CHURCH PENSION FUND
Passionate About Our Purpose

Clergy/Lay Employees: Reporting a Domestic Partnership Checklist

Clergyperson/Lay employee name:	Date of domestic relations order:
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") enters into a qualified domestic partner relationship 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.

Note: The **Institution** or **Diocesan Administrator** must create new CPG online profiles for the domestic partner and new dependents (if applicable) using *My Admin Portal (MAP)*, the "Add Dependent" screen.

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 & 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: Reporting a Domestic Partnership Guidelines

Manage an employee's new domestic partner and dependents in the 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: 30 days from date of qualifying event. Coverage effective date is on the first of the month following the qualifying event.

1. Provide the employee with medical and/or dental benefit information	• Depending on the group, healthcare benefits may or may not be offered to same-gender domestic partners, opposite-gender domestic partners, or both. • If eligible, determine if the employee will add domestic partner to current coverage, terminate coverage to go on domestic partner's plan, or make no change. • Direct the employee to complete the *Domestic Partner Affidavit.* • If adding domestic partner to current coverage, the employee may make a change to the current enrollment options. • Communicate any cost changes to the employee. • Direct the employee to the *Summary Benefits and Coverage* 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	• The employee's **Institution Administrator** must communicate the domestic partner's and new dependents (if applicable) required information (Legal Name, Date of Birth, and Gender) and a new plan selection (if applicable) to the institution's **Diocesan** or **Group Administrator.** • The institution's **Diocesan** or **Group Administrator** enrolls the domestic partner and new dependents (if applicable) or terminates the employee's coverage using MAP.

Review *The Episcopal Church Medical Trust Administrative Policy Manual* provided to you or refer to your Diocesan or 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 the employee with group life insurance information	• Update beneficiary information by completing the *Beneficiary Designation Form - Group & Individual Life and Annuities Only*
2. Necessary actions	• None

Review additional details on *Church Life, Group Life and Supplemental Group Life Insurance.*

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

Clergy Pension Plan

Deadline: None

1. If enrolled, provide clergyperson with the Clergy Pension Plan information	• Update beneficiary information for the *Preretirement Survivor Benefit* and *CPF Group Life Insurance.* • The Clergy Pension Plan recognizes same-gender marriages for purposes of spousal benefits but does not provide spousal benefits to domestic partners or civil unions. The clergyperson may, however, name the domestic partner as a second adult beneficiary when selecting a benefit option at retirement or as a beneficiary for the CPF Group Life Insurance. • Direct the clergyperson to *A Guide to Clergy Benefits* for complete details on the Clergy Pension Plan.
2. Necessary actions	None

Review *A Guide to Clergy Benefits* for complete details on the Clergy Pension Plan.

RSVP

Deadline: None

1. If enrolled, provide the employee with the RSVP information	• Update beneficiary information for the *Retirement Savings Plan (RSVP)*. • 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: Retirement Savings Plan* for complete details on the RSVP.
2. Necessary actions	• None

Review the *Your Guide to Getting Started: Retirement Savings Plan* for additional RSVP details.

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: Lay Defined Contribution Plan* 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 Lay Death Benefit Plan

Deadline: None

1. If enrolled, provide lay employee with the Lay DB Plan information	• Update beneficiary information for the *Lay DB Plan Death Benefit.* • The Lay DB Plan recognizes eligible same-gender marriages for purposes of spousal benefits but does not treat domestic partners or civil unions the same as a spouse. Lay employees may complete a change in beneficiary form for the above benefits. • 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 the Lay Death Benefit Plan.

Other Employee Products

Deadline: Varies

Supplemental Life, Annuities, and Individual Life policies	• If applicable, update beneficiary information by completing the *Life/Annuities Beneficiary Form.* This form is a Group & Individual Life and Annuities only form.

This material is provided for informational purposes only and should not be viewed as investment, tax, or other advice. It does not constitute a contract or an offer for any products or services. In the event of a conflict between this material and the official plan documents or insurance policies, any official plan documents or insurance policies will govern. The Church Pension Fund ("CPF") and its affiliates (collectively, "CPG") retain the right to amend, terminate, or modify the terms of any benefit plan and/or insurance policy described in this material at any time, for any reason, and, unless otherwise required by applicable law, without notice.