CHURCH PENSION FUND
Passionate About Our Purpose

Clergy/Lay Employees: Adding a Newborn/Adopted Child Checklist

Clergyperson/Lay employee Name: Date of child's birth or adoption:

Employer name: City:

This checklist and the guidelines on the following pages provide general directions for when a clergyperson or lay employee (together, "the employee") adds a newborn or adopted dependent child and how it affects benefits received through The Church Pension Fund and its affiliates (referred to as "the Church Pension Group" or "CPG").

The guide will help you to

1. provide direction on where to obtain detailed benefit plan information, and
2. take any necessary actions.

Use this table to track progress on benefit enrollments and changes:

Plan/Products	**Date communicated to the employee**	**Deadline (if applicable)**	**Date action taken**
Group Medical Coverage*			
Group Dental Coverage			
Group Life Insurance			
Disability Coverage			
Short-Term Disability		(not applicable)	
Long-Term Disability		(not applicable)	
The Church Pension Fund Clergy Pension Plan (Clergy Pension Plan)			
The Episcopal Church Retirement Savings Plan (RSVP)			
The Episcopal Church Lay Employees' Defined Contribution Retirement Plan (Lay DC Plan)			
The Episcopal Church Lay Employees' Retirement Plan (Lay DB Plan) and			
The Episcopal Church Lay Employees' Death Benefit Plan (Lay Death Benefit Plan)			
Other employee products			
Supplemental Group Life Insurance			
Annuities			
Individual Life Insurance			

**Medical Coverage generally includes prescription drugs, vision, Employee Assistance Program, Health Advocate, global travel assistance, and hearing benefits.*

Clergy/Lay Employee: Adding a Newborn/Adopted Child Guidelines

Manage an employee's new dependent using My Admin Portal (MAP).

- Employee benefits administrators who do not have access to MAP may request access from their organization's Institution Administrator or from a diocesan organization's Diocesan Administrator who has access to MAP.
- Please call Client Services at (855) 215-5990 if you do not know who that person is.
- Direct the employee to update personal information using *MyCPG Accounts.*

Group Medical/Dental

Deadline: within 30 days from date of qualifying event. Coverage is effective on the date of birth for a newborn, or date of adoption, or placement for adoption.

1. Provide employee with medical and/or dental benefit information	• Determine if the employee will add the child to current coverage, terminate coverage to go on spouse's plan, or make no change. • In addition to adding a child, the employee may make a change to the current enrollment options. • Communicate any cost changes to the employee. • The employer is responsible for providing the employee with a *Summary of Benefits and Coverage (SBC)* and a *Notice of Special Enrollment* for each applicable plan within 90 days of enrollment resulting from a Significant Life Event. • Direct the employee to the *Summary of Benefits and Coverage* and *Plan Document Handbooks* or visit *cpg.org* for more detailed information about plan coverage. • Direct the employee to call Client Services for more information at (800) 480-9967, Monday to Friday, 8:30 AM to 8:00 PM ET.
2. Necessary actions	• Employee's **Institution Administrator** must communicate the new child's required information (Legal Name, Date of Birth, Gender, and if available the child's Social Security Number) and a new plan selection (if applicable) to the institution's **Diocesan** or **Group Administrator**. • The institution's **Diocesan** or **Group Administrator** enrolls the child using MAP.

Review the *Medical Trust Administrative Policy Manual* provided to you or refer to your diocesan/group administrator for complete details on Medical Trust's policies and eligibility guidelines.

This material is not a substitute for professional medical advice or treatment. CPG does not provide any healthcare services and, therefore, cannot guarantee any results or outcomes. Always seek the advice of a healthcare professional with any questions about your personal healthcare, including diet and exercise.

Employer-Provided Group Life

Deadline: None

1. Provide employee with group life insurance information	• Suggest the employee update beneficiary information by completing the *Beneficiary Designation Form - Group & Individual Life and Annuities* Only
2. Necessary actions	• None

Review online for *clergy* and *lay employees* additional information on Church Life, Group Life and Supplemental Group Life Insurance.

Clergy Pension Plan

Deadline: None

1. If enrolled, provide clergyperson with the Clergy Pension Plan information	• Suggest the clergyperson update beneficiary information for the *Beneficiary Designation Form for Preretirement Survivor Benefits*. Each unmarried child younger than 25 who meets the Clergy Pension Plan's eligibility requirements will receive a benefit if the clergyperson dies. If an eligible child is disabled before age 25 and the disability is reported to CPF, the benefit continues for the duration of the disability. If both parents die, the benefit is doubled. Note that certain limitations apply to children adopted by a clergyperson who is age 50 or older. • Direct the clergyperson to *A Guide to Clergy Benefits* for complete details on the Clergy Pension Plan and dependent benefits.
2. Necessary actions	• None

Review *A Guide to Clergy Benefits* for complete details on the Clergy Pension Plan. Note that certain benefits are limited when paid to a child under a certain age.

RSVP

Deadline: None

1. If enrolled, provide employee with the RSVP information	• To make personal contribution changes, the employee should call Fidelity at (877) 208-0092 or visit *netbenefits.com*. • Direct the employee to *Your Guide to Getting Started* for complete details on RSVP.
2. Necessary actions	• None

Review *Your Guide to Getting Started* for additional information.

Lay DC Plan

Deadline: None

1. If enrolled, provide lay employee with the Lay DC Plan information	• Update beneficiary information for the *Lay Defined Contribution Plan*. • To make personal contribution changes, the lay employee should call Fidelity at (877) 208-0092 or visit *netbenefits.com*. • Direct the lay employee to *Your Guide to Getting Started* for complete details on the Lay DC Plan.
2. Necessary actions	• None

Review *Your Guide to Getting Started: Lay Defined Contribution Plan* for additional Lay DC Plan details.

Lay DB Plan and Death Benefit Plan

Deadline: None

1. If enrolled, provide lay employee with the Lay DB Plan information	• Direct the lay employee to *A Guide to the Lay Defined Benefit Plan* for complete details on the Lay DB Plan.
2. Necessary actions	• None

Review *A Guide to the Lay Defined Benefit Plan* for complete details on the Lay DB Plan and Lay Death Benefit Plan.

Other Employee Products

Deadline: Varies

Supplemental Life, Annuities, and Individual Life	• If applicable, suggest the employee update beneficiary information by completing the *Beneficiary Designation Form for Group & Individual Life and Annuities Only*.