-8000 or 1-800-661-6995. You can also contact the City’s Benefits Team through Inside Information at 780-944-4311.

## EPCOR’s Advantage Benefits

All transferring permanent employees, whether union, management or out-of-scope, will be covered under EPCOR’s Advantage Benefits program, effective September 1, 2017. There are a number of different components to EPCOR’s benefits and learning all of the details will take some time. This week, the focus will be on EPCOR’s Advantage Benefits program, which provides Extended Health (medical), Dental, Basic and Optional Life Insurance, Short Term Disability, Long Term Disability and Health Spending Account options.

Benefits claims are administered through Sun Life and the Advantage Benefits plan is flexible to offer employees choice in coverage to best suit their needs. EPCOR pays for core benefits, and then provides employees with Flex Credits, which they can allocate to higher levels of Extended Health and Dental options, allocate to a Health Spending Account or receive as taxable cash on each biweekly pay. Flex credits for the current benefit year (July 1, 2017 – June 30, 2018), are:

Full Time	Part Time 30-39 hrs/week	Part Time 20-29 hrs/week
<b>\$1,538.16*</b>	<b>\$1,153.62*</b>	<b>\$769.08*</b>

\*Note: Flex credits and costs will be pro-rated to the transfer date of September 1, 2017.

Each additional Extended Health or Dental benefit level (higher than Essentials) has a cost associated with it.

- Essentials level (EPCOR paid – no flex credits required)
- Comprehensive level (use flex credits)
- Enhanced level (use flex credits)

For Extended Health & Dental Coverage, employees have choices to cover:

- Employee Only
- Employee + One
- Employee + Family
- Opt-out of coverage (receive more flex credits)

For example, if you are covering a family of four and wish to choose the “Comprehensive” level of Extended Health benefits, the annual cost is \$790.92. Your flex credits can be used to cover that amount. If you are full time, you would have \$747.24 remaining in flex credits (Note: example is for a full benefit year: \$1,538.16 – \$790.92). You could use remaining Flex Credits to purchase a higher level of Dental benefits, allocate to a Health Spending Account, or take as taxable cash on your bi-weekly pay. If the cost of your choices exceeds your Flex Credits, the extra amount will be deducted from your bi-weekly pay.

Under Advantage Benefits, employees have the option to coordinate benefits with a spouse and choose coverage that fits their combined coverage needs. For example, if your spouse has 50% Health and Dental coverage through their employer, you could select the EPCOR paid Essentials Extended Health and Dental and allocate your whole flex credit allotment to your Health Spending Account or take as taxable bi-weekly cash.

You will choose your benefit options during the Enrollment Period that will run from September 1 to October 1, 2017 (at 11:59pm), giving you 31 calendar days to enroll. Enrollment is done online through EPCOR's enrollment system called MyEPCOR. You will have the opportunity to attend a benefit enrollment clinic which will provide in-person assistance to enroll. If you do not enroll online during this period, you will receive the EPCOR-paid core benefits only, with the option to change at the next annual enrollment for July 1, 2018 or a qualifying life event. The EPCOR-paid core benefits are:

- Essentials Extended Health and Dental (50% coverage) – Only the employee is covered
- No Health Spending Account
- Flex Credits would be paid out to you on your bi-weekly pay
- Long Term Disability (LTD) Essentials (66 2/3% of pay)

### **Learning More**

There are many options to choose from in the Advantage Benefits program. This article is a first overview of these benefits, which will take time to understand. To help you, three documents have been published on onecity and printed for common areas at work sites.

- An overview of Advantage Benefits showing what EPCOR provides as a core benefit and what your options are
- The Premium Rate Table showing the cost of each optional level
- The full Advantage Benefits Handbook, showing the details of what is covered under the program and how it all works

Detailed benefits information sessions will be scheduled to walk through the program face-to-face with employees and to answer questions. These after-hours sessions are being scheduled for times closer to the start of your benefits enrollment period on September 1.

Each employee will also receive a printed copy of all benefits related documents, including the ones listed above, as part of the "Transition Readiness" binders to be distributed in mid-August.

### **Questions**

As there are so many different options and unique personal situations, it is not possible to answer specific questions through the normal transition email box. Please note that although the EPCOR Benefits Support email is printed on the Advantage Benefits brochure, you will not be able to get support through that email until you become an EPCOR employee on September 1.

To get your questions answered, watch for the schedule of benefits information sessions, and make plans to attend a session.

## **A Change in Email and Mobile Device Conversion**

The Transition Team has made an important change to how email and mobile devices will be converted to EPCOR. Instead of being converted on the same weekend as your PC/laptop replacement, all email and mobile devices will be converted on the weekend of September 2-4 for all employees.

This new approach eliminates many of the difficulties in managing meeting invitations, meeting room bookings and distribution lists that would have occurred by having some Drainage employees converted, while others were still on City email.

With this new approach, only email sent or received from January 1, 2015 onward will move with you to your EPCOR email account. In an effort to ensure only appropriate emails are in EPCOR's possession, older email will not be converted. Low volume email users will not have email transferred to EPCOR. Every transferring employee will receive an email this week informing them which group they are in. For the most part, field employees are considered low volume email users. Keep in mind that your current emails belong to the City of Edmonton, and employees must not

save or manually transfer emails to EPCOR. Employees identified as high volume email users must complete their email cleanup, as per the instructions in the next article, by July 28.

On Monday, September 4, all mobile devices will be wiped by the City of Edmonton, and all email access from any device will be cut off. Special processes will be developed for any 24/7 operation that weekend. On September 5, there will be some manual activities required from mobile device users to set up their EPCOR email on their device. There will also be manual activities to set up email on your PC or laptop. We recommend that you do not book any meetings for the morning of September 5 to allow yourself time to complete your email and mobile device setup.

On-site support will be available to assist you. Since all mobile users will need to do the setup at the same time, support priority will be given to those people who need to get into the field quickly. If you use your personal phone to access email, you will need to initiate a request on September 5 to allow access to your EPCOR email. This process may take a few days.

After September 4, you will not have any further access to your edmonton.ca email, and your emails will not be forwarded. The City will place an auto-reply message on your edmonton.ca mailbox informing people of your new email address. If you use your edmonton.ca email as your user account with any outside organizations (e.g. Apple ID, Industry memberships), you should ensure you remind yourself of passwords, as you will be unable to recover passwords by email after September 1.

As with the PC/laptop replacement, there will be pre-conversion and post-conversion checklists to assist you with the right activities. There will be on-site support at all major sites to provide assistance.

## Email and Document Cleanup Reminders

Cleaning up your email and Google drives will ensure that EPCOR receives the information it needs, the City keeps records it needs, and sensitive and confidential information is protected. The City is asking for your help in reviewing and cleaning up these items.

- Email cleanup must be completed by **July 28, 2017**. As only email from January 1, 2015 onward is being converted for high volume email users, please clean up emails dated on or after that date.
- Google drive cleanup needs to be completed by **August 25, 2017**.

Review the contents of your email and Google drive for document decisions, activities, and operations not pertaining to drainage business. Drainage-related records should stay with you when you move to EPCOR, but any records regarding other City business areas need to remain in the custody of the City.

A shared folder has been created to store all documents that need to remain with the City. You can access it through the following the instructions:

1. Open Internet Explorer
2. Copy the file location [\\cepf1e1\DoNotMoveToEpcor](#)
3. Paste the file location in the Explorer browser bar, hit enter
4. Find your user ID (3+3)
5. Transfer any documents that should not transfer to EPCOR to your assigned folder
6. Delete the records from your email or Google Drive

If you have your own personal information stored in the City's system (e.g. copies of your performance appraisals), and know it is a duplicate of a record that has been placed on your central personnel files, delete the duplicate copy. All original appraisals should have been copied to your personnel file that will transfer to EPCOR. Employees may choose to keep a paper copy for their own records.

If you have any personal HR-related information about employees that you will still be supervising after September 1, you may keep that information. All other HR-related information about other employees should be deleted.

If you have any questions, please contact your Director. Any questions related to HR information may be forwarded to [russell.smith@edmonton.ca](mailto:russell.smith@edmonton.ca).

## Leadership Profile: Richard Brown

If you ask Richard Brown what he's looking forward to when Drainage transitions to EPCOR, it's how this new team will play an important role in building EPCOR's reputation as the go-to organization for all things water.

Richard is currently the Senior Manager for EPCOR's Industrial and Major Project's group, focusing on the development and delivery of EPCOR's alternative service delivery initiatives across Canada and the United States. He will become the Director of Drainage Planning in September.

Richard has more than 17 years of experience delivering major water and wastewater projects across North America and the United Kingdom. He has an engineering and operational background with a focus on alternate project delivery. He led the design and construction of Canada's largest wastewater public-private partnership, the Regina Wastewater Treatment Plant, for EPCOR. He has managed multiple new build and upgrade projects for Thames Water, Severn Trent Water and the Ministry of Defence in the UK. Richard's operational background includes team lead roles overseeing the UK's first thermal hydrolysis process system for Thames Water and the implementation of Reliability Centered Maintenance (RCM) across Severn Trent Water, UK.

Richard has a Master of Engineering degree (mechanical engineering) and holds several designations. He is a Professional Engineer (The Association of Professional Engineers and Geoscientists of Alberta), a Chartered Engineer (The Engineering Council UK), a Fellow of Institution of Mechanical Engineers, and a Project Management Professional (Project Management Institute). He is also a member of both the Design Build Institute of America and the International Desalination Association.

### **Expertise in Edmonton and beyond**

Richard noted that when EPCOR works on projects in other municipalities, the company provides its expertise and learns a lot from these experiences. He is looking forward to this exchange of expertise with Drainage to the benefit of the City of Edmonton.

"EPCOR is a forward-looking company that will seek opportunities outside of Edmonton to both share and grow our expertise," said Richard. "Having Drainage join the EPCOR team gives us more bench strength when looking for opportunities to work with other municipalities. We will be able to provide the full water cycle."

A lot of Richard's work with EPCOR has been outward facing — to bid on and then deliver high quality work in other regions. Richard felt fortunate to be part of the team delivering the 30-year Regina wastewater partnership project and to be able to showcase EPCOR's expertise in another province.

Why seek projects outside of Edmonton? As Richard pointed out, "EPCOR is seen as a leader in Canada and we have a mandate to grow and provide a good return on the City of Edmonton's investment. EPCOR can provide significant value to other municipalities and industries by applying our knowledge and finding innovative solutions to their complex water challenges."

### **Finding support at EPCOR**

Richard is no stranger to change and has some idea how Drainage employees are feeling as they prepare to transition over to EPCOR. Coming from the UK to Edmonton five years ago was a culture

shift — a new country and a new company. What he found was that EPCOR people were incredibly welcoming and willing to help him learn about the business.

“No question was a stupid question,” remembered Richard. “People spent time helping me settle into the job, but also into the city. I really felt supported.”

He is excited about his new role and looks forward to welcoming Drainage employees into the EPCOR family.

### **Speaking of family**

When he's not at work, Richard spends a lot of time watching ringette, gymnastics and any other sport his three young daughters are involved in. Something people may not know is that he has played rugby at an international level. If he finds any other free time, he has a dream to build a kit car from the ground up.

## More information and responses to your questions

You can find all information related to the EPCOR transfer at [onecity.edmonton.ca/EPCOR](https://onecity.edmonton.ca/EPCOR).

If you have more questions about the project, review these [frequently asked questions](#). If you can't find the answer to your question, email [drainage.transition@edmonton.ca](mailto:drainage.transition@edmonton.ca). To get your benefits questions answered, watch for the schedule of benefits information session and make plans to attend a session.



# HEALTH SPENDING ACCOUNT (HSA) CLAIM

Please refer to the back of this form for instructions on how to complete

10009 108 ST NW, Edmonton, Alberta T5J 3C5

Use this form to submit expenses to your Health Spending Account (HSA) only. Expenses submitted on this form will not be processed under your core health and dental plans. If you wish to submit them first through your core health and dental plan, please use the appropriate Alberta Blue Cross health or dental claim form. Any unpaid amounts automatically flow through to your HSA for consideration.

- An HSA may be used to claim health or dental related costs incurred by you and/or your eligible dependants. These expenses must meet the Canada Revenue Agency's (CRA) tax deduction guidelines for eligible expenses. Please read the accompanying instructions for important information about your HSA claim.
- When claiming expenses not eligible under a core health and dental plan, it is your responsibility to determine whether your medical expenses are allowable under the CRA's rules and guidelines.

1. Member information (refer to your ID card)				
Last name	SMITH		First name	JOHN
Address			Alberta Blue Cross ID number	
9600-69 street			88888888	
City	Province	Postal code	Group number	
Edmonton	AB.	T6B 1R0	35	
Telephone number				
			780-466-6666	

NOTE: Expenses submitted on this form will not be processed under your core health and dental plans. If you wish to submit them first through your core health and dental plan, please use the appropriate Alberta Blue Cross health or dental claim form. Any unpaid amounts automatically flow through to your HSA for consideration.

2. Claim submission details (remember to attach supporting receipts and/or statements from other benefits carriers)						
Expense description	Date of service			Patient's first name (add surname if different than member)	Relationship to member	Amount claimed
Health & Dental	2016	12	11 to	John	Self	914.04
Premiums	2017	08	31			
	YYYY	MM	DD			
	YYYY	MM	DD			
	YYYY	MM	DD			
	YYYY	MM	DD			
	YYYY	MM	DD			
	YYYY	MM	DD			
	YYYY	MM	DD			
NOTE: If additional space is required, please fill out an additional claim form.					Enter total claim amount	\$914.04

**ATTACH PAYSTUB WITH THIS FORM**

3. Employee consent and declaration	
<p>I certify that the information contained in this and other documents supporting this claim is complete and true. By submitting this form, I understand that I am requesting payment be made for the above expenses in accordance with my HSA. I accept full responsibility to ensure that all expenses incurred and submitted for payment from my HSA are allowable medical expenses as defined under the Income Tax Act. If unsure please visit the CRA's web site <a href="http://www.cra-arc.gc.ca/medical">www.cra-arc.gc.ca/medical</a> and/or call the CRA's Individual income tax enquiry line at 1-800-959-8281 for further information.</p> <p>I certify that the individuals for whom this claim is made are eligible under my HSA and/or may include others defined as eligible dependants by the Income Tax Act (those who were financially dependent on me during the last taxation year and for whom I can claim a medical expense tax credit).</p>	<p>I understand that the personal information provided herein, as well as any other personal information currently held by Alberta Blue Cross about me and eligible dependants will be used to determine eligibility for this benefit, verify, assess and pay claims, and administer my HSA. I certify that I am authorized by my spouse and/or dependants to disclose and receive information about them that is used for these purposes. I hereby acknowledge and agree that the personal information may be exchanged between Alberta Blue Cross and a health care professional, practitioner, institution or health benefits provider or insurer when needed for a purpose stated above.</p> <p>I understand that the personal information will be kept confidential and secure. I understand that I may revoke this consent at any time and acknowledge that should I do so, this claim may not be considered. I understand why the personal information is needed and am aware of the risks and benefits of consenting or refusing to consent to its disclosure. I have read and understood this employee consent and declaration.</p>
Signature of member (required)	Date
<i>J Smith</i>	2017 09 15
This consent is obtained in accordance with Alberta's Health Information Act, Alberta's Personal Information Protection Act and the federal Personal Information Protection and Electronic Documents Act.	

\*The Blue Cross symbol and name are registered marks of the Canadian Association of Blue Cross Plans, an association of independent Blue Cross plans. Licensed to ABC Benefits Corporation for use in operating the Alberta Blue Cross Plan. \*† Blue Shield is a registered trade-mark of the Blue Cross Blue Shield Association. ABC 55062\30676 2016/09





# Drainage Transition Frequently Asked Questions

## Updated: July 20, 2017

### New This Week

**NEW** **What happens to fitness memberships paid through payroll deductions after September 1 when the payroll deductions stop?**

Employees need to contact their places of membership to have all payments changed to a personal payment plan rather than via payroll deduction after August 31.

**NEW** **How will penalties for cancelling payroll deductions be handled (e.g. rec centre)?**

Employees wishing to continue payments for personal fitness memberships must make arrangements with each facility/vendor privately. If you contact establishments in advance and ensure continuity of payment, there should be no reason for penalties.

**NEW** **Will I have to restart EI/ CPP Payments?**

No, as a successor employer, EPCOR will receive payroll information from the City and continue with 2017 deductions as required. There will not be a re-start of EI/ CPP deductions.

**NEW** **Does EPCOR have any flex time or are employees expected to start work at a certain time?**

Flex time arrangements are addressed in respective Collective Agreements for unionized employees. Out-of-scope and management employees can work with their managers with respect to their applicable hours of work.

**NEW** **Will the transfer affect when I get my next step increase?**

In the transition discussions with CSU 52, the parties agreed that increment or step increases after the transfer date of September 1, 2017, will be administered according to Article 7 of the EPCOR/CSU 52 collective agreement. EPCOR has committed to recognize and honour the salary review dates that have been provided by the City of Edmonton. However, similar to the provisions in the City of Edmonton collective agreement, eligibility to move to the next increment step is still dependent on satisfactory performance. Assuming an employee has achieved satisfactory performance, and the Manager approves a step increase, it will be processed according to the salary review date provided by the City of Edmonton.

**NEW** **Will a current LAPP buyback through payroll deduction be affected?**

Current LAPP buybacks will not be affected and will continue through the EPCOR payroll system.

**NEW** **Does EPCOR pay management to be on standby list?**

Yes, depending on the operational area, (e.g. Operations, Maintenance, Safety), and the EPCOR Business Unit (e.g. Water Distribution & Transmission, Electricity Operations) identified Managers are eligible to receive standby pay if they are designated and approved in advance by their Manager, and are required to be available for work during off hours. The specifics of the compensation and other requirements are addressed in guidelines and procedures unique to each operational area and Business Unit.

**NEW** **Will we get our vacation right away or do we earn it like we do at the City?**

EPCOR provides pro-rated vacation entitlement at the start of employment and full vacation entitlement on January 1st of each year. Each employee's accrued vacation balance as of August 31, 2017 will be transferred from the City to EPCOR following final pay with the City.



## Drainage Transition Frequently Asked Questions Updated: July 20, 2017

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If an employee leaves EPCOR before the end of the year, the vacation entitlement would be pro-rated based on the remaining days from the termination date to the end of the year. Any unearned vacation would be subtracted from your vacation balance and any outstanding amount would be paid on the final pay. If an employee has used more than their adjusted vacation balance, they would be required to reimburse EPCOR for the outstanding amount.

**NEW** **Our union did not support this transfer, is there now animosity between the union and EPCOR?**

No, EPCOR and all of the unions have a positive relationship which is expected to continue in future.

**NEW** **Does EPCOR mandate employees to take vacation time between Christmas and New Year's?**

No, there is no mandated vacation time at EPCOR between Christmas and New Year's.

**NEW** **Will ID and payroll numbers change?**

Yes, EPCOR ID's and payroll numbers will be assigned to each employee. EPCOR will record the City payroll numbers, but they will not continue to be active after August 31, 2017.

**NEW** **Will temporary employees become permanent?**

Employment statuses will continue with EPCOR as they are/were with the City.