



Conference Forum—October 2020



Wespath

BENEFITS | INVESTMENTS

Customer Service Update

Customer Service Update



Call Trends



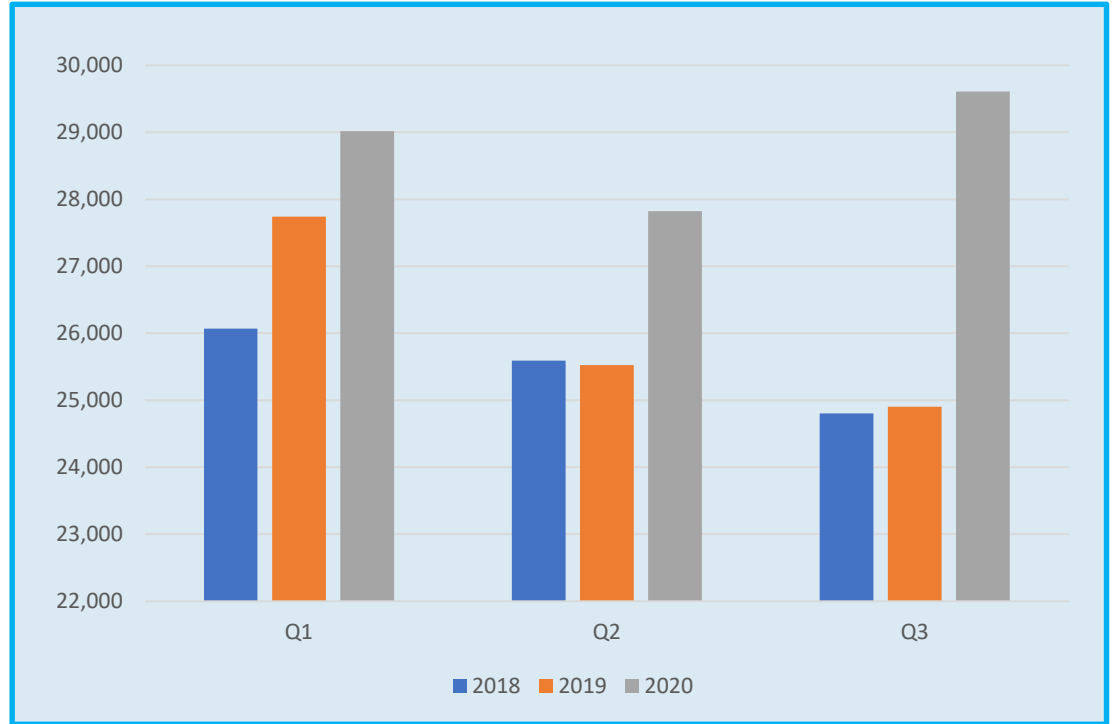
Survivor Benefits



Training

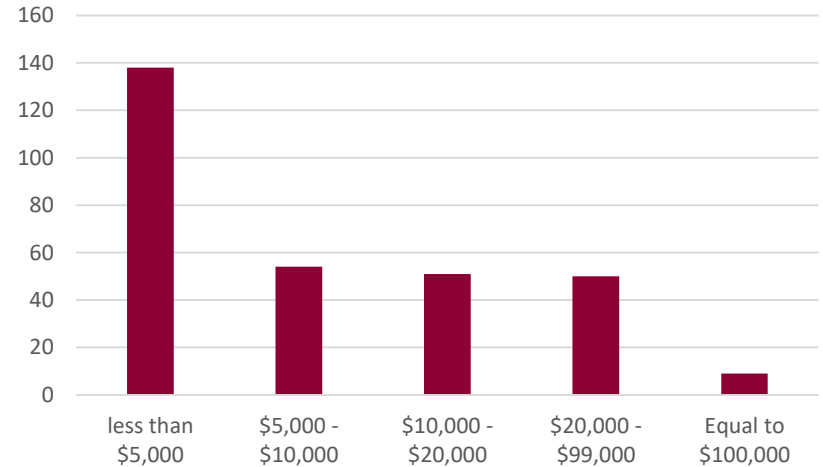
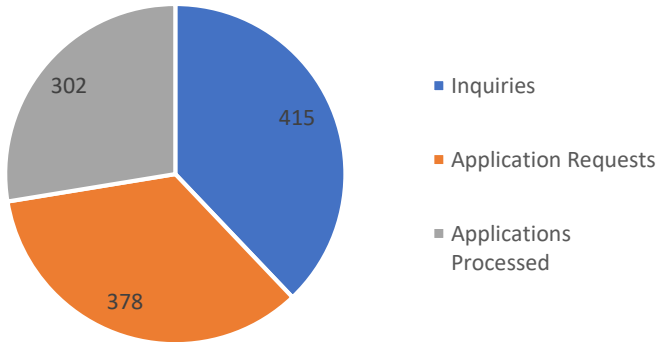
Call Trends

- Forms Request
- Distribution Options
- Benefits Access
- Data Updates

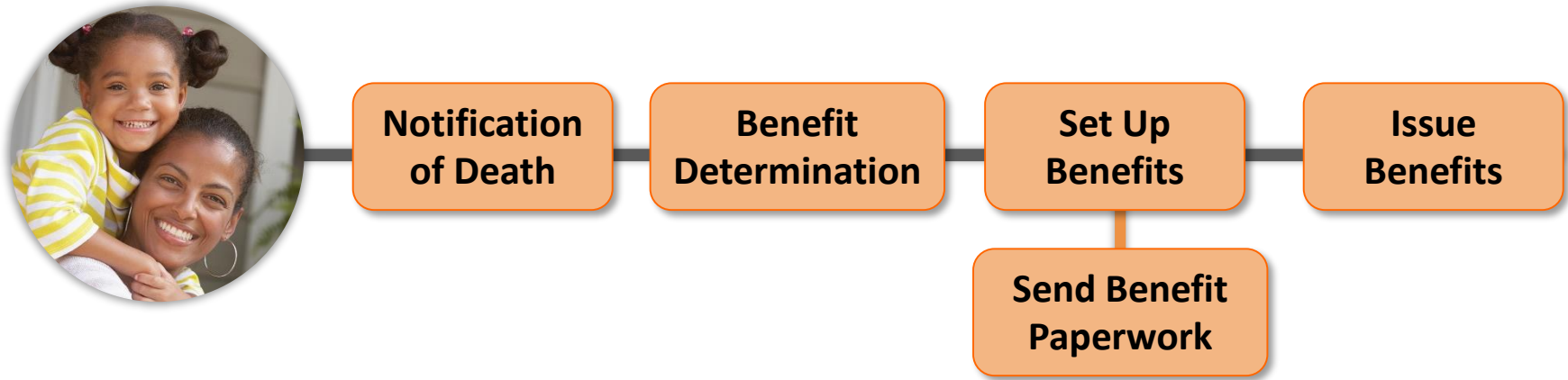


CARES Act Statistics

- Loan repayment delay—**87 out of 3000**
- Coronavirus Related Distribution total \$4,388,135

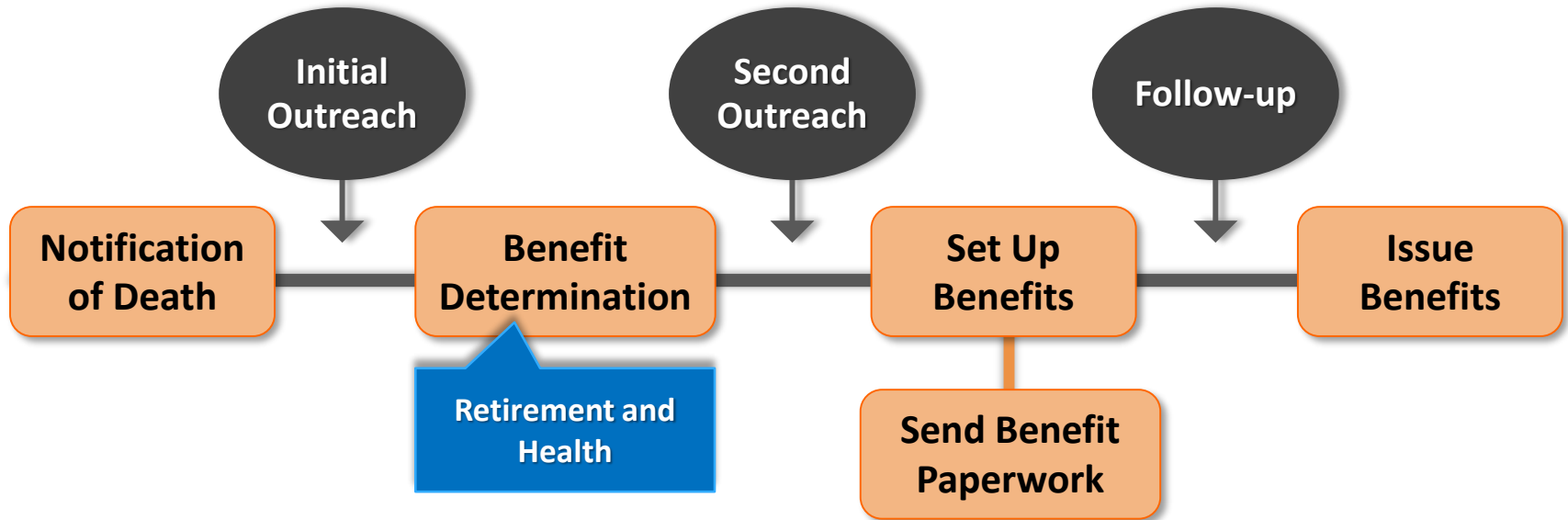


Survivor Benefits—Current Process



- One-on-one consultations are not offered
- Separate benefit determinations for health and retirement

Survivor Benefits—Future Design



Wespath engaging with survivors earlier in the process to assist with next steps

Conference Guide on Survivor Benefits

Wespath's Role

Wespath partners with conference staff to facilitate smooth and timely processing of benefits for your clergy and their family members. Here is a summary of the steps Wespath's Survivor Benefits Team will take when there is a clergy family death in your conference.

Process and Timeline (Wespath Survivor Benefits Team)

Upon receipt of death notification from conference or death certificate from family:

- ✓ Full review of deceased participant's account
- ✓ Determine eligibility for CPP death benefit
- ✓ Determination of beneficiaries
- ✓ Identify ongoing annuity benefits
- ✓ Administrative balance transfers to beneficiary(s)
- ✓ Identify outstanding account balances
- ✓ Confirm direct deposit information
- ✓ Process CPP death benefit, if payable
- ✓ Send CPP death benefit payment to beneficiary(s)
- ✓ Email CPP death benefit letter to conference
- ✓ Send retirement benefit information to beneficiary(s) and/or contingent annuitants. [Payment is sent via EFT (electronic funds transfer). Alternatively, a letter with a check payment will be mailed.]

The standard turnaround time for completion of this process is 10 business days.

Please note: Payment of annuity and transfer of account balances are processed after the CPP death benefit is paid and are not included in this turnaround timeline.

Helpful Phone Numbers

Wespath
1-800-851-2201
(ask for Survivor Benefits)

UNUM
1-800-985-0242
(for UNILifeOptions benefits)

Conference Actions

As soon as possible:

- ▶ Enter **death date** in the **Benefits Access Portal**.
- ▶ Submit **death notification by sending an email to survivorteam@wespath.org**.
- ▶ Review **indicative data** to ensure it has been updated.
 - **Name, address, telephone number, email address**
- ▶ **Remind surviving spouse or participant to review their beneficiary(s) designation for all plans.**
- ▶ Request **surviving spouse** to update EFT (electronic funds transfer) information
 - **Call Wespath: 1-800-851-2201**; or
 - **Online: [Benefitsaccess.org](https://www.benefitsaccess.org)**; or
 - Complete a Direct Deposit form

Within 1 week of the death, the following documents must be supplied to Wespath to prevent payment delays:

- ▶ **Power of Attorney (POA)/executor paperwork**
- ▶ **Estate documents**

For Surviving Family/Beneficiaries

Assuming all documentation has been provided to Wespath, Wespath's anticipated turnaround time is **10 business days**.

Missing information may cause a delay (see "Necessary Documentation").

Necessary Documentation

The following documentation is required to process payment:

- **Death notification or death certificate**
- **For Estates**—payments will be made to "Estate of ...". This requires **proof of executorship or trustee** such as letters of administration and/or letters of testamentary OR copy of estate's Employer Identification Number (EIN) verification from the IRS
- **For Power of Attorney/Executor**—for security reasons, specific account information cannot be shared by Wespath unless Wespath can authorize the individual who contacted Wespath

Survivor Benefits—Next Steps

- Obtain feedback from conferences
- Build processes to support more engaging interactions with survivors
- Share new process with conferences
- Implement by the end of 2020



Conference Staff Training Manual

Topics Covered

- Benefit Plans and Enrollment
- Appointment and Compensation Changes
- Leaves
- Transitions/Life Events
- System Administrative Functions
- Benefit Program Details

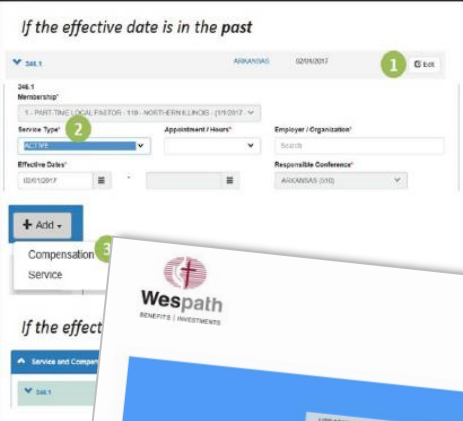
Please contact your PSM for a copy of the Manual

To Add Service and Compensation for a Participant from Another Conference:

A. If the effective date is in the past,
1. Click Edit next to the 346.1 record.
2. Change the Service Type to Active. Enter the applicable information and click Save.
3. Click Add and select Compensation to enter the compensation information and click Save.
The 346.1 record will be replaced with the applicable Discipline §346.1 appointment information.

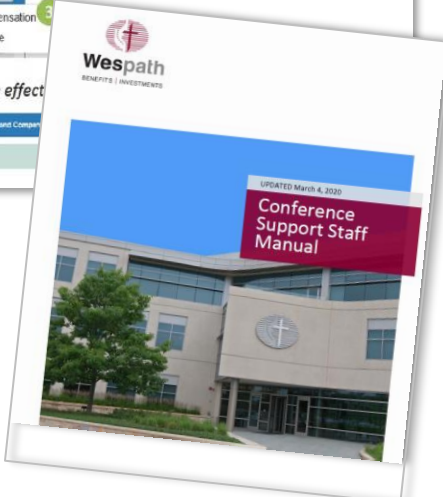
B. If the effective date is in the future,
4. Click Add and select Service to enter the applicable service and compensation information and click Save.
The green, 346.1 record will be replaced with the applicable appointment information. Click Cancel to remove the information and return to the 346.1 record.

If the effective date is in the past



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UPDATED March 4, 2020
Conference Support Staff Manual



Conference Staff Training Structure



Onboarding

Twice annually

- On site
- Via webinar series

Curriculum will cover:

- ✓ Wespath and customer service overview
- ✓ Plan training
(retirement, welfare, HealthFlex)
- ✓ Extension ministries and benefits education
- ✓ System training

Conference Staff Training Structure



Continuous Learning

Three times annually

- Via webinar series

Curriculum will cover:

- ✓ Service record corrections
- ✓ Batch uploads
- ✓ Moving expenses
- ✓ No record of appointments
- ✓ Clergy over age 72
- ✓ Year-end reminders
- ✓ Adoption agreement processing

Conference Staff Upcoming Webinar



November 18, 2020



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