

## Clergy/Lay Employee: Compensation Change Checklist

**Please note:** You must enter a domestic clergy new hire in the [My Admin Portal \(MAP\)](#).

Cleric/Lay Employee Name:	Date of Compensation Change:
Employer Name:	City:

This checklist and the guidelines on the following pages provide general directions for when the compensation paid to a clergyperson or lay employee (employee) changes, will provide guidance on what actions you must take to report the compensation change to The Church Pension Fund and its affiliates (referred to as “the Church Pension Group”, or “CPG”).

**The guide and will guide you to:**

1. Provide direction on where to obtain detailed benefit plan information
2. Take any necessary actions

Use this table to track progress on benefits and information disseminated to the employee:

Plan/Products	Date communicated to the employee	Deadline (if applicable)	Date action taken
Group Medical Coverage*		(not applicable)	
Group Dental Coverage		(not applicable)	
Group Life Insurance		(see <a href="#">plan guidelines</a> )	
Disability Coverage:			
Short-Term Disability		(see <a href="#">plan guidelines</a> )	
Long-Term Disability		(see <a href="#">plan guidelines</a> )	
The Church Pension Fund Clergy Pension Plan (Clergy Pension Plan)		(see <a href="#">plan guidelines</a> )	
The Episcopal Church Lay Employees' Defined Contribution Retirement Plan (Lay DC Plan)		(see <a href="#">plan guidelines</a> )	
The Episcopal Church Lay Employees' Retirement Plan (Lay DB Plan) and The Episcopal Church Lay Employees' Death Benefit Plan (Lay Death Benefit Plan)		(see <a href="#">plan guidelines</a> )	
The Episcopal Church Retirement Savings Plan (RSVP)		(see <a href="#">plan guidelines</a> )	
Other products cleric may purchase:			
Supplemental Group Life Insurance		(not applicable)	
Annuities		(not applicable)	
Individual Life Insurance		(not applicable)	

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## Clergy/Lay Employee: Compensation Change Guidelines

### Group Medical/Dental

**Deadline:** 30 days from date of compensation change

1. Provide cleric/lay employee with medical and/or dental benefit information	<ul style="list-style-type: none"> <li>• A change in compensation does not directly impact medical or dental benefits. However, if the change in compensation is a result of the change in hours worked, it may impact eligibility to benefits. Please see the <a href="#">Medical Trust Administrative Policy Manual</a> for more information.</li> <li>• Direct employee to call Client Services for more information at (800) 480-9967, Monday – Friday, 8:30AM – 8:00PM ET</li> </ul>
2. Necessary actions	<ul style="list-style-type: none"> <li>• If the compensation change results in the employee becoming eligible for coverage, follow the guidelines on the New Hire Checklist/Guidelines</li> <li>• If the compensation change results in the employee losing coverage, follow the guidelines on the Termination Checklist/Guidelines</li> </ul>

Review the [Medical Trust Administrative Policy Manual](#) or refer to your diocesan/group administrator for additional details on Medical Trust’s policies and eligibility guidelines.

### Employer-Provided Group Life

**Deadline:** Immediately

1. Provide cleric/lay employee with group life insurance information	<ul style="list-style-type: none"> <li>• Consult with your Diocesan or Group Administrator to determine if a compensation change will change the coverage amount</li> <li>• Communicate coverage amount to the employee</li> <li>• Notify the employee of the potential annual imputed income that will be reported on the employee’s Form W-2 if he/she is eligible for group term life insurance in excess of \$50,000 (including any coverage provided by The Church Pension Fund, if eligible*).</li> <li>• Direct employee to call Client Services for more information at (800) 480-9967, Monday – Friday, 8:30AM – 8:00PM ET</li> </ul>
2. Necessary actions	<ul style="list-style-type: none"> <li>• Individual compensation changes are submitted using MAP by Diocesan or Institution Administrators.</li> <li>• For large employers, “batch compensation” changes for multiple employees are submitted using MAP. Detailed instructions for the “batch upload” process can be found on the “Compensation” screen of MAP.</li> </ul>

It is important to understand the Group Life benefit that is also provided to eligible clergy participating in the Clergy Pension Plan. Refer to [A Guide to Clergy Benefits](#) for further information.

Church Life Insurance Corporation, NAIC No. 61875, a New York life insurance company, with its home office located at 19 East 34th Street, New York, New York 10016 (“Church Life”), offers group and, in certain circumstances, individual life insurance and annuities to clergy and lay employees, and their families, in the service of The Episcopal Church. Product availability and features may vary by state, and products may not be available in all states. Church Life is not licensed in all states. Any and all guarantees by Church Life are based on and expressly subject to the claims-paying ability of Church Life. The Church Pension Fund does not guarantee the payment of principal of or interest on any Church Life insurance policy or annuity contract. Information and descriptions of products and services are provided solely for general informational purposes and are not intended to be complete descriptions of, or to create a contract or an offer to provide, coverage. For complete details of coverage, including exclusions, limitations and restrictions, please see the actual life insurance policy or annuity contract. If any description of a Church Life product conflicts with the terms of the actual life insurance policy or annuity contract, then the terms of such life insurance policy or annuity contract will govern.

## Short-Term Disability

**Deadline:** Immediately

1. Provide cleric/lay employee with disability coverage information	<ul style="list-style-type: none"> <li>• Consult with your diocesan or group administrator to determine how a compensation change may change coverage and premium amounts</li> <li>• For employer-paid coverage, communicate change in coverage amount to cleric/lay employee</li> <li>• For voluntary coverage, communicate change in coverage and premium amounts to cleric/lay employee</li> <li>• Direct employee to call Client Services for more information at (866) 802-6333, Monday – Friday, 8:30AM – 8:00PM ET</li> </ul>
2. Necessary actions	<ul style="list-style-type: none"> <li>• Individual compensation changes are submitted using MAP by Diocesan or Institution Administrators.</li> <li>• For large employers, “batch compensation” changes for multiple employees are submitted using MAP. Detailed instructions for the “batch upload” process can be found on the “Compensation” screen of MAP.</li> </ul>

*Short-term disability and long-term disability insurance products and services are offered by American Family Life Assurance Company of New York, NAIC No. 60526. The information provided here is a summary of the group disability income insurance coverage and is for illustrative purposes only. A certificate with more complete policy information is available upon request. Please refer to the certificate or the group policy for a complete description of coverage, terms, conditions, exclusions, and limitations. If any conflict exists between the certificate and/or policy and the information described here, the terms of the certificate and policy will govern. Other self-funded disability benefits may be provided by The Church Pension Fund.*

## Long-Term Disability

**Deadline:** Immediately

1. Provide cleric/lay employee with disability coverage information	<ul style="list-style-type: none"> <li>• Communicate change in coverage amount to employee</li> <li>• Direct employee to call Client Services for more information at (800) 480-9967, Monday – Friday, 8:30AM – 8:00PM ET</li> </ul>
2. Necessary actions	<ul style="list-style-type: none"> <li>• Individual compensation changes are submitted using MAP by Diocesan or Institution Administrators.</li> <li>• For large employers, “batch compensation” changes for multiple employees are submitted using MAP. Detailed instructions for the “batch upload” process can be found on the “Compensation” screen of MAP.</li> <li>• Compensation changes may impact coverage and premium amounts</li> <li>• No action is required for clergy who only participate in The Church Pension Fund Clergy Long-Term Disability Plan as long as the compensation is reported to the Church Pension Fund (see Clergy Pension Plan below)</li> </ul>

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## Clergy Pension Plan, RSVP, Lay DC Plan, Lay DB Plan, and Lay Death Benefit Plan

**Deadline:** None

1. Provide cleric/lay employee with the applicable pension plan information	<ul style="list-style-type: none"> <li>• In order to receive all benefits provided to active participants, the employer is required to make all necessary assessment payments and contributions</li> <li>• Notify eligible participants in either the Clergy Pension Plan or the Lay DB Plan how the compensation change may impact the life insurance or death benefit</li> <li>• To make personal contribution changes in the Lay DC Plan or RSVP, they may call Fidelity at (877) 208-0092 or visit <a href="http://www.netbenefits.com">www.netbenefits.com</a></li> </ul>
2. Necessary Actions	<ul style="list-style-type: none"> <li>• Individual compensation changes are submitted using MAP by Diocesan or Institution Administrators.</li> <li>• For large employers, “batch compensation” changes for multiple employees are submitted using MAP. Detailed instructions for the “batch upload” process can be found on the “Compensation” screen of MAP.</li> </ul>

Review:

[A Guide to Clergy Benefits](#) for additional details on the Clergy Pension Plan

[RSVP & Lay DC Plan: Employee Guide](#) for additional RSVP and Lay DC Plan details

[A Guide to the Lay Defined Benefit Plan](#) for additional details on the Lay DB Plan and Lay Death Benefit Plan

## Other employee products

**Deadline:** None

Supplemental Group Life, Annuities, and Individual Life policies	<ul style="list-style-type: none"> <li>• No action necessary.</li> <li>• Encourage employees to review and update beneficiary information by completing the <a href="#">Life/Annuities Beneficiary Form</a>. This form is for Group &amp; Individual Life and Annuities only.</li> </ul>
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