

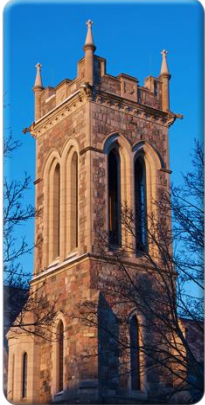


CHURCH
PENSION GROUP

A Century of Service
and Benefits for
the Episcopal Church



Connecting the Employee Roster and MLPS – “ER Enabling MLPS”



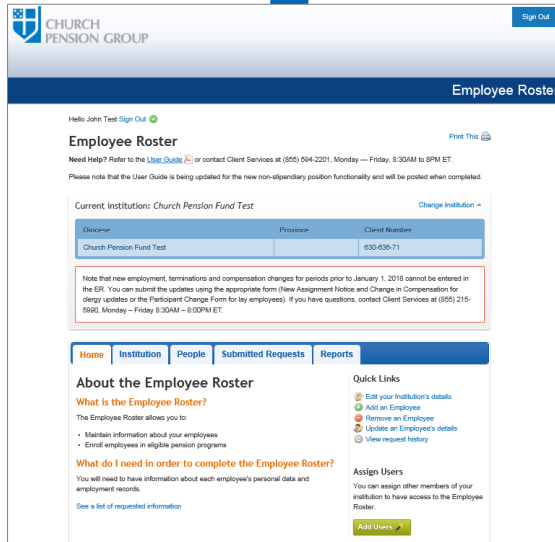
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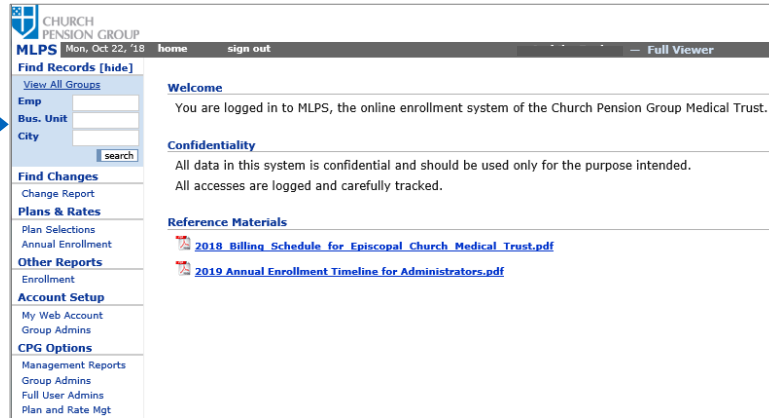


November 8, 2018

ER Enabling MLPS



The screenshot shows the 'Employee Roster' page for the Church Pension Group. At the top, there is a 'Sign Out' button. Below the header, a message reads: 'Hello John Test Sign Out'. The main heading is 'Employee Roster' with a 'Print This' link. A note states: 'Need Help? Refer to the User Guide or contact Client Services at (855) 594-2201, Monday — Friday, 8:30AM to 8PM ET. Please note that the User Guide is being updated for the new non-standby position functionality and will be posted when completed.' Below this is a table for 'Current Institution: Church Pension Fund Test' with columns for 'Discipline', 'Province', and 'Client Number'. The table contains one row: 'Church Pension Fund Test', 'Church Pension Fund Test', and '630-636-71'. A note below the table states: 'Note that new employment, terminations and compensation changes for periods prior to January 1, 2019 cannot be entered in the ER. You can submit the updates using the appropriate form (New Assignment Notice and Change in Compensation for clergy updates or the Participant Change Form for lay employees). If you have questions, contact Client Services at (855) 215-5660, Monday — Friday 8:30AM — 8:00PM ET.' At the bottom, there are navigation tabs: 'Home', 'Institution', 'People', 'Submitted Requests', and 'Reports'. The 'About the Employee Roster' section includes 'What is the Employee Roster?' and 'What do I need in order to complete the Employee Roster?'. A 'Quick Links' section lists: 'Edit your Institution's details', 'Add an Employee', 'Remove an Employee', 'Update an Employee's details', and 'View request history'. An 'Assign Users' section states: 'You can assign other members of your institution to have access to the Employee Roster.' and includes an 'Add Users' button.



The screenshot shows the 'MLPS' (Medical Life Pension System) interface for the Church Pension Group. At the top, there is a 'Sign Out' button and the date 'Mon, Oct 22, '18'. The main heading is 'MLPS' with a 'Full Viewer' link. Below this is a 'Find Records [hide]' section with a 'View All Groups' link and a search form with fields for 'Emp', 'Bus. Unit', and 'City', and a 'search' button. The 'Find Changes' section includes a 'Change Report' link. The 'Plans & Rates' section includes 'Plan Selections' and 'Annual Enrollment'. The 'Other Reports' section includes 'Enrollment'. The 'Account Setup' section includes 'My Web Account', 'Group Admins', 'CPG Options', 'Management Reports', 'Group Admins', 'Full User Admins', and 'Plan and Rate Mgt'. The 'Welcome' section states: 'You are logged in to MLPS, the online enrollment system of the Church Pension Group Medical Trust.' The 'Confidentiality' section states: 'All data in this system is confidential and should be used only for the purpose intended. All accesses are logged and carefully tracked.' The 'Reference Materials' section includes links to '2018 Billing Schedule for Episcopal Church Medical Trust.pdf' and '2019 Annual Enrollment Timeline for Administrators.pdf'.

■ Demographic data will be populated from the Employee Roster into MLPS

- MLPS administrators will no longer need to enter demographic data for new employees in MLPS

What Will Change?

- All **new** employee entries will begin in the Employee Roster (ER)
- All employee demographic data will be maintained in the Employee Roster (ER) — changes such as:
 - Address
 - Email address
 - Telephone number



What Will Change? (cont'd)

Create New Scheduled Payments Record (Lay)

Effective Date of Compensation * 01-01-2019
MM-DD-YYYY

Annual Income Amounts

Base salary (excluding housing) and scheduled taxable cash payments \$ 30,000.00

Employer Contributions to Qualified or Non-Qualified Plan \$ 0.00

Cash Housing Allowance and/or Utilities \$ 0.00

Housing

Employer Provided Housing? * Yes No

Calculated Totals

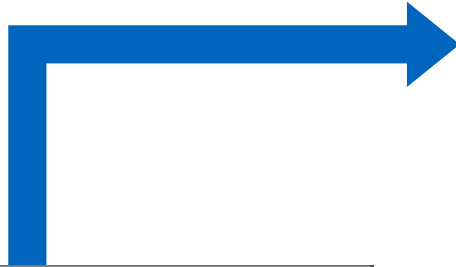
Value of Employer Provided Housing - DE \$0.00

Total Assessable Compensation - DE \$30,000.00

Value of Employer Provided Housing - DCRSVP \$0.00

Total Assessable Compensation - DCRSVP \$30,000.00

Cancel Add



Name

Designation/Salutation Mr. First Test Mid Employee Last Suffix

Mailing Address

Line 1 19 East 34 St Line 2 City New York Country United States of NY State/Province NY Zip/Postal Code 10016

Phone Personal E-Mail Business E-Mail Eff. date for address changes (if not today)

Demographics

Tax ID / SSN 111-22-3332 TIN Birth Date 10/01/1984 Clergy/Lay Status Lay Gender Male

Salary \$30,000.00 Hire Date 10/01/2018 Retire Date Deceased Date

Coverages

	Business Unit	Plan	Tier/Vol	Effective	Term. Date	Rate
Med	001002 CPG TEST	MHDE Anthem BCBS CDHP-2C	Single	10/01/2018		
Den	001002 CPG TEST	DD50 Basic Dent-50/150	Single	10/01/2018		
Life/ADD	001002 CPG TEST	GLIFE Group Life	30,000	01/01/2019		
Sup Life						
Sup Sps						
LTD	001002 CPG TEST	GLTDE LTD 50% \$25K-\$44K		01/01/2019		
IRP	001002 CPG TEST	GIRPB STD \$25K-\$44K		01/01/2019		

Date of qualifying event: 01/01/2019

- All compensation changes will be recorded in the Employee Roster (ER)
- Compensation will update in MLPS
- Compensation based coverages will update in MLPS
- Compensation related billing will be updated

What Will Remain the Same?

■ Coverages

- Employee coverages will continue to be maintained in MLPS

■ Dependents

- Dependent data will continue to be maintained in MLPS

What Will Remain the Same? (cont'd)

■ Employment Terminations

- Coverage related terminations will continue to be handled in MLPS
- Employment termination in Employee Roster will not terminate coverage in MLPS

The screenshot shows the 'Employees' section of a web application. At the top, there are navigation tabs: Home, Institution, People, Submitted Requests, and Reports. Below the tabs, there are links to 'Jump to: Offices' and 'Jump to: Non-Employee Leaders'. The main area is titled 'Employees' and contains a table with columns for Employee, Status, Address, and Employment Type. A red box highlights the 'Remove' button in the table. Below the table are buttons for 'Add Employee' and 'Add Non-Spendary Cleric'.



The screenshot shows the MLPS interface for a Church Pension Group. It includes fields for Name, Designation/Salutation, First, Mid, Last, Suffix, Mailing Address, Demographics, and Find Changes. A table of coverages is displayed with columns for Business Unit, Plan, Tier/Vol, Effective, Term Date, and Rate. The Term Date column is highlighted in green, and the dates are also highlighted in green. A red box highlights the Term Date column.

Business Unit	Plan	Tier/Vol	Effective	Term Date	Rate
Med 001002 CPG TEST	MHDE Anthem BCBS CDHP-2C	Single	10/01/2018	12/31/2018	
Den 001002 CPG TEST	DD50 Basic Dent-50/150	Single	10/01/2018	12/31/2018	
Life/ADD 001002 CPG TEST	GLIFE Group Life		30,000	10/01/2018	13/31/2018
Sup Life					
Sup Sps					
LTD 001002 CPG TEST	GLTDC LTD 25% \$45K+		10/01/2018	12/31/2018	
IRP 001002 CPG TEST	GIRPB STD \$25K-\$44K		10/01/2018	12/31/2018	

Adding a New Employee

Adding Employee — Step 1 (Employee Roster)



Home Institution **People** Submitted Requests Reports

View and edit people information.

- Jump to: Officers
- Jump to: Non-Employee Leaders

Employees

Download to Excel [Can I correct data errors?](#)

Employee	Status	Address	Employment Type	
South, North	Active Clergy	No Direction St Road MD 01234	Stipendiary, and Non-Stipendiary	Remove
String, Pull	Active Clergy	2356 Home Street Grace PA 18334	Stipendiary	Remove
Tom, Jerry	Active Clergy	111 Test St Brooklyn NY 11234	Non-Stipendiary	Remove
Un, Jessica	Lay	1 Test Zone Street Oxford MS 38655	Stipendiary	Remove

[+ Add Employee](#) [+ Add Non-Stipendiary Cleric](#)

If you are adding employment or a non-stipendiary position (for a cleric) for someone already at your institution, click on their name in the list above to update their information. You do not need to click on Add Employee or Add Non-Stipendiary Cleric.



New Employee

- Legal Name
- Employment
- Contact
- Demographics
- Benefits
- Compensation
- Marital Status
- Enrollment
- Non-Stipendiary Positions

Add New Employee

Legal Name

Designation / Salutation * First * Middle Last * Suffix

Mr. Test Middle Name Employee Please Select

Employment Status *
Please Select

[Cancel](#) [Save and Continue](#)

Adding Employee — Step 2 (MLPS)

CHURCH PENSION GROUP
MLPS Fri, Oct 5, '18 home sign out MLPSTest TestMLPSDioAdmin3 — Master Administrator

Find Records [hide]
All Business Units
Emp
Bus. Unit
City
search

Find Changes
Change Report

Plans & Rates
Plan Selections
Annual Enrollment

Other Reports

Church Pension Fund Test - 1111

Employee Search
The system will attempt to match and pull an employee's information based on SS# and DOB.
If the employee lacks a Social Security Number or US Tax ID, please phone Client Services at 866-802-6333 (Mon-Fri 8:30am - 8pm ET, except holidays)

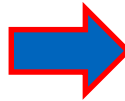
Tax ID / SSN
Date of Birth

Cancel Search

[\[+ Add Employee\]](#)

Adding Employee — Step 3 (MLPS)

Pre-populated from ER



Church Pension Fund Test - 1111

New Request

[Verify](#) **Make any desired changes and click Verify to begin.**
[Clear Changes](#) **Clear any changes on this unsaved request form.**

Name
 Designation/Salutation: Mr. [v] First: Test [v] Mid: [v] Last: Employee [v] Suffix: [v]

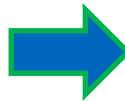
Mailing Address
 Line 1: 19 East 34 St [v] Line 2: [v] City: New York [v] Country: United States of [v] State/Province: NY [v] Zip/Postal Code: 10016 [v]

Phone: [v] Personal E-Mail: [v] Business E-Mail: [v] Eff. date for address changes (if not today): [v]

Demographics
 Tax ID / SSN: 111-22-3333 [v] TIN: [v] Birth Date: 10/01/1984 [v] Clergy/Lay Status: Lay [v] Gender: Female [v]

Salary: \$20,000.00 [v] Hire Date: 10/01/2018 [v] Retire Date: [v] Deceased Date: [v]

Employer will populate



Business Unit	Plan	Tier/Vol	Effective	Rate
Med	[v]	[v]	[v]	[v]
Den	[v]	[v]	[v]	[v]
Life/ADD	[v]	[v]	[v]	[v]
Sup Life	[v]	[v]	[v]	[v]
Sup Sps	[v]	[v]	[v]	[v]
LTD	[v]	[v]	[v]	[v]
IRP	[v]	[v]	[v]	[v]

Dependents

Med	Den	First	Mid	Last	Suffix	Tax ID / SSN	TIN	Birth Date	Gender	Relation	
<input type="checkbox"/>	<input type="checkbox"/>	[v]	[v]	[v]	[v]	[v]	[v]	[v]	[v]	[v]	Drop Edit
<input type="checkbox"/>	<input type="checkbox"/>	[v]	[v]	[v]	[v]	[v]	[v]	[v]	[v]	[v]	Drop Edit
<input type="checkbox"/>	<input type="checkbox"/>	[v]	[v]	[v]	[v]	[v]	[v]	[v]	[v]	[v]	Drop Edit

[Add row](#) More dependents? If all rows are filled, click to add another empty row.

Reflections, Questions, and Discussion



Feedback Poll

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