

CONTACT INFORMATION

	EMPLOYERS	EMPLOYEES
Web:	csb.gc.ca/employers	csb.gc.ca/employees
Email:	employerhelpdesk@csb.gc.ca	
Mail:	CSB Payroll Savings Program 50 O'Connor Street, Suite 201 Ottawa, Ontario K1P 6L2	CSB Payroll Savings Program 50 O'Connor Street, Suite 201 Ottawa, Ontario K1P 6L2
Phone:	1 877 899-3599 (Monday to Friday, 8 a.m. to 6 p.m. ET)	1 877 899-3599 (Monday to Friday, 8 a.m. to 8 p.m. ET)

<p>SEPTEMBER 2016</p> <table border="1"> <thead> <tr> <th>S</th> <th>M</th> <th>T</th> <th>W</th> <th>T</th> <th>F</th> <th>S</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td>1</td> <td>2</td> <td>3</td> </tr> <tr> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> <td>10</td> </tr> <tr> <td>11</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> <td>17</td> </tr> <tr> <td>18</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> <td>24</td> </tr> <tr> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> <td></td> </tr> </tbody> </table>	S	M	T	W	T	F	S					1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30		<p>OCTOBER 2016</p> <table border="1"> <thead> <tr> <th>S</th> <th>M</th> <th>T</th> <th>W</th> <th>T</th> <th>F</th> <th>S</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>1</td> </tr> <tr> <td>2</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> </tr> <tr> <td>9</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> </tr> <tr> <td>16</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> </tr> <tr> <td>23</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> </tr> <tr> <td>30</td> <td>31</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	S	M	T	W	T	F	S							1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31						<p>NOVEMBER 2016</p> <table border="1"> <thead> <tr> <th>S</th> <th>M</th> <th>T</th> <th>W</th> <th>T</th> <th>F</th> <th>S</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>6</td> <td>7</td> <td>8</td> <td>9</td> <td>10</td> <td>11</td> <td>12</td> </tr> <tr> <td>13</td> <td>14</td> <td>15</td> <td>16</td> <td>17</td> <td>18</td> <td>19</td> </tr> <tr> <td>20</td> <td>21</td> <td>22</td> <td>23</td> <td>24</td> <td>25</td> <td>26</td> </tr> <tr> <td>27</td> <td>28</td> <td>29</td> <td>30</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	S	M	T	W	T	F	S			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30				<p>DECEMBER 2016</p> <table border="1"> <thead> <tr> <th>S</th> <th>M</th> <th>T</th> <th>W</th> <th>T</th> <th>F</th> <th>S</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td>1</td> <td>2</td> <td>3</td> </tr> <tr> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> <td>10</td> </tr> <tr> <td>11</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> <td>17</td> </tr> <tr> <td>18</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> <td>24</td> </tr> <tr> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> <td>31</td> </tr> </tbody> </table>	S	M	T	W	T	F	S					1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
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2015 CAMPAIGN DIRECTORS SURVEY RESULTS

Every year, Campaign Directors provide insightful information and feedback on the information, tools, and material provided during the past campaign. The 2015 survey includes responses from 2,300 Campaign Directors. Here are some highlights:



91% of respondents said it is *Easy* or *Very Easy* to run the Program.



76% of respondents said it was *Easy* or *Very Easy* to navigate on the csb.gc.ca website.



76% of respondents downloaded the Employee Payroll Data File in the new Excel format.



The *Campaign Director Guide* and csb.gc.ca website were the leading resources consulted by respondents.

INTRODUCTION

The CSB Payroll Savings Program has existed for 70 years and continues to be an easy and secure way for Canadians to save for the things they want.

As Campaign Director, you are helping employees in your organization achieve financial goals that matter to them.

This guide is your reference for everything you need to know to run and manage the Program and campaign at your organization.

ORGANIZATION ID

This five-digit number is a unique identifier for your organization.

Your Organization ID should be shared with employees. Remember to indicate it on brochures, posters and any communications sent to your employees during the campaign.

Your Organization ID must also be included in the contribution files you send to the Bank of Canada at each pay period, and is required to access the CSB Orders website should you need additional printed campaign material.

YOUR ORGANIZATION ID:

2016 CAMPAIGN TIMELINES AND IMPORTANT DATES

Below is a list of key activities and dates to help you plan and prepare for the campaign.

IMPORTANT DATES – 2016

3 October	Start of campaign
1 November	End of campaign at 8 p.m. (ET)
Early November	Download the CSBOS Contribution Update File (log in to PRC)
30 November	Last day to update employee pay records in your payroll system
31 December	Last day to access the campaign statistics in PRC

EARLY SEPTEMBER

- You will receive the What's New Email and Organization ID Email. These communications will come from csb-en@e.csbemail.ca. Be sure to add this address to your safe list.
 - You will receive your campaign material, which includes Employee Brochures and Wall Posters. Check quantities and familiarize yourself with them.
-

3rd WEEK OF SEPTEMBER

- Test the download function for your CSBOS Contribution Update File at csb.gc.ca/employers/importantdates.
 - Use the Sample Employee Communication, available on the Employers web page, to create your own email, memo or newsletter to share information about the Program.
-

3 OCTOBER – CAMPAIGN LAUNCH AND 1st WEEK

- The CSB Payroll Savings Program campaign begins on 3 October.
- Write your Organization ID on the campaign posters and place them in high-traffic areas.
- Distribute Employee Brochures to your employees.
- If permitted, forward the First Employee Email, or send your own communication to employees to inform them that the campaign has begun (add your Organization ID in the subject line).
- Inform your employees to go to CSB Online Services to make changes to plan contributions or to enroll in the Program.
- Place an animated Intranet Banner on your organization intranet, if permitted.
- Inform employees that they can view the videos (or download the Employee How-To Guide) if they need help with their online transactions or want to learn more about CSBs. Both resources can be found at csb.gc.ca/employees.

4th WEEK OF OCTOBER

- If permitted, forward the Reminder Employee Email to employees or send your own communication to remind them of the deadline to change existing contributions or to enroll.

1 NOVEMBER – LAST DAY OF CAMPAIGN AND AFTER

- 1 November at 8 p.m. (ET) – Deadline for employees to change their contributions or enroll in the Program.
- Early November – Log in to the Payroll Resource Centre (PRC) to download the CSBOS Contribution Update File. Use the file to update employee pay records.
- 30 November – Last day to update employee pay records in your payroll system. Organizations already participating must enter new employee records and update existing employee records after their last pay in November and before their first pay in December.
- 31 December – Last day to access the 2016 campaign statistics on PRC.

CAMPAIGN MATERIAL AND COMMUNICATION TOOLS

In early September you will receive a campaign material kit containing posters and brochures for your employees. You can also download campaign material and communication tools from the Employers Web page.

CAMPAIGN MATERIAL



NEW! CSB BOND BASICS VIDEOS

Fun and informative videos to help employees learn more about how their Plan works, how interest is calculated and what happens when a series reaches maturity.



EMPLOYEE HOW-TO GUIDE

This step-by-step guide shows employees how to complete different transactions on CSB Online Services. Employees can download a copy at csb.gc.ca/employees.



EMPLOYEE BROCHURE*

An informative brochure for employees that describes how the Program works and how easy it is to use CSB Online Services (CSBOS). Include your Organization ID before distributing to all employees and encourage them to write down their Plan Number and Client ID on the detachable card.



POSTER*

Write your Organization ID on the posters and display them at your workplace during the campaign.



INTRANET BANNER

If your organization has an intranet website, you can download the animated banner for the campaign period. Consult with your IT support staff to install the banner.

Note: Items identified with an asterisk (*) can be ordered by selecting *Order Additional Campaign Materials* in the *Campaign Material* section on the Employers Web page.

COMMUNICATION TOOLS



SAMPLE EMPLOYEE COMMUNICATION

A Sample Employee Communication is available on the Employers Web page as a template you can use should you want to prepare your own memos, emails or newsletters to inform your employees about the Program.



EMPLOYEE EMAILS

Two email messages on the campaign are available for you to forward to your employees during the month of October. Simply add your Organization ID in the subject line before sending to employees.

EMPLOYERS WEB PAGE

The Employers Web page at csb.gc.ca/employers is the primary source of information for Campaign Directors and provides access to material such as forms, guides and brochures.

The csb.gc.ca website was redesigned last year and, according to the responses received through the 2015 Campaign Directors Survey, Campaign Directors find it user-friendly, functional, and easier to read and navigate.

Here are the features you will find:

- New layout and drop-down menu structure
- Enhanced navigation with access to information in fewer clicks
- A search tool

With the website's new features, content and navigation structure, the information that is most important to you is easy to find. The Employers web page is a great tool to help you manage and run the campaign. Make sure to bookmark it!

The screenshot shows the top navigation bar with the Government of Canada logo and a search box. Below is a banner for the Canada Savings Bonds Program. The main content area is titled "Payroll Savings Program: Employers" and includes a "Payroll Resource Centre" with a "Register / Login" button. There are also links to "Campaign Director Guide", "Campaign Material", "About the Payroll Resource Centre", "Campaign Timelines", "Manage the Program", and "Sponsor the Program". The footer contains "Legal" and "Customer Service" links.

Government of Canada / Gouvernement du Canada

Search [FR]

CANADA SAVINGS BONDS PROGRAM

PRODUCTS PAYROLL SAVINGS PROGRAM FINANCIAL INSTITUTIONS & DEALERS RESOURCES

Home » Payroll Savings Program » Payroll Savings Program: Employers

Payroll Savings Program: Employers

Learn how to manage the Program, download campaign materials and check important dates for the October campaign. Access the Payroll Resource Centre.

Payroll Resource Centre

Register / Login

Campaign Director Guide

This guide is your reference for everything you need to know to run and manage a successful campaign.

Campaign Material

Find all the material and information you need to promote the Program to employees.

About the Payroll Resource Centre

You can update your Employer Profile, view campaign statistics, download the CSBOS Contribution Update File or access the Web Transmission service from one secure portal.

Campaign Timelines

The timeline provides a checklist of important actions to take for a successful campaign.

Manage the Program

Learn about downloading the CSBOS Contribution Update File, account activities and changing transmission methods.

Sponsor the Program

Learn how to offer the Payroll Savings Program in your organization.

Legal

Customer Service

Privacy
Terms of Use

Phone
Fax
Email
Mail

Canada

CLIENT ID AND PASSWORD RESET IN CSBOS

If employees forget their CSB Online Services Client ID or password, they can follow these steps to obtain or reset their login information.

To retrieve their Client ID online, the employees need to:

1. Go to the CSBOS login page.
2. Select *Forgot your Client ID*.
3. Enter the email address on file for their CSBOS account.
4. The employee will receive an email containing the requested Client ID.

To reset their password online, the employees need to:


1. Go to the CSBOS login page.
2. Select *Forgot your password*.
3. Enter their Client ID and answer three challenge questions for authentication purposes.
4. Enter a new password to complete the reset.

CANADA SAVINGS BONDS
PAYROLL SAVINGS PROGRAM

Français

Login

LOGIN

 **CSB Online Services (CSBOS)**

CSBOS Account Login

Client ID:

[Forgot your Client ID?](#)

Password:

[Forgot your password?](#)

[Login](#)

New to CSBOS?

Your CSBOS account allows you to create your online profile, set up new Payroll Savings plans, change your contribution amounts and redeem your funds.

This one-time registration will take less than 10 minutes.

[Create a CSBOS Account](#)

PAYROLL RESOURCE CENTRE (PRC)

The Payroll Resource Centre (PRC) is a secure portal exclusively for Campaign Directors that allows access to multiple services required to manage the Program from one convenient location.

These services include:

- Updating your Employer Profile (to be completed by 10 June)
- Downloading the CSBOS Contribution Update File (to be completed by the end of November)
- Viewing campaign statistics (accessible until 31 December)


Make sure to log in to your PRC account from the Employers web page to ensure you're ready for this year's campaign!

CANADA SAVINGS BONDS
PAYROLL SAVINGS PROGRAM

[Français](#)

Login

LOGIN

 **Payroll Resource Centre**

PRC Account Login

User ID:

[Forgot your User ID?](#)

Password:

[Forgot your password?](#)

Login

New to the Payroll Resource Centre?

The Payroll Resource Centre (PRC) gives you access to PRC Services, such as Employer Profile Update, Statistics and CSBOS Contribution Update File, and Web Transmission.

Once you register, you will be able to access PRC services.

Register

CSBOS CONTRIBUTION UPDATE FILE

WHAT IS THE CSBOS CONTRIBUTION UPDATE FILE



During the campaign period, employees who enroll in the Program or make changes to their contributions online generate transactions that are processed and stored electronically at the Bank of Canada.

In early November, this employee transaction data is saved in your CSBOS Contribution Update File and is ready to be downloaded from the Payroll Resource Centre (PRC).

REMEMBER: This file is a list of employees who have made changes to their contributions or registered for the first time *online* through CSB Online Services. This file is NOT a list of all employees who participate in the Payroll Savings Program.

Contribution changes requested by paper, email or verbally with the Campaign Director will not be captured in the CSBOS Contribution Update File. Remember to manually update your organization's payroll system with these transactions.

WHAT TO DO WITH THE CSBOS CONTRIBUTION UPDATE FILE



The information contained in the CSBOS Contribution Update File must be used to update your organization's payroll system so that the correct amounts are deducted from each employee's pay. It is essential that you have these updated by 30 November.

HOW TO DOWNLOAD THE CSBOS CONTRIBUTION UPDATE FILE



In early November, you may log in to PRC and select *Statistics and CSBOS Contribution Update File* under PRC Services from the *My PRC Account* page. This file is available for download in two different record layouts:

- Split layout: shows each employee's contribution amount, with CSBs and RSPs, if applicable, on two separate lines.
- Combined layout: shows each employee's total contribution amount, with CSBs and RSPs, if applicable, combined in one field.

You have the option of downloading the CSBOS Contribution Update File in an Excel format for greater flexibility and readability. Simply select the record layout of your choice (split or combined) and the file will contain your choice of ASCII (.txt) or Excel (.xls) format.

NOTE: Organizations that use the CSBOS Contribution Update File to *automatically* update their payroll system must continue to use the ASCII file and not the Excel file. For more details, refer to the *Manage the Program* section of the Employers web page.

CSBOS CONTRIBUTION UPDATE FILE VIDEO



This step-by-step video shows you how to download the CSBOS Contribution Update File in order to update your payroll system.

The fields of each record (in order from left to right) are as indicated below:

FIELD NAME	CHARACTERISTICS
Employee ID	The unique identifier provided by the employer (often the employee's payroll number) – maximum of 20 characters
First Name	Maximum of 15 characters
Middle Name	Maximum of 15 characters
Last Name	Maximum of 30 characters
SIN	9 numeric characters – no separators
Date of Birth	10 characters in the format “yyyy-mm-dd”
Home Phone #	10 numeric characters – no separators
Office Phone #	10 numeric characters – no separators
Language Preference	Single character – “E” for English or “F” for French
Contributions	The amount to be deducted from each pay. The amount will always be positive, contain a decimal point and two digits to its right. No separators.
Action	This field will contain the word “Add” to denote an employee participating in the Program for the first time, or “Change” to denote that a participating employee has a revised deduction amount.
Plan	<p>This field will contain the word “CSB” to denote a contribution towards a regular CSB plan, or “RSP” to denote a contribution towards an RSP plan.</p> <p>This field is present only if:</p> <ul style="list-style-type: none"> • you downloaded the split file format; and • your organization is participating in the RSP option and would like to differentiate between regular CSB plan contributions and RSP plan contributions.

PLAN ACTIVITIES

Campaign Directors commonly get questions from employees about making changes to their CSB Payroll Savings Plans.

Whether employees want to set up a new plan, suspend their contributions while on maternity leave or redeem their funds, this table outlines the key actions that you, the Campaign Director, and employees need to take to ensure proper and timely completion of the request.

ACTIVITY	TIMING	WHAT THE CAMPAIGN DIRECTOR NEEDS TO DO	WHAT EMPLOYEES NEED TO DO
SETTING UP A NEW PLAN	During the campaign (Early October – 1 November)	<ul style="list-style-type: none"> Inform employees of the campaign period. 	<ul style="list-style-type: none"> Access CSB Online Services and select <i>Create a CSBOS Account</i> and follow online instructions (new participants). Log in to CSB Online Services, select <i>Set Up New Plan</i> and follow online instructions.
INCREASING CONTRIBUTIONS	During the campaign (Early October – 1 November)	<ul style="list-style-type: none"> Inform employees to make their increases online during the campaign period. <p><i>Changes will come into effect as of the first pay in December.</i></p>	<ul style="list-style-type: none"> Log in to CSB Online Services, select <i>Change Existing Contributions</i> and follow online instructions.
	Outside the campaign period	<p><i>It is at the Campaign Director's discretion whether or not to allow employees to increase their contributions year-round.</i></p> <ul style="list-style-type: none"> If so, ensure that the changes are reflected in your payroll system and send the updated payroll contribution file to the Bank of Canada at each pay cycle. <p><i>Changes will come into effect as per the date agreed upon between the employee and the Campaign Director.</i></p>	<ul style="list-style-type: none"> Outside the campaign period, employees are not allowed to make changes to their contributions on CSB Online Services. Employees must inform their Campaign Director of changes by phone, email or in person.

ACTIVITY	TIMING	WHAT THE CAMPAIGN DIRECTOR NEEDS TO DO	WHAT EMPLOYEES NEED TO DO
<p>DECREASING AND STOPPING CONTRIBUTIONS</p>	<p>During the campaign (Early October – 1 November)</p>	<ul style="list-style-type: none"> Inform your employees to make their changes online during the campaign period. <p><i>Changes will come into effect as of the first pay in December.</i></p>	<ul style="list-style-type: none"> Log in to CSB Online Services, select <i>Change Existing Contributions</i> and follow online instructions. Employees may redeem their funds anytime or leave them in their Plan to continue to earn interest.
	<p>Outside the campaign period</p>	<ul style="list-style-type: none"> Ensure that the changes are reflected in your payroll system and send the updated payroll contribution file to the Bank of Canada at each pay cycle. For stopped contributions, it is important to remove the employee’s name and information from the payroll contribution file before it is sent to the Bank of Canada. <p><i>Changes will come into effect as per the date agreed upon between the employee and the Campaign Director.</i></p>	<ul style="list-style-type: none"> Outside the campaign period, employees are not allowed to make changes to their contributions on CSB Online Services. Employees must inform their Campaign Director of changes by phone, email or in person. Employees may redeem their funds anytime or leave them in their Plan to continue to earn interest.
<p>REDEMPTIONS</p>	<p>Any time</p>	<ul style="list-style-type: none"> Encourage employees to view the How-To Videos and/or download the How-To Guide. 	<ul style="list-style-type: none"> Employees can redeem their funds anytime on CSB Online Services. <p><i>Note: The employee’s last contribution amount will be held for 15 days from the date that the Bank of Canada receives it.</i></p> <ul style="list-style-type: none"> Employees with Canada RSP can make redemptions by contacting the Payroll Savings Program Customer Service.

ACTIVITY	TIMING	WHAT THE CAMPAIGN DIRECTOR NEEDS TO DO	WHAT EMPLOYEES NEED TO DO
SUSPENSIONS AND RESUMPTIONS	Any time	<ul style="list-style-type: none"> When an employee chooses to suspend contributions (e.g., maternity leave), ensure that the change is reflected in your payroll system and remove the employee's name and information from the payroll contribution file submitted to the Bank of Canada. Keep a record of employees with suspended contributions so that they can be resumed when requested. 	<ul style="list-style-type: none"> Employees must notify their Campaign Director by phone, email or in person. There is no penalty or fee, and their Plan balance continues to earn interest even while contributions are suspended. Employees may resume their contributions by notifying their Campaign Director. Contributions will resume according to the pay frequency designated by the organization.
DEPARTURES	Any time	<ul style="list-style-type: none"> When a participating employee leaves your organization, ensure that the change is reflected in your payroll system and remove the employee's name and information from the payroll contribution file submitted to the Bank of Canada. 	<ul style="list-style-type: none"> When a participating employee leaves your organization, they may have their Plan transferred to their new employer if that organization is a Payroll Savings Program sponsor. The employee will need to ensure that their new employer calls the Payroll Savings Program Customer Service to complete the transfer and provide the following information: Organization Name and ID, first and last name of the employee, and the name of the former employer.



Employees can view How-To Videos and consult the *Employee How-To Guide* for information about these common transactions.

THINGS TO REMEMBER

Employees already part of the Program



At campaign time, employees who simply want their contributions to continue to be invested into their Plan, do not have to do a thing! Their existing contribution amount will continue to be deducted from their pay and automatically be allocated to the new CSB series on sale.

To learn more about how employees' payroll deductions are automatically allocated to the new series on sale during the campaign period, watch the CSB Bond Basics Videos on the Employees web page at csb.gc.ca/employees. Encourage your employees to do the same!

Direct Deposit



With Direct Deposit, employees will have their funds deposited into their bank account within four business days.

Employees with a Single Plan have the option to sign up for Direct Deposit online by logging in to their CSBOS account.

For Joint or Third Party Plans, Direct Deposit can be set up by completing the *Change of Address and Direct Deposit Form (COADD)*, available for download on the Employees web page at csb.gc.ca/employees.

NOTE: Employees who signed up for a Single Plan for the first time during the October campaign will only be eligible to enroll in Direct Deposit in mid-December.

Electronic statements and T5



Employees with a Single Plan and active CSBOS account will receive an email informing them that their electronic statements are ready and are accessible by logging in to CSB Online Services.

If the accumulated annual interest is \$50 or more, a T5 slip will be issued for income tax purposes.

