

TREASURER / PASTOR BENEFITS CHECK LIST

The benefits check list is designed to help churches and pastors with appointment changes and to be sure they have completed all the necessary benefits paperwork.

Outgoing Pastor

Incoming Pastor

<ul style="list-style-type: none"> <input type="checkbox"/> Pastors Health Insurance Benefits <input type="checkbox"/> *Pastor's Health Insurance Co-Pay- Health Plan determines copay rate. <i>(Pre-tax Payroll Deduction)</i> <input type="checkbox"/> *Flexible Spending Account: Health Care and/or Dependent Care Accounts <i>(Pre-tax Payroll Deductions)</i> <input type="checkbox"/> * Health Savings Account (HSA) <i>(Pre-tax Payroll Deduction)</i> <input type="checkbox"/> UMPIP – United Methodist Personal Investment Plan (*Before-Tax/Roth/After-tax Contribution) <ol style="list-style-type: none"> 1. Stop any automatic deductions you have with Wespath. <input type="checkbox"/> CRSP – Clergy Retirement Security Program Pension Program <input type="checkbox"/> ACH – Automatic Clearing House Automatic Clearing House, Automatic monthly withdrawals to process monthly debit entries from the Church's bank account. <input type="checkbox"/> *Pre-Tax Payroll Deductions – (FSA's, Co-Pay, HSA and UMPIP Before-tax election), are taken from your pastors pay before taxes are applied. The Pastor's money must be remitted monthly, and all remittances should be up to date for the outgoing pastor. 	<ul style="list-style-type: none"> <input type="checkbox"/> Church Dashboard/People Portal Pastor's, Staff Parish Relations Chairs, and Treasurers can review their incoming Pastor's Health insurance and Pension billing amounts in the Church Dashboard/People Portal. Login or register: https://www.neumc.org/welcome-portal <input type="checkbox"/> Pastors Health Insurance Benefits <input type="checkbox"/> *Pastor's Health Insurance Co-Pay- Health Plan determines copay rate. <i>(Pre-tax Payroll Deduction)</i> <input type="checkbox"/> *Flexible Spending Account: Health Care and/or Dependent Care Accounts <i>(Pre-tax Payroll Deductions)</i> <input type="checkbox"/> *Health Savings Account (HSA) <i>(Pre-tax Payroll Deduction)</i> <input type="checkbox"/> UMPIP – United Methodist Personal Investment Plan (*Before-tax/Roth/After-tax Payroll Deduction) <ol style="list-style-type: none"> 1. Incoming Pastors must complete new Contribution Election Form. Treasurer to sign form and mail/ fax to the Wespath - keep a copy for Local Church records. <input type="checkbox"/> CRSP – Clergy Retirement Security Program Pastors Pension Program <input type="checkbox"/> ACH – Automatic Clearing House Automatic Clearing House, Automatic monthly withdrawals to process monthly debit entries from the Church's bank account. <input type="checkbox"/> Clergy Moving Expense Reporting Form– Report moving expense payments for clergy. <input type="checkbox"/> FORM W-4 - An Employee's Withholding Allowance Certificate <input type="checkbox"/> FORM I-9 - Employment Eligibility Verification
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ACH Authorizations are to be submitted annually for each bill. Authorizations are completed electronically via the Church Dashboard in the People Portal found on the Conference website <https://www.neumc.org/welcome-portal>: Clergy Moving Expense Reporting and the Contribution Election form for UMPIP; are located on the NEUMC.org web site under; Finance/Admin/Benefits, Form Finder, and type in the form you are looking for.