

## Enrolling a New Employee in Benefits

### Overview

This checklist provides an overview of the steps to enroll a new employee (clergy or lay) in benefits offered through The Church Pension Fund (CPF) and its affiliates (referred to as “the Church Pension Group” or “CPG”). Refer to “[Clergy Benefits at-a-Glance](#)” and “[Lay Employee Benefits at-a-Glance](#)” for more information about benefits and key dates.

Note: Not all benefits may be offered by the employing institution and the specific plans or products available will vary based on the diocese’s or group’s elections.

Note: Access a step-by-step interactive guide for the [New Hire Process](#).

Note: Access an [Employee Information Data Collection Sheet](#) to collect employee information.

### Before You Begin

Complete the following steps:

<p><b>Confirm you have access to My Admin Portal (MAP).</b></p>	<p>Log into MAP at <a href="https://cpg.org/map">https://cpg.org/map</a></p> <p>If you cannot access MAP, employee benefits administrators can request access from your Institution Administrator or your institution’s Diocese Administrator. If you do not know who that person is, call CPG’s Client Services at (855) 215-5990.</p>
<p><b>Confirm employee eligibility for benefits.</b></p>	<p>Refer to the following documents for specific eligibility information by benefit:</p> <ul style="list-style-type: none"> <li>• Group Medical and Dental: Medical Trust <a href="#">Administrative Policy Manual</a></li> <li>• Employer-Provided Group Life Insurance: <a href="#">Church Life Coverage</a></li> <li>• Short-term and Long-term Disability: <a href="#">Disability Coverage</a></li> <li>• Clergy Pension Plan: <a href="#">A Guide to Clergy Benefits</a></li> <li>• Lay Defined Benefit Plan: <a href="#">A Guide to the Lay Defined Benefit Plan</a></li> <li>• Lay Employee Defined Contribution Retirement Plan (Lay DC) and Retirement Savings Plan (RSVP): <a href="#">Employee Guide</a></li> </ul>
<p><b>Gather list of benefits available to new employees.</b></p>	<ul style="list-style-type: none"> <li>• Prepare a list of the benefits options available to new employees. Note that clergy and lay employees may have different options.</li> <li>• If you are unsure what benefit options are available or the costs of those options, contact your Institution Administrator or your institution’s Diocese or Group Administrator. If you do not know who that person is, call CPG’s Client Services at (855) 215-5990.</li> <li>• Use the “Benefits at-a-Glance” resources to assist in sharing information with the new employee:             <ul style="list-style-type: none"> <li>○ <a href="#">Clergy Benefits at-a-Glance</a></li> <li>○ <a href="#">Lay Employee Benefits at-a-Glance</a></li> </ul> </li> </ul>
<p><b>Gather list of Beneficiary Designation Forms.</b></p>	<p>Adding beneficiaries to pension benefits, life insurance policies, and retirement plans is a separate step from plan enrollment. The employee can submit the appropriate Beneficiary Designation Form(s) listed in the Employee Communications section below to designate beneficiaries.</p>

## Employee Communications

As a first step, you will communicate with the employee to obtain the information needed to enroll them and eligible dependents in benefits.

<p>Provide relevant benefits information to the employee.</p>	<ul style="list-style-type: none"> <li>• Send the employee the list of available benefits that you prepared earlier.</li> <li>• Direct employee to the following resources for more detailed information about plan coverage:             <ul style="list-style-type: none"> <li>• Group Medical and Dental: <a href="#">Clergy</a> and <a href="#">Lay Employees</a></li> <li>• Employer-Provided Group Life Insurance: <a href="#">Clergy</a> and <a href="#">Lay Employees</a></li> <li>• Short-term and Long-term Disability: <a href="#">Clergy</a> and <a href="#">Lay Employees</a></li> <li>• Pension and Retirement Plans (Clergy): <a href="#">Clergy Pension Plan</a> and <a href="#">RSVP</a></li> <li>• Pension and Retirement Plans (Lay Employees): <a href="#">Lay Defined Benefit Plan</a>, <a href="#">Lay Defined Contribution Plan</a>, and <a href="#">RSVP</a></li> <li>• <a href="#">Legal Notices</a></li> <li>• Refer clergy and lay employees to the eLearning course: <a href="#">Understanding Your Benefits</a></li> <li>• Encourage the new employee to create a MyCPG Account at <a href="#">cpg.org</a></li> <li>• Provide the following beneficiary designation forms to the employee, as appropriate:               <ul style="list-style-type: none"> <li>○ <a href="#">Life Insurance Beneficiary Designation Form</a> (group and supplemental)</li> <li>○ For pension related beneficiary designation, <a href="#">see the form</a> related to the employee's pension plan.</li> <li>○ <a href="#">RSVP Beneficiary Designation Form</a></li> </ul> </li> </ul> </li> </ul>
<p>Request necessary information about new dependents.</p>	<p>For each dependent (spouse and/or children), the following information is required:</p> <ul style="list-style-type: none"> <li>• Full Legal Name</li> <li>• Gender</li> <li>• Date of Birth</li> <li>• Social Security Number (SSN)/Individual Tax ID Number. (When enrolling a newborn in medical benefits, adding the SSN is not required at enrollment, but strongly recommended when available. For further information, see the <a href="#">Administrative Policy Manual</a>.)</li> </ul>
<p>Communicate deadlines and receive necessary information.</p>	<ul style="list-style-type: none"> <li>• Clearly state the date you need their elections. Timing is critical to be sure employees can enroll in benefits.</li> <li>• Once you receive the benefit elections, you are ready for the next step.</li> </ul>

## Update or Create Employee Profile in MAP

Before enrolling a new employee in benefits, determine if they have an existing profile in MAP. If the new employee already exists in the system, you can verify and update their information as needed. If a new lay employee does not exist in the system, you can add them as a new employee. **Note: All ordained Episcopal clergy should have an existing profile in MAP. If a new clergyperson does not exist in the system, you will need to ensure the ordination was reported to CPG.**

<p>Check for existing employee profile.</p> <p>Depending on whether or not a match is found, proceed to step sequence A, B, or C.</p>	<ul style="list-style-type: none"> <li>• Log into MAP at <a href="https://cpg.org/map">https://cpg.org/map</a></li> <li>• From the MAP main landing page, click on the “People” tab.</li> <li>• From the “People” landing page, click on the “Add an Employee” quick action button.</li> <li>• If you are responsible for multiple institutions, select the employing institution from the “Select an institution” screen.</li> <li>• The New Hire “Personal Information” screen will launch. Begin inputting the new employee’s full legal name and date of birth.</li> <li>• Depending on whether or not a match is found, different steps apply:</li> </ul>
<p>Step sequence A</p> <p>If an existing profile match:</p> <ul style="list-style-type: none"> <li>• is found,</li> <li>• then update the existing profile.</li> </ul>	<ul style="list-style-type: none"> <li>• A pop-up notification will appear with the potential matching profile. If the match is correct, select the employee.</li> <li>• From the New Hire “Personal Information” screen, update any demographic information as necessary. Then click the “Continue to Employment and Compensation” button.</li> <li>• On the next screen, enter information for Employment and Compensation to complete the profile, and then click the “Submit and Finish” button.</li> <li>• A confirmation screen will appear indicating a successfully new hire addition. If the addition was unsuccessful, you will be informed of the error and how to fix it.</li> <li>• On the confirmation screen, you will see “Next Steps” suggestions, such as marital status update to add a spouse and pension plan enrollment. Select an option to continue with benefits enrollment.</li> <li>• Skip to next section “Enroll the Employee in Benefits.”</li> </ul>
<p>Step sequence B</p> <p>If an existing profile match:</p> <ul style="list-style-type: none"> <li>• is not found</li> <li>• and the new hire is a lay employee,</li> <li>• then create a new profile.</li> </ul>	<ul style="list-style-type: none"> <li>• From the New Hire “Personal Information” screen follow the on-screen instructions to add the new employee.</li> <li>• On the next screen, enter information for Employment and Compensation to complete the profile.</li> <li>• You will see a confirmation screen indicating the successful creation of a new employee profile.</li> <li>• Select from the “Next Step” suggestions to enroll the employee in pension benefits or “Update Marital Status” to enter the new employee’s spouse.</li> <li>• Skip to next section “Enroll the Employee in Benefits.”</li> </ul>

<p>Step sequence C</p> <p>If an existing profile match:</p> <ul style="list-style-type: none"> <li>• is not found</li> <li>• and the new hire is a clergy person,</li> <li>• then you'll need to confirm registration of the ordination.</li> </ul> <p>Do NOT create a new profile.</p>	<p><b><u>All ordained Episcopal clergy should have an existing profile in MAP.</u></b></p> <ul style="list-style-type: none"> <li>• Contact your diocesan Ordination Officer or Diocese Administrator. The Ordination Officer will confirm that the clergy person was reported to the Office of the Recorder of Ordinations.</li> <li>• If you do not know who that person is, call CPG's Client Services at (855) 215-5990.</li> <li>• Once the reporting of the ordination is completed, a profile will be automatically created for the clergy person. You can then update the clergy person's newly created profile.</li> <li>• Return to steps above "Check for existing profile" to confirm the existing profile exists and proceed with Step sequence A.</li> </ul>
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## Enroll the Employee in Benefits

Institution Administrators can add an employee, update information about the employee, and enroll new employees in pension and retirement benefits. Diocese or Group Administrators can enroll new employees in group health, life, and disability plans. After creating or updating the employee profile and enrolling the employee in pension and retirement benefits, Institution Administrators contact their Diocese or Group Administrator with the information below and the Diocese or Group Administrator will complete enrollment in group health, life, and disability benefits, if applicable.

### Institution Administrators:

<p><b>Enroll employee in retirement benefits.</b></p>	<p>After creating the new employee profile and adding dependents (if applicable), enroll the eligible new employee in pension and/or retirement plans.</p> <ul style="list-style-type: none"> <li>• Log into MAP at <a href="https://cpg.org/map">https://cpg.org/map</a></li> <li>• From the MAP main landing page, click on the "People" tab.</li> <li>• From the People landing page, click the "Enroll in Pension" quick action button</li> <li>• If you are responsible for multiple institutions, select the employing institution from the "Select an institution" screen.</li> <li>• Select the employee from the "Employees" screen.</li> <li>• On the "Pension Plan Summary" screen, confirm or update the marital status by clicking "Yes, this is correct" or "No, update Marital Status."</li> <li>• Then, enroll the new employee in the applicable pension and/or retirement plan.</li> <li>• Complete the enrollment by providing the required information on the next "Pension Enrollment Details" screen.</li> <li>• If you enroll the new employee in more than one plan, repeat this process.</li> <li>• Note: if you do not see a particular retirement plan, your institution hasn't adopted it. If you suspect an error, call Client Services at (855) 215-5990.</li> </ul>
<p><b>Communicate information to your Diocese or Group Administrator.</b></p>	<ul style="list-style-type: none"> <li>• Employee's full legal name and either their date of birth or Social Security Number/ Individual Tax ID Number.</li> <li>• The new employee's benefit elections for group health, life, and disability coverage, including enrollment decisions for dependents, if applicable.</li> </ul>

### Diocesan or Group Administrators:

<p>Enroll new employee in benefits.</p>	<p>After receiving the enrollment information for the new employee from the Institution Administrator, Diocesan or Group Administrators complete enrollments in group health, life, and disability benefits as appropriate.</p> <ul style="list-style-type: none"> <li>• Log into MAP at <a href="https://cpg.org/map">https://cpg.org/map</a></li> <li>• From the MAP main landing page, click on the “People” tab.</li> <li>• From the “People” landing page, click on the “View Coverage” quick action button.</li> <li>• If you are responsible for multiple institutions, select the employing institution from the “Select an institution” screen.</li> <li>• Select the employee from the “Employees” screen.</li> <li>• Follow the on-screen instructions to enroll the new employee and dependent(s), if applicable, in coverage.</li> <li>• Refer to the “Support and Guidance” links onscreen for assistance and additional information.</li> </ul>
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### Post-Enrollment

<p>Keep a record of employee benefits enrollment information.</p>	<p>Record should include employee information, dependent information, and benefit elections and enrollments.</p>
<p>Communicate enrollment completion to employee.</p>	<p>Contact the employee to communicate that all necessary enrollments have been completed.</p> <p>Note: CPG will send the employee a letter confirming enrollment. The employee will also receive an invitation to set up a MyCPG Account, where they can review and update personal information, including dependents, and see their benefit enrollments.</p>
<p>Provide employee with required documentation.</p>	<p>Provide the employee a medical and dental <a href="#">Summary of Benefits and Coverage (SBC)</a>.</p>

### Disclaimers

*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.*