

Employment Documents for Change of Local Church Appointment at Annual Conf.

Documents (packets for moving clergy will be distributed at Moving Pastor Retreat):

To retrieve these documents you will need to go to the conference website: www.ngumc.org. For numbers 2, 3, 4, 5, 6, 8 click on *Benefits & Finance* and click on left hand bar click on *Pensions*.

FORMS DUE IN DISTRICT OFFICE or to your church BY JUNE 26.

1. Pre-Appointment Form filled out by DS- submitted by DS by AC Cabinet meeting
2. Clergy Compensation Worksheet- copy for District Office and Conference Benefits
3. I-9 Work Form- filled out for and with your church to go in your file there by June 26
4. UMPIP Billing Change Form- due to Conference Benefits- optional for all- by June 26
5. Before/After Tax Agreement UMPIP- give to church by June 26- optional for all
6. Pension Waiver- for exceptions with permission of DS- if needed, due with Pre-Appointment Form, submitted by DS by AC Cabinet meeting
7. Insurance Enrollment- for new full time clergy only- must be submitted by DS by AC Cabinet meeting. Karen will have new full time clergy fill out form at Moving Pastor Seminar.
8. Information for Conference Master List- copy to District Office and Conference Benefits- June 26

Full Time Elders, Deacons, Provisional Elders, Provisional Deacons and Local Pastors who are *already appointed in NGA*

2. Clergy Compensation Worksheet- copy to District Office and Conference Benefits by June 26
3. I- 9- for employer files by June 26
4. UMPIP Billing Change Form- due to Conference Benefits Office- by June 26 optional
5. Before/After Tax Agreement UMPIP - give to church by June 26- optional
- 7(c) MCSD Clergy Expense for HealthFlex – due to District Office and Conference Benefits-by June 26
8. Information for Conference Master List- copy to District Office and Conference Benefits- June 26

Full Time Elders, Deacons, Provisional Elders, Provisional Deacons and Local Pastors who are *appointed for the first time as full time in NGA*

1. Pre-Appointment Form- DS fills out and brings to Cabinet meeting the day before AC
2. Clergy Compensation Worksheet- copy to District Office and Conference Benefits- by June 26
3. I-9 Work Form- filled out for and with your church to go in file there- due June 26
4. UMPIP Billing Change Form- due to Conference Benefits Office by June 26- optional
5. Before/After Tax Agreement UMPIP - give to church by June 26- optional
7. Insurance Enrollment- for new full time clergy only- must be submitted by DS by AC Cabinet meeting. Karen will have new full time clergy fill out form at Moving Pastor Seminar.
8. Information for Conference Master List- copy to District Office and Conference Benefits- June 26

Part Time Elders, Deacons, Provisional Elders, Provisional Deacons and Local Pastors- *for those who are already part of NGA*

1. Pre-Appointment Form- DS fills out and brings to Cabinet meeting the day before AC
2. Clergy Compensation Worksheet- copy to District Office and Conference Benefits- by June 26
3. I-9 Form- give to church by June 26
4. UMPIP Billing Change Form- due to Conference Benefits Office by June 26- optional
5. Before/After Tax Agreement UMPIP - for those enrolled- give to church by June 26- optional
6. Pension Waiver for those choosing to waive CRSP- for exceptions with permission of DS- if needed, due with Pre-Appointment Form, submitted by DS by AC Cabinet meeting
(Part Time are not eligible for Conference Insurance)
8. Information for Conference Master List- copy to District Office and Conference Benefits- June 26

Part Time Elders, Deacons, Provisional Elders, Provisional Deacons and Local Pastors- for those who are new part time in NGA

1. Pre-Appointment Form- DS fills out and brings to Cabinet meeting the day before AC
2. Clergy Compensation Worksheet- copy to District Office and Conference Benefits- by June 26
3. I-9- give to church by June 26
4. UMPIP Billing Change Form- due to Conference Benefits by June 26- optional
5. Before/After Tax Agreement UMPIP - for those enrolled- give to church by June 26- optional
6. Pension Waiver for those choosing to waive CRSP- for exceptions with permission of DS- if needed, due with Pre-Appointment Form, submitted by DS by AC Cabinet meeting
8. Information for Conference Master List- copy to District Office and Conference Benefits- June 26

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1. Pre-Appointment Form: Notification/documentation of appointment by Bishop approved by Cabinet. Form for Cabinet use not clergy.
 2. Clergy Compensation Worksheet: Official documentation of compensation package paid to clergy, necessary for correct pension, CPP, HealthFlex Billing, record for GBOPHB
 3. I-9 Work Form : Federally required employee identity verification form
 4. UMPIP Billing Change Form: Notification of personal withholding amount and taxability of contributions to pension plan.
 5. Before/After Tax Agreement UMPIP: Notification/request to church to withhold voluntary contributions from payroll for pension
 6. Pension Waiver: Form to allow less than full-time clergy to opt out of CRSP pension. May be revoked at any time.
 7. Insurance Enrollment: A) HealthFlex Participant Enrollment/Change Form for new enrollees, or changes in coverage-add/term dependents, etc. B) MetLife Enrollment Form for new enrollees or changes in beneficiary for MetLife coverage. C) MCSD clergy expense for HealthFlex
 8. Information for Conference Master List: Personal information on clergy-names, address, spouse, children, etc.

GBOPHB: General Board of Pension & Health Benefits of the United Methodist Church.

CRSP: Clergy Retirement Security Program (replaced MPP) in 2 parts - the Defined Benefit (CRSP DB), Defined Contribution (CRSP DC) Church expense, Pension program for Full-time & Part-time clergy.

UMPIP: United Methodist Personal Investment Plan, voluntary pension contributions withheld from payroll, Individual expense, Full-time & Part-time clergy

CPP: Comprehensive Protection Plan, long term disability and death benefits, Church expense, Full-time clergy required, $\frac{3}{4}$ time option

BPP: Basic Protection Plan, \$10,000 death benefit for Full-time clergy, Apportionment

HealthFlex: Health insurance plan for Full-time clergy, Church expense/Clergy expense

MetLife: Additional life coverage for all enrolled in HealthFlex (part of HealthFlex rate)

MCSD: Mandatory Clergy Salary Deduction: Clergy share of HealthFlex cost, withhold from payroll pre-tax