

Instructions

The following instructions are designed to help you complete the Notice of Death for the Healthcare of Ontario Pension Plan (HOOPP).

1. Deceased Member Information

- Provide the deceased member's full name, social insurance number (SIN) and mailing address in the space provided.
- HOOPP needs the late member's date of birth because pension benefits are based, in part, on the late member's age. In the case of a death before retirement, return this form with a copy of any proof of age document you have on file for the member.

2. Spousal/Contact Information

- Complete this section if you know the name and contact information of the late member's spouse or contact for settlement. If this information is not known, leave this section blank.
- HOOPP must establish the deceased member's spousal status. Under HOOPP, a qualifying spouse is someone who, at the time a determination is needed:
 - was legally married to the member, but not separated from the member; or
 - had been living with the member continuously in a conjugal relationship for at least a year; or
 - was the mother or father (natural or adoptive) of the member's child, and lived with the member in a relationship of some permanence.
- Provide the qualifying spouse's name, social insurance number, date of birth, and other information in the space provided. This section advises HOOPP of whom to contact to settle the death benefit. The contact can be a spouse, non-spouse beneficiary, executor, or other person; please indicate the relationship to the member.

3. Final Pension Information

Provide the date of death and the member's last day at work. These are usually the same, unless the member:

- was on a leave
- was on termination notice period
- already terminated membership (i.e., retirement, deferred pension)

If the dates are different, provide the reason in the space provided.

A. Inactive member

If deceased member was inactive at date of death, provide annualized earnings for the current and previous year in the space provided.

B. Weeks and Contributions Information

- Provide, for the current year, the deceased member's weeks of contributory service, and contributions (low, and if applicable, high rate). If the deceased member made contributions for a leave (or topped up contributions for a temporary period of reduced earnings) in the current year that have not been reported to HOOPP, include that information (as it relates to the leave and/or temporary period of reduced earnings) in the totals reported here. Provide the same information for the previous year, if not already reported to HOOPP.
- There are only a couple of situations where there can be no contributions reported for a member on this form. Refer to Section 6 of the online HOOPP Administration Manual for details.

C. Retroactive Pay

Complete this section if the deceased member received any retroactive pay (pensionable earnings) that applies to previous years (paid in the current or previous year)

D. Leaves/temporary periods completed in current year

- If the member completed a leave or temporary period of reduced earnings **that has not already been reported to HOOPP**, provide the type of leave/period and its start and end dates.
- Please indicate the start and end dates of the part of the leave/period where no earnings were received.
Example – a member might receive earnings for the first 13 weeks of a pregnancy/parental leave, but none after that.
- Indicate, for the current and previous year, the deemed earnings on which contributions were based. Deemed earnings represent the difference between what the member would have earned had he/she worked as scheduled during the leave/period, and his/her actual earnings during the leave period.
- If the employee works part time, base his or her deemed earnings on the average weekly earnings received by the member for the 10 weeks prior to the leave.

Here are some examples:

Example 1: If a member earning \$1,000 per week takes a 13-week employer approved leave, and receives no employment earnings, and chooses to contribute for the leave period, the deemed earnings on which contributions are based would be \$13,000, and that would be the figure you enter in the deemed earnings field.

Example 2: If a member earning \$1,000 per week takes a one-year pregnancy/parental leave, and is paid 40 % of his/her pre-leave earnings for the first 13 weeks of the leave, the deemed earnings are calculated as follows:

For more information about leaves and temporary periods of reduced earnings, please refer to Section 9 of the online HOOPP Administration Manual.

$\begin{aligned} & \$1,000 \text{ per week} \times 52 \text{ weeks} = \$52,000 \\ \text{Deemed earnings} &= \$52,000 - [13 \text{ weeks} \times .40 \times \$1,000] \\ &= \$52,000 - \$5,200 \\ &= \$46,800 \end{aligned}$
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4. Employer Information

- Sign and date the form, indicating it is correct and complete to the best of your knowledge.

5. Returning this form

- Return this form to HOOPP. Barcodes cannot be read if the form is sent by fax. If you are printing this form, please do not reduce it in size or fold it.