

CPG for New Administrators: Doing the Work



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Integrated Benefits
Account Management Services

≡ Today's Agenda



-
- 01** Administrator Types and Roles

 - 02** My Admin Portal (MAP) Overview

 - 03** Employee Benefits Process
 - New Hire
 - Compensation Changes
 - Termination of Employment/Benefits

 - 04** The Medical Life Participant System (MLPS)

 - 05** The Fidelity Investments Systems (PSW and SCP)

01

Administrator Types and Roles

Administrator Types and Roles

Dioceses administrators

- Manage employment
- Enrollment in retirement plans
- Enrollment in group benefits for institutions under diocesan authority



Group administrators

- Enrollment in group benefits (health, life, and/or disability) for associations

Institution administrators

- Manage employment
- Enrollment in retirement plans

02

My Admin Portal (MAP) Overview

My Admin Portal



CHURCH PENSION GROUP

About Us | Investment Management | Contact Us | Jobs | [Sign In / Create Account](#)

search for subjects, conferences, videos

Home MyCPG Retirement Insurance Learning Administrators

Sign In or Create Account

Sign In [Create Account](#)

* Username, Personal Email or Client Number (XXX-XXX-XX)

[Forgot Username?](#)

* Password Show typing

[Forgot Password?](#)

Sign In

Need Help?
Please contact Client Services (855) 594-2201
Monday - Friday, 8:30AM - 8:00PM EST

* Required field.

MAP Landing Page Dashboard

The screenshot displays the MAP Landing Page Dashboard for the Church Pension Group. The page is organized into several main sections:

- Header:** Features the Church Pension Group logo, a search bar, and navigation links for MAP, People, Benefits Groups and Billing, Institution, Resources, and Reports. An orange arrow points to the MAP link.
- My Admin Portal:** A section for users signed in as Diocese Administrator, Group Administrator, or Institution Administrator. An orange arrow points to this section.
- Quick Actions:** A grid of buttons for common tasks: Add an Employee, View Billing Accounts, View Downloads, View Group Administrators, View Alerts & Notifications, and View News & Updates. An orange arrow points to this section.
- Guides & Resources:** A section with two image-based cards. An orange arrow points to this section.
- Employment Events:** A section titled "What to do when" with a list of events such as "You hire a new cleric," "A cleric leaves or is terminated," and "A cleric marries." An orange arrow points to this section.
- Life Events:** A section titled "What to do when an employee" with a list of events such as "Needs to update benefits due to a change in spouse's or dependent's employment," "Gets married," and "Has a baby or adopts." An orange arrow points to this section.
- Learning Center:** A section with a link to "Understanding your bills." An orange arrow points to this section.
- Employee Resources:** A section with links to "2022 Clergy Tax Talk for 2021 Taxes (pre-recorded webinar)" and "Understanding the Clergy Housing Allowance." An orange arrow points to this section.
- Latest Updates:** A section on the right side of the page listing recent news items with dates and titles, and a "View More" button.
- Client Services Support:** A section on the right side of the page providing "Hours of Operation" and contact information for "Administrative Support" and "Technical Support." An orange arrow points to this section.

03

Employee Benefits Processes

MAP New Hire Process

New Hire: Start with “People” Landing Page

CHURCH PENSION GROUP

MAP ▾ 🔔 🔍

MAP People Benefits Groups and Billing Institution Resources Reports

Map / People

People

Employment Quick Actions

- Add an Employee
- Add a Non-Stipendiary Position
- Terminate Employee
- Update Compensation
- Update Employment
- View Employees
- View Institution Administrators

Employee Quick Actions

- View Coverage
- Add a Leave of Absence
- Enroll in Pension
- Update Personal Information
- View Relationships
- Add Dependent
- Update Marital Status
- Upload Employee Document

Support and Guidance

- [Add a new cleric or lay employee](#)
- [Terminate an employee](#)
- [Update employee information and status](#)
- [Update employee benefits and pensions](#)
- [Marital changes](#)
- [Dependent changes](#)
- [Report a death](#)

New Hire: Personal Information

MAP People Benefits Groups and Billing Institution Resources Reports

Client ID: 541-210-41 Diocese Of Oklahoma

MAP / Stipendiary - New Hire

Personal Info
In Progress

Employment & Compensation
Not Started

Personal Information

Important Information

When you enter a legal name, SSN/individual Tax ID, and date of birth we will search for that individual. If there is a match you will be able to select them from a list.

Lay Employees

For a new lay employee, please complete the information below.

Clergy

For a newly ordained clergy person who is not yet registered, please contact the Recorder of Ordinations at (800) 223-6602 x6246.

Salutation

Ms.

Legal First Name *

Janelle

Legal Middle Name

Sprigge

Legal Last Name *

Doe

Suffix

- Please Select...

Preferred Name

Jane

Support and Guidance

- [Purpose of this screen](#)
- [Documents needed for a new employee](#)
- [Required information for a new employee profile](#)
- [Enrollment in benefits](#)
- [Privacy of employee information](#)

Required:

- Legal name
- Gender
- Date of Birth
- SSN/ITIN
- Mailing Address
- Email

Gender * i

Female

Male

Gender Identity

This field records the self-designated gender identities of our clients. It is optional, it is used only by CPG and our affiliates, and it is not shared with our third-party vendors at this time. Please contact Client Services at (866) 802-6333 if you have any questions about this field.

Female

Male

Non-Binary

Self-describe

Date of Birth * i

05/01/1980 i

MM/DD/YYYY

SSN or ITIN (Individual Tax ID) * i

005-01-1980

New Hire: Personal Information, cont.



Mailing Address



Country

United States

Address Line 1

23241 Smith St

Address Line 2

City

Astoria

State

New York

Postal Code

11106



Phone Number

Mobile

United States And Canada +1

(435) 394-0019

Home

- Please Select -



Email Address

At least one email is required. *

Business

janettedoe@fakeyahoo.com

Personal

Cancel Changes

Continue to Employment and Compensation



New Hire: Employment & Compensation

CHURCH PENSION GROUP

MAP People Benefits Groups and Billing Institution Resources Reports

Client ID: 541-210-41 Diocese Of Oklahoma

MAP / Stipendiary - New Hire

Personal Info Complete Employment & Compensation In Progress

Employment and Compensation

Employment

Hire Date *

05/04/2022

MM/DD/YYYY

Position Title *

Communications Officer

Hours expected to work per year *

2080

Compensation

Compensation Type *

Scheduled Payment

One-time Payment

Scheduled Payment

Effective Date of Compensation *

05/04/2022

MM/DD/YYYY

MAP



Annual Income Amounts

Base salary (excluding housing) and scheduled taxable cash payments

\$50000.00

Employer contributions to qualified or non-qualified plan

\$2050.00

Cash housing allowance and/or utilities

\$10000.00

Housing

Employer provided housing *

Yes

No

Go Back

Submit and Finish

You will be able to add additional compensation after this transaction is submitted.

New Hire: Employment Confirmation

CHURCH PENSION GROUP

MAP ▾ 🔔

MAP People Benefits Groups and Billing Institution Resources Reports

Janette Sprigge Doe
Client Number: XXX-X38-42

✓ Information successfully updated!

Stipendiary Employment Confirmation

Janette Doe
Client Number: XXX-X38-42

Next Steps...

Marital Status Update

Marital status updates may be required to successfully add a pension plan.

[Marital Status Update](#)

Pension Plan Enrollment

The member's marital status may need to be updated to successfully add a pension plan.

[Pension Plan Enrollment](#)

New Hire: Marital Status

The screenshot shows the top navigation bar of the Church Pension Group application. On the left is the logo with the text "CHURCH PENSION GROUP". On the right are a "MAP" dropdown menu, a notification bell icon, and a search bar. Below the header is a secondary navigation bar with links for "MAP", "People", "Benefits Groups and Billing", "Institution", "Resources", and "Reports".

Janette Sprigge Doe

Client Number: XXX-X38-42

Navigate to a Section

Pension

Pension Plans Summary

 Please verify the following information before proceeding:
The member's marital status.

Please confirm or update the member's marital status below.

Marital Status

Single

Is this correct?

No, update Marital Status **Yes, this is correct**

Support and Guidance

- [Purpose of this screen](#)
- [The Clergy Pension Plan](#)
- [The Lay Defined Benefit \(DB\) Plan](#)
- [The Lay Defined Contribution \(DC\) Plan](#)
- [Overview of The Episcopal Church Retirement Savings Plan \(RSVP\)](#)

New Hire: Marital Status – married

CHURCH PENSION GROUP

MAP | People | Benefits Groups and Billing | Institution | Resources | Reports

Janette Sprigge Doe
Client Number: XXX-X38-42

Navigate to a Section

Relationships

Marital Status

Marital Status *

- Single
- Married

Support and Guidance

[Marital Status](#)

Required:

- Legal name
- Gender
- Date of Birth
- SSN/ITIN

Spouse Information

Salutation

- Please Select -

Legal First Name *

Sam

Legal Middle Name

P

Legal Last Name *

Doe

New Hire: Adding Dependents

CHURCH PENSION GROUP

MAP | People | Benefits Groups and Billing | Institution | Resources | Reports

Janette Sprigge Doe
Client Number: XXX-X38-42

Navigate to a Section

Relationships

Add Dependent

Relationship *

Child

Is this a stepchild? *

Yes

No

Is this child disabled? *

Yes

No

Support and Guidance

[Definition of dependents](#)

[Enrolling dependents in benefits](#)

[When a dependent turns 30 years of age](#)

[Adding or updating dependent information](#)

[Documents for adding new dependents](#)

Dependent Information

Salutation

- Please Select -

Legal First Name *

Daedra

Required:

- Legal name
- Gender
- Date of Birth
- SSN/ITIN

New Hire: Adding Dependents – Confirmation

CHURCH FENSON GROUP

MAP ▼ 🔔 🔍

MAP People Benefits Groups and Billing Institution Resources Reports

Janette Spriggo Doe
Client Number: XXX-XXX-42

Navigate to a Section
Relationships

Add Dependent

Relationship: Child

Is this a stepchild? No

Is this child disabled? No

Dependent Information

Legal First Name: David

Legal Middle Name: P

Legal Last Name: Doe

Gender: Female

Gender Identity: other

Date of Birth: 05/04/2006

SSN or ITIN (Individual Tax ID): 000-04-2008

Optional Documentation

Supporting documentation may be provided for this dependent, you can upload one of the following documents.

- Driver's License
- State ID
- Birth Certificate
- Passport
- Social Security Card

Acceptable file formats: .pdf, .doc, .docx, .odt, .jpg, .jpeg, .png, .gif

Multiple files can be added. The total size of all files combined should be under: 200 mb

Drag and drop or click to browse



Optional Documentation

Supporting documentation may be provided for this dependent, you can upload one of the following documents.

- Driver's License
- State ID
- Birth Certificate
- Passport
- Social Security Card

Acceptable file formats: .pdf, .doc, .docx, .odt, .jpg, .jpeg, .png, .gif

Multiple files can be added. The total size of all files combined should be under: 200 mb

Drag and drop or click to browse



Cancel Submit

Cancel Submit

New Hire: Pension Enrollment

CHURCH PENSION GROUP

MAP ▾ 🔔

MAP People Benefits Groups and Billing Institution Resources Reports

Janette Sprigge Doe
Client Number: XXX-X38-42

Navigate to a Section

Pension ▾

Pension Plans Summary

Plan Selection

⚠ Mapped message for **PLayDCImm401A**

Eligible Plans

This person is eligible for the following plan(s):

- 57218 RSVP 403B
- 57163 Lay 401A - Immediate Vesting


Support and Guidance

- [Purpose of this screen](#)
- [The Clergy Pension Plan](#)
- [The Lay Defined Benefit \(DB\) Plan](#)
- [The Lay Defined Contribution \(DC\) Plan](#)
- [Overview of The Episcopal Church Retirement Savings Plan \(RSVP\)](#)

Cancel

Continue to Plan Details

New Hire: Pension Enrollment – Details

CHURCH PENSION GROUPMAP🔔

[MAP](#) [People](#) [Benefits Groups and Billing](#) [Institution](#) [Resources](#) [Reports](#)

Janette Sprigge Doe
Client Number: XXX-X38-42

Navigate to a Section
Pension

Pension Enrollment Details

Selected Plan
57163 Lay 401A - Immediate Vesting
[Select a different plan](#)

Billing Organization
Who is contributing to the plan? *
 Institution
 Diocese

Participation Date: ⓘ
Year *
2022
Month *
06 - June

Scheduled Total Assessable Compensation - DC/RSVP ⓘ
\$78,000.00
[Update Compensation](#)

Support and Guidance

- [Purpose of this screen](#)
- [The Clergy Pension Plan](#)
- [The Lay Defined Benefit \(DB\) Plan](#)
- [The Lay Defined Contribution \(DC\) Plan](#)
- [Overview of The Episcopal Church Retirement Savings Plan \(RSVP\)](#)

New Hire: Pension Enrollment – Details, cont.

Employee Contributions

Per pay period contribution

Percentage

Fixed Amount

Contribution

4.00 %

Employer monthly contributions

ER Base contribution %

10%

ER Match contribution %

0%

By pressing "Enroll" you will enroll this employee in the selected pension program.

Once this data is submitted it cannot be edited from this application. To edit this enrollment, you will need to call Client Services.

Please confirm this is the information you would like to submit.


Press "Cancel" to edit this data.

Press "Enroll" to enroll this person in the selected pension plan.

Cancel

Enroll

New Hire: Pension Enrollment – Confirmation

MAP People Benefits Groups and Billing Institution Resources Reports


Janette Sprigge Doe
Client Number: XXX-X38-42

MAP ▼ 🔔

Janette Sprigge Doe
Client Number: XXX-X38-42

Navigate to a Section

Pension ▼

 **Information successfully updated!**
57163 Lay 401A - Immediate Vesting


Pension Plans Summary

Enrolled

This person is enrolled in the following plan(s):

57163 Lay 401A - Immediate Vesting
Participation Date: 06/01/2022

No other plans available

 All available plans are already enrolled

[MAP Home](#)

Support and Guidance

- [Purpose of this screen](#)
- [The Clergy Pension Plan](#)
- [The Lay Defined Benefit \(DB\) Plan](#)
- [The Lay Defined Contribution \(DC\) Plan](#)
- [Overview of The Episcopal Church Retirement Savings Plan \(RSVP\)](#)

New Hire: Coverage for Employee Benefits

CHURCH PENSION GROUP MAP

MAP People Benefits Groups and Billing Institution Resources Reports

Janette Sprigge Doe
Client Number: XXX-X38-42

Navigate to a Section
Coverage

Coverage


To view and update this member's coverage please proceed by selecting a Benefits Group.

Select Group and View Coverage

Support and Guidance

- [Purpose of this screen](#)
- [Qualifications for mid-year coverage change](#)
- [Date definitions](#)
- [Adding dependents](#)
- [More information on administering benefits](#)

New Hire: Coverage, cont.

CHURCH PENSION GROUPMAP🔔

[MAP](#) [People](#) [Benefits Groups and Billing](#) [Institution](#) [Resources](#) [Reports](#)

Client ID: 541-210-41 Diocese Of Oklahoma

[MAP](#) / Benefits Group & Billing

Janette Sprigge Doe
Client Number: XXX-X38-42



Select a Benefits Group

ID	Name
0604	Diocese of New York
0605	Resurrection Episcopal Day School-NY
0611	Trinity Wall Street
0621	St Thomas Church-NYC
0692	St James-NYC
0718	Diocese of Oklahoma



New Hire: Coverage, cont.

CHURCH PENSION GROUP MAP ▾ 🔔 🔍

MAP People Benefits Groups and Billing Institution Resources Reports

MAP / People / Coverage

Janette Sprigge Doe
Client Number: XXX-X38-42

Coverage

Date of Qualifying Event * ⓘ

05/04/2022 📅

MM/DD/YYYY

Navigate to a Section

Coverage ▾

Support and Guidance

- [Purpose of this screen](#)
- [Qualifications for mid-year coverage change](#)
- [Date definitions](#)
- [Adding dependents](#)
- [More information on administering benefits](#)

Participants

To make changes to the member's dependent(s), add/edit here.

[Add or edit relationships](#)

Medical Coverage

<input checked="" type="checkbox"/> Daedra P Doe Child	Add
<input checked="" type="checkbox"/> Sam P Doe Spouse	Add

To terminate coverage, add a termination date below.

Dental Coverage

<input checked="" type="checkbox"/> Daedra P Doe Child	Add
<input checked="" type="checkbox"/> Sam P Doe Spouse	Add

To terminate coverage, add a termination date below.

Medical Coverage

[Add or edit relationships](#)

<input checked="" type="checkbox"/> Daedra P Doe Child	Add
<input checked="" type="checkbox"/> Sam P Doe Spouse	Add

New Hire: Coverage, cont.

Plans

Medical

Billing Account: 0718007102 Episcopal Ch... Plan: Cigna Open Access Plan ... Tier: Family Rate: \$7,675.00 Effective Date: 06/01/2022 Termination Date: MM/DD/YYYY

Dental

Billing Account: 0718007102 Episcopal Ch... Plan: Basic Dent-50/150 Tier: Family Rate: \$124.00 Effective Date: 06/01/2022 Termination Date: MM/DD/YYYY

Group Life

Billing Account: 0718007102 Episcopal Ch... Plan: Group Life Volume: \$50000.00 Rate: Effective Date: 06/01/2022 Termination Date: MM/DD/YYYY

Long Term Disability

Billing Account: 0718007102 Episcopal Ch... Plan: LTD 180 days 66.67% ER ... Volume: Rate: Effective Date: 06/01/2022 Termination Date: MM/DD/YYYY

Short Term Disability

Billing Account: 0718007102 Episcopal Ch... Plan: STD 26 weeks 66.67% ER... Volume: Rate: Effective Date: 06/01/2022 Termination Date: MM/DD/YYYY

My Notes

255/255 characters remaining

Special Requests or Instructions

Notes entered will be reviewed by Client Services.

255/255 characters remaining

Clear Changes **Submit Update**

New Hire: Coverage, cont.

Plans

Medical



Billing Account

Plan

Tier

Family

Rate

\$2,675.00

Effective Date

MM/DD/YYYY

Termination Date

MM/DD/YYYY

Dental

Billing Account

Plan

Tier

Family

Rate

\$124.00

Effective Date

MM/DD/YYYY

Termination Date

MM/DD/YYYY

New Hire: Coverage, cont.

CHURCH PENSION GROUP

MAP

MAP People Benefits Groups and Billing Institution Resources Reports

[MAP](#) / [People](#) / [Coverage](#) / Confirmation

Janette Sprigge Doe
Client Number: XXX-X38-42

Navigate to a Section
Coverage



Submitted/In Process

Information successfully updated!
Please note that you cannot edit the information below.

Coverage

Date of Qualifying Event
2022-05-04

Participants

Medical Coverage

- ✓ **Daedra P Doe** Added
Child
- ✓ **Sam P Doe** Added
Spouse

Dental Coverage

- ✓ **Daedra P Doe** Added

New Hire: Coverage, cont.

Current Plan



Medical

Billing Account <i>New</i>	Plan <i>New</i>	Tier <i>New</i>	Rate <i>New</i>	Effective Date <i>New</i>	Termination Date
0718007102 Episcopal Church Of Oklahoma	Cigna Open Access Plus PPO 100	Family	\$2,675.00	2022-06-01	

Dental

Billing Account <i>New</i>	Plan <i>New</i>	Tier <i>New</i>	Rate <i>New</i>	Effective Date <i>New</i>	Termination Date
0718007102 Episcopal Church Of Oklahoma	Basic Dent-50/150	Family	\$124.00	2022-06-01	

Group Life

Billing Account <i>New</i>	Plan <i>New</i>	Volume	Rate	Effective Date <i>New</i>	Termination Date
0718007102 Episcopal Church Of Oklahoma	Group Life	\$45,000.00		2022-06-01	

Supplemental Life

Billing Account	Plan	Volume	Rate	Effective Date	Termination Date
None	None				

Supplemental Spouse

Billing Account	Plan	Volume	Rate	Effective Date	Termination Date
None	None				

MAP Compensation Change Process

Compensation

CHURCH PENSION GROUP

MAP ▾

MAP People Benefits Groups and Billing Institution Resources Reports

Map / People

→ People

Employment Quick Actions

→

Add an Employee	Add a Non-Stipendiary Position	Terminate Employee
Update Compensation	Update Employment	View Employees
View Institution Administrators		

Support and Guidance

- Add a new cleric or lay employee
- Terminate an employee
- Update employee information and status
- Update employee benefits and pensions
- Marital changes
- Dependent changes
- Report a death


Employee Quick Actions

Add a Leave of Absence	Add Dependent	Enroll in Pension
Upload Employee Document	Update Marital Status	Update Personal Information
View Coverage	View Relationships	

Guides & Resources



Compensation: Select an Employee

CHURCH PENSION GROUPMAP🔔

[MAP](#) [People](#) [Benefits Groups and Billing](#) [Institution](#) [Resources](#) [Reports](#)

Client ID: 541-210-41 Diocese Of Oklahoma

[MAP](#) / [People](#)

Employees

Click on an employee's client number below to view their record. You can also sort each column by clicking on the blue arrow next to the column header.

Support and Guidance

- [Purpose of this screen](#)
- [Adding a new cleric or employee](#)
- [Filters](#)

[Add an Employee](#) [Add a Non-Stipendiary Position](#)

Filters

Employment Type

- All Employment Types
- Stipendiary
- Non-Stipendiary

Clergy and Lay

- Both
- Clergy

Search by Name

Client Number	Name	Address	Employment Type	Pension Status	Action
XXX-X38-42	Doe, Janette Sprigge	Astoria, NY 11106 US	Stipendiary	✔ Complete	Remove

Compensation: Overview

CHURCH PENSION GROUP

MAP

[MAP](#) [People](#) [Benefits Groups and Billing](#) [Institution](#) [Resources](#) [Reports](#)

Janette Sprigge Doe
Client Number: XXX-X38-42

Navigate to a Section

Compensation

Compensation

Employer Diocese Of Oklahoma
Oklahoma City, OK 73102-5814
Client Number: 541-210-41

Hire Date 05/04/2022

[View Employment](#)

Support and Guidance

- [Compensation components](#)
- [Severance reporting](#)
- [Clergy assessments](#)
- [Lay Defined Benefit \(DB\) assessments](#)
- [Scheduled hours and benefit eligibility](#)
- [Late assessment payments](#)
- [Reporting one-time payments](#)

Current Scheduled Hours

[Update Scheduled Hours](#)

Current Scheduled Hours 2080

Start Date of Scheduled Hours 05/04/2022

[View Scheduled Hours History](#)

Compensation: Overview, cont.

Current Compensation (Annual)

[Update Scheduled Payment](#)

[Add One-time Payment](#)

Effective Date of Compensation 05/04/2022

Scheduled Payments

Base salary (excluding housing) and scheduled taxable cash payments ⓘ \$50,000.00

Employer contribution to qualified or non-qualified plan. Do not include monies paid to or toward pension assessments. ⓘ \$2,050.00

Cash housing allowance and/or utilities ⓘ \$10,000.00

Housing

Employer provided housing? ⓘ Yes

Calculated Totals

Value of employer provided housing - DB ⓘ \$18,615.00

Total Assessable Compensation - DB ⓘ \$80,665.00

Value of employer-provided housing - DC / RSVP ⓘ \$18,000.00

Total assessable compensation - DC / RSVP ⓘ \$78,000.00

[View Compensation History](#)

Compensation: Update Scheduled Hours

CHURCH PENSION GROUP

MAP | People | Benefits Groups and Billing | Institution | Resources | Reports

Janette Sprigge Doe
Client Number: XXX-X38-42

Navigate to a Section

Compensation

Edit Scheduled Hours

Employer

Diocese Of Oklahoma
Oklahoma City, OK 73102-5814
Client Number: 541-210-41

Hire Date

05/04/2022

Support and Guidance

- Hours required by lay employees to qualify for benefits
- Clergy hours and benefit eligibility

Scheduled Hours *

1500

Start Date *

05/09/2022

MM/DD/YYYY

Scheduled Hours *

1500

Start Date *

05/09/2022

MM/DD/YYYY

Cancel Changes

Submit

Compensation: Error Messages

CHURCH PENSION GROUP

MAP MAP People Benefits Groups and Billing Institution Resources Reports

Janette Sprigge Doe
Client Number: XXX-X38-42

Navigate to a Section

Compensation

Could not create Scheduled Hours. Please fix errors below.

1 error(s) were found in this form.

Scheduled work hours effective date cannot be before existing DC/RSVP plan status effective date

Support and Guidance

- Hours required by law employees to qualify for benefits
- Clergy hours and benefit eligibility

Edit Scheduled Hours

Employer Diocese Of Oklahoma
Oklahoma City, OK 73102-5814
Client Number: 541-210-41

Hire Date 05/04/2022

Scheduled Hours *

2080

Start Date *

05/05/2022

MM/DD/YYYY

Scheduled work hours effective date cannot be before existing DC/RSVP plan status effective date

Compensation: Update Scheduled Payment

CHURCH PENSION GROUP

MAP MAP People Benefits Groups and Billing Institution Resources Reports

Janette Sprigge Doe
Client Number: XXX-X38-42

Navigate to a Section

Compensation

Update Scheduled Payment

A new record should be created when a member/employee has a compen

Hire Date
05/04/2022

Compensation Effective Date *

MM/DD/YYYY
MM/DD/YYYY

Hire Date
05/04/2022

Compensation Effective Date *

06/01/2022
MM/DD/YYYY

Support and Guidance

- Compensation components
- Severance reporting
- Clergy assessments
- Lay Defined Benefit (DB) assessments
- Scheduled hours and benefit eligibility
- Late assessment payments
- Reporting one-time payments

Annual Income Amounts

Base salary (excluding housing) and scheduled taxable cash payments

\$50000.00

Employer contributions to qualified or non-qualified plan

\$2050.00

Cash housing allowance and/or utilities

\$10000.00

Base salary (excluding housing) and scheduled taxable cash payments

\$60000.00

Employer contributions to qualified or non-qualified plan

\$3000.00

Cash housing allowance and/or utilities

\$10000.00

Compensation: Update Scheduled Payment, cont.

Housing

Employer provided housing? * ⓘ

Yes

No



Calculated Totals

Value of employer provided housing - DB ⓘ	\$18,615.00
Total Assessable Compensation - DB ⓘ	\$80,665.00
Value of employer-provided housing - DC / RSVP ⓘ	\$18,000.00
Total assessable compensation - DC / RSVP ⓘ	\$78,000.00

Cancel Changes

Submit



Compensation: Update Scheduled Payment, cont.

Current Compensation (Annual)

✓ Information successfully updated!

You may also want to:

- [View Employee List](#)

[Update Scheduled Payment](#)

[Add One-time Payment](#)

Effective Date of Compensation 06/01/2022

Scheduled Payments

Base salary (excluding housing) and scheduled taxable cash payments ⓘ \$60,000.00

Employer contribution to qualified or non-qualified plan. Do not include monies paid to or toward pension assessments. ⓘ \$3,000.00

Cash housing allowance and/or utilities ⓘ \$10,000.00

Housing

Employer provided housing? ⓘ Yes

Calculated Totals

Value of employer provided housing - DB ⓘ \$21,900.00

Total Assessable Compensation - DB ⓘ \$94,900.00

Value of employer-provided housing - DC / RSVP ⓘ \$21,000.00

Total assessable compensation - DC / RSVP ⓘ \$91,000.00

[View Compensation History](#)

Compensation: One-Time Payment

CHURCH PENSION GROUP MAP

MAP People Benefits Groups and Billing Institution Resources Reports

Janette Sprigge Doe
Client Number: XXX-X38-42

Navigate to a Section
Compensation

Add One-time

Payment Effective Date *
06/01/2022
MM/DD/YYYY

Payment Amount *
\$2000.00

Support and Guidance
[Understanding of Severance reporting](#)

Cancel Changes **Submit**

Compensation: One-time Payment, cont.

Current Compensation (Annual)



✔ Information successfully updated!
You may also want to:

- [View Employee List](#)

[Update Scheduled Payment](#) [Add One-time Payment](#)

Effective Date of Compensation 06/01/2022

Scheduled Payments

Base salary (excluding housing) and scheduled taxable cash payments ⓘ	\$60,000.00
Employer contribution to qualified or non-qualified plan. Do not include monies paid to or toward pension assessments. ⓘ	\$3,000.00
Cash housing allowance and/or utilities ⓘ	\$10,000.00

Housing

Employer provided housing? ⓘ Yes

Calculated Totals

Value of employer provided housing - DB ⓘ	\$21,900.00
Total Assessable Compensation - DB ⓘ	\$94,900.00
Value of employer-provided housing - DC / RSVP ⓘ	\$21,000.00
Total assessable compensation - DC / RSVP ⓘ	\$91,000.00



[View Compensation History](#)

Compensation: Compensation History

Janette Sprigge Doe
Client Number: XXX-X38-42

Compensation History

Scheduled Payments (Annual)

Pre 2018 Post 2018

Effective Date of Compensation	06/01/2022	05/04/2022
Scheduled Payments		
Base salary (excluding housing) and scheduled taxable cash payments	\$60,000.00	\$50,000.00
Employer contribution to qualified or non-qualified plan. Do not include monies paid to or toward pension assessments.	\$3,000.00	\$2,050.00
Cash housing allowance and/or utilities	\$10,000.00	\$10,000.00
Housing		
Employer provided housing?	Yes	Yes
Calculated Totals		
Value of employer provided housing - DB	\$21,900.00	\$18,610.00
Total Assessable Compensation - DB	\$84,900.00	\$80,665.00
Value of employer-provided housing - DC / RSVP	\$21,000.00	\$18,000.00
Total assessable compensation - DC / RSVP	\$91,900.00	\$79,000.00

Scheduled Payments (Annual)


Pre 2018 Post 2018

Effective Date of Compensation	06/01/2022	05/04/2022
Scheduled Payments		
Base salary (excluding housing) and scheduled taxable cash payments	\$60,000.00	\$50,000.00
Employer contribution to qualified or non-qualified plan. Do not include monies paid to or toward pension assessments.	\$3,000.00	\$2,050.00
Cash housing allowance and/or utilities	\$10,000.00	\$10,000.00

One Time Payments

Effective Date	Amount	Assessable One Time Payment
06/01/2022	\$2,000.00	\$2,600.00

Compensation: Compensation History, cont.


MAP

[MAP](#) [People](#) [Benefits Groups and Billing](#) [Institution](#) [Resources](#) [Reports](#)

Janette Sprigge Doe
 Client Number: XXX-X38-42

Navigate to a Section
Compensation

Compensation History

Scheduled Payments (Annual)

Pre 2018 Post 2018

Effective Date of Compensation	06/01/2022	05/04/2022
Scheduled Payments		
Base salary (excluding housing) and scheduled taxable cash payments	\$60,000.00	\$50,000.00
Employer contribution to qualified or non-qualified plan. Do not include monies paid to or toward pension assessments.	\$3,000.00	\$2,000.00
Cash housing allowance and/or utilities	\$10,000.00	
Housing		
Employer provided housing?	Yes	
Calculated Totals		
Value of employer provided housing - DB	\$21,500.00	
Total Assessable Compensation - DB	\$64,000.00	
Value of employer-provided housing - DC / RSVP	\$21,000.00	
Total assessable compensation - DC / RSVP	\$91,000.00	

Support and Guidance

- [Client and Lay DC retroactive compensation changes before 11/2016](#)
- [Client and Lay DC retroactive compensation changes after 11/2016](#)

One Time Payments

Effective Date	Amount	Assessable One Time Payment
06/01/2022	\$2,000.00	\$2,600.00



One Time Payments

Effective Date	Amount
06/01/2022	\$2,000.00

MAP Termination Process

Terminations: Start with People Landing Page

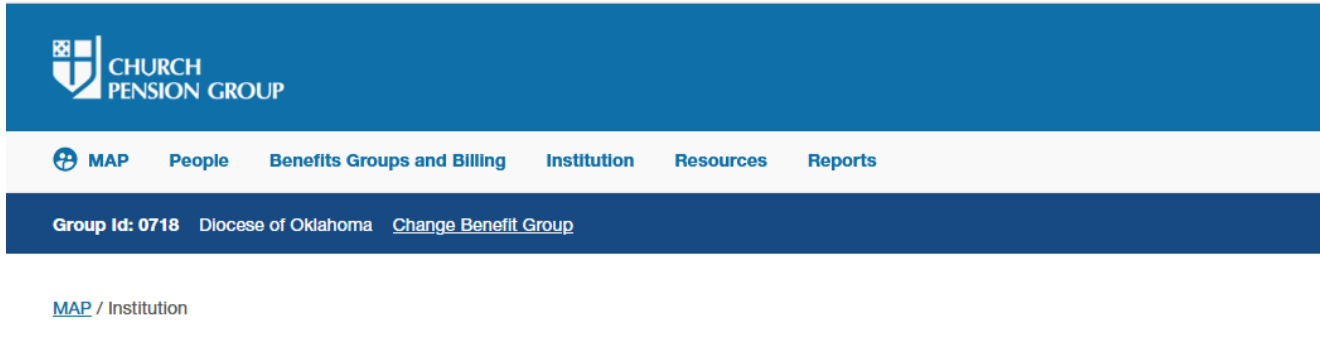


People

Employment Quick Actions



Terminations: Select Institution



CHURCH PENSION GROUP

MAP People Benefits Groups and Billing Institution Resources Reports

Group Id: 0718 Diocese of Oklahoma [Change Benefit Group](#)

[MAP](#) / Institution

Select an institution

Search by Name

Client Number ▾	Name ▾	City ▾
541-210-41	Diocese Of Oklahoma	Oklahoma City
599-190-76	Diocese Of New York	New York



Terminations: Click “Remove”

MAP / People




Employees

Click on an employee's client number below to view their record. You can also sort each column by clicking on the blue arrow next to the column header.

Add an Employee

Add a Non-Stipendiary Position

Support and Guidance

-  [Purpose of this screen](#)
-  [Adding a new cleric or employee](#)
-  [Filters](#)

Filters








Employment Type

- All Employment Types
- Stipendiary
- Non-Stipendiary

Clergy and Lay

- Both

Search by Name

Client Number 	Name 	Address 	Employment Type 	Pension Status	Action
XXX-X10-95	Beatty, Alane D	Oklahoma City, OK 73112-6032 US	Stipendiary	 Complete	Remove 
XXX-X78-10	Blick, Stan Linn	Tulsa, OK 74422-5252 US	Stipendiary	 Missing Info	Remove

Terminations: Select “Termination Type”

MAP People Benefits Groups and Billing Institution Resources Reports

Alane D Beatty

Client Number: XXX-X10-95

Employment Termination

Note: Terminating employment will not automatically end participation in any group health, life, or disability plan. Make sure that you have discussed the termination with the individual and the Diocese (if applicable) before processing. If you need assistance, contact Client Services at (855) 215-5990, Monday – Friday, 8:30 AM – 8:00 PM ET.

Termination Information

Employee	Alane Beatty
Client Number	XXX-X10-95
Employer	Diocese Of Oklahoma Oklahoma City, OK 73102-5814 US
Employment Type	Stipendiary
Hire Date	02/19/2019

- Please Select -
Employment
Death
Person Never Worked Here

Termination: Employment

Termination—Employment: Enter “Last Day Worked”

MAP	People	Benefits Groups and Billing	Institution	Resources	Reports
Employee	Alane Beatty				
Client Number	XXX-X10-95				
Employer	Diocese Of Oklahoma Oklahoma City, OK 73102-5814 US				
Employment Type	Stipendiary				
Hire Date	02/19/2019				
Termination Type *					
Employment					
Last Day Worked *					
04/15/2022					
MM/DD/YYYY					
What if I do not know the date? ⓘ					
<p>⚠ Note: Terminating employment will not automatically end participation in any group health, life, or disability plan. Make sure that you have discussed the termination with the individual and the Diocese (if applicable) before processing. If you need assistance, contact Client Services at (855) 215-5990, Monday – Friday, 8:30 AM – 8:00 PM ET.</p>					

Termination—Employment: Verify Termination

The screenshot shows the Church Pension Group web interface. At the top left is the logo and name "CHURCH PENSION GROUP". At the top right are "MAP" and "Close X" buttons. A navigation menu on the left includes "MAP", "People", and "Benefits Groups and Billing". Below the menu are fields for "Employee" and "Client Number". A white modal dialog is centered on the screen with the text "Are you sure you want to terminate this employment?". At the bottom of the dialog are two buttons: "No, DO NOT terminate" and "Yes, terminate". The "Yes, terminate" button is circled in orange.

CHURCH PENSION GROUP

MAP

Close X

MAP People Benefits Groups and Billing


Employee

Client Number

Are you sure you want to terminate this employment?

No, DO NOT terminate Yes, terminate

Termination—Employment: Terminate Benefits



CHURCH
PENSION GROUP

MAP People Benefits Groups and Billing Institution Resources Reports

✓ You have successfully terminated this employee.

Employment Termination

Terminated Employee

Stipendiary employment has been terminated for employee:

Alane Beatty

Client Number: XXX-X10-95

Next Steps

Group Health, Life, and Disability Coverage

Employee termination does not remove group, life, and health coverage. To terminate benefits, follow the link below.

[Terminate Benefits](#)



≡ Termination—Employment: “Qualifying Event” Date ≡

CHURCH PENSION GROUP

MAP People Benefits Groups and Billing Institution Resources Reports

[MAP](#) / [People](#) / Coverage

Alane D Beatty
Client Number: XXX-X10-95

Coverage

Date of Qualifying Event * ⓘ

04/15/2022 ⓘ

MM/DD/YYYY

The screenshot shows the Church Pension Group website interface. At the top is a blue header with the logo and name. Below it is a navigation menu with links for MAP, People, Benefits Groups and Billing, Institution, Resources, and Reports. The breadcrumb trail indicates the current location: MAP / People / Coverage. The client information for Alane D Beatty is displayed, including the client number XXX-X10-95. The 'Coverage' section is visible, with a field for 'Date of Qualifying Event *' highlighted by an orange box. The date entered is 04/15/2022, and the format MM/DD/YYYY is shown below. An information icon (i) is present next to the field label.

Termination—Employment: Enter “Termination Date”

CHURCH PENSION GROUP

MAP

MAP People Benefits Groups and Billing Institution Resources Reports

Plans

Medical

Billing Account	Plan	Tier	Rate	Effective Date	Termination Date
0718007102 Episcopal Ch...	Cigna Open Access Plus ...	Single	\$1,163.00	03/01/2019	04/30/2022
				MM/DD/YYYY	MM/DD/YYYY

Dental

Billing Account	Plan	Tier	Rate	Effective Date	Termination Date
0718007102 Episcopal Ch...	Dent&Ortho-25/75	Single	\$75.00	03/01/2019	04/30/2022
				MM/DD/YYYY	MM/DD/YYYY

Termination—Employment: Confirmation

MAP People Benefits Groups and Billing Institution Resources Reports

Information successfully updated!
Please note that you cannot edit the information below.

Coverage

Date of Qualifying Event
2022-04-15

Participants

Medical Coverage

Dental Coverage

Current Plan

Medical

Billing Account
0718007102 Episcopal Church Of
Oklahoma

Plan
Cigna Open Access Plus PPO 100

Tier *New*
N/A
Original Tier: Single

Rate *New*
N/A
Original Rate: \$1,163.00

Effective Date
2019-03-01

Termination Date *New*
2022-04-30



Termination: Death

Termination—Death: Enter “Date of Death”

MAP People Benefits Groups and Billing Institution Resources Reports

Florencio J Conroy

Client Number: XXX-X56-72

Employment Termination

Note: Terminating employment will not automatically end participation in any group health, life, or disability plan. Make sure that you have discussed the termination with the individual and the Diocese (if applicable) before processing. If you need assistance, contact Client Services at (855) 215-5990, Monday – Friday, 8:30 AM – 8:00 PM ET.

Termination Information

Employee	Florencio Conroy
Client Number	XXX-X56-72
Employer	Diocese Of Oklahoma Oklahoma City, OK 73102-5814 US
Employment Type	Stipendiary
Hire Date	03/27/2017

Termination Type *

Death

Date of Death *

04/15/2022



Termination—Death: Verify Termination

The screenshot displays the Church Pension Group web application interface. At the top left is the logo and name "CHURCH PENSION GROUP". At the top right, there are links for "MAP" with a dropdown arrow and "Close" with an "X" icon. A navigation menu on the left includes "MAP" with a plus icon, "People", and "Benefits Groups and Billing". Below this menu are labels for "Employee" and "Client Number". A white modal dialog box is centered on the screen, containing the text "Are you sure you want to terminate this employment?". To the right of the text are two buttons: "No, DO NOT terminate" and "Yes, terminate". The "Yes, terminate" button is highlighted with an orange oval.

Termination—Death: Death Process is Initiated



[MAP](#) [People](#) [Benefits Groups and Billing](#) [Institution](#) [Resources](#) [Reports](#)

✓ You have successfully terminated this employee.

Reporting a Death

Employee

Florencio Conroy

Client Number: XXX-X56-72

Termination: Person Never Worked Here

Termination—Person Never Worked Here

MAP People Benefits Groups and Billing Institution Resources Reports

Employment Termination

Note: Terminating employment will not automatically end participation in any group health, life, or disability plan. Make sure that you have discussed the termination with the individual and the Diocese (if applicable) before processing. If you need assistance, contact Client Services at (855) 215-5990, Monday – Friday, 8:30 AM – 8:00 PM ET.

Termination Information

Employee	William Shatner
Client Number	XXX-X02-35
Employer	St. Buster Kohler of West Sookland Bronx, NY 10468-4300 US
Employment Type	Stipendiary
Hire Date	01/01/2022

Termination Type *

Person Never Worked Here

Terminations—Never Worked Here: Verify

The screenshot shows the Church Pension Group interface. At the top left is the logo and name "CHURCH PENSION GROUP". At the top right, there is a "MAP" dropdown menu and a "Close X" button. Below the header is a navigation bar with "MAP", "People", and "Benefits Groups and Billing". Under "People", there are sub-items for "Employee" and "Client Number". A white modal dialog box is centered on the screen with the text "Are you sure you want to terminate this employment?". To the right of the dialog are two buttons: "No, DO NOT terminate" and "Yes, terminate". The "Yes, terminate" button is circled in orange.

Termination—Person Never Worked Here: Confirmation



- MAP
- People
- Benefits Groups and Billing
- Institution
- Resources
- Reports

✓ You have successfully terminated this employee.

Employment Termination

Terminated Employee

Employment has been terminated for the below individual, who, to your knowledge, never worked at your institution.

William Shatner

Client Number: XXX-X02-35

04

The Medical Life Participant System (MLPS)

MLPS: What is it? Who is it for?

Non-employee
healthcare benefits
management
(seminarians,
religious)

For AE Group Plan Selection – MLPS will still
be used to select plans for 2023 plan year

05

The Fidelity Investments Systems

- Plan Sponsor WebStation (PSW)
 - Simplified Contribution Platform (SCP)
-
-

PSW and SCP

What are they? What are they used for?

PSW and SCP are not CPG systems, but are controlled by Fidelity

Remit employer and employee contributions electronically to Fidelity Investments (our record keeper) for our: Lay Defined Contribution Plan (Lay DC), and Retirement Savings Plan (RSVP)

Set up banking and other information for electronic funding of contributions to your employees' retirement accounts

- Fidelity no longer accepts a paper contribution transmittal form
- Which one do you use?
 - Contact Fidelity at 800-917-4369 or scphelp@fmr.com
 - SCP is the newer and recommended system

SCP: New Users

- If you are new to your position, or if your institution has not begun using the SCP process:
 - Request access to SCP by going to fidelityinvestments.tfaforms.net/660021
 - Complete the form and submit
 - Fidelity will email you a temporary password and username
 - Log in and set up a new permanent password
- Enter banking information and create your first contribution request

Organization: ----

Summary Authorization Funding Related Actions

Enter Organization's Bank Account Details
This information is used to fund your organization's contributions.

Plan Name
ABC Co. Org

Organization Name

Bank Name *
[Enter max 20 characters: Bank name]

Account Number *
[Enter max 20 digits: Account number]

ABA Routing Number *
[Enter max 9 digits: ABA Routing Number]

ABA Routing Number

An identifying number for the banking institution; restricted to 9 digits/characters; the following diagram shows a routing number on a check.

Check Sample-(lower left corner)
PAY TO THE ORDER OF _____
MEMO: _____
0011 2345678901 09876543210

Routing Number Account Number Check Number

Organization: ----

CREATE CONTRIBUTION REQUEST UPDATE BANK DETAILS

Summary Authorization Funding Related

Client ID: 123456
Client Name: ABC Company Organization
Plan Name: ABC Co. Org
Plan Number: 0000
Plan Active: Yes
Plan Has Division(s)? No
Organization Identifier: ----
Organization Name: ----

Organization Address
49 NORTH 400 WEST, 6TH FLOOR
C/O SERVICE INSTALLATION GROUP
MAIL ZONE SL66B
PROVO, Utah

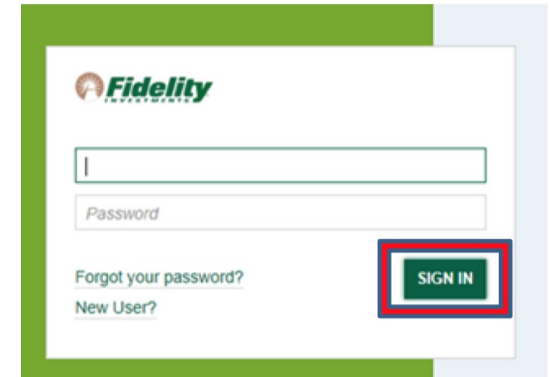
Contribution Requests

[Search Bar] Any

Request Number	Plan Number	Total Amount	Last Modified
----------------	-------------	--------------	---------------

SCP: How to Make Contributions

- Once you have set up your account, or established yourself as a new user:
 - Log into SCP using your assigned log in credentials
 - Review previously submitted contributions requests, add and delete employees, and make funding amount adjustments as appropriate
 - Confirm and submit new contribution request
 - Funding will occur according to the banking information you established



SCP: Where to Find Help

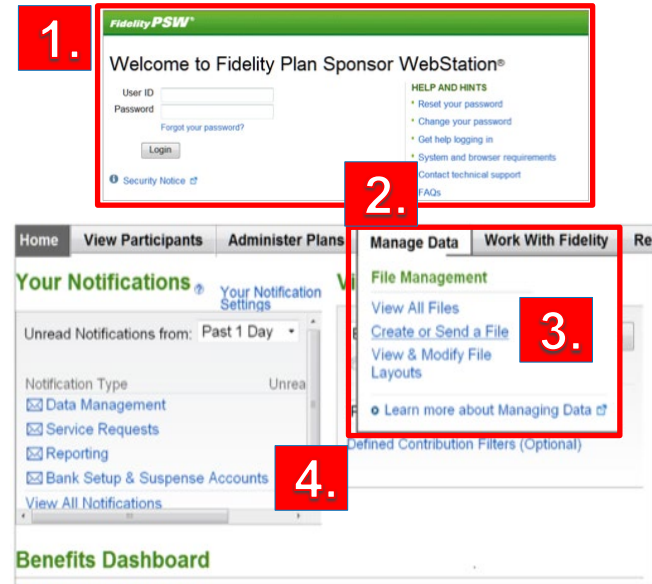
- The SCP User Guide and Training Video found on cpg.org
 - Select Administrators
 - Retirement
 - Defined Contribution Plan
 - Contribution Remittance
- Fidelity's SCP Hotline
 - 800-917-4369

The screenshot shows the Church Pension Group website with several callouts:

- 1.** Points to the top navigation bar, including "About Us | Investment Management | Contact Us | Jobs" and "Sign In / Create Account".
- 2.** Points to the "Retirement" link in the "MyCPG" navigation menu.
- 3.** Points to the "Defined Contribution Plan" link in the "Retirement" sub-menu.
- 4.** Points to the "Fidelity SCP Resources" section, which lists:
 - Fidelity's SCP Hotline: (800) 917-4369
 - SCP User Guide
 - SCP Training Video

PSW*: How to Make Contributions

- If using PSW (first time users must submit a New User Request Form to Client Services):
 1. Log into the PSW using your assigned log in credentials
 2. From the home page, hover over Manage Data and select Create or Send a File
 3. Create and submit new contribution request
 4. Fund the request by user making payment using the auto debit functions of your current bank



PSW: Where to Find Help

- The PSW Tutorial and Guide Book found on cpg.org

1. Select Administrators
2. Retirement
3. Defined Contribution Plan
4. Contribution Remittance

- Fidelity for technical issues

- 888-502-7526

- CPG's Administrator Assist

- 855-215-5990

The image displays a series of screenshots from the Church Pension Group (CPG) website, illustrating the steps to find help. The screenshots are annotated with numbered red boxes and arrows:

- Step 1:** The top navigation bar includes "About Us | Investment Management | Contact Us | Jobs | Sign In / Create Account". Below the navigation bar, three main sections are visible: "For Clergy & Spouses" (Active Clergy, Retired Clergy, Seminarians), "For Lay Employees & Spouses" (Active Lay Employees, Retired Lay Employees), and "For Administrators" (Administrators, Officers & Volunteers). A red box labeled "1." highlights the "For Administrators" section.
- Step 2:** The "MyCPG" menu is shown, with a red box labeled "2." highlighting the "Retirement" link.
- Step 3:** The "Retirement" page is shown, with a red box labeled "3." highlighting the "Defined Contribution Plan" link.
- Step 4:** The "Defined Contribution Plan" page is shown, with a red box labeled "4." highlighting the "Contribution Remittance" link.

A separate box titled "PSW Resources" contains the following links:

- [PSW Tutorial](#)
- [PSW Guidebook](#)

Important Notes



- Employer responsible for remitting employer and employee contributions within a reasonable timeframe*



- Employees can change individual contribution amounts by contacting Fidelity; employees should let the employer know.



- Change compensation amounts in **MAP** before making changes to contribution records in PSW or SCP



- Use **MAP** for enrollment, and changes to an employee's compensation or other information, and termination

*Under IRS guidelines, recommended timeframe is no more than 15 business days after payroll is completed.

Questions and Comments





Thank you!
For your participation and feedback.

Disclaimers

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Neither CPF’s defined contribution plans, nor any company or account maintained to manage or hold plan assets and interests in such plans or accounts, are subject to registration, regulation, or reporting under the Investment Company Act of 1940, the Securities Act of 1933, the Securities Exchange Act of 1934, the Employee Retirement Income Security Act of 1974, as amended (ERISA), or state securities laws. Plan participants and beneficiaries therefore will not be afforded the protections of the provisions of those laws. In addition, as church plans, CPF’s defined contribution plans are not subject to ERISA.

Church Pension Group Services Corporation (“CPGSC”), doing business as The Episcopal Church Medical Trust, maintains a series of health and welfare plans (the “Plans”) for eligible employees (and their eligible dependents) of The Episcopal Church (the “Church”). The Medical Trust serves only eligible Episcopal employers. The Plans that are self-funded are funded by the Episcopal Church Clergy and Employees’ Benefit Trust, a voluntary employees’ beneficiary association within the meaning of section 501(c)(9) of the Internal Revenue Code.

The Plans are church plans within the meaning of section 3(33) of the Employee Retirement Income Security Act of 1974, as amended, and section 414(e) of the Internal Revenue Code. Not all Plans are available in all areas of the United States or outside the United States, and not all Plans are available on both a self-funded and fully insured basis. Additionally, the Plan may be exempt from federal and state laws that may otherwise apply to health insurance arrangements. The Plans do not cover all healthcare expenses, so members should read the official Plan documents carefully to determine which benefits are covered, as well as any applicable exclusions, limitations, and procedures.

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