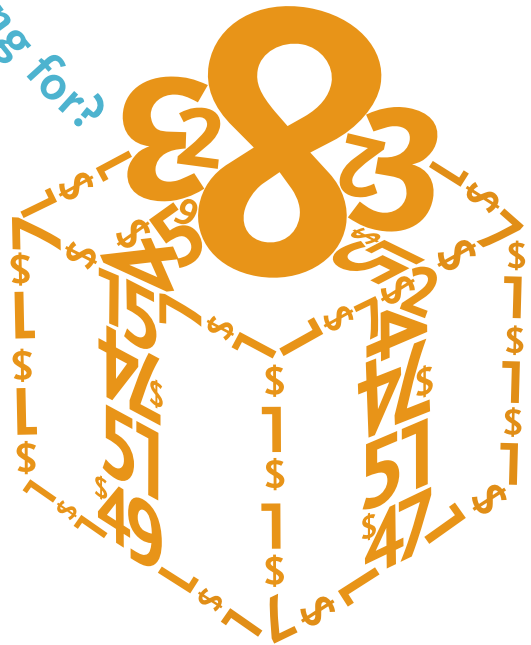


# PAYROLL SAVINGS PROGRAM

What are you saving for?



# Contacts and Information

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## FOR EMPLOYERS

- Web: [csb.gc.ca/employers](https://csb.gc.ca/employers)
- General information
  - Order additional campaign materials
- Email: [employerhelpdesk@csb.gc.ca](mailto:employerhelpdesk@csb.gc.ca)
- Phone: 1 888 467-5999, Monday to Friday, 8 a.m. to 6 p.m. (ET)

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# Quick Overview

## THE PROCESS

Employees contribute to the Payroll Savings Program in the following manner:

- Employees go to [csb.gc.ca/employees](https://csb.gc.ca/employees) and select **CSB Online Services**.
- During each pay cycle, amounts deducted from an employee's pay are added to the plan as contributions (or subtracted in the case of a negative correction).

**It is very important that the employees' purchase data is transmitted in a timely fashion since the contributions are dated as of the day the Bank of Canada receives the employees' payroll deductions from the employer.**

- Payment is collected by the Bank of Canada from the sponsoring employer.
- If you are contacted by a Bank of Canada Customer Service Representative to rectify a contribution error, you have 15 days to correct it starting from the date when the funds are received. If no correction is done by the employer, the Bank of Canada may be required to make the correction, and consequently a Pre-Authorized Debit (PAD) or Direct Deposit (DD) will occur in the account of the unresponsive employer.

## ABOUT THE WEB TRANSMISSION SITE

The Web Transmission Site is designed to offer small organizations (up to 250 employees) a convenient way to deliver employee purchase information to the Bank of Canada:

- This application stores a database of employee payroll deduction records for the purchase of CSBs on our Web Transmission Site. This data will subsequently be transmitted to the Bank of Canada based on a pay schedule predetermined by the employer.
- The subscriber from the sponsoring organization begins by creating employee records for contributions to a Payroll Savings Plan. Once these employee records are created, only modifications are required to the database for any deduction changes occurring between pay periods. The subscriber then authorizes the processing.
- There are two transmission options:
  1. The Auto Transmit option, whereby the organization's purchase information will be sent automatically two days prior to the effective pay date (as per the employer's predetermined pay schedule).
  2. The Manual Transmit option, which requires the subscriber to initiate a transmission at least two days before each effective pay date.

- The organization will receive an email or fax notification from the Bank of Canada four business days before the next scheduled pay date, allowing time to verify the employee purchase records and make any changes.
- The subscriber will have two business days to access the website and make any changes to the current employee records to effect changes for the next scheduled pay date.
- Upon request, a notification that the organization's bank account will be debited for the total amount of the transmission can be received either by fax or email.

## **MINIMUM SYSTEM REQUIREMENTS**

The Web Transmission Site is a web-based application, which can be accessed using the following supported browsers:

- Microsoft Internet Explorer versions 6, 7, or 8
- Mozilla Firefox versions 3.6.10 or 4.0

## **SECURITY**

Security for the Web Transmission Site is provided through the Payroll Resource Centre application.

A unique electronic credential (user ID and password) identifies you in the Payroll Resource Centre and is used in your communication with the Web Transmission Site.

The Payroll Resource Centre credentials do not expire. If you forget your Password, the Payroll Resource Centre provides a mechanism to reset it. If you are unable to restore your Password, you will be required to re-register by creating a new User ID/Password in the Payroll Resource Centre and re-register again in the Web Transmission Site.

# Getting Started

---

## BECOMING AN AUTHORIZED USER

When an organization initially agrees to sponsor the Payroll Savings Program, it must sign an Employer Sponsorship Form. In addition to providing authorization to participate in the Program, the form requests contact information for the person(s) (known as “the subscriber(s)”) who will be responsible for accessing the Web Transmission Site to maintain the list of employees and their associated contribution information.

Shortly after receiving the Employer Sponsorship Form, the Bank of Canada will send two emails to the identified subscriber(s). The first email will contain the following information:

- Name of subscriber
- Personal Identifier (PID)
- Notification that a Personal Identification Number (PIN) will arrive the following day in a separate email (for security reasons)
- Phone number to call for assistance

The following day, the subscriber(s) will receive a second email containing the following information:

- Name of subscriber
- Personal Identification Number (PIN)
- Instructions on how to register with the Payroll Resource Centre at [employer.csb.gc.ca](http://employer.csb.gc.ca)
- Instructions on how to access the Web Transmission Site
- Phone number to call for assistance

Once the subscribers have obtained both the PID and PIN, they will be ready to access the Web Transmission Site through the Payroll Resource Centre at [employer.csb.gc.ca](http://employer.csb.gc.ca).

## FIRST-TIME ACCESS TO THE WEB TRANSMISSION SITE

For your first-time access to the Web Transmission Site, you will need to register on the Payroll Resource Centre at [employer.csb.gc.ca](http://employer.csb.gc.ca).

## REGISTERING ON THE PAYROLL RESOURCE CENTRE

The screenshot shows the 'Canada Savings Bonds' website for employers. The page has a header with the Canadian flag, 'Government of Canada / Gouvernement du Canada', and the 'Canada' logo. Below the header is a navigation bar with 'Français', 'Help', and 'Logout'. The main content area is titled 'LOGIN' and features a 'Payroll Resource Centre' section. This section has two columns: 'Are you already registered with the Payroll Resource Centre?' with input fields for 'User ID:' and 'Password:', and 'Are you registering for the first time?' with a registration instruction and a 'Register' link. A 'Login' link is also present at the bottom of the registration section.

Click on the **Register** link on the right-hand side of the screen under **Are you registering for the first time?**

In the registration process you will be asked to create or enter the following:

- A unique User ID
- A Password (**Remember: Do not share your Password**)
- An email address (will be used for sending confirmation notices regarding your Payroll Resource Centre account)
- Password Challenge Questions

Once this registration process is completed, you will be presented with a **Confirmation** screen.

The screenshot shows the 'REGISTRATION' confirmation screen. The header and navigation bar are identical to the previous screenshot. The main content area is titled 'REGISTRATION' and features a 'Confirmation' section. This section contains the text: 'You have completed the Payroll Resource Centre registration. If you wish to make a copy of this information, please keep in a secure place.' Below this, it displays 'Your User ID is: BOBBYBROWN62' and 'Your Password is:'. A 'Print | Continue' link is located at the bottom right of the confirmation area.

By clicking on **Continue** you will be taken to the **My Account** screen of the Payroll Resource Centre. From the left navigation menu you have the option to:

- Change your Password
- Change your Challenge Questions
- Change your User ID
- Change the email address that is used for sending confirmation notices regarding your Payroll Resource Centre account



The screenshot shows the website interface for Canada Savings Bonds. At the top, there are logos for the Government of Canada and the word "Canada". Below this is a red maple leaf logo and the text "Canada Savings Bonds" and "employer.csb.gc.ca". A navigation bar contains "Français", "Help", and "Logout". The main content area is titled "MY ACCOUNT" and "Payroll Resource Centre". A light blue box contains the text "The next Payroll Savings Program campaign starts 1 October 2012." Below this, there is a "Contact Information:" section with the text "TTester3" and "TEST3.TTEETER3@HP.COM". Underneath, there is a section for "Employer secure websites" with a link to "Web Transmission Site". On the left side, there is a vertical navigation menu with options: "My Account", "Payroll Resource Centre", "Password", "Challenge Questions", "User ID", and "Email Address".

Clicking the **Web Transmission Site** link under **Employer secure websites** will present you with a Login screen where, as a first-time user, you will enter the temporary PID and PIN that were emailed to you.



## REGISTERING ON THE WEB TRANSMISSION SITE

Government of Canada / Gouvernement du Canada

Canada

**CANADA SAVINGS BONDS**  
csb.gc.ca

Français | Help | Contact Us | employer.csb.gc.ca | Logout

Payroll  
Logout

**LOGIN**

**Login**

Please identify yourself using the Personal Identifier and the Personal Identification Number that were sent to you.

Personal Identifier (PID):

Personal Identification Number (PIN):

Submit

Finally, clicking **Submit** will bring you to the **Regular Transmission** screen of the Web Transmission Site. See the next section on **Navigating Through the Website**.

Government of Canada / Gouvernement du Canada

Canada

**CANADA SAVINGS BONDS**  
csb.gc.ca

Français | Help | Contact Us | employer.csb.gc.ca | Logout

Payroll  
Regular Transmission  
Setup Information  
Pay Schedule  
Unscheduled Transmission  
Reports  
Transmission Report  
Detailed Transmission Report

**PAYROLL**

**Regular Transmission**

Select and confirm your Organization ID and Payroll Frequency Period.

Organization ID:  
ACME COMPANY 12345

Payroll Frequency Period:  
Weekly

Employee payroll deductions for effective pay date 2007 02 15

Item	Last Name	First Name	SIN	Active	Amount(\$)
1	BOBBY	BROWN	999999994	Yes	400.00
2	JANE	JACOB	222222226	Yes	200.00
3	JOHN	DOE	111111118	Yes	100.00
<b>Total:</b>					<b>\$700.00</b>

Number of Records: 3

Submit | Change | Print

## SUBSEQUENT VISITS TO THE WEB TRANSMISSION SITE

For your subsequent visits, go to **employer.csb.gc.ca** and enter your User ID and Password on the left-hand side of the screen under **Are you already registered with the Payroll Resource Centre?** You will then be taken to the **My Account** screen of the Payroll Resource Centre where you may update your User ID, Password, etc., or follow the link to the Web Transmission Site. There is no need to use the PID and PIN again.

Although the User ID and Password to access the Payroll Resource Centre do not expire, your access to the Web Transmission Site will be deactivated if you have not logged on for 15 months. If this happens, you will need to contact **1 888 467-5999** (Monday to Friday, 8 a.m. to 6 p.m. ET) to request that a new PID and PIN be emailed to the address on record.

The next time you access the Web Transmission Site, you will be required to enter your new PID and PIN before you are able to access the **Regular Transmission** screen.

## WHAT HAPPENS IF I FORGET MY PAYROLL RESOURCE CENTRE USER ID AND/OR PASSWORD?

If you forget your Password, you can go to **employer.csb.gc.ca** to recover your Password. Enter your User ID and then click **Forgot your password?** You will then be presented with your Password Challenge Questions. When you have answered the questions, you will be asked to create another Password. Once this is done, you will be presented with the **My Account** screen of the Payroll Resource Centre.

However, if you cannot remember the answers to your challenge questions, or if you cannot remember your Payroll Resource Centre **User ID**, you will need to contact **1 888 467-5999** (Monday to Friday, 8 a.m. to 6 p.m. ET) and a new PID and PIN will be emailed to the address on record.

With your new PID and PIN, you will then follow the steps for first-time access to the Web Transmission Site.

# Navigating Through the Website

Note: The Payroll Resource Centre and Web Transmission sites look very similar. You will know which site you are currently looking at by the colour of the page title line – blue for Web Transmission Site and dark grey for Payroll Resource Centre.

The tool bar at the top of each page of the Web Transmission Site presents standard navigating options:

- Use the **Français** button on any page to access the website in French.
- The **Help** button displays the online help function.
- The **Logout** button is used to log out of the session and return to the **Login Page** at the Payroll Resource Centre at **employer.csb.gc.ca**.
- The **employer.csb.gc.ca** link (when present) is used to exit the Web Transmission Site and to return to the **My Account** screen at the Payroll Resource Centre at **employer.csb.gc.ca**.
- Use the **Contact Us** button if you have any questions or call us toll-free at **1 888 467-5999** (Monday to Friday, 8 a.m. to 6 p.m. ET).

The left navigation menu that is displayed on all of the pages allows the user to navigate through the website and lets you select:

- Regular Transmission
- Setup Information
- Pay Schedule
- Unscheduled Transmission
- Transmission Report
- Detailed Transmission Report



## SETUP INFORMATION

- The information behind the **Setup Information** screen located in the left navigation menu is based on the Employer Sponsorship Form completed by your organization. It is recommended that this information be viewed and verified for accuracy. Select **Setup Information** from the left navigation menu and verify the data on the screen.

Should changes be required to data fields that cannot be edited online, please call **1 888 467-5999**.

Please also check the summary list of pay schedules created. This schedule should coincide with the dates your employees will be paid.

Government of Canada / Gouvernement du Canada

Canada

CANADA SAVINGS BONDS  
ccb.gc.ca

Français Help Contact Us employer.csb.gc.ca Logout

**PAYROLL**

**Setup Information**

Organization Name: ACME COMPANY  
Organization ID: 11411  
Payroll Frequency Period: Weekly [Confirm](#)

Payroll Day: Thursday  
Report Type: Summary  
Method: Email  
E-mail/Fax: GOOULAS@F3.COM

Auto Transmit:  
Yes - Auto  
No [Confirm](#)

**Existing Payrolls**

Campaign Year	Start Date	End Date	Status
2009 FALL CAMPAIGN	2009 11 05	2010 10 31	Active

## AUTO TRANSMIT OPTION

**Auto Transmit** will ensure that a transmission is created and processed automatically two business days prior to the effective pay date.

If this option is not selected, the default option requires that you access the site at least two business days before the effective pay date to transmit the employees' purchase data. A late notification will be sent every day until a transmission is received or we receive notification that no transmission will be made.

Regardless of the transmission taking place before the pay date, the employer's bank account will be debited only as of the effective pay date. The employees' plans will be credited at the same time.

**If a transmission is late, the employees' plans will be credited as of the day the transmission and the payment are received. Purchases will not be back-dated to coincide with the pay date.**

## MULTIPLE PAYROLLS

All payrolls for which you are responsible are displayed on the **Regular Transmission** screen, which can be selected on the left navigation menu. You may switch back and forth from one payroll database to another by selecting the Organization ID or Payroll Frequency Period from the drop-down menu.

The screenshot displays the Canada Savings Bonds Employer Portal. At the top, there are logos for the Government of Canada and the word "Canada". Below this is a red maple leaf logo and the text "CANADA SAVINGS BONDS" with the URL "csb.gc.ca". A navigation bar contains links for "Français", "Help", "Contact Us", "employer.csb.gc.ca", and "Logout".

The main content area is titled "PAYROLL" and "Regular Transmission". It instructs the user to "Select and confirm your Organization ID and Payroll Frequency Period." There are two dropdown menus: "Organization ID:" with the value "ACME COMPANY 10408" and "Payroll Frequency Period:" with the value "Weekly". Each dropdown has a "Confirm" button next to it.

Payroll	PAYROLL
Regular Transmission	<b>Regular Transmission</b> Select and confirm your Organization ID and Payroll Frequency Period.
Setup Information	
Pay Schedule	
Unscheduled Transmission	
Reports	
Transmission Report	<b>Organization ID:</b> ACME COMPANY 10408 <input type="button" value="Confirm"/>
Detailed Transmission Report	<b>Payroll Frequency Period:</b> Weekly <input type="button" value="Confirm"/>

## PAY SCHEDULE

You can access the **Pay Schedule** by selecting the appropriate link on the left navigation menu. This schedule is used to determine the timing of when:

- Notifications of upcoming transmissions are received
- Your organization's payment will be collected for employees' CSB purchases
- Employees will be credited for their purchases of CSBs (if late in transmitting, then employees' plans will only be credited when we receive the transmission and the payment)

The dates indicated should coincide with the dates employees are paid. If a date is incorrect, please change it on this screen. You can change the dates that are available in the **Old Pay Date** drop-down list.

To change a pay date, select the date from the **Old Pay Date** drop-down menu and enter the correct date in the **New Pay Date** field using the format (YYYY/MM/DD).

You will receive an error message if:

- Two dates are the same

Click the **Confirm** button to save the changes. You may make changes for any pay date as long as a transmission has not occurred for that date.

If you would like to print a pay schedule for your records, click the **Print** button on the screen.

The screenshot shows the 'PAYROLL' section of the Canada Savings Bonds system. The page title is 'Pay Schedule'. It displays organization information: 'Organization Name: SCME CORP/SCY', 'Organization ID: 11400', 'Schedule: 0 - THE FALL CAMPAIGN', 'Start Date: 2006 11 02', 'End Date: 2007 01 31', 'Pay Frequency Period: Weekly', and 'Payroll Day: Thursday'.

Under 'Effective Pay Dates:', there is a table with 5 columns of dates:

2006 11 02	2006 11 09	2006 11 16	2006 11 23	2006 11 30
2006 12 07	2006 12 14	2006 12 21	2006 12 28	2007 01 04
2007 01 11	2007 01 18	2007 01 25	2007 02 01	2007 02 08
2007 02 15	2007 02 22	2007 03 01	2007 03 08	2007 03 15
2007 03 22	2007 03 29	2007 04 05	2007 04 12	2007 04 19
2007 04 26	2007 05 03	2007 05 10	2007 05 17	2007 05 24
2007 05 31	2007 06 07	2007 06 14	2007 06 21	2007 06 28
2007 07 05	2007 07 12	2007 07 19	2007 07 26	2007 08 02
2007 08 09	2007 08 16	2007 08 23	2007 08 30	2007 09 06
2007 09 13	2007 09 20	2007 09 27	2007 10 04	2007 10 11
2007 10 18	2007 10 25			

Below the table, there is a text box with instructions: 'To change a pay date, select an Old Pay Date from the drop-down list, and edit the value in the New Pay Date field. To delete a pay date, blank out the value in the New Pay Date field, and select Confirm.'

At the bottom, there are two input fields: 'Old Pay Date:' with a dropdown menu showing '2007 02 05' and 'New Pay Date (YYYY/MM/DD):' with a text input field containing '2007 02 05'. A 'Confirm' button is located at the bottom right of the form.

## CREATING THE DATABASE FOR TRANSMISSION

By entering employee details for payroll transmissions, you are creating a database of employee records for payroll purchases. The following information is required for each employee:

- Organization ID
- Payroll Frequency Period (to be selected before entering the employee list in the database and only if your organization has more than one)
- Employee's last name and first name
- Social Insurance Number (SIN)
- Amount of purchase: the sum of CSB and RRSP (if applicable) deductions

You can access the **Regular Transmission** screen by selecting it on the left navigation menu. The **Regular Transmission** screen has two distinct modes:

- The first mode is used to transmit the payroll, by clicking **Submit**, or to **Print** the employees' deduction amount.

The screenshot displays the 'Regular Transmission' screen. The header includes the Government of Canada logo and the text 'CANADA SAVINGS BONDS' with the website 'csb.gc.ca'. The navigation menu on the left lists 'Payroll', 'Regular Transmission', 'Setup Information', 'Pay Schedule', 'Unscheduled Transmission', 'Reports', 'Transmission Report', and 'Detailed Transmission Report'. The main content area is titled 'Regular Transmission' and contains a form with two dropdown menus: 'Organization ID' (set to 'ACME COMPANY TL408') and 'Payroll Frequency Period' (set to 'Weekly'). Below the form is a table of employee payroll deductions for effective pay date 2007 02 15.

Item	Last Name	First Name	SIN	Active	Amount(\$)
1	BOBBY	BROWN	993333334	Yes	400.00
2	JANE	JACOB	222222226	Yes	200.00
3	JOHN	DDE	111111118	Yes	100.00
<b>Total:</b>					<b>\$700.00</b>

Number of Records: 3

[Submit](#) | [Change](#) | [Print](#)

- The second mode is used to edit, add, or delete employee records.

Selecting the **Change** button will take you to the **Change Regular Transmission** screen.

**Change Regular Transmission**

Revised and confirm your Organization ID and Payroll Frequency Period.

Organization ID: ACME COMPANY 042

Payroll Frequency Period: Weekly

**Employee Information**

To modify employee deduction amounts, enter new amount under appropriate employee and select Save.

Item	Last Name	First Name	SIN	Amount(\$)	Active	Delete
1	ECKBY	BROWN	23335334	400.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	JANE	JANE	222222226	200.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	JOHN	DOE	111118	00.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Total:				700.00		

Number of Records: 3

**New Employee Information**

To add new employees to the Employee Payroll Data File, enter new employee information below and select Add.

Last Name	First Name	RIN	Amount(\$)	Active
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>

[Back](#) | [Save](#) | [Cancel](#)

If you are entering data for the first time, no records will be displayed. To build the database of employee records, enter the employee information in the **New Employee Information** section.

Enter each employee's information in the fields provided and click **Add** each time a new record is completed. Ensure the on-screen message confirms "New employee record created" for each new employee record. Each employee's data will now be shown in the **Employee Information** section as an active record.

Notice how the total number of records and total amount change in accordance with the active records once you click on the **Add** button.

### Example:

James Howard would like to update his current payroll plan (\$200) online and contribute to a new plan for his wife (\$50), in addition to one for his son (\$100). For these three purchases, you create only one record.

Howard      James      987654321      350

The **Regular Transmission** screen lists names alphabetically by each employee's last name. Since it is assumed that all new employee records entered are permanent, a newly created record will default to Active.

Once all employees are entered, click **Save** and you will then return to the **Regular Transmission** page. Click **Print** to make a hard copy of your permanent database for your records. The printout should be kept in a safe location since it contains personal information.



## CHANGES TO EMPLOYEE RECORDS

By clicking **Change** on the **Regular Transmission** page, you will enter the **Change Regular Transmission** screen where you may:

- Suspend an employee's purchase
- Change an employee's purchase amount
- Correct employee information (name, SIN)
- Insert a record for a missed employee
- Delete a record for an employee who has left or was incorrectly entered

## SUSPENDING PURCHASES

To suspend an employee's purchase, deactivate that record on the **Change Regular Transmission** screen by removing the check mark in the **Active** column. Then click **Save** to save this change in the database. Notice how the total number of records and total amount change in accordance with the active records once you click the **Save** button.

You will also see the on-screen message: "Records updated successfully."

When you are finished making changes, you may return to the **Regular Transmission** screen by clicking the **Back** button or by selecting the link on the left navigation menu.

## INSERTING MISSED EMPLOYEE PURCHASES

Follow the same steps for inserting missed employee records as when entering a new employee. This is done in the **Change Regular Transmission** screen.

## CHANGING PURCHASE AMOUNTS

To change an employee's purchase amount, enter the **Change Regular Transmission** screen and enter the new amount in the Amount field associated with the employee. Click **Save** to update the database.

The total amount will change once you update the database. You will also see the on-screen message: "Records updated successfully."

All reports, transmissions and notifications are as of the last update.

It is recommended that you retain a hard copy of the employee records you just finished modifying. The printout should be kept in a safe location since it contains personal information.

## CORRECTIONS TO EMPLOYEE RECORDS

On the **Change Regular Transmission** screen, make the appropriate changes and click **Save** to update the database. You will see the on-screen message: "Records updated successfully."

## DELETING EMPLOYEE RECORDS

If an employee leaves the organization, or you are certain that no further purchases are expected in the future by this employee, you may want to permanently delete the employee's record from the database. Otherwise, you may want to temporarily deactivate the record if future purchases are expected.

To delete an employee record from the **Change Regular Transmission** screen, check the **Delete** box associated with the employee to permanently remove the record from the database. A message will appear asking you to confirm deletion. Click **OK** to complete this task.

By clicking **Save**, the employee record is removed, the totals reflect the new database of active records and you will be returned to the **Regular Transmission** screen.

## NOTIFICATIONS

You will receive email or fax notifications four business days before an effective payday to remind you of the upcoming transmission and to prompt you to make any changes to your database, if necessary.

Sample:

### Canada Savings Bonds

**Regular Transmission**

ANYCOMPANY

Organization ID:	12345	Pay Frequency: Weekly
Effective Pay Date:	2006/05/24	

**Number of records:** 8  
**Total amount:** \$780.00

A transmission for the above amount is due for your employees' purchase of CSBs through payroll deductions. If you have any changes, please access the website and make your changes within the next two business days and send the transmission. Should you have no changes, you will still need to go to the website to send the transmission, which will result in the Bank of Canada collecting from your organization a payment for the corresponding total. Purchases will be credited to your employees' plans as of the date we receive the transmission and the payment.

*Please be advised that late delivery of transmissions (information and payment) may result in delaying the Bank of Canada's purchase of bonds. The Bank of Canada and Canada Investments and Savings are not responsible for any loss of interest as a result of such delay.*

If you would like to have automatic transmissions, you may opt for this feature on the Setup Information screen of the website.

## SENDING TRANSMISSIONS

If the **Auto Transmission** option has been selected on the **Setup Information** page, a transmission will be automatically generated two business days prior to the effective payday matching the last transmission unless changes have been made since then.

If the **Auto Transmission** option is not selected, transmissions must be sent manually. Confirm that the employees' records are correct and the effective pay date is accurate on the **Regular Transmission** screen. Click on the **Submit** button to send the payroll file to the Bank of Canada for processing.

There will be a second message asking you to authorize the transmission. This extra step is to ensure that a transmission is not sent in error. By sending a transmission, you will be authorizing the Bank of Canada to collect payment from your organization for the corresponding amount of employee purchases. You may click **Cancel** on this screen and not send a transmission; otherwise, click the **OK** button.

Notice the status bar on the bottom will read: "Employee records transmitted successfully."

## CONFIRMATION NOTICE

You will also receive a separate confirmation once your file has been processed. Confirm that a transmission has been sent by viewing the **Pay Schedule** screen. All dates for which transmissions were sent are shaded.

## AUTO TRANSMIT OPTION

Employers on the **Auto Transmit** option have two business days prior to the effective pay date to make changes to employee records. For example, if your payday is Friday, you have until 11 p.m. (Eastern Time) on Wednesday to make the changes. Otherwise, corrections will only be effective the next payday.

If you have the **Auto Transmit** option and you have accidentally manually sent your payroll file, remember only one transmission will be created per effective pay date, so another will not be created automatically. Confirm the pay schedule if you have doubts.

## UNSCHEDULED TRANSMISSION

If you have **not** selected the **Auto Transmit** option, you will need to go to the **Regular Transmission** screen and click on the **Submit** button any time before the next payday. It is recommended that you send a transmission at least two business days before an effective pay date; otherwise you will receive a friendly reminder every day until a transmission is received or you inform us that no transmission will be sent. Late transmissions will result in your employees' plans not being credited until we receive the transmission and payment.

If you are late making changes, or if you have accidentally sent a transmission without making the appropriate changes, you may access the website and make corrections to your organization's database that will offset the incorrect employee records on the next transmission.

To create a transmission for a correction immediately, you may access the **Unscheduled Transmission** screen from the left navigation menu. The **Unscheduled Transmission** screen is separated into two distinct modes. The first mode is used to edit the employee records that will be transmitted, while the second mode is used to transmit the employee data.

This screen allows you to send a transmission that is not part of the established pay schedule, such as a correction to an earlier transmission. All employee records will be displayed as per the last transmission. On this screen, you may change the amount and the active status for each record.

You have the ability to reverse an earlier transmission by inserting a negative sign in each record amount field (negating all purchase values of the prior transmission). The negative transmission will result in a reimbursement to your organization and employees' plans will be reversed as of the date we receive the transmission. Employers are encouraged to make a negative transmission as soon as possible after the erroneous transmission – preferably within 15 days, since employees' purchases cannot be redeemed until 15 days after the purchase (i.e., the date the transmission and the payment are received). If no correction is done by the employer, the Bank of Canada may be required to make the correction, and consequently a Pre-Authorized Debit (PAD) or Direct Deposit (DD) will occur in the account of the unresponsive employer.

You also have the option of entering the Effective Pay Date. If you are making a correction, enter the original transmission date to be corrected. Otherwise, enter the Effective Pay Date. The transmission date is the current business date and cannot be changed.

Click **Save** to access the **Regular Transmission** screen and click **Submit** to send the transmission.

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**PAYROLL**

**Unscheduled Transmission**

Unscheduled transmissions are for correction purposes only. Transmissions sent from this page will not affect your pay schedule. See your manual for details.

Select and confirm your Organization ID and Payroll Frequency period.

Organization ID:  [Confirm](#)

Payroll Frequency Period:  [Confirm](#)

Transmission Date: 2017-07-14

**Employee Information**

To modify employee deduction amounts, enter new amount under appropriate employee and select Save.

Employee payroll deductions for effective pay date: 2017-07-14

Item	Last Name	First Name	SN	Active	Amount(\$)
1	ROBY	ERIK	00000004	<input checked="" type="checkbox"/>	<input type="text" value="100"/>
2	WAT	ALAN	00000004	<input checked="" type="checkbox"/>	<input type="text" value="100"/>
3	LOU	BOB	111111	<input checked="" type="checkbox"/>	<input type="text" value="100"/>
<b>Totals:</b>					\$0.00

Number of Records: 3

[Back](#) [Save](#) [Cancel](#)

## REPORTS

Two reports are available to you from the left navigation menu:

- Transmission Report (available for the last 12 months)
- Detailed Transmission Report (available for the last 12 months)

Note that a **Report of Employee Records** can be printed from either the **Regular** or **Unscheduled Transmission** screens by clicking the **Print** button (and then the print function from your browser).

## TRANSMISSION REPORTS

You may view and print a Transmission Report that contains all transmissions that have occurred over a selected time period. After entering the time period desired, click **Submit**.

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**REPORTS**

**Transmission Report Selection**

**ACME COMPANY 10408**

Enter the start and end dates to retrieve the Transmission Report.

Start Date (YYYY MM DD):

End Date (YYYY MM DD):

[Submit](#)

If you have selected the **Auto Transmit** option, a transmission will be automatically generated for you and the User will display "Autotrans" for transmissions sent this way.

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**REPORTS**

**Transmission Report**

**Organization Name:** ACME COMPANY  
**Organization ID:** 10408  
**Report Start Date:** 2009 01 01  
**Report End Date:** 2009 01 30

**Transmissions**



Effective Pay Date	Transmission Date	Number of Records	User	Amount(\$)
2009 01 08	2009 01 06	16	Autotrans	1,550.00
2009 01 08	2012 05 25	3	Autotrans	700.00
2009 01 15	2012 05 25	3	Autotrans	700.00
2009 01 15	2009 01 13	5	Autotrans	355.00
2009 01 22	2012 05 25	3	Autotrans	700.00
2009 01 22	2009 01 20	16	Autotrans	1,550.00
2009 01 29	2012 05 25	3	Autotrans	700.00
2009 01 30	2009 01 29	5	Autotrans	255.00
<b>Total</b>				<b>\$6,810.00</b>

**Total Transmissions: 8**

**Number of Records: 54**

[Print](#) | [Back](#)

Detailed Transmission Report Page 1 of 1

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## CANADA SAVINGS BONDS

### REPORTS

#### Detailed Transmission Report

**Organization Name:** ACME COMPANY  
**Organization Id:** 10408  
**Pay Frequency Period:** Weekly  
**Effective Pay Date:** 2010-09-23  
**Transmission Date:** 2012-05-23

**Transmission Report**

Employee Name	SIN	Amount (\$)
BROWN BOBBY	999999999	400.00
DOE JOHN	111111111	200.00
JACKO JANE	222222222	200.00
<b>Totals:</b>		<b>\$700.00</b>

**Number of Records:** 3

<https://www.transmission.gc.ca/online/controller/DisplayDetailReportIndex?operator=..> 28/05/2012

## DETAILED TRANSMISSION REPORTS

You may view and print the detailed records contained in past transmissions. The 10 most recent transmissions will be listed. To view the detailed records for any of these listed transmissions, click on the transmission date desired. To view details of a transmission not listed, enter the date of the transmission in the **Effective Pay Date** box, then click **Submit**. All transmissions are listed in the **Transmission Report**.

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- Payroll**
- Regular Transmission
- Set up Information
- Pay Schedule
- Unscheduled Transmission
- Reports**
- Transmission Report
- Detailed Transmission Report**

## REPORTS

### Detailed Transmission Report

To view a particular report, select a date in the table or enter an effective pay date in the field below.

**Organization Name:** ACME COMPANY  
**Organization ID:**104C8

**Recent Transmissions:**

Effective Pay Date	Number of Records	Total Amount(\$)
<a href="#">2009 11 13</a>	6	573.00
<a href="#">2009 10 30</a>	7	1,132.00
<a href="#">2009 10 15</a>	18	1,775.00
<a href="#">2009 10 01</a>	13	1,390.00
<a href="#">2009 09 30</a>	5	355.00
<a href="#">2009 09 17</a>	15	1,560.00
<a href="#">2009 09 15</a>	5	355.00
<a href="#">2009 09 03</a>	15	1,560.00
<a href="#">2009 08 31</a>	5	355.00
<a href="#">2009 08 20</a>	15	1,560.00

Specify an effective date to view the transmission report for that specific date.

**Effective Pay Date (YYYY MM DD):**

**Submit**





# Frequently Asked Questions

## Q. WHAT DO I DO IF I FORGET MY PAYROLL RESOURCE CENTRE USER ID?

- R. If you cannot remember your **User ID**, you will need to contact **1 888 467-5999** (Monday to Friday, 8 a.m. to 6 p.m. ET) and a new PID and PIN will be emailed to the address on record. You will need to re-register on the Payroll Resource Centre following the steps for first-time access.

## Q. WHAT DO I DO IF I FORGET MY PAYROLL RESOURCE CENTRE PASSWORD?

- R. You can go to **employer.csb.gc.ca** to recover your Password. You will need to provide the answers to your Password Challenge Questions. If you cannot remember the answers to your Password Challenge Questions, you will need to contact **1 888 467-5999** (Monday to Friday, 8 a.m. to 6 p.m. ET) and a new PID and PIN will be emailed to the address on record. You will need to re-register on the Payroll Resource Centre following the steps for first-time access.

## Q. HOW DO I TRANSMIT MY PAYROLL FILE?

- R. If there are no changes to be made to your employees' purchases as described on the notification you received:
1. Access the website **employer.csb.gc.ca** and enter your User ID and Password and click **Login** to be taken to the **My Account** screen of the Payroll Resource Centre.
  2. Follow the Web Transmission Site link at the bottom of the page to be taken to the **Regular Transmission** screen.
  3. Confirm totals and Pay Effective Date and click **Submit**. You will be asked to confirm this transaction to avoid errors.
  4. You may confirm a transmission was sent by viewing the **Pay Schedule** screen or you may go to the **Transmission Report** to view.

## Q. HOW DO I CHANGE AN EMPLOYEE'S CONTRIBUTION AMOUNT?

- R. If there are changes to be made to your employees' purchases:
1. Access the **employer.csb.gc.ca** website and enter your User ID and Password and click **Login** to be taken to the **My Account** screen of the Payroll Resource Centre.
  2. Follow the Web Transmission Site link at the bottom of the page to be taken to the **Regular Transmission** screen.
  3. Select **Change** to be taken to the **Change Regular Transmission** screen.
  4. Make changes to employees' records.
  5. Click **Save** to return to the **Regular Transmission** screen. Confirm totals and Pay Effective Date and click **Submit**. You will be asked to confirm this transaction to avoid errors.
  6. You may confirm a transmission was sent by viewing the **Pay Schedule**, or you may go to **Transmission Report** to view.

## Q. I HAVE OPTED FOR THE AUTO TRANSMIT OPTION, BUT I ALSO TRANSMITTED A PAYROLL FILE MANUALLY. WHAT DO I DO?

- R. If you are on the **Auto Transmit** option and you have accidentally sent your payroll file manually, a second transmission **will not be sent** because **only one transmission** will be created per effective pay date. Confirm the pay schedule if you have doubts.

## Q. CAN I RECEIVE EMAIL NOTICES RATHER THAN A FAX?

- R. Yes. Contact **Payroll Savings Program – Employers** at **1 888 467-5999** or by email at **employerhelpdesk@csb.gc.ca** and inform them of your change in preference. Your request will be processed within two business days.

**Q. WHAT IS AN UNSCHEDULED TRANSMISSION?**

R. It is mainly used for corrections. This screen allows you to send a transmission that is not part of the established pay schedule, such as a correction to an earlier transmission. If you send a transmission from this screen rather than the **Regular Transmission** screen, you will receive late notices because your pay schedule is not affected by an **Unscheduled Transmission**. See the **Sending Transmission** section of the manual for more details.

**Q. WHAT HAPPENS WITH THE FILES IF I GO ON HOLIDAY?**

R. If you are not expecting any changes to employee purchases, it is suggested that you select the **Auto Transmit** option on the **Setup Information** screen. Transmissions will occur automatically in your absence and your replacement can confirm the transactions with the notifications. It is also recommended that you have a replacement who is available to act on your behalf in your absence.

**Q. I HAVE FORGOTTEN TO SUBMIT PURCHASES FOR ONE EMPLOYEE. HOW CAN I MAKE THEM UP?**

R. You may add an employee to your database at any time. Create a record for that employee by clicking the **Add** button from the **Change Regular Transmission** screen. Complete the **Amount** field with the amount of purchase. This record will be included in your next transmission.

Otherwise, you may go to the **Unscheduled Transmission** screen and with only that record active send the transmission. Confirm that only that record is active by checking the totals.

**Q. I WOULD LIKE TO AUDIT ALL EMPLOYEE PURCHASES SENT. HOW DO I DO THIS?**

R. The **Transmission Report** (from the left navigation menu) lists all transmissions received to date. The **Detailed Transmission Report** lists each employee record sent in each transmission. Together, these reports will allow you to complete your audit.

**Q. AN EMPLOYEE HAS JOINED OUR COMPANY FROM ANOTHER ORGANIZATION ALSO PARTICIPATING IN THE PAYROLL SAVINGS PROGRAM AND WOULD LIKE TO CONTINUE WITH THE PROGRAM. SHOULD I FORWARD THEIR PURCHASES AS WELL?**

R. You may add an employee to your database at any time. Create a record for that employee by clicking the **Add** button from the **Change Regular Transmission** screen. Complete the **Amount** field with the amount of the contribution. This record will be included in your next transmission. You must contact Technical Support to report the change of the individual's Organization ID before sending the first contribution of the new employee.

**Q. A NEW EMPLOYEE HAS JOINED OUR COMPANY. SHOULD I FORWARD THEIR PURCHASE AS WELL?**

R. No. Unless an employee has registered online to CSB Online Services to contribute to a Payroll Savings Plan, you may not add their contributions to the database. The employee will have to wait until the next sales campaign period to join the Payroll Savings Program.

**Q. WE ARE CHANGING OUR PAY FREQUENCY FROM WEEKLY TO BIWEEKLY. HOW CAN I MAKE THE CHANGE TO MY PAY SCHEDULE?**

R. Contact the **Payroll Savings Program – Employers** support line at **1 888 467-5999** or by email at **employerhelpdesk@csb.gc.ca**.

# Notes

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