

# TCSM 158 - New Hire

Dio & Parish Admin

**Epic:** TCWEB - 158 Web Self Service - Create Person

**Persona(s):** Back-Office Admin

**Entrypoint:** Admin Dashboard

**Requirements:** <https://cpg.app.box.com/file/?s=rgais67kc9awbay1ce2w91ogg3r0dmd7>



November 19, 2020

# Hello, User Name

## Quick Actions

Customize

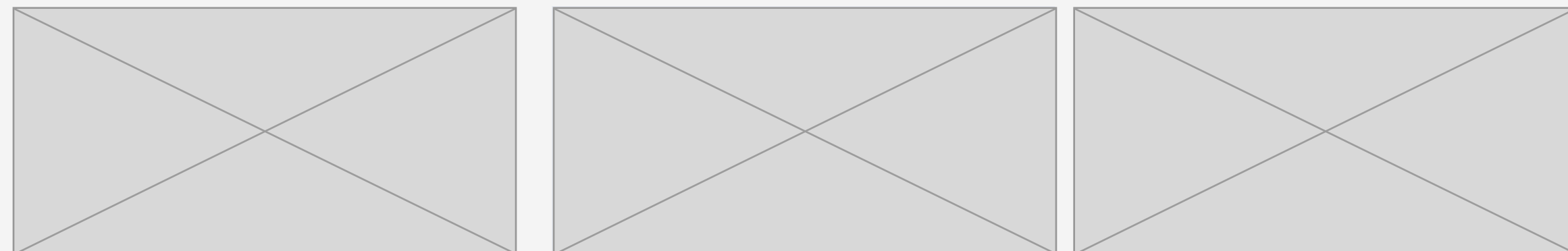
Update Existing	Edit Demographics	Lay Retirement
Change Compensation	New Hire Enrollment	Manage Billing
Terminate Employment	Add Action	Add Action

## Latest Updates

- [Spousal Eligibility for Episcopal](#) 8/14/2020
- [Church Medical Trust Health Plans](#) 8/2/2020
- [Fidelity Service Outage](#) 7/15/2020
- [Imputed Income Webinar](#) 6/12/2020
- [CPG Webinars for Administrators](#) 6/8/2020
- [Reminders](#) 5/19/2020
- [Enrollment changes](#) 4/5/2020
- [Lay employee differences webinar](#) 1/15/2020
- [Finalize annual enrollment](#) 1/10/2020

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## Resources



### Employment Events

What to do When:

- [Hiring an employee](#)
- [Salary Changes](#)
- [Terminating an employee](#)
- [Retierment](#)
- [Filing a Disability Claim](#)

### Life Events

What to do When:

- [Marital Status Change](#)
- [Birth/Adoption](#)
- [Dependent Change](#)
- [Benefits update - spouse or dependent employment change](#)
- [Death](#)

### Learning Center

Learn about products and services available to your employees

- [Pensions & Retirement Savings](#)
- [Health Benefits](#)
- [Life Insurance](#)
- [Disability Insurance](#)
- [Billing](#)
- [Reporting](#)

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## My Account Manager

**Courtney McAlister**  
 ✉ [cmcalister@cpg.org](mailto:cmcalister@cpg.org)  
 ☎ 1.212.592.6381  
 📱 1.267.535.0962

### Need Help?

Contact Client Services  
 Monday-Friday  
 8:30 AM - 8:00 PM ET  
 (Excluding holidays)

## Knowledge Base

[Browse all topics](#) →

## Notes

1. The workflow entry point is assumed to be from the Admin dashboard.

The user invokes Manage Employees and is prompted to find the employee to manage

# TCSM 158 - New Hire Search

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# Header

## Primary Navigation

New Hire Enrollment / Person Search

### Notes

Editing always starts with searching for the employee to edit using Search for a person functionality from the Duplicate match merge project

IF there is 1 result then navigate to that user's profile

IF there are >1 results navigate to the search results page

### Search

## Use the search form to find a member

Enter client number, first few letters of key works from a person's name.

Client Number

000-000-00

First Name

Last Name

SSN

0000

Date of Birth

MM-DD-YYYY

Clear

Search



## Footer

# Header

## Primary Navigation

New Hire Enrollment / Person Search - Results

### Search

Client Number

000-000-00

First Name

Last Name

SSN

0000

Date of Birth



MM-DD-YYYY

Clear

Search

### Use the search form to find a member

Enter client number, first few letters of key works from a person's name.

Institution	Client Number	SSN	DOB	Address
 <a href="#">Aaron Michael Bell</a>	000-000-00	None on file	00/00/0000	Baltimore, MD 21218-5929 US
<a href="#">Dad Aaron Michael Carr</a>	000-000-00	None on file	00/00/0000	Baltimore, MD 21218-5929 US
 <a href="#">Lawrence Edward Doe</a>	000-555-12	555-55-5555	06/24/1964	Baltimore, MD 21218-5929 US

 Add Employee



### Notes

Editing always starts with searching for the employee to edit using Search for a person functionality from the Duplicate match merge project

IF there is 1 result then navigate to that user's profile

IF there are >1 results navigate to the search results page

When Result is not found - Add Employee

### Footer

# TCSM 158 - New Hire

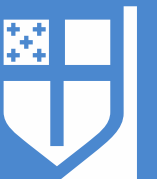
## Demographics/Create New Person

**Epic:** TCWEB - 158 Web Self Service - Create Person

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**Requirements:** <https://cpg.app.box.com/file/?s=rgais67kc9awbay1ce2w91ogg3r0dmd7>



Demographics \*

Employment & Compensation \*

Benefits \*

Confirmation

#### Create New Person

##### Name

\* Designation/Salutation

\* First Name

Middle Name

\* Last Name

Suffix

##### Personal Information

Tax ID/SSN

\* Birth Date

\* Gender

##### Mailing Address <sup>1</sup>

\* Country <sup>2</sup>

Address Line 1

Address Line 2

Address Line 3

City

State/Province

Zip/Postal Code

##### Phone <sup>3</sup> <sup>4</sup>

+ Add Phone

Country Code

Phone Type <sup>5</sup>

Phone Number

##### Email <sup>6</sup>

Personal Email <sup>7</sup>

Business Email <sup>7</sup>

Next

## Notes

Scenario: Lorem Ipsum

1.If employee exists in the system, system must pre populate the below information (if available):

- Address
- Phone
- Email

Employer is not required to enter contact information for member

Member must enter this information if it is not pre - populated

- Address
- Phone
- Email

Employer will enter/review:

- Legal Name (required)
- Employment (required)
- Compensation (required)
- Enrollment (required employer paid only)
- Contact (optional)
- Demographics (optional)
- Marital Status (optional)
- Enrollment (optional ancillary)

Pre-populate fields used in the user search step with the search criteria

<sup>1</sup> Mailing Address tool tip text:

This address will be used for correspondence / mailings.

<sup>2</sup> Country tool tip text: Country Default to Parish

For International Pension Enrollment, please contact Client Services at (855) 215-5990

Country selection drives country based defaults, e.g. country code for phone # and additional fields for international addresses

<sup>3</sup> Phone tool tip text:

Providing a phone number is optional. The number provided can be work, home, or mobile. Each phone number type may only be used once, for a maximum of 3 phones.

<sup>4</sup> Country setting controls phone number format for validation

<sup>5</sup> Validate as phone number based on country setting

<sup>6</sup> Email tool tip text:

If the personal email address is entered, it can be changed but cannot be deleted. Members can update their own email address via MyCPG Accounts Profile Settings. CPG communicates with plan participants about their benefits via email and uses a member's email address when creating CPG web accounts. Please enter a unique email address for the participant in the personal email field for communications and account security. A general email address or one that is used for another member will not be accepted.

<sup>7</sup> Validate as validly formed email address

# TCSM 158 - New Hire

## Employment & Compensation

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# Header

## Primary Navigation

### New Hire Enrollment / Employment - Base View

Demographics \*

Employment & Compensation \*

Benefits \*

Confirmation

#### Employment Information

\* Hire Date <sup>1</sup>

MM-DD-YYYY 

\* Position Title <sup>2</sup>

Please select 

Expected Hours to Work Each Year

Placeholder 

#### Scheduled Compensation <sup>12</sup>

\* Employer Provided Housing? <sup>12</sup>

Yes  No

#### Annual Income Amounts

Base Salary <sup>4</sup>

\$0.00

Employer Contributions <sup>5</sup>

\$0.00

Cash Housing Allowance and/or Utilities <sup>5</sup>

\$0.00

Effective Date

MM/DD/YYYY 

#### Calculated Values

Value of Employer Provided Housing - DB <sup>8</sup>	\$00,000.00
Value of Employer Provided Housing - DB <sup>9</sup>	\$000,000.00
Value of Employer Provided Housing - DC / RSVP <sup>10</sup>	\$00,000.00
Total Assessable Compensation - DC / RSVP <sup>11</sup>	\$000,000.00

#### One Time Payment <sup>12</sup>

Payment Amount

\$0.00

One-Time payments Effective Date

MM/DD/YYYY 

Next

## Notes

### BASE VIEW

Required:

- Hire Date
- Position Title (not required for Lay employees)
- Position Title Effective Date (only required if position title contains a value)
- Hours Expected to Work per Year
- Scheduled Hours Effective Date

Note that field formats must be consistent with other applications

- Example: For Date of Birth, Ben Admin currently uses 11/26/1998 while ER uses 11-26-1998

<sup>1</sup> Hire Date tool tip text:

The hire date should reflect the actual hire date for the employee. This date is used for enrollment in pension and other benefits.

To change the hire date, submit the Participant Change form with the employee's data including the correct hire date OR submit a letter on institution letterhead with the employee's data and the request to correct the hire date. Please email the request to Administrator Assistance at AAssist@cpq.org

<sup>2</sup> Position Title tool tip text:

Please select the position title that most closely matches the individual's responsibilities. It is required for all clergy.

<sup>3</sup> If user enters 500 hours or less, system displays a reminder notification that the field must include hours for the year, not week.

<sup>4</sup> Base salary tool tip text: Included base salary (excluding, for clergy, the amount designated as a housing allowance in accordance with the U.S tax code or a similar law of a local jurisdiction), Social Security tax reimbursements, employer-paid tuition for dependents (if taxable), and other scheduled taxable income.

<sup>5</sup> Employer contributions to qualified... tool tip text: Includes employer contributions to a qualified contribution plan, such as a 403(b) or 401(k), and / or to a non-qualified deferred compensation plan or arrangement (whether funded or not). Does not include assessments paid to CPF. (May have been previously known as a Housing Equity Allowance)

<sup>6</sup> Cash Housing Allowance and / or Utilities tool tip text: Includes cash payments that are paid on a regular basis and are excludible from an employee's gross income for income tax purposes under the U.S. tax code or a similar law of a local jurisdiction. (For example, the amount of a cleric's base salary that has been designated as a housing allowance.) Also includes amounts paid by the employer to cover the cost of utility bills, including but not limited to fuel, gas, and electricity, or amounts paid on the employee's behalf.

<sup>7</sup> Employer Provided Housing tool tip text: Indicate whether physical housing, either owner or rented directly by the employer, is provided to the employee.

- Employer-provided housing is considered compensation even if no cash compensation is paid.
- If a home is owned or rented directly by the employee, it should not be reported as employer-provided housing regardless of whether (1) the employer pays the mortgage or rent directly to the mortgage holder or landlord or (2) the employer reimburses the employee for the full amount of the mortgage or rent payments. (In this case, report the amount of the mortgage or rent as (1) a cash housing allowance, if excludable from the employee's gross income for income tax purposes, or (2) as scheduled taxable cash payments, if includable in the employee's gross income for income tax purposes.)

<sup>8</sup> Value of Employer Provided Housing - DB tool tip text: The value of employer-provided housing equals 30% of the sum of base salary (excluding housing) and scheduled taxable cash payments, cash housing allowance and / or utilities, employer contributions to a qualified or non-qualified plan and any one-time payments.

<sup>9</sup> Total Assessable Compensation - DB tool tip text: The sum of the different components of the employee's compensation for which the assessment rate is applied. As shown on this screen, the following components have been included (see note on one-time payments below):

- Base salary (excluding housing) and schedule taxable cash payments, cash housing allowance and / or utilities, employer contributions to a qualified or non-qualified plan, and
- The value of employer-provided housing.

Any one-time payments are also included in Total Assessable Compensation. However, since one-time payments are reported in a different screen in the Employee Roster, they are not included in the Total Assessable Compensation - DB as shown on this screen.

<sup>10</sup> Value of Employer Provided Housing - DC / RSVP tool tip text: The value of employer-provided housing equals 30% of the sum of base salary (excluding housing) and scheduled taxable cash payments, cash housing allowance and / or utilities, and any one-time payments.

<sup>11</sup> Value of Employer Provided Housing - DC / RSVP tool tip text: The value of employer-provided housing equals 30% of the sum of base salary (excluding housing) and scheduled taxable cash payments, cash housing allowance and / or utilities, and any one-time payments.

- Base salary (excluding housing) and schedule taxable cash payments, cash housing allowance and / or utilities, employer contributions to a qualified or non-qualified plan, and
- The value of employer-provided housing.

Any one-time payments are also included in Total Assessable Compensation. However, since one-time payments are reported in a different screen in the Employee Roster, they are not included in the Total Assessable Compensation - DC / RSVP as shown on this screen.

Scheduled Compensation

## Footer

# TCSM 158 - New Hire Benefits

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**Requirements:** <https://cpg.app.box.com/file/?s=rgais67kc9awbay1ce2w91ogg3r0dmd7>



When my marital status = married  
Then I must be prompted to add my spouse  
And the Add Dependent form must be displayed  
And I must enter the following information for my spouse

Demographics \*

Employment & Compensation \*

Benefits \*

Confirmation

### Enrolled Benefits

Group Life ⓘ	\$100,000
Long Term Disability ⓘ	Yes
Short Term Disability ⓘ	Yes
Medical ⓘ	Yes
Dental ⓘ	Yes
Effective Date *	00/00/0000

\* Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore.

Member is automatically enrolled  
Consectetur adipisicing elit, sed do eiusmod tempo Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor.

### RSVP

Enroll ⓘ  Yes  No

Employer Discretionary Contribution ⓘ

Employer's Contribution Match ⓘ 4%

Effective Date \* 00/00/0000

\* Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore.

#### Placeholder

Consectetur adipisicing elit, sed do eiusmod tempo. Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor.

### Clergy DC

Enroll ⓘ  Yes  No

Employee Contribution ⓘ

Employer's Contribution Match ⓘ 0%

Effective Date \* 00/00/0000

\* Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore.

#### Placeholder

Consectetur adipisicing elit, sed do eiusmod tempo. Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor.

### Clergy DB

Enroll ⓘ  Yes  No

Effective Date \* 00/00/0000

\* Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore.

#### Placeholder

Consectetur adipisicing elit, sed do eiusmod tempo. Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor.

Submit

# TCSM 158 - New Hire Confirmation

**Epic:** TCWEB - 158 Web Self Service - Create Person

**Persona(s):** Back-Office Admin

**Entrypoint:** Admin Dashboard

**Requirements:** <https://cpg.app.box.com/file/?s=rgais67kc9awbay1ce2w91ogg3r0dmd7>



When my marital status = married  
Then I must be prompted to add my spouse  
And the Add Dependent form must be displayed  
And I must enter the following information for my spouse

[Demographics \\*](#)

[Employment & Compensation \\*](#)

[Benefits \\*](#)

Confirmation

### Confirmation

[Mail](#) [Print](#)

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#### Lawrence Edward Doe

<b>Gender:</b>	Male	<b>Business Email:</b>	LeDoe@aol.com
<b>Date of Birth:</b>	123-456-78	<b>Personal Email:</b>	LeDoe@yahoo.com
<b>Client Number:</b>	000-00-0000	<b>Hire Date:</b>	00-00-0000
<b>SSN:</b>	***-**-5555	<b>Compensation:</b>	\$00,000
		<b>Primary Phone:</b>	555-000-0000
		<b>Alternate Phone:</b>	555-555-5555

---

#### Enrolled Benefits

<h5>Clergy Pension Plan</h5> <p><b>Group Life:</b> 100,000 <b>Long Term Disability:</b> Yes <b>Short Term Disability:</b> Yes <b>Effective Date:</b> 00/00/0000</p>	<h5>Clergy DC</h5> <p><b>Enrolled:</b> Yes/No</p>
<h5>RSVP</h5> <p><b>Enrolled:</b> Yes/No</p>	<h5>Clergy DB</h5> <p><b>Enrolled:</b> Yes/No</p>

No Lump Sum Death