

CPG for New Administrators: The Basics



Toni Marie Sutliff
Client Financial Education Specialist

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Director Client Learning
and Resources

August 2, 2022
Integrated Benefits
Account Management Services

≡ Today's Agenda



01 About CPG and What We Do Together

02 “I am an Administrator”

03 Administrator Resources

04 Employee Benefit Transactions

05 Questions and Comments

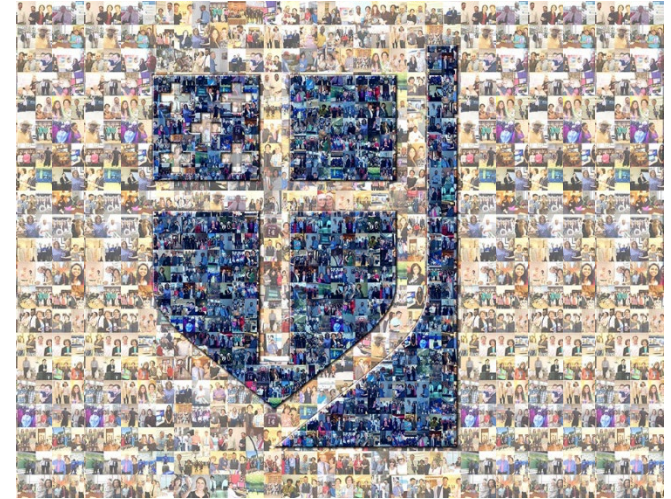
01

About CPG and What We do Together

≡ What Is Our Purpose?

Passionate About Our Purpose

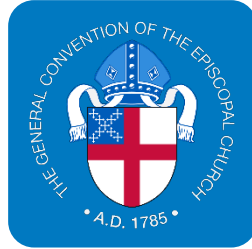
Our clients will have the highest possible level of financial security in retirement that is consistent with exemplary financial stewardship on our part and with the evolving needs of the Church.



100+ Years of Partnership



**Imagined
by Bishop
Lawrence**



**Authorized
by an act
of General
Convention**



**Board of
Trustees
elected by
the General
Convention**



**Created as a New
York corporation,
governed by
various federal
and state laws**

Result: Unique balance of responding to Church needs and protecting assets for participants

Employee Benefits Offerings



**Pensions
& Retirement
Savings**



**Health
Benefits**



**Life
Insurance**



**Disability
Coverage**



**Education
& Wellness**

Church Insurance Companies: property, casualty, and liability insurances

Church Publishing, Inc.: books, church supplies, and worship materials

02

“I am an Administrator”

TCSM Administrator Types and Roles



Diocese administrators

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

Institution administrators

- Manage employment
- Enrollment in retirement plans

Group administrators

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

What Can You Expect from CPG?



**Administrator
and member
assistance**



**Administrator
Education**



Call Center



**Timely
communication**



**Subject matter
experts**



**Network of
vendors**



**Online
resources**



**Knowledge of
the Church and
your working
situations**

Benefits Management—Expectations

Administrator roles vary, but there are common responsibilities



Confirming eligibility, performing enrollments and termination on a timely basis



Training newly enrolled staff (MyCPG Accounts)



Notifying CPG of employee changes

- MAP (administrator)
- MyCPG Accounts (member)
- Calling CPG Client Services Call Center



Processing your monthly invoices

03

Administrator Resources

Benefits Management—Administrator Resources

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- Who to Contact
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- Recursos en Español
- Guides & Resources

Administrators' Resource Center

My Admin Portal (MAP)

MAP consolidates many tasks from the Institution Roster, Employee Roster, and the Medical Life Participant System (MLPS), streamlines the administrative process, and helps you complete most benefits-related tasks—all in one place! [Learn more about MAP.](#)

Guides & Resources

View sample bills and helpful what-to-do-when checklists.

- [Understanding Your Bills](#)

Administrator Resources: Events

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- CPG Partnership Conference
- Episcopal Business Administration Conference

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Webinars

2022 IBAMS Group Administrator Webinar Series

This webinar series for administrators and church leaders will cover offerings, benefits management processes and best practices, regulatory changes, industry standards, and other information that will aid you in managing retirement, health, group life, property, casualty, and disability.

CPG, Fidelity & Cigna EAP Webinars

Our education specialists present webinars to help you deal with the challenges you face as clergy or lay employees in The Episcopal Church, the most of your CPG benefits, and live your best life.

[Learn More](#)

CPG Partnership Conference

Save the date! The next annual 2023 CPG Partnership Conference Benefits Partnership Conference (BPC), for administrators and lay employees of dioceses, parishes, and specific participating institutions will be held on November 11, 2023 at Camp Allen in Navasota, TX.

[Learn More](#)

Administrators' Resource Center

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- CPG Partnership Conference
- Episcopal Business Administration Conference

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Guides & Resources


2022 IBAMS Group Administrator Webinar Series

My Admin Portal (MAP)

Thursday, June 2, 2022
3:30 PM – 4:15 PM ET

- MAP Overview
- Selected Transaction Walkthroughs
- Open Forum Questions & Answers

Replay this webinar: *coming soon!*




Annual Enrollment 101 & Health Plan Selection: What It Is, and What You Need to Do

Wednesday, June 8, 2022
3:30 PM – 4:15 PM ET

- Overview of the Group Health Plan Selection, AE process, and timelines
- Overview of the 2023 Plan Array
- Plan Selection & AE
- Member Education & Website Overview - What is available for your employees
- Plans Going Away

Replay this webinar: *coming soon!*



Administrator Resources: Contacts

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MyCPG Retirement Insurance Learning Administrators

Who to Contact

Do you have a question about administering the benefits offered through CPG?

- Need help enrolling an employee?
- Do you or an employee need to contact a healthcare provider?
- Do you want to review your Institution's property & casualty coverage?

We've gathered contact information for you so that you can answer these and other questions fast.

CPG Account Managers (IBAMS)

The Integrated Benefits Account Management Services (IBAMS) Regional Account Specialists provide individualized service, support, and education to Episcopal dioceses and institutions for all CPG employee benefits. For more information, see Account Managers.

Health Plans

Contact information for the Medical Trust and health plan carriers for the plans offered through the Medical Trust.

Property & Casualty

Locate your local representative for The Church Insurance Agency Corporation. View the list of representatives.

You can email your questions to us - go to Contact Us, select the benefit you have a question about, and submit your email.

Administrators' Resource Center

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Healthcare Benefits

Church Insurance

CPG Account Managers

Account Manager Assignments

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CPG Account Managers

Our Integrated Benefits Account Management Services (IBAMS) account managers provide individualized service, support and education to Episcopal dioceses and institutions for all Church Pension Group (CPG) employee benefits. Our specialists are available to:

Don't know who your account manager is? See [Account Manager Assignments](#).

IBAMS Domestic Account Management



Kirk Mason
Vice President, Domestic Relationship Management
(212) 592-4292
kmason@cpg.org



Chipasha Kashoki
Director, Western U.S. Region
(212) 592-4259
ckashoki@cpg.org



Jeff Hamilton
Account Specialist
(212) 592-4283
jhamilton@cpg.org



Courtney Whittington
Account Specialist
(212) 592-6381
cwhittington@cpg.org



Jackie Quamberg
Sr Account Specialist
(212) 592-4203
[jqumberg@cpg.org](mailto:jquamberg@cpg.org)

Administrator Resources: Resources

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Guides & Resources

View sample bills and helpful what-to-do-when checklists.

- [Understanding Your Bills](#)
- [Employment Events](#)
- [Employee Life Events](#)
- [Employee Resources](#)

Contact Lists

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About MAP

You told us that you needed help with the processes and procedures involved when someone is hired or leaves their job, has a change in their compensation or a change in their personal status. These events all impact your employees' pensions, retirement plans and benefits. We've developed "What To Do When" guides and checklists to help you complete the work as quickly and accurately as possible, and ensure your employees' benefits are properly managed the first time around.

Events

Who to Contact

Documents & Mailings

Recursos en Español

Guides & Resources

Understanding Your Bills

Understanding Your Bills

Sample pension assessment, medical trust, and church insurance bills with explanations make it easier for you to review your bills and understand the charges. Also find remittance payment addresses.

Employment Events

You hire a new Cleric

This checklist and the enrollment guidelines on the following pages provide general directions for enrollment into benefits for clergy.

You Hire a new Lay Employee

This checklist and the enrollment guidelines on the following pages provide general directions for enrollment into benefits for lay employees.

A Cleric leaves or is terminated

General directions for when a clergy person's employment is terminated and how it affects benefits provided by The Church Pension Fund and its affiliates.

[View All Employment Events](#)

Administrator Resources: Spanish

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- [Employment Events](#)

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Recursos de Church Publishing

Política de privacidad de CPG

CPG en Español

CPG lleva más de 100 años ayudando al clero y a los empleados laicos con ahorrar para la jubilación. Si desea más información sobre productos y servicios, lo invitamos a llamar al Centro de Servicios a Clientes.

Marque **1-866-802-6333**, opción 3 para atenderle en español, de **lunes a viernes entre las 8:30 a.m. y 8:00 p.m.** hora del este, para ver cómo CPG le puede ayudar.

Consulte la hoja de datos de la CPG para obtener más información sobre nuestra visión y nuestro servicio a la Iglesia Episcopal.

Leer más sobre hitos clave de nuestra historia.

Últimos Anuncios y Documentos

Marzo de 2022

- [Un mensaje del presidente—Primavera del 2022](#)

diciembre de 2021

- [Un mensaje del presidente—Invierno del 2021](#)

octubre de 2021

- [Un mensaje del presidente—Otoño del 2021](#)
- [muestra de factura de aportación de pensión](#)
- [No se cobrarán intereses sobre las aportaciones vencidas del ICPP hasta el 1 de enero de 2023](#)

Administrator Resources: MAP

The screenshot displays the Church Pension Group (CPG) MAP website interface. At the top, the CPG logo and 'CHURCH PENSION GROUP' are on the left, and 'MAP' with a dropdown arrow, a notification bell, and a search bar are on the right. Below this is a navigation menu with items: MAP, People, Benefits Groups and Billing, Institution, Resources, and Reports. An orange arrow points from the 'Resources' menu item down to the 'Resources' heading on the page. Below the heading is the sub-heading 'Guides and Resources'. There are four main content cards arranged in a 2x2 grid. The top-left card is titled 'Events' and features a photo of a man at a computer with a microphone; below it are links for 'Administrator Webinar Series', 'CPG Partnership Conference', and 'Episcopal Business Administration Conference'. The top-right card is titled 'Who to Call' and features a photo of hands holding a smartphone; below it are links for 'Account Managers', 'Healthcare Benefits', and 'Property & Casualty'. An orange arrow points from the 'Who to Call' title back to the 'Resources' menu item. The bottom-left card is titled 'Employment Events' and features a photo of three men in business attire; below it is the link 'What to do when'. The bottom-right card is titled 'Life Events' and features a photo of an elderly couple; below it is the link 'What to do when an employee'.

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MAP

MAP People Benefits Groups and Billing Institution Resources Reports

Map / Resources


Resources

Guides and Resources




Events

- [Administrator Webinar Series](#)
- [CPG Partnership Conference](#)
- [Episcopal Business Administration Conference](#)




Who to Call

- [Account Managers](#)
- [Healthcare Benefits](#)
- [Property & Casualty](#)



Employment Events

[What to do when](#)



Life Events

[What to do when an employee](#)

Client Services Call Center—Administrator Line



CPG Client Services Administrator Services

Call [\(855\) 215-5990](tel:8552155990)

Monday through Friday

8:30AM to 8:00PM ET

Email admin-assist@cpg.org

The IBAMS* Account Representatives

- **Relationship Management** and Business Development**
 - Regionally based
 - Consultative and personalized
 - Special care for issue resolution
- **Implementation and Operations**
 - Managing “behind the scenes”
 - New group enrollments for all products



*Integrated Benefits Account Management Services (IBAMS)








**Account management is provided to institutions that have direct employee benefits relationships with CPG. Visit cpg.org/ibams to learn who is your account manager. Other resources provided are for all administrators.

04

Employee Benefit Transactions

Basic Transactions



-  **Enroll new employees**
-  **Enrolling dependents: spouse, children, etc.**
-  **Discontinue an employee's benefits**
-  **Pay Invoices: e.g. Medical/Dental, Fidelity, CPG pension, Church Insurance**
-  **Update information: organization, individual**
-  **Plan selection: Annual Enrollment (AE)**
-  **Filing Claims: property/casualty, disability, death**

Enroll New Employee



- Confirming eligibility for benefits
- My Admin Portal (MAP)
 - Step #1 (Institution/Diocese Administrators)
 - Enter new employee into MAP
 - Enroll in retirement and pension
 - Step #2 (Diocese/Group Administrators)
 - Enroll new employee in group health, life, and/or disability plan(s)
- New Hire Checklists

≡ Video: Understanding Your Benefits



Enrolling dependents (spouse, children, etc.)



- Who is eligible?
- Importance of timing
- MAP / MyCPG Accounts—adding a dependent
- Affect on tier and invoice
- Supplemental life insurance?
- Pension/life beneficiary info

Terminating Employee Benefits



- Reasons to discontinue coverage
- Terminating employment and benefits
- My Admin Portal (MAP)
 - Step #1 (Institution/Diocese Administrators)
 - Terminate employment
 - Automatically terminates active status in pension
 - Step #2 (Diocese/Group Administrators)
 - Terminate Group health, life, and disability (GHLD)
- No longer eligible: terminating Lay-DB, GHLD
- Terminating Employee Checklists

≡ Paying Invoices



- Medical, Dental, Group Life, Disability
- Lay Employees' Defined Contribution Retirement Plan (Lay DC) and Retirement Savings Plan (RSVP)
- The Clergy Pension Plan (Clergy DB) and the Lay Employees' Retirement Plan (Lay DB)
- Church Insurance Companies
- Understanding Your Bills
- Expectations

Administrators' Resource Center

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Understanding Your Bills

Employment Events

Employee Life Events

Employee Resources

Understanding Your Bills

You told us that it can be difficult to understand all the details in your CPG billing statements. We created sample bills with explanations to make it easier for you to review your bills and understand the charges. Just click on the links below to get the scoop!

Sample Bills

Pensions

- [Pension Assessment Bill - English](#) | [Español](#)
 - [Total Assessable Compensation \(IAC\) Comparison Chart](#)
 - [Employment Change Form - 2018](#) - This form replaces the New Assignment Notice and Change Compensation forms for changes effective on or after January 1, 2018 for clergy and lay employees

Funding Contributions to the Lay DC and RSVP Plans

- Institutions that have adopted a plan remit employer and employee contributions electronically to Fidelity through one of two systems:
 - Fidelity Simplified Contribution Platform (SCP)
 - Fidelity Plan Sponsor WebStation (PSW)

For new user access, remitting contributions, and resources see [Contribution Remittance](#).

*Fidelity will no longer accept the Contribution Transmittal Form after 12/31/2018. See [Fidelity Introduction SCP](#) for more information.

Medical Trust

- [Group Health Billing Summary](#)

Property & Casualty Insurance

- [Church Insurance Bill](#)

A The Church Pension Fund
 (855) 215-5990
admin-assist@cpg.org

Episcopal Church

B Bill Type Clergy
C Client # 999-999-999
 Total Amount Due \$ 4,995.00

EPISCOPAL CHURCH
 ATTENTION SALLY SMITH
 123 MAIN STREET
 NEW YORK, NY 10016



Clergy Pension Assessment Bill

Please see cpg.org/billingmap for information about our new bill and how to submit compensation changes.

D April 2018 Billing Statement
Activity From 03/01/2018 Through 03/31/2018

E Total Amount Due Last Statement	\$	6,300.00
F Payments Received	\$	(6,300.00)
G Administrative Adjustments	\$	
H Balance Forward	\$	0.00
I Adjustments Processed This Billing Period	\$	1,830.00
J Current Assessment	\$	6,180.00
K Total Amount Due on April 30, 2018	\$	8,010.00

Please pay as billed. Any adjustments made will appear on the next assessment bill.

GRACE CHURCH
 ATTENTION SALLY SMITH
 123 MAIN STREET
 NEW YORK, NY 10016

Please make checks payable to **Church Pension Fund**

Remittance Stub

GRACE CHURCH	
Due Date	04/30/2018
Client #	999-999-999
Total Amount Due	\$ 8,010.00
Amount Enclosed	\$ _____

L THE CHURCH PENSION FUND
 75 REMITTANCE DR
 SUITE 6121
 CHICAGO, IL 60675-6121



Please return this remittance stub with your payment



* L 0 4 2 5 0 0 4 2 1 2 *

Filing Claims

Filing Claims



- Three categories
 - Property/casualty losses
 - Disability
 - Death

Annual Enrollment

Annual Enrollment—Overview



Group Plan Selection

Administrator Role

- Analyze Medical Trust plan array for new plan year
- Select plan(s) to offer clergy and lay employees

Member Annual Enrollment

Administrator Role

- Prepare employees
- Oversee enrollment change process for employees
- Work with CPG to quickly resolve issues for employees

Education

Administrator and Member Education Opportunities

- AE Website (Admin's) cpg.org/aeadmin
- AE admin webinar series cpg.org/webinars
- AE Website (Members) cpg.org/annualenrollment
- IBAMS member education sessions

Updating Information

Updating Information



- **MAP** – Institution Information
 - Name, contact information, etc.
 - Institution Administrator assignments
- **MyCPG Accounts** – members
 - Personal information
 - Spouse/dependent information
 - Clerical information
- **MAP** – Individual information

Updating Information—Help

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Employment Events



You hire a new Cleric

This checklist and the enrollment guidelines on the following pages provide general directions for enrollment into benefits for clergy.



You Hire a new Lay Employee

This checklist and the enrollment guidelines on the following pages provide general directions for enrollment into benefits for lay employees.



A Cleric leaves or is terminated

General directions for when a clergyperson's employment is terminated and how it affects benefits provided by The Church Pension Fund and its affiliates.



A lay employee leaves or is terminated

This checklist and the guidelines on the following pages provide general

Who to Contact, Web Resources, Handouts

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Who to Contact

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- Do you or an employee need to contact a healthcare provider?
- Do you want to review your institution's property & casualty coverage?

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CPG Account Managers (IBAMS)

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Health Plans

Contact information for the Medical Trust and health plan carriers for the plans offered through the Medical Trust.

- Healthcare benefits
- Church Insurance Representatives
- IBAMS Account Representatives
- Client Services
- cpg.org/arc
- MAP / Resources

Questions and Comments





Thank you!
For your participation and feedback.

Disclaimers

This presentation is provided for informational purposes and should not be viewed as investment, tax, or other advice. In the event of a conflict between this presentation and the official plan documents, the terms of the official plan documents will govern. CPF and its affiliates reserve the right to amend, terminate, or modify the terms of any benefit plans described in this presentation at any time, without notice, and for any reason. The Clergy Pension Plan is a qualified plan under section 401(a) of the Internal Revenue Code, but as a church plan, it is not subject to the Employee Retirement Income Security Act of 1974, as amended.

The Church Pension Fund plans to continue to provide the Medicare Supplement Subsidy. However, given the rising cost of medical care coupled with the uncertainty regarding the structure of Medicare in the future, this should not be viewed as a guarantee of the Medicare Supplement Subsidy in perpetuity.

Life insurance is offered by or through Church Life Insurance Corporation; 19 East 34th Street, New York, NY 10016 (“Church Life”). Like most insurance policies, Church Life’s policies contain exclusions, limitations, reductions of benefits, and terms for keeping them in force. For complete details of coverage, including exclusions, limitations, and restrictions, please consult the actual policy or certificate. Products and features may not be available in all states. If the descriptions of the Church Life products in this document conflict with the terms of the actual policy, then the terms of the actual policy will govern.

Church Pension Group Services Corporation, doing business as The Episcopal Church Medical Trust, maintains a series of health plans for employees (and their dependents) of the Episcopal Church. The Episcopal Church Medical Trust serves only ecclesiastical societies, dioceses, missionary districts, or other bodies subject to the authority of the Episcopal Church. The health plans that are self-funded are funded by The Episcopal Church Clergy and Employees’ Benefit Trust, which is a voluntary employees’ beneficiary association within the meaning of section 501(c)(9) of the Internal Revenue Code.

Disclaimers (cont'd)

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.

The Lay DB Plan's financial condition is disclosed in the Church Pension Group Annual Report, which is located on our website at cpg.org. Like many defined benefit plans, there may be times when the Lay DB Plan is not fully funded. CPF, as sponsor of the Lay DB Plan, continues to monitor the plan's funding status and reserves the right to change the employer assessment rate at any time.

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.

Short-term disability and long-term disability insurance products and services are offered by American Family Life Assurance Company of New York, NAIC No. 60526. The information provided here is a summary of the group disability income insurance coverage and is for illustrative purposes only. A certificate with more complete policy information is available upon request. Please refer to the certificate or the group policy for a complete description of coverage, terms, conditions, exclusions, and limitations. If any conflict exists between the certificate and/or policy and the information described here, the terms of the certificate and policy will govern. Other self-funded disability benefits may be provided by The Church Pension Fund.

Disclaimers (cont'd)

“Church Insurance Companies” refers to The Church Insurance Company, NAIC No. 10669, a New York domiciled insurance company with its home office located at 19 East 34th Street, New York, New York 10016, The Church Insurance Company of Vermont, a Vermont domiciled insurance company with its home office located at 210 South Street, Bennington, VT 05201, and The Church Insurance Agency Corporation, an insurance agency with its home office located at 19 East 34th Street, New York, NY 10016. The Church Insurance Companies offer property and casualty insurance coverage and other related services to The Episcopal Church and its dioceses, parishes and other entities.

Property and casualty insurance products are underwritten by The Church Insurance Company, The Church Insurance Company of Vermont, and other companies (not affiliated with the Church Insurance Companies) for which The Church Insurance Agency Corporation acts as an insurance agent or broker. Product availability and features may vary by state, and products may not be available in all states. The Church Insurance Companies are not licensed in all states. Information and descriptions of products and services are provided solely for general informational purposes and are not intended to be complete descriptions, 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 policy or certificate. If any description of a Church Insurance Companies product conflicts with the terms of the actual policy or certificate, then the terms of such policy or certificate will govern.

The Church Insurance Companies do not guarantee the performance of the legal and contractual obligations of any unaffiliated insurer.