Institution Roster
User Guide

CHURCH PENSION GROUP

Table of Contents

What is the Institution Roster?

The Institution Roster (IR) is an online registration tool with which diocesan administrators such as yourself collect and confirm relevant information about church and institutional employers in their dioceses that are subject to the authority of The Episcopal Church (the Church) and other institutions that are associated with the Church. Data in the IR also contributes to the accuracy of the comprehensive, online database of the congregations (parishes, missions, chapels, etc.) and other institutions in the Church.

Why is This Important?

This Institution Roster works in tandem with a second roster – called the Employee Roster (ER) — an online tool that will roll out this year (2014) and enable administrators in your congregations and institutions to capture and update data about their employees, enroll them into the pension system and input employee moves, adds, and changes quickly and easily.

When the IR launched in 2012, diocesan administrators confirmed the accuracy of the list of congregations and institutions in each diocese and identified a Senior Officer for each congregation and institution. Now, in advance of the launch of the ER, diocesan administrators should log onto the IR, confirm the accuracy of the list of congregations and institutions, and confirm or update the Senior Officers for each congregation and institution.

When the ER launches, all persons who have been designated as Senior Officers will have access to confidential information about each employee in their congregation or institution. Thus it is vital that diocesan administrators confirm that each congregation or institution has been assigned the appropriate Senior Officer.

How Do I Do This?

Log onto the Diocesan Administrators section of the CPG website (www.cpg.org) and select the Institution Roster from the left-hand navigation bar. Once there, you will be asked to complete two simple tasks in sequential order:

• Confirm your congregations and institutions in the Institutions List

• Confirm — or, if necessary, identify — the Senior Officers in each of your congregations and institutions

Where Does the Data Come From?

We've pre-populated the IR with information we already have in The Church Pension Fund (CPF) database. That data comes from a variety of sources, including the Parochial Report Office, the Episcopal Church Annual (aka The Redbook), and CPF records.

Responsibilities of a Senior Officer

A Senior Officer will be empowered to:

• View and administer the list of employees and their information for that diocese, congregation, or institution

• Assign (nominate) another administrator to carry out these responsibilities

Who is a Senior Officer?

Use these guidelines when confirming or assigning a Senior Officer:

• Senior Officers are staff or volunteers at an institution who are responsible for administering the Employee Roster. They can also assign Administrative Officers to perform these duties, allowing them to view confidential employee information, add new employees, and update existing records.

• Once assigned, this person will have access to add, remove, and change employee demographic and employment information, including confidential data such as date of birth and compensation.

• Before designating a Senior Officer at any Associated Institution, you must confirm with the institution that he or she has been granted the authority to access and make changes to the Employee Roster.

• Please note that if you have been granted this authority by an institution, you may designate yourself as the Senior Officer for that institution, and will be responsible for completing the list of employees at that institution or designating the person who performs this task.

Accessing the Institution Roster

There are three easy steps for accessing the Institution Roster:

| 1. Go to *www.cpg.org*	2. Sign in using your Web Sign In Account.	3. Click on Institution Roster in the left-hand column of the Diocesan Administrators section
Supported in: - Internet Explorer versions 8 and 9 - Firefox - Safari	**Sign in for:** • DioAdmin Resources • MLPS • Ordination Officers • Institution Roster * **Username:** [_____] Forgot username? * **Password:** [_____] Forgot password? ☐ Show typing ↗ Don't have an account? **Sign In** ↓ If you do not have a Web Sign In account, please contact us at (855) 594-2201. If you have forgotten your Username or Password, click on "Forgot?" and you will be walked through a series of predetermined security questions so you can reset it yourself.	**Diocesan Administrators** Diocesan Administrators Overview Diocesan Directory Search Directory Profile 2014 EBAC Conferences Institution Roster Guide to Human Resources ListServ Updating Information Diocesan Reports Forms & Publications

Starting Phase I: Four Tasks

Phase I:

When you first enter the Institution Roster, you will be taken to the *Your Task*s Tab. This is the first step in completing the roster. You will start with Task 1 and work in order through Task 4. At any time, you can also make changes through the Institutions Tab.

There are **four tasks** to complete, in consecutive order:

1. Confirm Institution List

2. Identify Senior Officers for Your Diocese and Congregations

3. Categorize Other Institutions
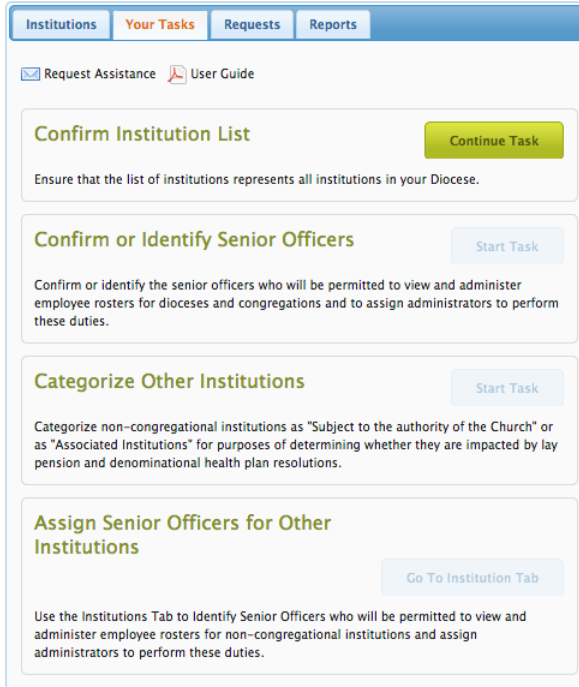
4. Identify Senior Officers for Other Institutions Subject to the Authority of the Church

When you complete each task, the button on the right will change to "Complete" and you will be able to start the next task. Until Task 1 is completed, all other tasks will not be available. Once Task 1 is complete, Tasks 2 and 3 will be available. When Task 3 is complete, Task 4 will be available and redirect you to the Institutions Tab.

At any time, you can view the other tabs:

Institutions: To view a complete list of institutions within your diocese

Requests: To show all outstanding and completed requests for changes that you have submitted to CPG via this roster

Phase II:

After you have completed all four tasks, please use the *Institutions* Tab for ongoing maintenance of the roster.

**Tools
to Assist You**

At the top of every page of the IR, you will find these tools to assist you:

Export 　Save Changes 　Request Assistance 　User Guide
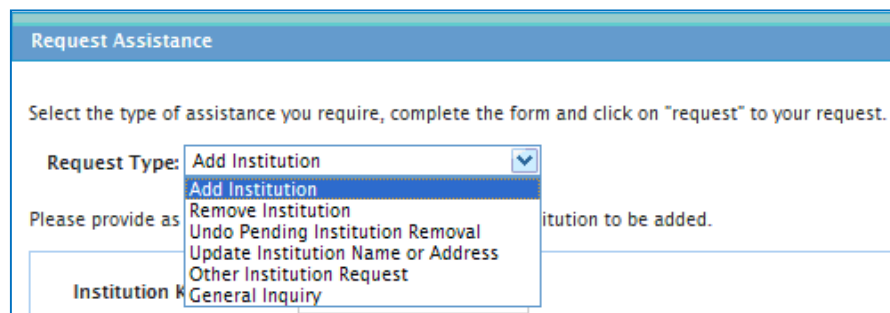
1. Export:
- You can export a file of all "saved" confirmed institutions in your diocese to an Excel worksheet. The file will contain the following information for all institutions in your diocese:
  - Confirmed and Removed Institutions
  - Institution Names (Legal and "Known As")
  - Institution Type and Category of Institution
  - Client Number – a unique identifier for CPG's individual and institutional customers
  - Parish ID – CPF's Source ID for billing of The Church Pension Fund Clergy Pension Plan (Clergy Pension Plan)
  - Parish UEID **–** Universal Episcopal ID (institution's Parochial Report number issued by The Episcopal Church)
  - Institutional demographic information including address, phone, email, and web URL
- You can use this file during completion of the tasks to keep track of your progress, or at the end in order to have a comprehensive list of all institutions within your diocese.

2. Save Changes:
- While you are working on your four tasks, you can click on Save Changes at any time to save your work and continue working. **We recommend you do this often.**

3. Request Assistance:
- You can request assistance at any time. Use the dropdown menu to choose the option from the list below that best matches your request.
- Requests will be completed within two business days or we will contact you for further clarification.
- You can check the status of your request using the Requests tab.

Request Assistance

Select the type of assistance you require, complete the form and click on "request" to your request.

Request Type: | Add Institution ▼ |

Add Institution
Remove Institution
Please provide as ~~~~~~~~~~~~ itution to be added.
Undo Pending Institution Removal
Update Institution Name or Address
Other Institution Request
Institution I ～ General Inquiry

- **Add Institution** – to add an institution (including yokes and clusters, see page 19 for definitions) that is within your diocese but not listed in the IR
- **Remove Institution** – to remove an institution **not** associated with your diocese
  - Be sure to read the special instructions about when **not** to remove an institution
- **Undo Pending Institution Removal** – to undo a Remove Institution request
- **Update Institution Name or Address** – to change the name or address of an institution
  - This will redirect you to The Red Book (*www.theredbook.org*) to make these changes
- **Other Institution Request** – for any questions or requests **directly** related to a specific institution
- **General Inquiry** – for any question or request **not** related to a specific institution

Before You Begin Task 1	Follow the instructions in this guide to complete this task (you may want to check each box as you complete each item):

- Review the Considerations When Confirming an Institution (see below)

- Review the Considerations Before Removing an Institution (see below)

- Confirm that the list of institutions reflects all your congregations and Episcopal Church-associated institutions **by clicking the box to the left of the institution name.**

  Note: **There are three categories that are represented by three tabs at the top of this section. Confirm institutions in each category.**

- If you need to **add** an institution that is not listed under any of the three tabs and is associated with your diocese: Click the Add Institution button at the lower-left side and complete the form.

- If you need to **remove** an institution that is not associated with your diocese: Click the Remove button to the right of the institution name and complete the form.

- Confirm this task is done. When you have checked all institutions, click the Confirm button. It will not be activated until all institutions are checked or removed **in all three categories**.

Considerations When Confirming an Institution	

- Institutions are listed by their **common** name, but if you move your computer mouse over the name, the full legal name and address will also appear.

- If a congregation has a school or pre-school, it should be listed separately under the *Other Institutions* Tab. Please list all congregation-related schools and pre-schools separately. Click Add Institution if you do not see it listed here to add it to the roster.

- In this application, you will see the relationship between the clusters and yokes and their constituent congregations. If a congregation is part of a cluster or yoke and you do not see the relationship listed, please inform us through the Other Institution Request Form on the Request Assistance drop-down menu and we will connect it to the appropriate cluster or yoke.

Considerations Before Removing an Institution	

- CPG **cannot** remove a congregation (parish, mission, chapel, etc.) listed under the *Congregation* category if it is not closed.

  o To see if an institution is closed, go to http://pr.dfms.org

  o To close a congregation, please contact the Episcopal Church Center's Parochial Report Office: (212) 922-5331.

- CPG **can** remove a school/pre-school associated with a congregation that is not closed.

- If a congregation is inactive or has an impaired relationship with the diocese but is not formally closed, please use the Other Institution Request Form on the Request Assistance drop-down menu to notify us of this, and name yourself the Senior Officer for this congregation in Task 2.

  o An example of an impaired relationship is when members of the congregation have tried to take the parish out of The Episcopal Church. In that case, the congregation still legally belongs to the diocese and should not be removed.

- If an institution is not subject to the authority of the Church but is still associated with The Episcopal Church, please do not remove the institution. You may classify it later as an Associated Institution in Task 3 (Categorize Institutions).

- For the purposes of the Institution Roster, "Associated Institution" means an institution that, while not subject to the authority of the Church, is associated with the Church through its Episcopal identity and ties to the Church. These institutions are eligible to participate in our pension and health plans on a voluntary basis, subject to the review and approval of The Church Pension Fund.

- An institution classified as an Extension of Ministry is a non-Episcopal institution or an Associated Institution that has chosen not to participate in the Clergy Pension Plan at which a member works and participates in the Clergy Pension Plan under the Extension of Ministry provision.

- If you remove an institution from the roster completely on the basis of its having no ties to The Episcopal Church, the institution will not be eligible to participate in CPG's pension or health plans.

  - If you need to "undo" the Remove request, click the Pending-Undo button.

Tips!
- **Save your work** often by clicking on "Save Changes".
- **Before** you leave this screen, click on the "Save and Continue Later" button.
- You can **sort** each category (institution name, city, zip code) by clicking on the up and down arrows to the left of each category. This way, you can organize your work in whatever way works best for you.
- By continuing to click on the ✓ icon, you can view just the checked institutions, just the unchecked institutions, or all of your institutions.
- **Scroll down** to find the Confirm button.
- **Review** the considerations when confirming an institution and before removing an institution.

**Before You
Begin Task 2**

Follow the instructions below to complete this task (you may want to check each box as you complete each item):

- Review the "Responsibilities of a Senior Officer," and "Who Is a Senior Officer?" below to be sure you understand the Senior Officer's role

- For each institution, please confirm or assign a Senior Officer. You may assign more than one. Click on the "Add/Remove Officers" button on the right to remove, add, or change a Senior Officer.

- By clicking the confirm button you are certifying that the designated Senior Officers have been granted the authority to make changes to confidential employee information contained in the Employee Roster.

- Confirm that this task is done. When you have checked all institutions, click the Confirm button. It will not be possible to activate it until all institutions are checked and at least one Senior Officer is listed for each institution.

  Note: If you just added an institution in Task 1 (Confirm Institutions), it may not appear in this task. You can add Senior Officers to any institution later by clicking on the *Institutions* tab, selecting that institution, and then clicking on the *Officers* tab.

**Responsibilities
of a Senior
Officer**

A Senior Officer will be empowered to:

- View and administer the list of employees and their confidential information for that diocese, congregation, or institution

- Assign (nominate) another administrator to carry out these responsibilities

**Who is a
Senior Officer?**

Use these guidelines when confirming or assigning a Senior Officer:

- Senior Officers are staff or volunteers at an institution who are responsible for administering the Employee Roster. They can also assign Administrative Officers to perform these duties, allowing them to view confidential employee information, add new employees, and update existing records.

- Once assigned, this person will have access to add, remove, and change employee demographic and employment information, including confidential data such as date of birth and compensation.

- Before designating a Senior Officer at any Associated Institution, you must confirm with the institution that he or she has been granted the authority to access and make changes to the Employee Roster.

- Please note that if you have been granted this authority by an institution, you may designate yourself as the Senior Officer for that institution, and will be responsible for completing the list of employees at that institution or designating the person who performs this task.

Add/Remove   To add or remove a Senior Officer, click on the Add/Remove Officer button to the right of the institution name.

- To **remove** a Senior Officer, click on Remove to the right of the name.

- To **add** a Senior Officer, click on Add New Officer. You will have two options:

  1. Add New Officer:

     ➢ First, search for the person you wish to add. Once you have found the person, click the Add Officer button.

     ➢ By clicking the Add Officer button you are certifying that the designated Senior Officers have been granted the authority to make changes to confidential employee information contained in the Employee Roster.

     ➢ If you cannot find the person you are looking for, click on the Create New User as Officer button and complete the form.

  2. Add Myself: If you have been granted this authority by an institution, you may designate yourself as the Senior Officer for that institution, and will be responsible for completing the list of employees at that institution or designating the person who performs this task.

  3. When you are finished adding Senior Officers for an institution, click on the X in the upper right-hand corner of the Add/Remove box.

Tips!
- **Save your work** often by clicking on "Save Changes".
- **Before** you leave this screen, click on the "Save and Continue Later" button.
- You can **sort** each category (institution name, city, zip code) by clicking on the up and down arrows to the left of each category. This way, you can organize your work in whatever way works best for you.
- By continuing to click on the 🔵 icon, you can view just the checked institutions, just the unchecked institutions, or all of your institutions.
- **Scroll down** to find the Confirm button.

Before You Begin Task 3

Follow the instructions below to complete this task (you may want to check each box as you complete each item):

- Review "Who is Subject to the Authority of the Church and Questions to Consider" (below) to determine which institutions are subject to the authority of the Church.

- Categorize each non-congregational institution as either **"subject to the authority of the Church"** or **"Associated institution"** by clicking on and dragging the institution name from the left-hand column to the appropriate column on the right.

  o These institutions are all the confirmed institutions from Task 1 listed under *Other Institutions.*

  o Categorization will help you determine which of these institutions may be subject to the Lay Employee Pension System (General Convention Resolution A138) and the Denominational Health Plan (General Convention Resolution A177).

  o For more information about these resolutions, visit: www.cpg.org/laypensions or www.cpg.org/dhp.

- Confirm this task is done**.** When you have categorized all, click the Confirm button. It will not be possible to activate it until all institutions have been moved to the "Subject to the Authority of the Church" or "Associated Institution" columns.

Who is Subject to the Authority of the Church and who is Associated?

Resolutions A138 and A177 both contain the following phrase with regard to the applicability of the resolutions: "…any domestic Diocese, Parish, Mission or other ecclesiastical institution or body subject to the authority of the Church." While this phrase has existed in the *Constitution and Canons* since 1914, the recent enactment of Resolutions A138 and A177 has resulted in many questions regarding the meaning of the phrase. **The final determination as to whether or not a specific institution is subject to the authority of the Church will be made by each diocese.**

For the purposes of the Institution Roster, "Associated Institution" means an institution that, while not subject to the authority of the Church, is associated with the Church through its Episcopal identity and ties to the Church. These institutions are eligible to participate in our pension and health plans on a voluntary basis, subject to the review and approval of The Church Pension Fund.

Note: For Resolution A177 (Denominational Health Plan), the diocese decides which other institutions (e.g., schools, community service institutions, etc.) must comply, regardless of whether or not they are subject to the authority of the Church. For Resolution A138 (Lay Employee Pension System), if an institution is subject to the authority of the Church, it must comply.

Questions to Consider:

"Subject to the Authority of the Church?"

Consider the following questions when determining if an institution is "subject to the authority of the Church." **The final determination as to whether or not a specific institution is subject to the authority of the Church will be made by each diocese.**

1. Is the institution subject to the Constitution or Canons of the General Convention?

2. Is the institution subject to the Constitution or Canons of your diocese?

3. Does your annual Convention/Council/Synod elect or approve the appointment of a majority of the governing body members of the institution?

4. Does the bishop appoint or approve the election of a majority of the governing body members of the institution?

5. Was the institution created by the diocese?

6. Is the institution separately incorporated from the diocese?

7. Does the institution use the diocese's or parish's tax exemption (501(c)(3)) or does it have its own exemption?

8. Does the institution use the diocese's or parish's tax or employer ID number or does it have its own?

9. Do the institution's founding documents (e.g., articles of incorporation) link its mission, operations, or assets to the diocese or parish?

10. Is the institution required to have the approval of the bishop or chancellor or some person or body in the diocese to amend its Articles or Bylaws or other governing documents?

11. Is the bishop the *ex officio* Chair or President of the governing body?

12. Does the institution have the word "Episcopal" in its name?

13. Has the institution been treated as part of the diocese?

14. Is the institution listed in the diocesan directory or journal?

15. Is there a close, day-to-day coordination of the religious, educational, or other charitable activities of the diocese or parish and the institution?

16. Does the institution manage its own assets and have its own bank accounts and payroll or are any of those managed by the diocese or parish?

17. Is the institution required to obtain approval of the diocese or parish to leverage or dispose of its property?

18. Does the diocese or parish have the right to set objective standards for the institution's operations and/or audit the institution's records to determine compliance with such objective standards?

19. Does the diocese or parish have the right to sanction the institution by liquidating the institution, terminating the institution's founding documents, or other means?

20. Does the diocese or parish have the right to the institution's assets upon the institution's liquidation?

21. Is the institution required to submit an annual report and/or audited financial statements to the diocese or parish?

Tips!
- The **Questions to Consider** above may help you determine whether a non-congregational institution is subject to the authority of the Church.
- **Remember:** The final determination as to whether or not a specific institution is subject to the authority of the Church will be made by each diocese.
- **Save your work** often by clicking on "Save Changes".
- **Before** you leave this screen, click on the "Save and Continue Later" button.

**Before You
Begin Task 4**

Note: this process is the same as Task 2

Follow the instructions below to complete this task (you may want to check each box as you complete each item):

- Review the "Responsibilities of a Senior Officer," and "Who Is a Senior Officer?" below to be sure you understand the Senior Officer's role

- For each institution, please confirm or assign a Senior Officer. You may assign more than one. Click on the "Add/Remove Officers" button on the right to remove, add, or change a Senior Officer.

- By clicking the confirm button you are certifying that the designated Senior Officers have been granted the authority to make changes to confidential employee information contained in the Employee Roster.

- Confirm that this task is done. When you have checked all institutions, click the Confirm button. It will not be possible to activate it until all institutions are checked and at least one Senior Officer is listed for each institution.

    Note: If you just added an institution in Task 1 (Confirm Institutions), it may not appear in this task. You can add Senior Officers to any institution later by clicking on the *Institutions* tab, selecting that institution, and then clicking on the *Officers* tab.

**Responsibilities
of a Senior Officer**

A Senior Officer will be empowered to:

- View and administer the list of employees and their confidential information for that diocese, congregation, or institution.

- Assign (nominate) another administrator to carry out these responsibilities.

**Who is a
Senior Officer?**

Use these guidelines when confirming or assigning a Senior Officer:

- Senior Officers are staff or volunteers at an institution who are responsible for administering the Employee Roster. They can also assign Administrative Officers to perform these duties, allowing them to view confidential employee information, add new employees, and update existing records.

- Once assigned, this person will have access to add, remove, and change employee demographic and employment information, including confidential data such as date of birth and compensation.

- Before designating a Senior Officer at any Associated Institution, you must confirm with the institution that he or she has been granted the authority to access and make changes to the Employee Roster.

- Please note that if you have been granted this authority by an institution, you may designate yourself as the Senior Officer for that institution, and will be responsible for completing the list of employees at that institution or designating the person who performs this task.

Add/Remove   To add or remove a Senior Officer, click on the Add/Remove Officer button to the right of the institution name.

- To **remove** a Senior Officer, click on Remove to the right of the name.

- To **add** a Senior Officer, click on Add New Officer. You will have two options:

1. Add New Officer:

   ➢ First, search for the person you wish to add. Once you have found the person, click the Add Officer button.

   ➢ By clicking the Add Officer button you are certifying that the designated Senior Officers have been granted the authority to make changes to confidential employee information contained in the Employee Roster.

   ➢ If you cannot find the person you are looking for, click on the Create New User as Officer button and complete the form.

2. Add Myself: If you have been granted this authority by an institution, you may designate yourself as the Senior Officer for that institution, and will be responsible for completing the list of employees at that institution or designating the person who performs this task.

3. When you are finished adding Senior Officers for an institution, click on the X in the upper right-hand corner of the Add/Remove box.

Tips!
- **Save your work** often by clicking on "Save Changes".
- **Before** you leave this screen, click on the "Save and Continue Later" button.
- You can **sort** each category (institution name, city, zip code) by clicking on the up and down arrows to the left of each category. This way, you can organize your work in whatever way works best for you.
- By continuing to click on the ✓ icon, you can view just the checked institutions, just the unchecked institutions, or all of your institutions.
- **Scroll down** to find the Confirm button.

**Viewing the
Institutions Tab**

The *Institutions* tab will be the main screen you will use after you have completed all four of your tasks, and can be used to update all Institution and Senior Officer information.

This tab contains:

• Names of institutions categorized as Diocese, Congregations, Pending Categorization, Subject to the Authority of the Church, and Associated

• City of Institution

• Senior Officers

If you place your cursor over the institution name, the demographic information and the Manage Institution link will appear.

If you place your cursor over the Senior Officer, the city and state of that officer will appear.

Managing Institutions

You can manage institutional data by clicking on the name of the institution and selecting one of the request options. These include:

- **Remove**: To remove an institution not associated with your diocese
  o The Remove request form contains instructions for when **not** to remove an institution

- **Undo Pending Removal**: To undo a Remove Institution request.

- **Other Request**: For any questions or requests **directly** related to a specific institution

- **Update Name or Address**: This function has been moved to the Employer Roster for institutions to update. Diocesan administrators will not be able to edit name or address information in the Institution Roster.

Manage Institution ✕

Saint Katherine's Church

Institution Data	Officers

St Katherine Episcopal Church

(Saint Katherine's Church)

Category: Congregations

206 E 3rd St, Owen, WI 54460

+1 (715) 229-2643

Remove	Other Request	Update Name or Address

Return to Institution List
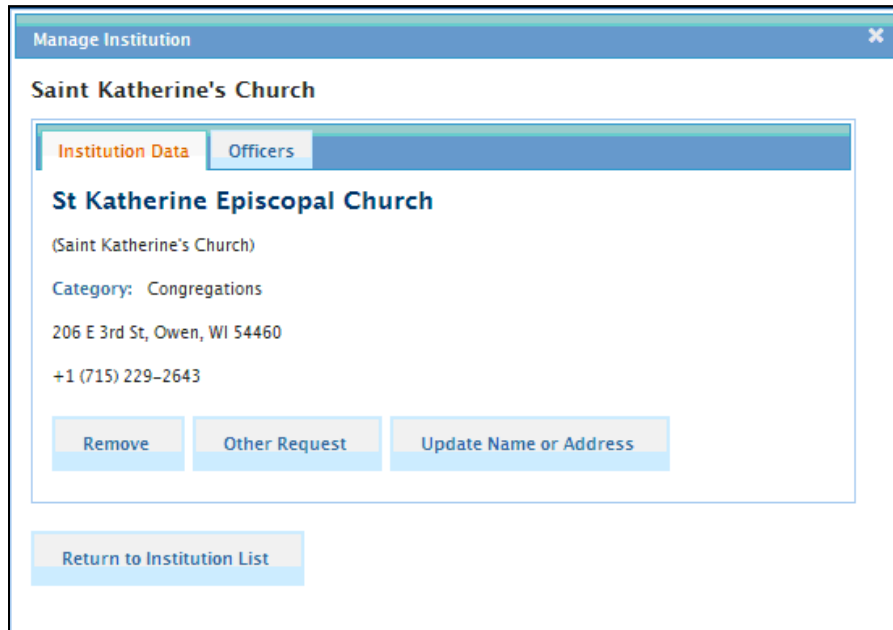
Request Assistance: 📊 Export   💾 Save Changes   ✉ Request Assistance   📄 User Guide

- If you have a general inquiry **not** directly related to a specific institution, go to the Request Assistance icon on the top of the screen and select General Inquiry from the drop-down menu.

- If you need to add an institution that is within your diocese but not listed in the Institutions tab, go to the Request Assistance icon on the top of the screen and select Add Institution from the drop-down menu. Complete the form.

- For all other inquiries, please select the most appropriate type of inquiry from the drop-down menu.

Managing Senior Officers

You can manage Senior Officers by clicking on the name of the Senior Officer.

- To **remove** a Senior Officer, click on Remove to the right of the name.

- To **add** a Senior Office, click on Add New Officer. You will have two options:
  1. Add New Officer:

- First, search for the person you wish to add. Once you have found the person, click the Add Officer button.

- Before designating a Senior Officer at any Associated Institution, you must confirm with the institution that he or she has been granted the authority to access and make changes to the Employee Roster.

- If you cannot find the person you are looking for, click on the Create New User as Officer button and complete the form.

2. Add Myself: If you have been granted this authority by an institution, you may designate yourself as the Senior Officer for that institution, and will be responsible for completing the list of employees at that institution or designating the person who performs this task.

3. When you are finished adding Senior Officers for an institution, click on the X in the upper right-hand corner of the Add/Remove box.

Troubleshooting and Support

Review the troubleshooting questions below to find the one that best applies to your situation.

If you need further assistance, contact our **Technical Support team** toll-free at (855) 594-2201, Monday – Friday, 8:30AM – 8:00PM ET, excluding holidays**.**

You may request assistance online by clicking the "Request Assistance" icon at the top of each screen and choosing the appropriate drop-down menu. For general questions not related to a specific institution, select General Inquiry.

Access:

Can I assign someone else to do this IR work instead of me?
Yes. You can assign another Senior Officer for your diocese, which will provide that person with access to the IR. You may also contact CPG's Technical Support Team with your request. After the request is made, the person you delegate should receive an email invitation from weboperations@cpg.org to set up an account within 3 to 5 business days.

I don't have a web account for the Diocesan Administrators site on the CPG website.
Please check to see if you have received an email invitation to create your user account. The email would have been sent by *weboperations@cpg.org* with the subject line "Welcome to Diocesan Administrators Website." If you need us to send you another invitation, please contact CPG's Technical Support Team for assistance.

I'm having problems logging on as an administrator.
Please check your username and password. If you have forgotten either, click on "Forgot?" to the right of the Username and Password in the Diocesan Administrators Sign In screen. You will be walked through a series of predetermined security questions to reset either one yourself.

I don't have/can't see the "Institution Roster" listed in the left-hand column.
Make sure you are in the Diocesan Administrators section of the CPG website. See the instructions on page 3 of this User Guide. You will not see an option for the Institution Roster until after you sign in. If you still don't see Institution Roster listed (see the illustration on page 3), please call CPG's Technical Support Team.

Technical:

I am having internet issues accessing the Institution Roster.
The supported internet browsers for the Employee Roster are Internet Explorer versions 8 and 9, Firefox 10 and later, and Safari (latest). Please check your browser versions. If you are using a different version of Internet Explorer please click on the Compatibility mode. This will not change your browser version but will enable you to use the Employee Roster.

I am having other technical issues accessing the Institution Roster.
Please contact CPG's Technical Support Team for assistance.

Data:

I keep losing my data.
It's important to continually save your work. The Institution Roster will time out after 20 minutes of inactivity. The system remains "inactive" until you click on the Confirm, Save Changes, or Save and Continue button.

I cannot seem to update an institution name or address.
You will not be able to edit an institution name or address via the Institution Roster. This function is enabled in the Employee Roster to be executed by Senior or Administrator Officers.

Tasks:

Troubleshooting and Support

My task is not showing as complete; the Confirm button is not activated; I can't find the Confirm button.
Make sure all institutions are checked, removed, pending removing, categorized, or contain a Senior Officer before you confirm the task is complete. The Confirm button is located at the bottom right-hand side of each task screen; you may need to scroll down to locate it. Each task shows the number of institutions shown in the task and the number that have been confirmed or categorized. These numbers need to match before the Confirm button is activated (e.g., 61/61).

I am having trouble submitting a request.
Several of the request forms include required data in specific formats. Make sure you have entered all required data correctly and then try to submit your request again. If you continue to have issues, please contact CPG's Technical Support Team.

Can I add Senior Officers to associated institutions not subject the authority of the Church?
Yes, but not in Task 2 or 4 (they won't appear). You may add Senior Officers in the Institutions tab after you have categorized institutions, but it is not required. Please note you will be asked to certify that designated Senior Officers for Associated Institutions have been granted the authority by the Associated Institution to access and make changes to confidential employee information contained in the Employee Roster.

Must all institutions subject to the authority of the Church comply with Resolutions A138 and A177?
Yes, for Resolution A138. Under Resolution A177, the diocese decides which non-congregational institutions (e.g., schools, community service institutions, etc.) must comply, regardless of whether or not they are subject to the authority of the Church.

If I categorize institutions as "associated," does that mean they do not need to comply with Resolutions A138 and A177?
Yes.

May an associated institution that is not required to do so, choose to participate in the Lay Employee Pension System or the Denominational Health Plan?
Yes, subject to approval by The Church Pension Fund. An associated institution that is not required to participate in our lay pension or health plans may choose to do so and should contact Client Engagement at (800) 480-9967 Monday – Friday, 8:30AM – 8:00PM ET for more information.

May I change the categorization of a non-congregational institution after I complete the Categorization task?
Yes. You may change the category of a non-congregational institution at any time after the Categorization task is complete. To do so, complete an Other Institution Request for that institution and we will change the categorization for you.

Definitions:

Associated Institution
For the purposes of the Institution Roster, "Associated Institution" means an institution that, while not subject to the authority of the Church, is associated with the Church through its Episcopal identity and ties to the Church. These institutions are eligible to participate in our pension and health plans on a voluntary basis subject to the review and approval of The Church Pension Fund.

Troubleshooting and Support

COO
Community Outreach Organization

Cluster/Yoke
A cluster is a number of congregations joined in a single administrative unit, normally more than two and often in rural areas. A yoke is usually only two congregations joined in a single administrative unit.

ECCC
Episcopal Camps and Conference Center

Health Agency
Any health agency or hospital

Impaired Relationship
An example of an impaired relationship is when members of the congregation have tried to take the parish out of The Episcopal Church. In that case, the congregation still legally belongs to the diocese and should not be removed.