



SELF-FUNDED LEAVE OF ABSENCE PLAN CHECKLIST

If you are thinking of applying, have you:

- read the Self-Funded Leave of Absence Plan Policy and myCity website information so you are familiar with the specifics of the Plan? ☐
- considered the impact on your income, benefits and personal taxation? ☐

In order to apply for participation in the Plan, have you:

- completed a Self-Funded Leave of Absence Application form (**P 903**)? This form can be obtained from the myCity website; myCity > Tools & Resources> Forms. ☐
- named a beneficiary on the Self-Funded Leave of Absence Application form? If you have not named a beneficiary, any Account balances upon your death will be payable to your estate. ☐
- submitted the form to PayrollPaymentTransaction@calgary.ca? The form should be returned within sixty (60) days from the date you made application. ☐
- received notification, by signed copy of the Application form from Management (your Manager and Business Unit Director), of your approval for participation in the Plan? ☐

Once the Approved form is returned to you, have you:

- noticed your biweekly pay advice is being reduced by the amount of Contributions, starting with the first pay period coinciding with or following the beginning of your designated Contributory Period? ☐
- verified that the amount of the Contribution is being deposited to your Account with Canada Life? ☐
- received Statements of Participation at your home address on a quarterly basis from Canada Life? ☐
- received your annual interest payment 30 days after yearend? ☐



Six (6) months before your leave, have you:

- contacted HR Support Services at 403-268-5800 to make arrangements for pre-payment of your benefits to The City of Calgary prior to your Leave Period? **Note:** The City of Calgary will pay the corresponding employer contributions, if any, during the Leave Period. ☐

- completed a Request for Leave of Absence (**X 83**) form? This form can be obtained from your department payroll or by contacting HR Support Services at 403-268-5800. ☐

Two (2) months before your leave, have you:

- received and completed Canada Life's Request for member withdrawal Deferred Salary Leave Plan form to determine how payments will be made to you during your leave? **Note** a copy of a VOID cheque is required to be set up on direct deposit. This form can also be obtained by contacting HR Support Services at 403-268-5800. ☐

During your leave, have you:

- received payment based on how you completed Canada Life's Request for member withdrawal Deferred Salary Leave Plan form? Such return of monies shall continue until your Account has been exhausted or until the end of the Leave Period. **Note** your first payment will take approximately 3 to 4 weeks after your leave has commenced. ☐
- received tax slips from Canada Life? ☐

After your leave, have you:

- received any monies remaining in your Account at the end of the Leave Period, if applicable? If there is remaining money, it should be returned no later than 60 days after the end of the Leave Period, or the end of the first calendar year commencing after the end of the Contributory Period, whichever is earlier. ☐
- decided to buy back your pension after the Leave Period? If so, you will receive a cost notification letter in the spring of the following year in which your leave occurred. For more information, contact HR Support Services at 403-268-5800. ☐