

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

New Elders, Deacons, Provisional Elders, Provisional Deacons, Local Pastors, anyone else appointed to N GA churches/Agencies

Required Forms Listing

1. Pre-Appointment Form- 1st Time Appt- filled out by DS- submitted by DS by AC Cabinet meeting
2. Appointment Form –already appointed in N GA-Filled out by DS when someone is not going from church to church by AC Cabinet meeting
3. Clergy Financial Support Worksheet- copy for District Office and Conference Benefits- due July 1
4. I-9 Work Form- filled out for and with your employer to go in your file there- due July 1
5. UMPIP Billing Change Form- due to Conference Benefits by July 1- participation optional for all
6. UMPIP Contribution Election Form- give to church by July 1- participation optional for all
7. Pension Waiver- for exceptions with permission of DS- if needed, original due to Conference Benefits by June 8 **for half & three quarters time only**
8. Insurance Enrollment- for full time clergy only- due to Conference Benefits by June 3
9. Information for Conference Master List- copy to District Office and Conference Benefits- July 1

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

2. Appointment Form –already appointed in N GA-if change necessary
3. Clergy Financial Support Worksheet- copy to District Office and Conference Benefits- by July 1
4. I- 9 Work Form- filled out for and with your employer to go in file there- due July 1
5. UMPIP Billing Change Form- due to Conference Benefits by July 1- participation optional
6. UMPIP Contribution Election Form- give to church by July 1- participation optional
9. Information for Conference Master List- copy to District Office and Conference Benefits- July 1

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

1. Pre-Appointment Form 1st Time- DS fills out and brings to AC Cabinet meeting
3. Clergy Financial Support Worksheet copy for District Office and Conference Benefits- due July 1
4. I-9 Work Form- filled out for and with your employer to go in file there- due July 1
5. UMPIP Billing Change Form- due to Conference Benefits Office by July 1- participation optional
6. UMPIP Contribution Election Form- give to church by July 1- participation optional
8. Insurance Enrollment due to Conference Benefits by June 3
9. Information for Conference Master List- copy to District Office and Conference Benefits- July 1

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

2. Appointment Form - DS fills out and brings to AC Cabinet meeting
3. Clergy Financial Support Worksheet- copy to District Office and Conference Benefits- by July 1
4. I-9 Work Form- filled out for and with your employer to go in file there- due July 1
5. UMPIP Billing Change Form- due to Conference Benefits Office by July 1- participation optional
6. UMPIP Contribution Form- due to Conference Benefits Office by July 1- participation optional
7. Pension Waiver- for those choosing to waive CRSP- to DS (DS brings to AC Cabinet meeting with Appointment Form)

(Part Time are not eligible for Conference Insurance)

9. Information for Conference Master List- copy to District Office and Conference Benefits- July 1

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

1. Pre-Appointment Form 1st Time- DS fills out and brings to AC Cabinet meeting
3. Clergy Financial Support Worksheet- copy to District Office and Conference Benefits- by July 1
4. I-9 Work Form- filled out for and with your employer to go in file there- due July 1
5. UMPIP Billing Change Form- due to Conference Benefits by July 1- participation optional
6. UMPIP Contribution Form- for those enrolled- give to church by July 1- participation optional
7. Pension Waiver for those choosing to waive CRSP- to DS (DS brings to AC Cabinet meeting with Pre-Appointment Form)
8. Information for Conference Master List- copy to District Office and Conference Benefits- July 1

1. Pre-Appointment Forms: Notification/documentation of appointment by Bishop approved by Cabinet. Form for Cabinet use not clergy.
- 3 Clergy Financial Support Worksheet: Official documentation of compensation package paid to clergy, necessary for correct pension, CPP, HealthFlex Billing, record for GBOPHB
- 4 I-9 Work Form : Federally required employee identity verification form
- 5 Pension Enrollment: Personal information necessary for all non TBS/Supply appointments. Used for pension (CRSP), UMPIP, CPP, UM Life Options.
- 6 UMPIP Billing Change Form: Notification of personal withholding amount and taxability of contributions to pension plan.
- 7 UMPIP Contribution Election Form: Notification/request to church to withhold voluntary contributions from payroll for pension
- 8 Pension Waiver: Form to allow less than full-time clergy to opt out of CRSP pension. May be revoked at any time.
- 9 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.
- 10 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

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

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

Mailing address for Conference Benefits: Conference Benefits, United Methodist Center, 1700Century Circle, Atlanta, GA 30345 Fax 678 533-1380