

Salary Sheet User Guide - With Interview Screens

The Salary Sheet entry process as it was did not explain well enough some of the choices available to the user and required an improved way to advise the person doing the entry of the options available. In order to accomplish that a series of questions have been added to walk you through the process and to explain the options more completely. These screens do more data validation to prevent incorrect selections from being made.

All of the choices for Yes/No answers and other selections or fill in the blank items that might not have been explained clearly have been removed from the money entry screens and are now part of the new Q & A screens.

It is important to note that the Q & A screens depend on you having ALL of the money items completed on ALL salary sheets for your entire appointment. For example, if you are appointed to a 3 point charge, you will have 3 salary sheets to fill out. There are 3 money entry screens in the entry process, so the best way to fill them in is to do the following:

1. Fill in the money items on the first "Cash/Housing" screen of the Salary Sheet for Church # 1
2. Fill in the money items on the second "AR/Cash Allow" screen of the Salary Sheet for Church # 1
3. Fill in the money items and Commuter miles (if applicable) on the third "Other Items" screen of the Salary Sheet for Church # 1
4. DO NOT answer the questions yet. Go back and repeat steps 1 - 3 for Church # 2 and Church # 3
5. When all money entries are complete on ALL salary sheets, THEN do the questions found on the "Other Items" screen.

If you have not filled in ALL money entries on ALL salary sheets, then during the Q & A Interview, the salary totals calculated will not be correct and you will have to go back and do the money entries anyway.

You will only need to answer the questions one time, NOT on every salary sheet. So please do it on the last salary sheet AFTER all entries have been made for ALL money amounts.

The Interview process currently has 7 screens and you can navigate through them either forward or backward. By using the "Next >>" or "<< Back" buttons, you can move forward or backward through the interview screens. Any changes you make on a screen is automatically saved whenever you move away from a screen, either forward or backward.

The screens that make up the interview process are explained below:

On this partial screen shot showing the "Other Items" screen, the new "Final Interview Questions" description is presented. Again, it points out that you only need to do these questions once. Your answers will cover ALL salary sheets. The "Next >>" button on the last screen will bring you back to this screen when you are done.

Special Compensation Items

Tax deferred contributions: ?

Contributions to IRS Code Sec 125 Plan: ?

Housing allowance paid in lieu of a Parsonage: ?

Commuter Miles (Round Trip - Home to Charge & Back) ?

Equitable & Other

Are all salary sheets to date charge filled in completely equitable and commuted calculated? Your charge

Final Interview Questions

When you click "Answer Questions" it will take you through a few additional items that MUST be answered to process your Salary Sheet(s) correctly. The answers cover all salary sheets, so you only need to do this once. When you click "Next >>" on the final question, the system will return you to this screen to continue.

Answer Questions

DS Only

Cash/Housing

AR/Cash Allow

Other Items

Certification

Salary Worksheet

Church Summary

Appointment Summary

Compensation Report

Print for each Church

Print for each Church

Print Once for the Appointment

Print Once for the Appointment

Clicking the "Answer Questions" button will take you to the first screen of the Interview as shown below:

Conference Relationship

Conference Relationship will be the single most important entry on your Conference Relationship. Please be sure it is correct

I have selected from the list below a Conference Relationship of

PL - Part Time Local Pastor

- NA Not Applicable - I do not have a current Conference Relationship
- DM Diaconal Minister (consecrated under previous Conference Relationship)
- DR Retired Diaconal Minister (consecrated under previous Conference Relationship)
- AF Affiliate Member
- AM Associate Member
- PD Provisional Deacon
- FD Deacon In Full Connection
- FE Elder in Full Connection
- PE Provisional Elder
- PE-SS Provisional Elder - Seminary Student

This is only a partial view of the screen, but it simply asks for you to select your conference relationship from the list of choices by clicking one of the "radio buttons" on the screen. When you make a selection it will be shown in the box at the top of the list. Some of the Conference Relationship Codes on the list have been added by the Texas Annual Conference in order to better identify all of your eligibilities.

If the selection is not your current Conference Relationship, please select the correct one by clicking on it in the list and then click "Next >>" to continue.

The screen shown below is to determine if you live in a parsonage or if you get a Housing Allowance In Lieu of a parsonage, or if you get neither. Click on the choice that correctly describes your situation and your choice will be described in the information box below the selections. Then click "Next >>" to continue. It is important to note that you cannot live in a parsonage and at the same time be receiving a Housing Allowance In Lieu of a parsonage.

Live In Parsonage

Are you living in a parsonage provided by the Church or Churches at this appointment ???

- Yes, I am living in a Parsonage provided by this appointment.
- No, I am NOT living in a parsonage, but I DO receive a Housing Allowance In Lieu of a Parsonage
- No, I am NOT living in a parsonage, and I DO NOT receive any Housing Allowance In Lieu of a Parsonage

Your current selection indicates you are NOT living in a parsonage and you DO NOT receive any Housing In Lieu of a parsonage.

This next screen addresses a topic that is often misunderstood. It has to do with your Base Cash Salary which is entered as the first item on the "Cash/Housing" screen of the main Salary Sheet screens. Your Base Cash Salary is directly tied to what you enter into the two tax sheltered items found on the "Other Items" screen. These two items are titled "Tax Deferred Contributions" and "Contributions to IRS Code Sec 125 Plan".

These two BEFORE TAX items you enter on the "Other Items" screen are PART OF YOUR BASE CASH SALARY.

These two items are defined by the IRS as "Salary Reduction Plans" and are elective. You can choose to put none or some amount of your Base Cash Salary into these BEFORE TAX plans if they are available to you and you want to participate. As required by "Salary Reduction Plans", you take some of your normal AFTER TAX 'take home" pay that is part of your Base Cash Salary. The amounts you place into these BEFORE TAX plans will be withheld from your Base Cash Salary.

The screen below helps make this clear. It adds all 3 items together to create an "Actual Cash Salary". If you want to re-allocate more or less of your "Base Cash Salary" to the BEFORE TAX items, you can do it here. If the total shown in "Actual Cash Salary" is incorrect, then go back to the money entry screens and put the correct amount into your Base Cash Salary entry, zero out the "Tax Deferred Contributions" and "Contributions to IRS Code Sec 125 Plan" on all salary sheets and then come back here to allocate the amounts to the "Tax Deferred Contributions" and "Contributions to IRS Code Sec 125 Plan". As you enter amounts into the "Tax Deferred Contributions" and "Contributions to IRS Code Sec 125 Plan" boxes, it will be deducted from your Base Cash Salary just as you would expect when participating in any IRS qualified "Salary Reduction Plan".

Remember that participation is optional and the amount you enter must follow the rules set out in the plan regarding maximum amounts allowed.

And finally, you cannot contribute to any plan that has not been formally established under valid IRS rules, is in full compliance with those rules, and for which you qualify as eligible for participation.

The screen has more explanations for your review and at the bottom is the work area where you can make your elections for amounts to be allocated into the two BEFORE TAX plans. Enter the amounts and then click on the "Recalculate My Changes" button to do the allocations. You will see that the amounts in the two lower boxes are deducted from your Base Cash Salary (take home pay) and the sum of the 3 bottom boxes will always total to match the amount in the "Actual Cash Salary" box.

Church	FULSHEAR, FIRST				
Actual Cash Salary	14500	0.00	0.00	0.00	0.00
Base Cash Salary	14500	0.00	0.00	0.00	0.00
Tax Deferred Plans	0	0.00	0.00	0.00	0.00
Sect 125 Plans	0	0.00	0.00	0.00	0.00

[Recalculate My Changes](#)

When all allocations are as you want them, then click "Next >>" to continue.

The next screen is not for everyone. It spells out the steps necessary to Opt OUT of the Pensions Programs. Whether not you can Opt OUT is determined by your Conference Relationship Code. If your Conference Relationship is "FE", "FL", "FD", "PE", or "AM"

Participation in the Pensions Program is mandatory.

If you are not one of the Conference Relationships shown above and are eligible for the Pension Program you have the right to Opt out of the Pension Program if you so desire. To do so, you MUST follow some very specific steps which are explained on the screen shown below. You must fill out two separate waiver forms to Opt OUT. The first is the "Waiver of Participation in CRSP" and the second is a "Waiver of Participation in UMPIP". These forms must be completed and you MUST have them notarized. The date of notarization is basis used to determine when you are officially out of the Pension Program. The later of the two dates of notarization will be used and you will be out of the Pension Program effective on the first day of the month following the later notarization date. Once both dates are filled in on the question, the system will determine the starting month you will be out of the Pension Program. To be re-instated, you will have to complete a form to rescind each waiver and once done, you will be back on the Pension Program effective on the first day of the month after the later date on the form you file to rescind the waivers. To complete your request to Opt OUT, click on "Done" when you have submitted each notarized form to the Conference Office and enter the date each form was notarized. When that is complete, click on "Next >>" to continue.

Opt OUT of the Pensions Program

<< |

Your Conference Relationship of PL allows you the option to Opt OUT of the Pensions Program. If you want to Opt OUT comply with the steps shown below.

In order to Opt OUT of the Pensions Program you must sign and submit two separate waiver forms to the Conference Office forms are identified below:

You must fill out the form, Sign it, have it NOTARIZED, and send it in to the Conference Office.

- Done
 Not Done

Enter the date your "Waiver of Participation in CRSP" was Notarized.

2. "Waiver of Participation in UMPIP"

You must fill out the form, Sign it, have it NOTARIZED, and send it in to the Conference Office.

- Done
 Not Done

Enter the date your "Waiver of Participation in UMPIP" was Notarized.

Your written request to Opt OUT of the Pensions Program will become effective on the first day of the month that follows two notarization dates. In your case, based on your waiver notarization dates, you will be out of the Pensions program st day of September 2009.

In order to rejoin the Pensions Program you will need to submit a notarized request to rescind the "on file" waiver request effect. Again, based upon the later notaization date, you will start back on the Pensions Program effective on the first da following the later of the two notarization dates on the requests to rescind.

The screen shown below is for individuals who are eligible for the CPP Program but whose General Board of Pensions Total Salary is below 60% of the Denominational Average Compensation or 60% of the Conference Average Compensation, whichever is lower. In the Texas Annual Conference, that is normally the DAC so that is what is used. The screen explains where your salary falls, and if you are below the required level, you will be offered the option of participating in CPP by paying a specified amount monthly in order to participate. If you are equal to or above the 60% of the DAC level, you will have nothing to do on this screen and can click "Next >>" to continue. If you fall below the 60% of the DAC level, you will be asked if you want to pay the monthly amount and participate. Please select "Yes" to participate or "No" to decline. The monthly amount shown will need to be paid each month for you to continue to participate in the CPP program.

IMPORTANT IMPORTANT IMPORTANT IMPORTANT

THIS SCREEN DEPENDS ON SALARY TOTALS FROM ALL SALARY SHEETS !!!

Before completing this screen, you **MUST** complete all money entries on all your salary sheets from all organi you. If you have not completed all Salay Sheet money entries, please go back now and complete all Salary S need to answer thse questions one time, please answer them as you are completing your last salary sheet.

DENOMINATION AVERAGE COMPENSATION

60 % OF DENOMINATION AVERAGE COMPENSATION

*YOUR TOTAL PLAN COMPENSATION FOR
GENERAL BOARD OF PENSIONS AND HEALTH BENEFITS*

Because your salary is below 60% of the Denominational Average you **CANNOT** participate in the Standard Comprehens Plan. However, you **CAN** participate in the Optional CPP plan if you desire, by electing to pay the montlhy amount showr make your selection below. Thanks.

Participation is Optional. Please make your selection.

Amount you must pay to participate in the Optional CPP Plan

Monthly Amount

Once you have made your selection regarding Optional CPP (if it applies), please click "Next >>" to continue.

That will take you to the screen shown below where you will be asked how much of your time will be spent serving at this appointment. From the drop down list, please select the amount of time that best describes your time commitment to serving this appointment. As noted on the screen, this should not be confused with the term "Full Time Equivalentents" or FTE. The FTE number cannot be entered by the user, it is an internal calculation that is made from your total salary amount and is used by the Conference Office as a tool to estimate total salary units paid across the entire Conference and is reported to the General Board for their use in estimating our Pensions and Health Benefits obligations as a Conference.

The screen below has nothing to do with FTE and is here so you can directly enter the amount of time you actually spend serving in the appointment.

Percent of Time Serving at This Appointment

What percent of time will you be serving at this appointment?

It is important to note that this "Percent of Time Served" has nothing to do with "Full Time Equivalents" or "FTE". FTE is purely a salary based calculation used to help determine a conference wide number of salary units paid by our conference to estimate our overall pension obligations as a conference. It has nothing to do with the number of hours you spend serving your appointment.

The percentage of my time I will spend serving this appointment will be:

100 % = Full Time

After making your selection above, please click "Next >>" to continue.

That will take you to the final screen in the interview process which is shown below. On this screen you will be asked for several key dates needed to process your salary information.

The first is the date you were first appointed to this position. It is from this date that your tenure in the appointment is calculated. If you find that your tenure is not correct in any published information, then this date needs to be corrected.

The second date is the date that this salary package becomes effective. This will normally be the first day of the year unless this is for a mid year reassignment. Since all salary amounts are always entered in full year (annual) amounts (never pro-rated), this date is used as the start date to commence payments to you in the amounts shown in this set of salary sheet(s).

The third date is the date you held your charge conference meeting to approve the salary shown on these salary sheet(s).

Once all entries have been completed, click on "Next >>" to end the interview question series and return to the "Other Items" screen where you can print your salary sheets out and certify them as correct.

Key Dates For This Salary Information

<

Please enter the key dates related to this appointment and salary sheet.

Please enter the date when you first started serving at this appointment. It is from this date that tenure is calculated.

Date You Were First Appointed to This Charge:

Show Calendar

Please enter the date when this salary sheet will become effective.

Date this salary sheet becomes effective.

Show Calendar

Please enter the date of the charge conference meeting when this salary was approved.

Date of the charge conference meeting when
this salary was approved.

Show Calendar