INTRODUCTION CHECKLIST for Local Church Appointment Changes

Now that your new pastor has been introduced, there is work to be done to be ready to receive the pastor. Not all of the listed items will be applicable in every situation. A double column is provided to help you to know where you are in the information gathering process.

I.	SPRC /Pastor Responsibilities	Assigned	Completed
1.	SPRC: Forward completed Statement of Benefits to Treasurer		
2.	Review "*Ending Well – Local Church*" package with SPRC; work with current pastor to complete Transition Checklist		
3.	Register and plan to attend a *Starting Well* workshop with the new pastor.		
4.	Communicate with new pastor regarding moving expenses (e.g. how many bids required, direct pay or reimbursement, etc.) *Note that these are W-2 reported income.*		
5.	Oversee parsonage transition (See the Parsonage section of the *Transition Checklist*) Note: The current pastor is responsible for the condition of the parsonage and financially responsible for unreasonable wear and tear.		
6.	Consult with new pastor on needs for pastor's office		
7.	Complete new Accountable Reimbursement Policy form and Housing Allowance Exclusion when new pastor arrives; and approve at Church Council/Leadership Board. Submit a copy to your District Office.		

II.	Treasurer/Business Office/Pastor Responsibilities	Assigned	Completed
1.	Direct eligible clergy to wellness page to enroll into HealthFlex Program at: https://www.westohioumc.org/stewardship-finance/healthflex-group-health-plan or contact WOC Benefits Office. (New enrollees only.)		
2.	Ensure eligible clergy register on the Wespath Benefits Access Portal at: www.benefitsaccess.org.		
3.	Setup billing arrangements for CRSP DB/DC pension and health care with WOC Benefits Office (Accounts Receivable/Rhonda Tyree, rtyree@wocumc.org, x10310). Health and pension are withdrawn via ACH on the 25th of each month.		
4.	Set-up UMPIP (403B) account for clergy personal contributions with Wespath at: 1-800-851-2201.		
5.	New Treasurers should contact Wespath to update their contact information at: 1-800-851-2201.		
6.	Follow-up with your Clergy to ensure the following forms are completed and sent to WOC Benefits Office: Health Flex Enrollment or Waiver Form and CRSP/UMPIP Enrollment or Waiver Form, within first 30 days. (New enrollees only.)		
7.	Confirm any grants for salary with District Administrator.		
8.	Setup payroll withholdings for new pastor - tax forms - setup automatic direct deposit (if available) - notify of payroll schedule -personal HSA, FSA, DCFSA, 403B contributions -clergy healthcare premium share, if applicable		
9.	Treasurer should register new clergy with Bureau of Workers Compensation by contacting Kathy Redmond at Sedgwick, Kathy.Redmond@Sedgwick.com.		

West Ohio Conference Resource List		
Health Insurance Questions	https://www.westohioumc.org/stewardship-finance/healthflex-group-health-plan	Questions regarding healthcare benefits, premium credit, healthcare rates, and billing and withholding
Pension Information	www.westohioumc.org/stewardship-finance/financial-wellness	Pension Calculator
Benefits/HR Specialist	Grace Welch, Director of Benefits, gwelch@wocumc.org	Questions not answered through the above website resources, or escalation to Director of Benefits/HR.
Accounts Receivable	Rhonda Tyree, rtyree@wocumc.org, x10310	Specific health and pension billing questions
Personal Pension Account Assistance	Wespath Benefits and Investments 1 -800-851-2201	Account Information, Consultation, Distributions, etc.