

Health Plan Renewal and Annual Enrollment 101: What It Is and What You Need to Do



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**Annual Enrollment
Webinar Series**

Annual Enrollment


WHAT'S NEW?





- Quantum Health
- Institution Sub-select



Today's Agenda



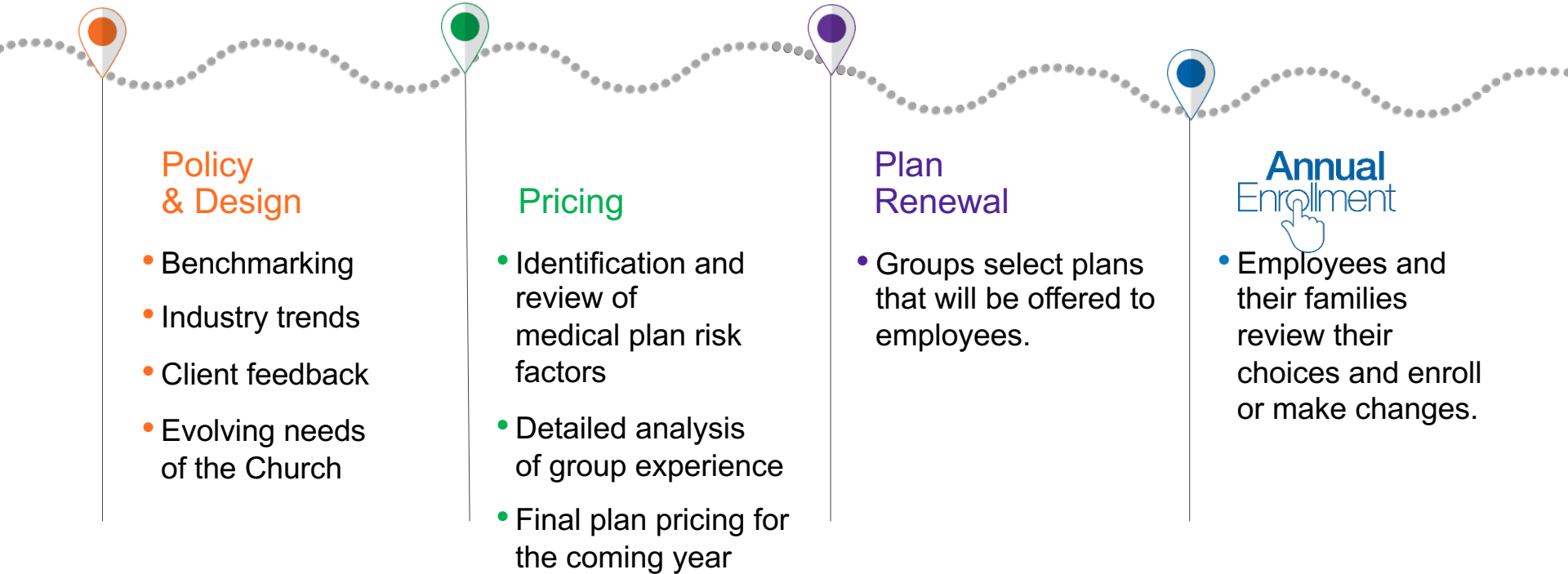
The Journey from Planning to Enrollment

-  **Health Plan Renewal Planning and Annual Enrollment Timeline**
-  **Pricing and Renewals**
 - Pricing and Trends
 - Annual Renewals
 - Group Plan Selection
-  **Annual Enrollment Communications**
-  **Annual Enrollment Administration and Reports**



Health Plan Renewal Planning and Annual Enrollment Timeline

Overview of Our Seamless Annual Process



Policy & Design

- Benchmarking
- Industry trends
- Client feedback
- Evolving needs of the Church

Pricing

- Identification and review of medical plan risk factors
- Detailed analysis of group experience
- Final plan pricing for the coming year

Plan Renewal

- Groups select plans that will be offered to employees.

Annual Enrollment

- Employees and their families review their choices and enroll or make changes.

Health Plan Renewal and Annual Enrollment Timeline

Annual Enrollment

January to July

- Policy and design process
- Pricing
- Renewals
- Renewal supporting materials
- Member communications

August to September

- Plan renewals release date
- Group plan renewals
- Institution sub-selection
- Enrollment system preparation
- Member communication mailings

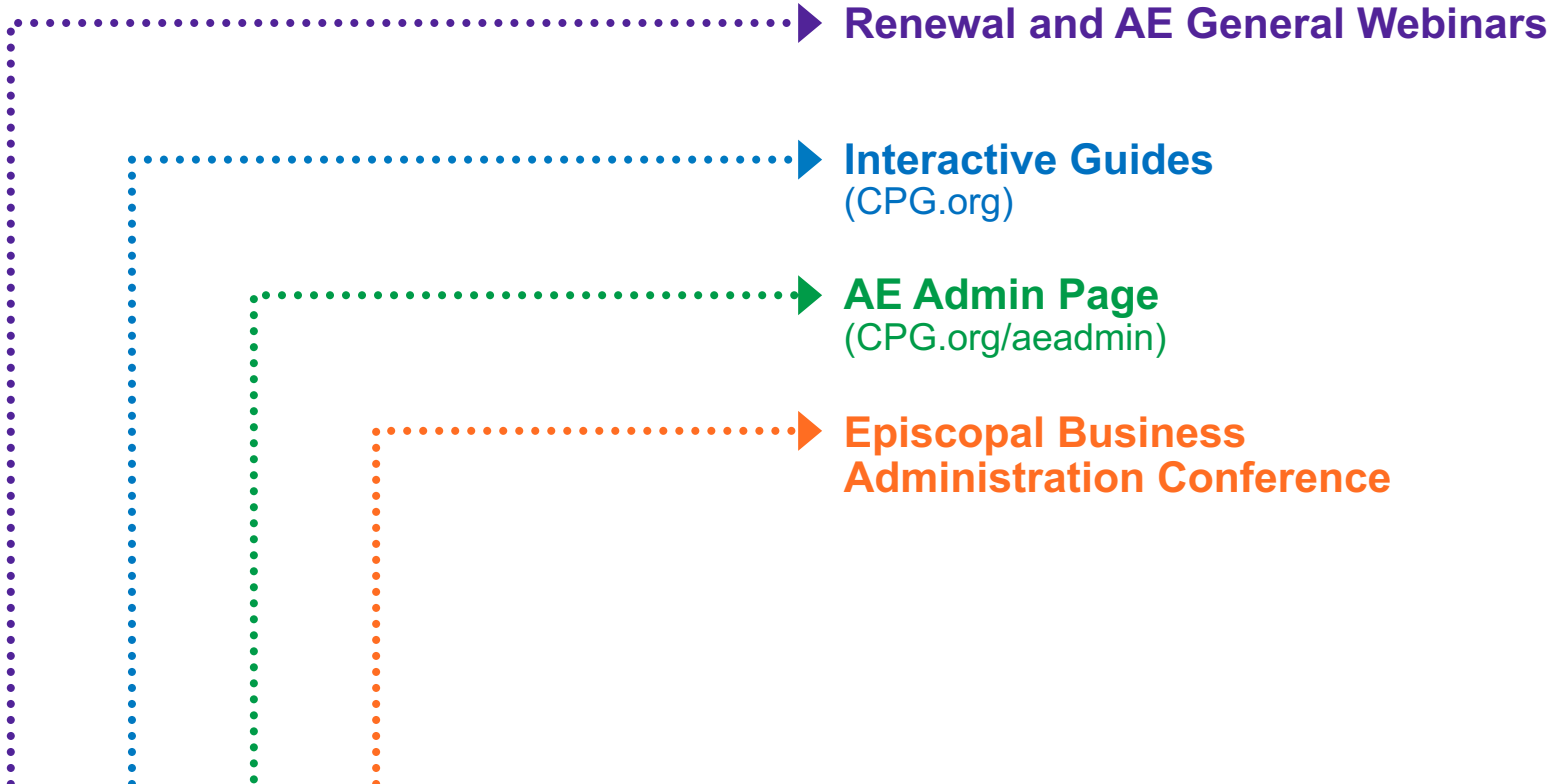
October to November

- Institution Sub-selection ends
- Active members and Pre-65 Former Employees AE
- Post-65 Former Employees AE
- Vendor/member account setup

December to January

- CPG conducts a quality review of AE transactions
- Member ID card is created and mailed

Administrator Education Opportunities



Centralized AE Admin Information on CPG.org

CHURCH PENSION GROUP | Investment Management | Contact Us | Jobs | Sign In / Create Account

Search for subjects, conferences, videos

MyCPG | Insurance | Learning | Active Clergy

Health Plan Renewal and Annual Enrollment Administrator Central

In This Section

- News & Updates
- 2022 Annual Enrollment Timeline
- Learning Modules
- Webinars
- Documents & Mailings

News & Updates
Check back for news and updates on 2022 Renewal and Annual Enrollment!

2022 Renewal and Annual Enrollment Timeline for Administrators

AUG 26 Renewal Selection Release Date
Plan selections are announced to Administrators by email Thursday, August 26, 2021.

CPG.org/aeadmin

- Health Plan Renewal and AE information
- AE Admin news and updates
- Education, documents, and mailings
- Calendar key dates and resources

A stylized, semi-transparent map of a city grid is the background. The map shows a network of streets in white and light gray, with some green and brown patches representing parks and other areas. A blue river flows through the right side of the map. A solid purple rectangular box is overlaid on the map, containing the text "Pricing and Renewals" in white.

Pricing and Renewals

Pricing and Trends

≡ Pricing: Overview – Key Factors



Overall

Actual versus expected

- Large claims

Projected

- Cost trend assumptions
- Known/expected changes
- Stress testing

Group Specific

Group specific

- Demographic/geographic factors
- Experience
- Prior rate actions

≡ Pricing: Focus on Cost Trend Assumptions ≡

What is a medical and pharmacy cost trend?

- Projected percentage increase in the cost to treat patients from one year to the next, assuming that benefits remain the same



Cost trends used to estimate what the same health plan design will cost from year to year



Cost trend influencers

- Unit cost inflation of medical products and services
- Per capita utilization or changes in the number or intensity of service usage

Pricing: Focus on Cost Trend Assumptions

What are some factors that can affect healthcare trends?



**Healthcare
service
utilization**



**Medical
technology and
drug therapies**



**Impact of fixed
deductibles
and copays**



**Aging of
the covered
population**



**Cost-shifting
from public to
private plans**



**Price inflation
or deflation**



**Variations
in provider
treatment patterns**



**Changing health
of the covered
population**



**Healthcare
provider
consolidation**



**Changes in
federal or state
legislation**



Annual Renewals



Renewal Email

- Alerts administrator to go to My Admin Portal (MAP)/Medical Life Participant System (MLPS) for the Group's Plan offering and selections
- Provides a link to instructions for how to access information



Renewal Supporting Materials

- Medical Trust Renewal Letter
- Participating Group Agreement
- Administrative Policy Manual
- Medical Trust Compass Report and instructions
- AE Timeline and Letter Templates for Administrators
- Healthcare Compliance Notices
- Summaries of Benefits and Coverage (SBCs) on [cpg.org](https://www.cpg.org)
- Health Plan Comparison Chart
- The array of plans being offered

Available in MAP/MLPS

- Review plans and rates, share accordingly with your key stakeholders
- Benefits Relationship Management Team resources will be available to assist you with questions
- Determine your Plan offering and make elections in MAP/MLPS

Plan Selection Timing

- Plan Selection Deadlines

Communicating with Your Related Entities and Employees

Letter Templates



Customizable templates to help facilitate communications with your group about plans, rates, dates, etc.

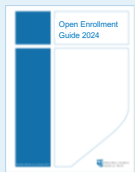
- **Template #1:** Memo to rectors, parish administrators, and other benefits personnel
- **Template #2:** Letter to employees (members and non-participating employees)

Plan Comparison Chart

	Plan A Basic	Plan B Regular	Plan C Premium
—	✓	✓	✓
—	x	✓	✓
—	✓	x	x

Provides side-by-side benefit details to help members compare their options

Annual Enrollment Guide



Helps employees make their annual plan elections



Group Plan Selection

My Admin Portal (MAP)

CHURCH PENSION GROUP

MAP People Benefits Groups and Billing Institution Resources

MyAdmin Portal
Quick. Convenient. Safe.

My Admin Portal

Quick Actions Add or Remove

View Billing Accounts	View Downloads	View
Update Marital Status	View Relationships	U
Add an Employee	Terminate Employee	

CHURCH PENSION GROUP

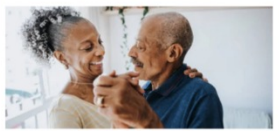
MAP People **Benefits Groups and Billing** Institution Resources Reports

MyAdmin Portal
Quick. Convenient. Safe.

Guides & Resources



Employment Events



Life Events

[View More](#)

Client Services Support

Hours of Operation
Monday – Friday
8:30 AM – 8:00 PM

Administrator Support
(855) 215-5990

Benefits Groups and Billing

The screenshot shows the Church Pension Group website interface. At the top left is the logo and name 'CHURCH PENSION GROUP'. Below it is a navigation bar with links for 'MAP', 'People', 'Benefits Groups and Billing', and 'Insti...'. The main content area is titled 'Benefits Groups and Billing' and includes a breadcrumb 'Map / Benefits Group & Billing'. Underneath is a 'Quick Actions' section with six buttons: 'View Billing Accounts', 'View Downloads', 'View Group Administrators', 'View Plan Selection', 'View Participants', and 'View Annual Enrollment'. An orange callout box highlights the 'View Plan Selection' button. Below the callout box, there are links for 'Reading your Medical Trust bill' and '2022 Billing Schedules'. At the bottom, there is a 'Guides and Resources' section with two images: one of two people looking at a laptop and another of a person typing on a laptop.

Guides and Resources



Entering MLPS

The screenshot displays the Church Pension Group MAP interface. At the top left is the logo for CHURCH PENSION GROUP. The navigation bar includes 'MAP', 'People', 'Benefits Groups and Billing', 'Institution', and 'Res'. A search bar is located at the top right. The main content area is titled 'Benefits Groups and Billing' and features a 'Quick Actions' section with buttons for 'View Billing Accounts', 'View Downloads', 'View Group Administrators', 'View Plan Selection', 'View Participants', and 'View Annual Enrollment'. On the right, there is a 'Support and Guidance' section with links to 'Medical Trust bill payment and address information', 'Monthly Medical Trust bill reconciliation checklist', 'Reading your Medical Trust bill', and '2022 Billing Schedules'. A modal dialog box is centered on the screen, asking 'Opening a new tab, would you like to proceed?' with 'Cancel' and 'Continue' buttons. An orange arrow points to the 'Continue' button. The dialog box also has a 'Close X' button in its top right corner.

Plan Selection Page: Making Selections

Review your offering

Option 1 [Click here to download your Plan Selection Sheet](#)

Plan Name	Plan Code	Enroll Total	Rates					Rates					Election	
			Single	Plus Sps	Plus Child	Family	Final % Chg	Single	Plus Sps	Plus Child	Family	Final % Chg	Accept	Decline
Anthem BCBS High Deductible Health Plan	MHDE	67	357	893	893	893	11.91	800	1840	1840	1840	109.52	<input type="radio"/>	<input type="radio"/>
Anthem PPO 80/60	MSPZ	100	520	1300	1300	1300	12.07	624	1435	1435	1435	14.09	<input type="radio"/>	<input type="radio"/>
Anthem BCBS EPO80	MSEZ							613	1410	1410	1410	11.20	<input type="radio"/>	<input type="radio"/>
Anthem BCBS EPO90	MSED							648	1490	1490	1490	11.25	<input type="radio"/>	<input type="radio"/>
Anthem BCBS High Deductible Plan 15	MHDG							624	1435	1435	1435	11.26	<input type="radio"/>	<input type="radio"/>
Anthem BCBS High Deductible Plan 40	MHBR							388	892	892	892	11.28	<input type="radio"/>	<input type="radio"/>
Anthem BCBS PPO 70 SLV	MPSI							536	1233	1233	1233	11.16	<input type="radio"/>	<input type="radio"/>

Option 1 [Click here to download your Plan Selection Sheet](#)

Plan Name	Plan Code	Enroll Total	2016 Rates					2017 Rates					2017 Election	
			Single	Plus Sps	Plus Child	Family	Final % Chg	Single	Plus Sps	Plus Child	Family	Final % Chg	Accept	Decline
Anthem BCBS High Deductible Health Plan	MHDE	67	357	893	893	893	11.91	800	1840	1840	1840	109.52	<input type="radio"/>	<input type="radio"/>
Anthem PPO 80/60	MSPZ	100	520	1300	1300	1300	12.07	624	1435	1435	1435	14.09	<input type="radio"/>	<input type="radio"/>
Anthem BCBS EPO80	MSEZ							613	1410	1410	1410	11.20	<input type="radio"/>	<input type="radio"/>
Anthem BCBS EPO90	MSED							648	1490	1490	1490	11.25	<input type="radio"/>	<input type="radio"/>
Anthem BCBS High Deductible Plan 15	MHDG							624	1435	1435	1435	11.26	<input type="radio"/>	<input type="radio"/>
Anthem BCBS High Deductible Plan 40	MHBR							388	892	892	892	11.28	<input type="radio"/>	<input type="radio"/>
Anthem BCBS PPO 70 SLV	MPSI							536	1233	1233	1233	11.16	<input type="radio"/>	<input type="radio"/>
Anthem PPO 90/70	MSP0							667	1534	1534	1534	11.23	<input type="radio"/>	<input type="radio"/>
EAP	MEAP							5	5	5	5	0.00	<input type="radio"/>	<input type="radio"/>
Preventive Dental	DDPV							37	85	85	85	19.68	<input type="radio"/>	<input type="radio"/>
Basic Dent-50/150	DD50							70	161	161	161	21.02	<input type="radio"/>	<input type="radio"/>
Dent&Ortho-25/75	DD25							92	212	212	212	19.75	<input type="radio"/>	<input type="radio"/>

Additional Option Requested

To complete Plan Selections:

1. Click **Accept** or **Decline** next to each plan (do not leave any blank radials).
2. Click **Submit**.
3. Finished!

Plan Selection Page: Additional Option Requests

Submitting a request for additional options

To request an
Additional Option:

1. Leave radial buttons blank.
2. Click check mark in **Additional Option Requested** box.
3. Enter comments in the **Plan Request** box.
4. Click **Submit**.

Option 1 [Click here to download your Plan Selection Sheet](#)

Plan Name	Plan Code	Enroll Total	Rates				2016 Rates				2017 Rates				Election		2017 Election	
			Single	Plus Sp	Plus Child	Family	Single	Plus Sp	Plus Child	Family	Single	Plus Sp	Plus Child	Family	Final % Chg	Accept	Decline	
Anthem BCBS High Deductible Health Plan	MHDE	67	357	893	893	893	11.91	800	1840	1840	1840	109.52						
Anthem PPO 80/60	MSPZ	100	520	1300	1300	1300	12.07	624	1435	1435	1435	14.09						
Anthem BCBS EPO80	MSEZ							613	1410	1410	1410	11.20						
Anthem BCBS EPO90	MSED							648	1490	1490	1490	11.25						
Anthem BCBS High Deductible Plan 15	MHEDG							624	1435	1435	1435	11.26						
Anthem BCBS High Deductible Plan 40	MHBR							388	892	892	892	11.28						
Anthem BCBS PPO 70 SLV	MPSL							536	1233	1233	1233	11.16						
Anthem PPO 90/70	MSPD							667	1534	1534	1534	11.23						
EAP	MEAP							5	5	5	5	0.00						
Preventive Dental	DDPV							37	85	85	85	19.68						
Basic Dent-50/150	DDSO							70	161	161	161	21.02						

Additional Option Requested

Please specify your plan request

Plan Selection Page: Additional Option Requests

Viewing Tier and Rx Changes

If you request a multiple Tier and/or Rx pricing, upon receiving notice that your additional request is ready, you will need to review your new offering.

1. Adjust values for **Rate Tiers / Rx Options** to desired changes.
2. Click **View Plans** (to complete, use previous instructions).
3. Finished!

Diocese of
Effective Date:

Rate Tiers: 2 Rx Option: Standard View Plans

Option 1 [Click here to download your Plan Selection Sheet](#)

Plan Name	Plan Code	Enroll Total	Rate						
			Single	Plus Sps	Plus Child	Family	Final % Chg	Single	Plus Sps
Anthem BCBS High Deductible Health Plan	MHDE	75%	357	893	893	893	11.91	75%	75%
Anthem PPO 80/60	MSPZ	75%	520	1300	1300	1300	12.07	75%	75%
Anthem BCBS EPO80	MSEZ							75%	75%
Anthem BCBS EPO90	MSE0							75%	75%

MLPS–Plan Selection Page

Medicare Secondary Payer Small Employer Exception (MSP SEE) Status

Option 1 [Click here to download your Plan Selection Sheet](#)

Plan Name	Plan Code	Enroll Total	2023 Rates					2024 Rates					Rel Value	Plan Sel Load	2024 Election		
			Single	Plus Sps	Plus Child	Family	Final % Chg	Natl Single Rate	Natl % Diff	Single	Plus Sps	Plus Child			Family	Final % Chg	Accept
Anthem BCBS BlueCard MSP PPO 90	MS10															<input type="radio"/>	<input type="radio"/>
Anthem BCBS BlueCard PPO 100	MPP1															<input type="radio"/>	<input type="radio"/>
Anthem BCBS BlueCard PPO 90	MPP2															<input type="radio"/>	<input type="radio"/>
Anthem BCBS CDHP-20/HSA	MHDE															<input type="radio"/>	<input type="radio"/>
EAP	MEAP															<input type="radio"/>	<input type="radio"/>
Anthem BCBS BlueCard MSP PPO 100	MSG9															<input type="radio"/>	<input type="radio"/>
Anthem BCBS BlueCard MSP PPO 70	MS12															<input type="radio"/>	<input type="radio"/>
Anthem BCBS BlueCard MSP PPO 80	MS11															<input type="radio"/>	<input type="radio"/>
Anthem BCBS BlueCard PPO 70	MPP4															<input type="radio"/>	<input type="radio"/>
Anthem BCBS BlueCard PPO 80	MPP3															<input type="radio"/>	<input type="radio"/>
Anthem BCBS CDHP-15/HSA	MHDG															<input type="radio"/>	<input type="radio"/>
Anthem BCBS CDHP-40/HSA	MHBR															<input type="radio"/>	<input type="radio"/>
Cigna Open Access Plus CDHP-15/HSA	MCDH															<input type="radio"/>	<input type="radio"/>
Cigna Open Access Plus CDHP-20/HSA	MHDC															<input type="radio"/>	<input type="radio"/>
Cigna Open Access Plus CDHP-40/HSA	MCDG															<input type="radio"/>	<input type="radio"/>
Cigna Open Access Plus MSP PPO 100	MGM1															<input type="radio"/>	<input type="radio"/>
Cigna Open Access Plus MSP PPO 70	MGM4															<input type="radio"/>	<input type="radio"/>
Cigna Open Access Plus MSP PPO 80	MGM3															<input type="radio"/>	<input type="radio"/>
Cigna Open Access Plus MSP PPO 90	MGM2															<input type="radio"/>	<input type="radio"/>
Cigna Open Access Plus PPO 100	MG01															<input type="radio"/>	<input type="radio"/>
Cigna Open Access Plus PPO 70	MG04															<input type="radio"/>	<input type="radio"/>
Cigna Open Access Plus PPO 80	MG03															<input type="radio"/>	<input type="radio"/>
Cigna Open Access Plus PPO 90	MG02															<input type="radio"/>	<input type="radio"/>

Plans Going Away

Should a Participating Group or Institution elect to no longer offer a medical plan that they currently offer

Employees are required to make a plan selection during Annual Enrollment or they will lose coverage.

Tools and reports are available to help group administrators manage members in plans going away.

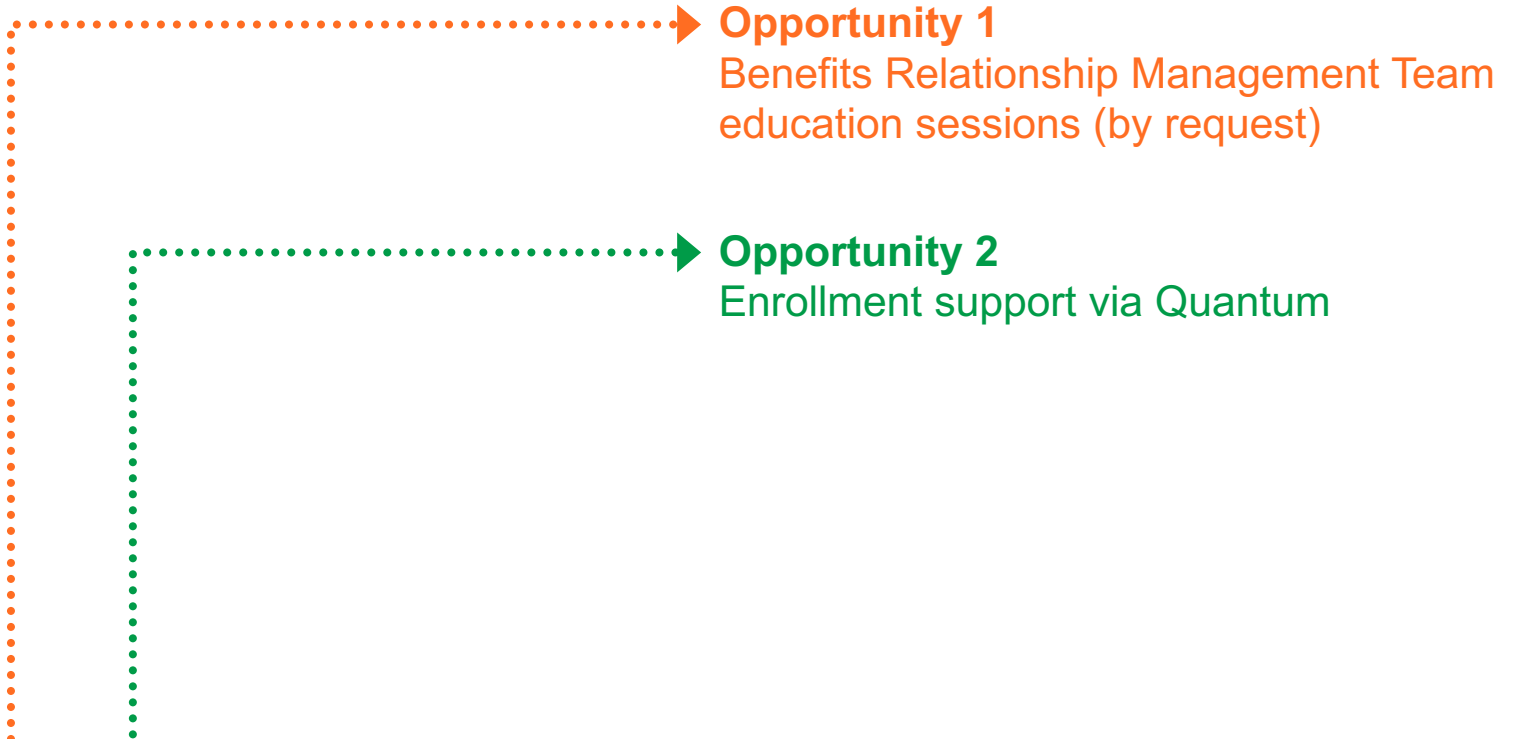


Changes to Participating Group or Institution plan selections may affect the plan types and networks available to members of the Participating Group or Institution.

The background is a stylized, semi-transparent map of a city grid. The streets are represented by white lines on a light gray background. A prominent blue river flows from the top right towards the bottom right. Several green rectangular areas are scattered across the map, possibly representing parks or green spaces. A solid green horizontal banner is positioned in the center of the image, containing white text.

Annual Enrollment Communications

Member Education Opportunities



Annual Enrollment Letter

EPISCOPAL CHURCH MEDICAL TRUST
19 East 34th Street
New York, NY 10016

Presorted
First Class Mail
US Postage
PAID
S Hackensack, NJ
Permit # 361

Annual Enrollment

Coming soon... Annual Enrollment 2024: We're almost there!
You'll soon be able to choose 2024 health coverage for yourself and your family members, and make any changes to your personal information.

Available now... Discover your 2024 health plan options on the Annual Enrollment member page at cpgp.org/annualeenrollment.

Website Resource

- annualeenrollment.cpgp.org
- cpgp.org/annualeenrollment
- cpgp.org/accounts
- HealthAdvocate.com/members

Need help? Contact Church Pension Group Client Services
Call us Monday to Friday, 8:30 AM to 8:00 PM ET, (800) 480-9967
Email: mtcuserserv@cpgp.org

These documents may contain protected health information as described under the Health Insurance Portability and Accountability Act of 1996 and the regulations issued thereunder ("HIPAA"). This information is confidential and is intended only to be used by the authorized individual to whom, or to whom it is addressed, it is addressed. The recipient of this information is prohibited from disclosing this information to any other party unless required to do so by law or regulation and is required to destroy this information after its stated need has been fulfilled. If you do not have the intended recipient of this information, you are hereby notified that any disclosure, copying or distribution of this information, or any action taken in reliance on this information, is strictly prohibited and may subject you to civil or criminal penalties. If you have received this information in error, please notify the sender and the Church Pension Group Policy Officer immediately to arrange for the return or destruction of the information. Contact information for the sender is provided above and the Church Pension Group Policy Officer may be contacted by email at privacy@cpgp.org. www.usps.com/business

AE Member Letter Estimated Mail Dates

Active Members, Pre-65, and
Post-65 Retirees: Approximately
2 Weeks Prior to when Annual
Enrollment Session Commences

Annual Enrollment Communication and Member Education Materials



CHURCH PENSION GROUP

About Us | Investment Management | Contact Us | Jobs | Sign In / Create Account

Search for subjects, conferences, videos

Change text size: A A A

MyCPG Retirement Insurance Learning Administrative

Active Member Resources
Retiree Resources

Annual Enrollment

Annual Enrollment [Login to Enroll](#)

All of the Annual Enrollment information you need, all in one place.

What is Annual Enrollment?
The Episcopal Church Medical Trust (Medical Trust) holds Annual Enrollment (AE) each fall for its health plan members, providing you with the opportunity to compare your current medical and/or dental plan with other available options; select the plan(s) that will best meet your and/or your family's health and financial needs for the upcoming year, and add or drop covered dependents.

Why Enroll Each Year?
The medical and dental plan choice you make can have important health and financial implications for the upcoming year, so it's important to understand your individual situation and how the available plans meet those needs.

Show employees where to find materials, resources, and additional information.



I'm an Active Employee

(currently working³)

[Get Resources For Me](#)



I'm an Early Retiree

(not eligible for Medicare)

[Get Resources For Me](#)



I'm a Retiree

(eligible for Medicare)

[Get Resources For Me](#)

Member Annual Enrollment Website



Sign In or Create Account

[Sign In](#) [Create Account](#)

Note: Username and Client ID are no longer used to sign in to MyCPG Accounts or My Admin Portal. Instead, use the email address associated with your account and your password. Contact Client Services if you experience difficulty signing in.

* Personal Email

* Password Show typing

[Forgot Password?](#)

Remember this device for 10 hours. Do not select if you are on a public or shared computer.

Need Help?
Please contact Client Services (855) 594-2201
Monday - Friday, 8:30AM - 8:00PM EST

* Required field.

Encourage employees to log into the AE website.

Check personal data, even if there is no intent to change coverage.

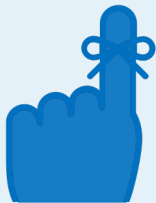
Helping Employees Prepare

Employee Cost



Explain any employee cost share toward monthly contributions.

Reminder



Remind employees about plans going away, if applicable, and the need to select another plan in order not to lose coverage.

- Explain your decisions to change plan(s)
- Remember to monitor your employees' AE activity to make sure they select another plan.

Helping Employees Prepare



Explain the differences between

- Traditional plans and CDHPs, if applicable
- HealthEquity and other selected HSA custodian
- HSA funding rules and any employer contributions



- Explain network and out-of-network* deductibles and out-of-pocket maximums
- The plan comparison chart can help employees choose



Include reminders about benefits that form part of the plans**

- Vision, Pharmacy, EAP, Telehealth, and Point Solutions

For all of the above, Quantum is the member first point of contact

*Only network benefits are available under plans administered by Kaiser.

**This does not apply for Stand-Alone EAP members.



Annual Enrollment Administration and Reports

Accessing AE Reports

CHURCH PENSION GROUP

MAP People Benefits Groups and Billing Institution Resources Reports

Map / Reports-landing-page

Reports

Benefits Group Reports

View reports for your Benefits Group(s). If you are responsible for more than one group, on the next screen **select the benefits group** you wish to view.

[View Benefits Group Reports](#)

Billing Account Reports

View reports for the Billing Account(s) under your Benefits Group authority or responsibility. If you are responsible for more than one billing account, on the next screen **select the billing account** you wish to view.

[View Billing Account Reports](#)

Institution Reports

View reports for your institution(s). If you are responsible for more than one institution, on the next screen **select the institution** to view.

[View Institution Reports](#)

Diocesan Reports

View reports for your diocese and institutions under diocesan authority. If you are responsible for more than one diocese, on the next screen **select the benefits group** you wish to view.

[View Diocesan Reports](#)

Note: In the original image, an orange arrow points from the 'View Benefits Group Reports' button to the 'Reports' title in the callout box, and another orange arrow points from the 'View Billing Account Reports' button to the 'Billing Account Reports' title in the callout box.

Reports

Benefits Group Reports

View reports for your Benefits Group(s). If you are responsible for more than one group, on the next screen **select the benefits group** you wish to view.

[View Benefits Group Reports](#)

Billing Account Reports

View reports for the Billing Account(s) under your Benefits Group authority or responsibility. If you are responsible for more than one billing account, on the next screen **select the billing account** you wish to view.

[View Billing Account Reports](#)

Assessing AE Reports, continued

CHURCH PENSION GROUP

MAP People Benefits Groups and Billing Institution Resources Reports

Group Id: 0425 Diocese of Long Island [Change Benefit Gr](#)

[MAP / Benefits Group & Billing / Reports](#)

Benefits Group Reports

Reports containing information for group health, life, and disability under the Benefits Group's authority or responsibility.

- [Enrollment Change Report](#)
- [Group Health, Life, Disability Enrollment Report](#)
- [Annual Enrollment Report](#)

CHURCH PENSION GROUP

MAP People Benefits Groups and Billing Institution Resources Reports

Billing account: 0114001110 Diocese Of Chicago [Change billing accounts](#)

[MAP / Benefits Group & Billing / Billing Accounts / Reports](#)

Diocese Of Chicago
Account Number:
Name: Diocese of Chicago
Group Id:
Client Number:

Navigate to a Section
Reports

Billing Accounts Reports

Reports containing information for group health, life, and disability benefit enrollments, if applicable, for the selected billing account.

- [Enrollment Change Report](#)
- [Group Health, Life, Disability Enrollment Report](#)
- [Annual Enrollment Report](#)
- [Download employee list](#)

- [Enrollment Change Report](#)
- [Group Health, Life, Disability Enrollment Report](#)
- [Annual Enrollment Report](#)
- [Download employee list](#)

AE Reports—DOMO Dashboard

All AE institution and member information is now available on the DOMO Dashboard.

Annual Enrollment Reports

Instructions

- Expand a report by clicking its heading or the icon.
- Select desired filters from the filter list displayed on the right side of expanded reports.
- Export/download a report using .
- View reports in either chart or table format. Exported/downloaded reports use chart format.

Grouped by: Billing Account, Particip...
190 Participants

Billing Account
00XXX - Diocese Of Long Island
004211 - Diocese Of Long Island - Participant T...
00XXX - Diocese Of Long Island

Grouped by: Participation Status
190 Participants

Participation Status	Billing Account Number
Not Submitted	All Saints Church
	All Saints Church
	All Saints Church
	All Saints Church
	All Saints Church
	All Saints Church
	All Saints Church
	All Saints Church
	Cathedral of the

Grouped by: Billing Account
190 Participants

Billing Account
00XXX - Diocese Of Long Island
004211 - Diocese Of Long Island Participant
00XXX - Diocese Of Long Island

Grouped by: Participation Status, Billi...
190 Participants

Participation Status	Billing Acco
Not Submitted - Participant Total	Count 190 / 190

Callouts: Export (top right), Expand (middle right), Specialized "cards" (bottom right).

AE Reports—Expand a Card

Complete Report

190 Participants

Group ID	Group to View CN	Group to View	Billing Account	Participation Status
00XX	XXX-XXX-XX	Diocese of Long Island	00XXX - Zion Church	Not Submitted
00XX	XXX-XXX-XX	Diocese of Long Island	00XXX - Diocese Of Long Island	Not Submitted
00XX	XXX-XXX-XX	Diocese of Long Island	00XXX - St Marks Church	Not Submitted
00XX	XXX-XXX-XX	Diocese of Long Island	00XXX - Cathedral of the Incarnation	Not Submitted
00XX	XXX-XXX-XX	Diocese of Long Island	00XXX - Diocese Of Long Island	Not Submitted
00XX	XXX-XXX-XX	Diocese of Long Island	00XXX - Diocese Of Long Island	Not Submitted
		Diocese of Long Island	- Diocese Of Long Island	Not Submitted
		Diocese of Long Island	- Grace Church	Not Submitted
		Diocese of Long Island	- All Saints Church	Not Submitted
		Diocese of Long Island	- Trinity St Johns Church	Not Submitted
		Diocese of Long Island	- Grace Church	Not Submitted
		Diocese of Long Island	- All Saints Church	Not Submitted

Group to View: Diocese of Long Island

Coverage Going Away:

- Select All
- N
- Y

Filter by Participation Status:

- Select All
- Not Submitted

Filter by Visit Status:



Export

Filters

AE Reports—Expanded Card Filtering

You can filter information.

Annual Enrollment Reports

Grouped by: Billing Account, Participation Status

24 Participants

Billing Account	Participation Status	Date	Part
- Diocese Of Long Island	Not Submitted		
- Diocese Of Long Island	Not Submitted		
- Diocese Of Long Island	Not Submitted		
- Diocese Of Long Island - Participant Total	Count 4 / 24		
- Diocese Of Long Island	Not Submitted		
- Diocese Of Long Island	Not Submitted		
- Diocese Of Long Island	Not Submitted		
- Diocese Of Long Island - Participant Total	Count 3 / 24		
- Grace Church			

Coverage Going Away:

- Select All
- N
- Y

Filter by Participation Status:

- Select All
- Not Submitted

Filter by Visit Status:

- Select All
- No visit: never logged in

Filters

AE Reports—Export Data

The screenshot displays the 'Annual Enrollment Reports' interface. The main content area shows a table titled '24 Participants' grouped by 'Billing Account' and 'Participation Status'. The table has columns for 'Billing Account', 'Participation Status', 'Date', and 'Part'. The data is grouped into sections for 'Diocese Of Long Island' and 'Grace Church', with participant counts (4/24 and 3/24) shown in grey rows. A filter panel on the right allows filtering by 'Coverage Going Away' (N, Y) and 'Visit Status' (Select All, No visit: never logged in). An orange box highlights the export icon in the top right corner of the report area. An arrow points from this icon to a larger 'Export' button with an upload icon. Below the 'Export' button is a menu titled 'Export: Annual Enrollment Administration - Complete Report' with four options: CSV, Print, PowerPoint, and Excel.

Billing Account	Participation Status	Date	Part
- Diocese Of Long Island	Not Submitted		
- Diocese Of Long Island	Not Submitted		
- Diocese Of Long Island	Not Submitted		
- Diocese Of Long Island	Not Submitted		
- Diocese Of Long Island - Participant Total	Count 4 / 24		
- Diocese Of Long Island	Not Submitted		
- Diocese Of Long Island	Not Submitted		
- Diocese Of Long Island	Not Submitted		
- Diocese Of Long Island - Participant Total	Count 3 / 24		
- Grace Church			

Export: Annual Enrollment Administration - Complete Report

- CSV
- Print
- PowerPoint
- Excel

Stay Tuned for More Information

Annual Enrollment Resources



The screenshot shows the Church Pension Group website. At the top left is the logo with the text "CHURCH PENSION GROUP". To the right of the logo are navigation links: "About Us", "Investment Management", "Contact Us", "Careers", and "International Support". A green button labeled "Sign In / Create Account" is on the far right. Below the navigation is a dark blue bar with a search box containing "Search for subjects, cont...", a "Popular Topics" dropdown, and a "Your Role:" dropdown. The main content area features a left sidebar with a list of links: "Administrators' Resource Center", "About MAP", "Guides & Resources", "New Administrator Training", "Events", "Who to Contact", "Documents & Mailings", and "Recursos en Español". The main content area has a header image of two people looking at a computer screen, followed by the heading "Administrators' Resource Center". Below this is a section titled "Latest Updates" with a sub-heading "Covid Test Kit Provisions Update". The text below reads: "See the [letter to members](#) of the Episcopal Church Medical Trust for benefit changes related to the end of Public Health Emergency for COVID-19 effective May 12, 2023."

Register for upcoming webinars on ARC at cpg.org/arc.

Important Disclosures

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Church Pension Group Services Corporation (“CPGSC”), doing business as The Episcopal Church Medical Trust, maintains a series of health and welfare plans (the “Plans”) for eligible employees (and their eligible dependents) of The Episcopal Church (the “Church”). The Medical Trust serves only eligible Episcopal employers. The Plans that are self-funded are funded by the Episcopal Church Clergy and Employees’ Benefit Trust, a voluntary employees’ beneficiary association within the meaning of Section 501(c)(9) of the Internal Revenue Code.

The Plans are church plans within the meaning of Section 3(33) of the Employee Retirement Income Security Act of 1974, as amended, and Section 414(e) of the Internal Revenue Code. Not all Plans are available in all areas of the United States or outside the United States, and not all Plans are available on both a self-funded and fully insured basis. Additionally, the Plan may be exempt from federal and state laws that may otherwise apply to health insurance arrangements. The Plans do not cover all healthcare expenses, so members should read the official Plan documents carefully to determine which benefits are covered, as well as any applicable exclusions, limitations, and procedures.