

2021 Disability Open Enrollment

Coverage Option Survey Guide for Administrators

You will receive the Disability Open Enrollment Coverage Option Survey email from Salesforce.com. Please do not reply to the email.

Click the embedded link to launch the survey in your browser. Please read and answer each question carefully in the survey. If you do not receive the survey via email, you can access it at the Administrator Resource Center.

The survey covers three coverage option selection scenarios. This is a step-by-step guide for each coverage option selection scenario. You can jump to that section of the guide, or scroll through the sections.

1. Employers who currently offer disability coverage, and [are not](#) making changes to their offerings for 2021.
2. Employers who currently offer disability coverage, and [are](#) making changes to their offerings for 2021.
3. Employers who do not offer disability coverage, and are [selecting coverage options for the first time](#) for Open Enrollment 2021.

Coverage Option Selection Scenario 1

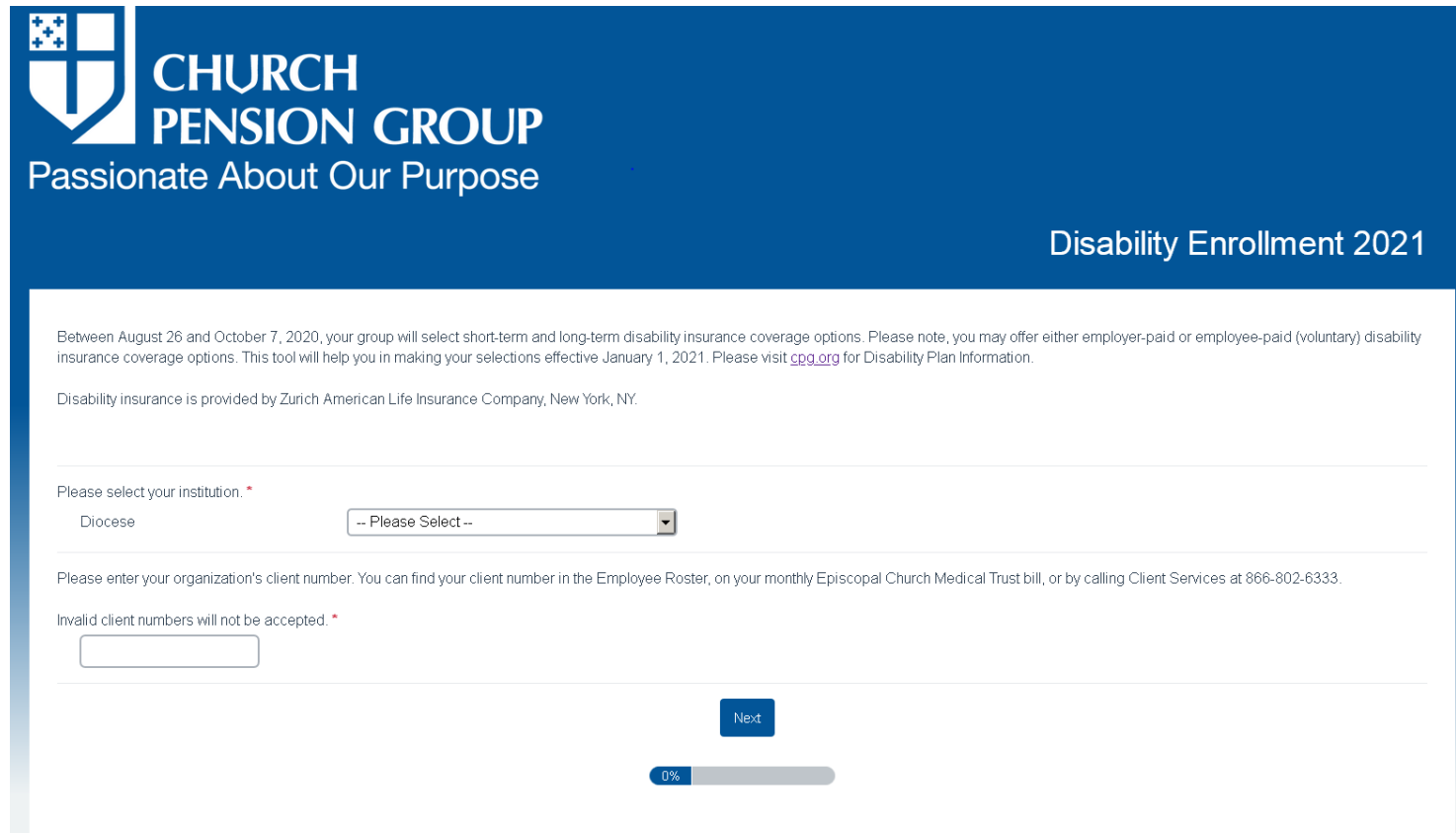
Employers who currently offer disability coverage, and **are not** making changes to their offerings for 2021.

If your institution currently offers disability coverage to your employees, and you **do not** intend to make any coverage option changes, **follow the steps below**. Your institution will continue to offer the same disability coverage options for calendar year 2021.

Step 1

Select your Diocese, city, and the name of your institution. Enter your Client ID, and click “Next”.

Note: If you are not part of a Diocese, please select “None”.



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Disability Enrollment 2021

Between August 26 and October 7, 2020, your group will select short-term and long-term disability insurance coverage options. Please note, you may offer either employer-paid or employee-paid (voluntary) disability insurance coverage options. This tool will help you in making your selections effective January 1, 2021. Please visit cpg.org for Disability Plan Information.

Disability insurance is provided by Zurich American Life Insurance Company, New York, NY.

Please select your institution. *

Diocese

Please enter your organization's client number. You can find your client number in the Employee Roster, on your monthly Episcopal Church Medical Trust bill, or by calling Client Services at 866-802-6333.

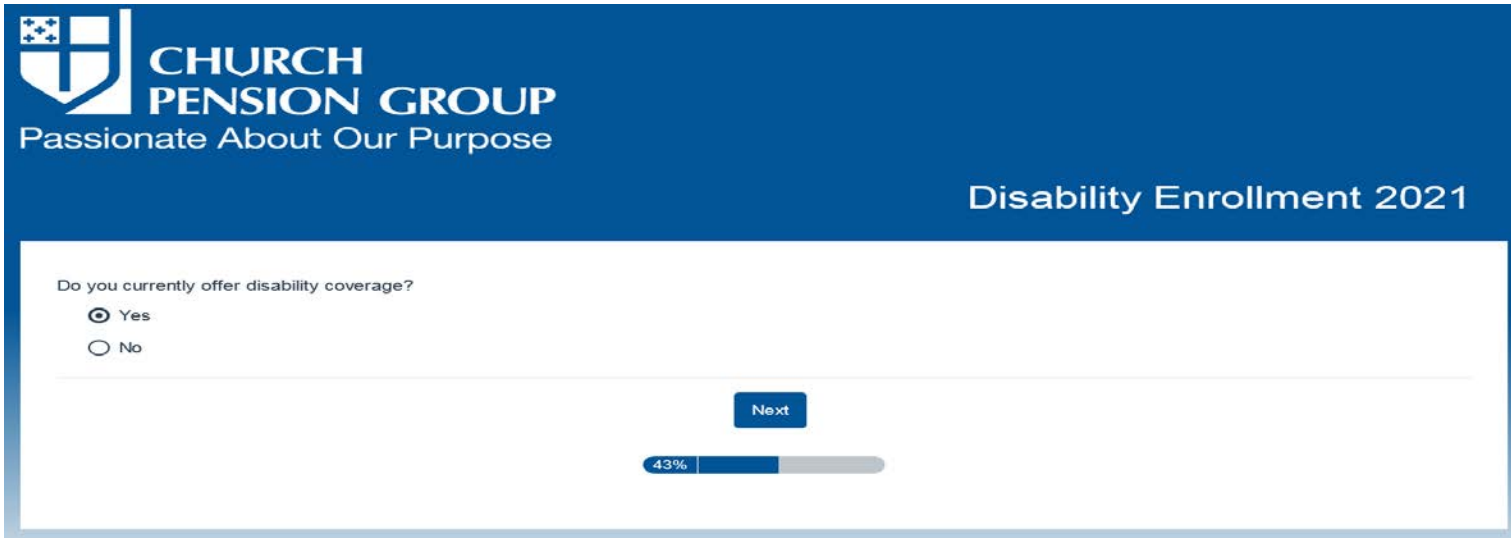
Invalid client numbers will not be accepted. *

Next

0%

Step 2

Do you currently offer Disability Coverage? Select “Yes” and click “Next”.



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Disability Enrollment 2021

Do you currently offer disability coverage?

Yes
 No

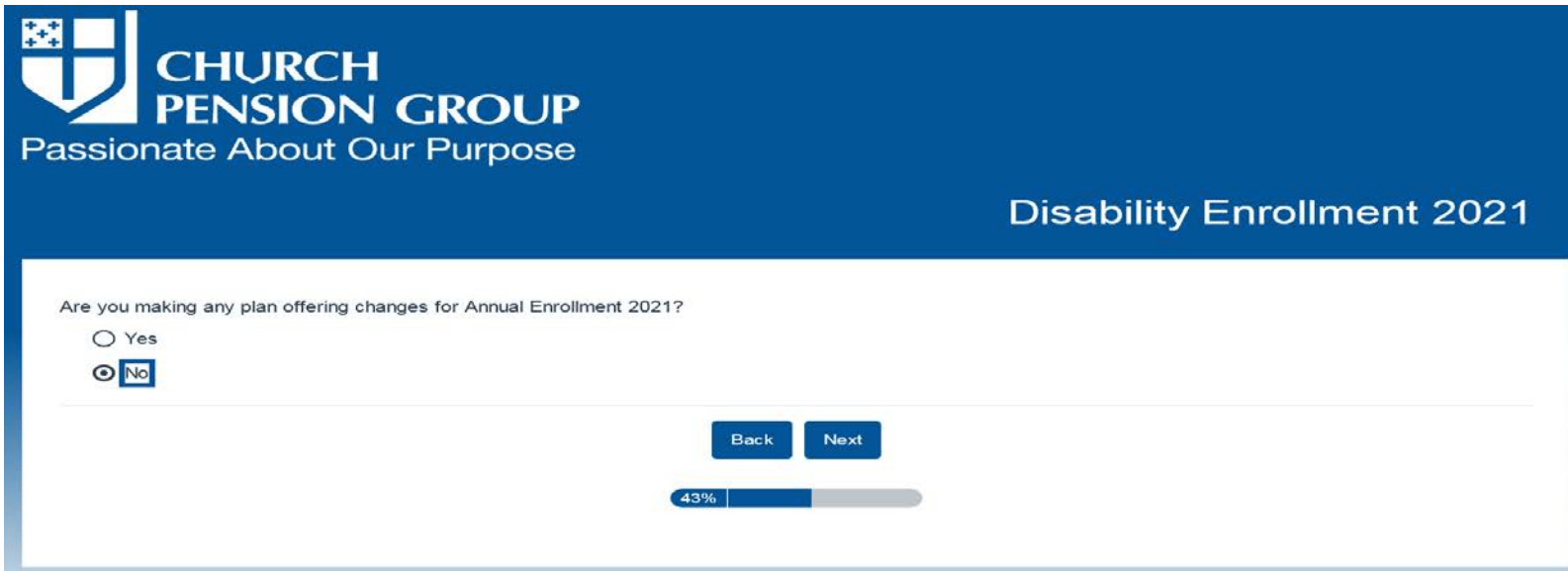
Next

43%

Detailed description: This is a screenshot of a survey form for Church Pension Group. The header is dark blue with the logo and tagline. The main title is 'Disability Enrollment 2021'. The question asks if the respondent currently offers disability coverage. The 'Yes' option is selected. A 'Next' button is centered below the question. A progress bar at the bottom shows 43% completion.

Step 3

Are you making any plan offering changes for Open Enrollment 2021? Select “No” and click “Next”.



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Disability Enrollment 2021

Are you making any plan offering changes for Annual Enrollment 2021?

Yes
 No


Back Next

43%

Detailed description: This is a screenshot of a survey form for Church Pension Group. The header is dark blue with the logo and tagline. The main title is 'Disability Enrollment 2021'. The question asks if the respondent is making any plan offering changes for Annual Enrollment 2021. The 'No' option is selected. 'Back' and 'Next' buttons are centered below the question. A progress bar at the bottom shows 43% completion.

Step 4

Enter your name and the name of your organization. Select the appropriate description of your role at your organization. Read the User Consent Agreement section, and click "Submit".



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Copy
Disability Enrollment 2021

Please enter your name. *

For verification, please enter the organization for which you have made these coverage selections. *

Please select which of the following best characterizes your roll at your organization. *

Benefits Administrator/Payroll Officer


Rector/Priest-In-Charge/Senior Clergy

Treasurer/Warden

Other - please specify:

Step 5

You have completed the 2021 Open Enrollment Disability Survey. Please retain this screen as confirmation that your coverage options will remain the same in 2021.



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Disability Enrollment 2021

Thank you. There is no further action required. Your institution will continue to off the same disability plans for calendar year 2021. Your disability coverage selections have been entered. This will serve as your confirmation statement.

100%

Coverage Option Selection Scenario 2

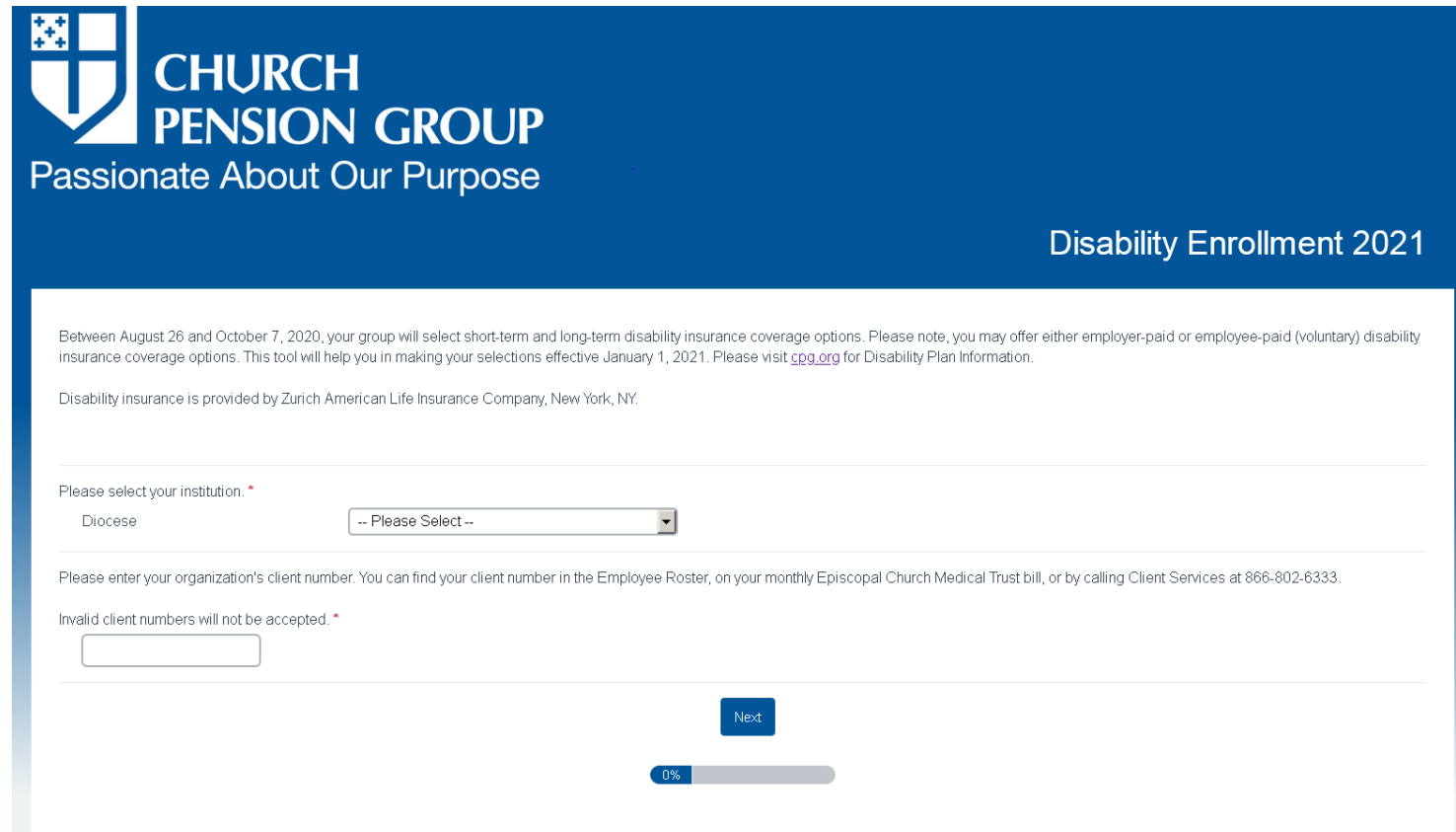
Employers who currently offer disability coverage, and **are** making changes to their offerings for 2021.

If your institution currently offers disability coverage and you intend to **change** your coverage options for year 2021, follow the steps below.

Step 1

Select your Diocese, city, and the name of your institution. Enter your Client ID, and click “Next”.

Note: If you are not part of a Diocese, please select “None”.



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Disability Enrollment 2021

Between August 26 and October 7, 2020, your group will select short-term and long-term disability insurance coverage options. Please note, you may offer either employer-paid or employee-paid (voluntary) disability insurance coverage options. This tool will help you in making your selections effective January 1, 2021. Please visit cpg.org for Disability Plan Information.

Disability insurance is provided by Zurich American Life Insurance Company, New York, NY.

Please select your institution. *

Diocese

Please enter your organization's client number. You can find your client number in the Employee Roster, on your monthly Episcopal Church Medical Trust bill, or by calling Client Services at 866-802-6333.

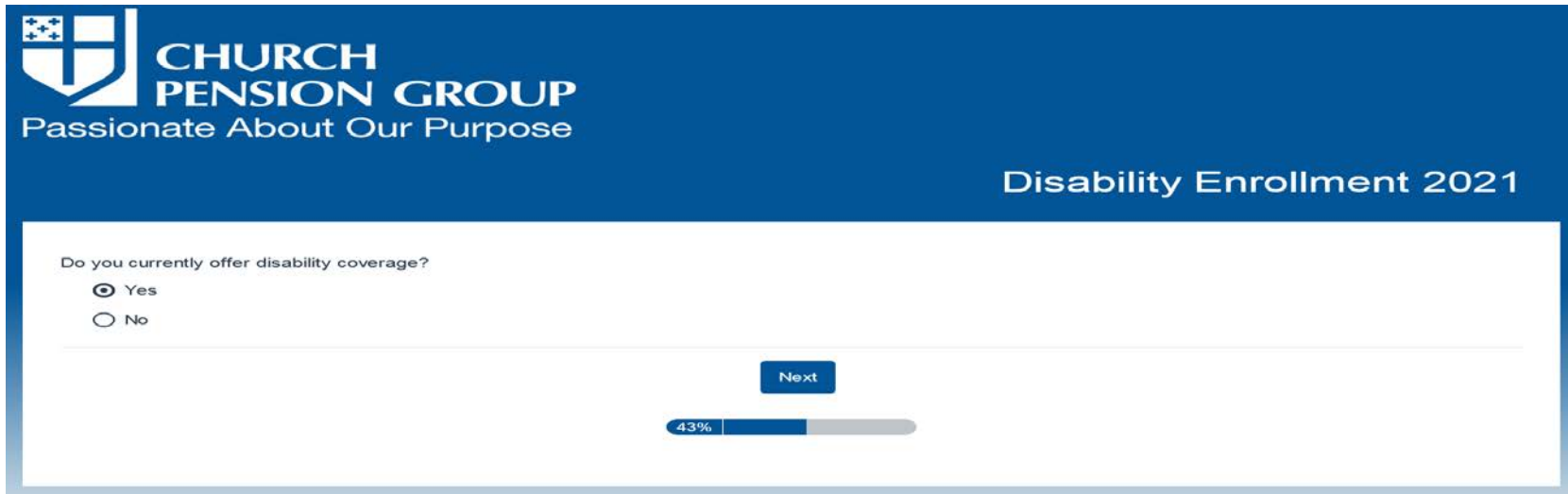
Invalid client numbers will not be accepted. *

Next

0%

Step 2

Do you currently offer Disability Coverage? Select “Yes,” and click “Next”.



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Disability Enrollment 2021

Do you currently offer disability coverage?

Yes
 No

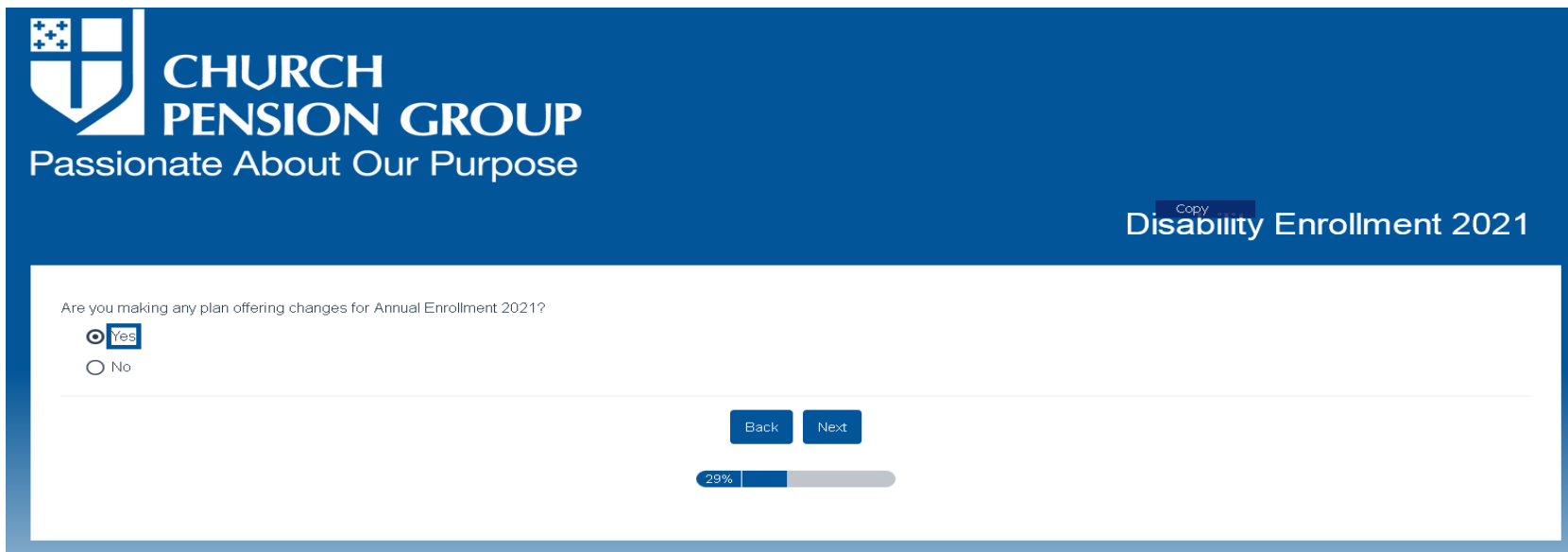
[Next](#)

43%

This screenshot shows a survey form for Church Pension Group. The header includes the logo and the text 'CHURCH PENSION GROUP Passionate About Our Purpose'. The main title is 'Disability Enrollment 2021'. The question is 'Do you currently offer disability coverage?'. There are two radio button options: 'Yes' (which is selected) and 'No'. Below the options is a blue 'Next' button. At the bottom, there is a progress bar showing 43% completion.

Step 3

Are you making any plan offering changes for Open Enrollment 2021? Select “Yes,” and click “Next”.



CHURCH PENSION GROUP
Passionate About Our Purpose

Disability Enrollment 2021

Are you making any plan offering changes for Annual Enrollment 2021?

Yes
 No

[Back](#) [Next](#)

29%

This screenshot shows a survey form for Church Pension Group. The header includes the logo and the text 'CHURCH PENSION GROUP Passionate About Our Purpose'. The main title is 'Disability Enrollment 2021'. The question is 'Are you making any plan offering changes for Annual Enrollment 2021?'. There are two radio button options: 'Yes' (which is selected) and 'No'. Below the options are two buttons: 'Back' and 'Next'. At the bottom, there is a progress bar showing 29% completion.

Step 4 – Short Term Disability (STD)

Are you electing to offer Short-Term Disability (STD) Insurance?

Choose “No, I decline coverage” if your institution will **not** offer STD coverage for 2021, and click “Next.”

Choose “Yes, I will make a selection from coverage options” if you are making a change to your STD coverage offering. If you currently offer STD coverage and are NOT making a change, please choose this option as well. Then select the coverage option that you currently offer from the list below this question.

Select your desired Coverage Option.

Select employer-paid or employee-paid coverage, and click “Next”.

Note: If you elect “Employer Paid”, please select if you are offering to Lay only or Lay and Clergy:

Are you electing to offer Short-Term Disability (STD) Insurance? *

Yes, I will make a selection from coverage options

No, I decline coverage

Please select whether the premium payments will be employer paid or employee paid. *

Employer Paid

Employee Paid

Select an STD insurance coverage option. *

26 Weeks at 60.00%

26 Weeks at 66.67%

13 Weeks at 60.00%

13 Weeks at 66.67%

Who will you offer STD insurance coverage to?

Lay employees only

Lay employees and Clergy

Click "Next" to make your Long-Term Disability Insurance selections.

[Back](#) [Next](#)

43%

Step 5 – Long Term Disability (LTD)

Are you electing to offer Long-Term Disability (LTD) Insurance?

Choose “No, I decline coverage” if your institution will **not** offer LTD coverage for 2021, and click “Next”.

Choose “Yes, I will make a selection from coverage options” if you are making a change to your LTD coverage offering. If you currently offer LTD coverage and are NOT making a change, please choose this option as well, and select the coverage option that you currently offer from the list below this question.

Select your desired coverage option, including whether the coverage is employer- or employee-paid.

Note: If you elect “Employer Paid”, please select if you are offering to Lay only or Lay and Clergy:

Are you electing to offer Long-Term Disability (LTD) Insurance? *

Yes, I will make a selection from coverage options

No, I decline coverage

Please select whether the premium payments will be employer paid or employee paid.

Employer Paid

Employee Paid

Select an employer paid LTD Insurance coverage option: *

180 Days at 40.00%

180 Days at 60.00%

180 Days at 66.67%

90 Days at 40.00%

90 Days at 60.00%

90 Days at 66.67%

Who will you offer LTD disability insurance coverage to?

Lay employees only

Lay employees and Clergy

[Back](#) [Next](#)

57%

Step 6

Enter your name, and the name of your organization. Select the appropriate description of your role at your organization. Read the User Consent Agreement section, and click "Submit".



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Copy
Disability Enrollment 2021

Please enter your name. *

For verification, please enter the organization for which you have made these coverage selections. *

Please select which of the following best characterizes your roll at your organization. *

- Benefits Administrator/Payroll Officer
- Rector/Priest-In-Charge/Senior Clergy
- Treasurer/Warden
- Other - please specify:

Step 7

You have completed the 2021 Open Enrollment Disability Survey. Please retain this screen as confirmation of your coverage option changes. Remember to notify all employees of your institution's coverage option changes.

Disability Enrollment 2021

Thank you. Your disability insurance coverage selections have been entered. This will serve as your confirmation statement.

The following information summarizes the Zurich STD Insurance and LTD Insurance coverage options you selected for your organization. Please print this page and keep it for your records.

Organization Name: Diocese Of California,Church of the Resurrection, Pleasant Hill
Client Number: 563-295-68

Name: Damon Tutein
Role: Benefits Administrator/Payroll Officer

Selection Date: 08/25/2020
Effective Date of Coverage: 01/01/2021

STD Insurance Coverage Selection: STD - 13 Weeks at 60.00% (Employer Paid), Lay employees and Clergy
LTD Insurance Coverage Selection: LTD - 90 Days at 60.00% Employer Paid, Lay employees and Clergy

100%



Coverage Option Selection Scenario Three

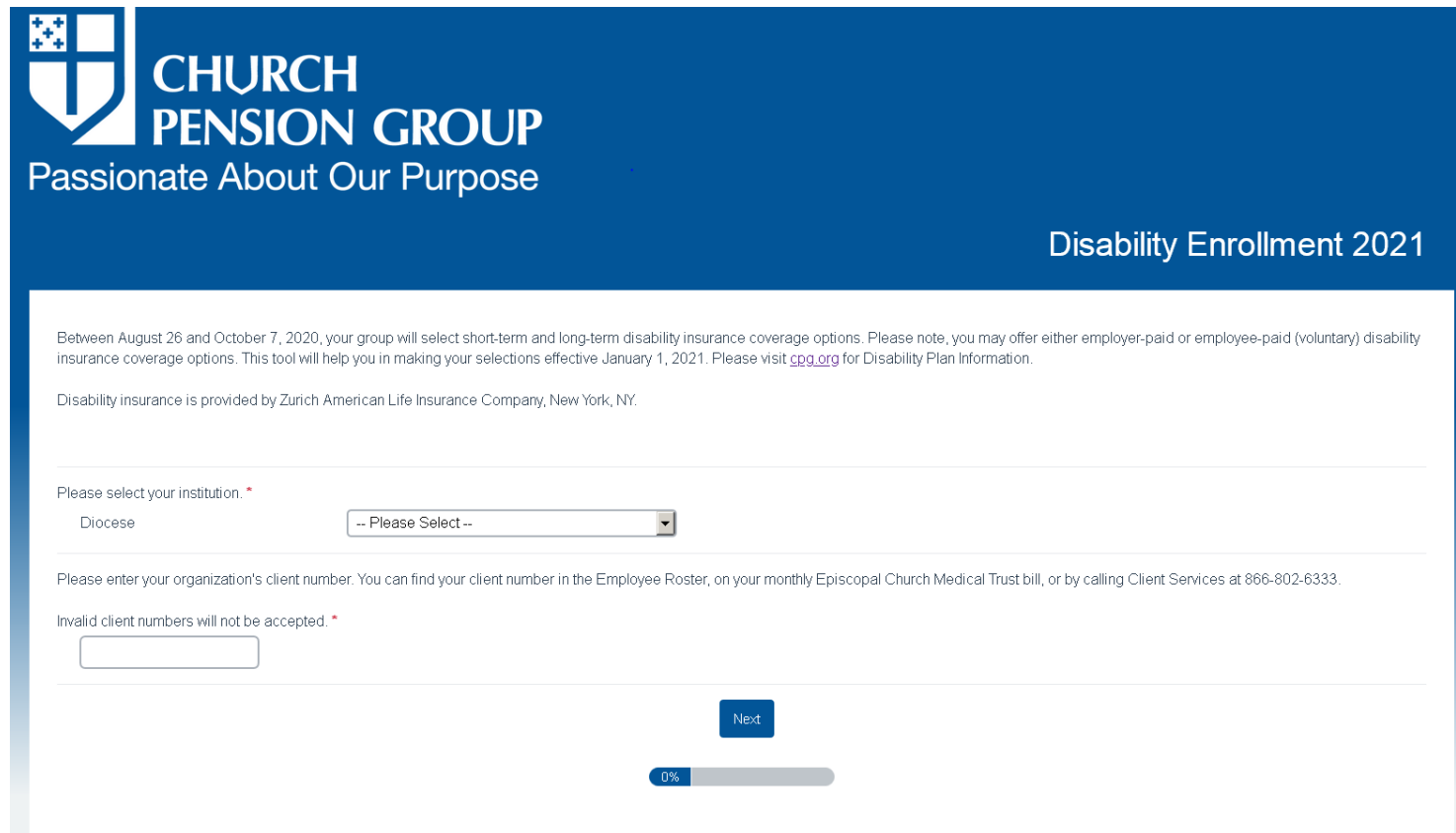
Employers who do not offer disability coverage, and are selecting coverage options for the first time for Open Enrollment 2021.

If you currently **Do Not** offer disability coverage, and intend to offer disability coverage for Plan Year 2021, follow the steps below:

Step 1

Select your Diocese, city, and the name of your institution. Enter your Client ID, and click “Next”.

Note: If you are not part of a Diocese, please select “None”.



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Disability Enrollment 2021

Between August 26 and October 7, 2020, your group will select short-term and long-term disability insurance coverage options. Please note, you may offer either employer-paid or employee-paid (voluntary) disability insurance coverage options. This tool will help you in making your selections effective January 1, 2021. Please visit cpg.org for Disability Plan Information.

Disability insurance is provided by Zurich American Life Insurance Company, New York, NY.

Please select your institution. *

Diocese

Please enter your organization's client number. You can find your client number in the Employee Roster, on your monthly Episcopal Church Medical Trust bill, or by calling Client Services at 866-802-6333.

Invalid client numbers will not be accepted. *

Next

0%

Step 2

Do you currently offer Disability Coverage? Select “No” and click “Next”.

Disability Enrollment 2021

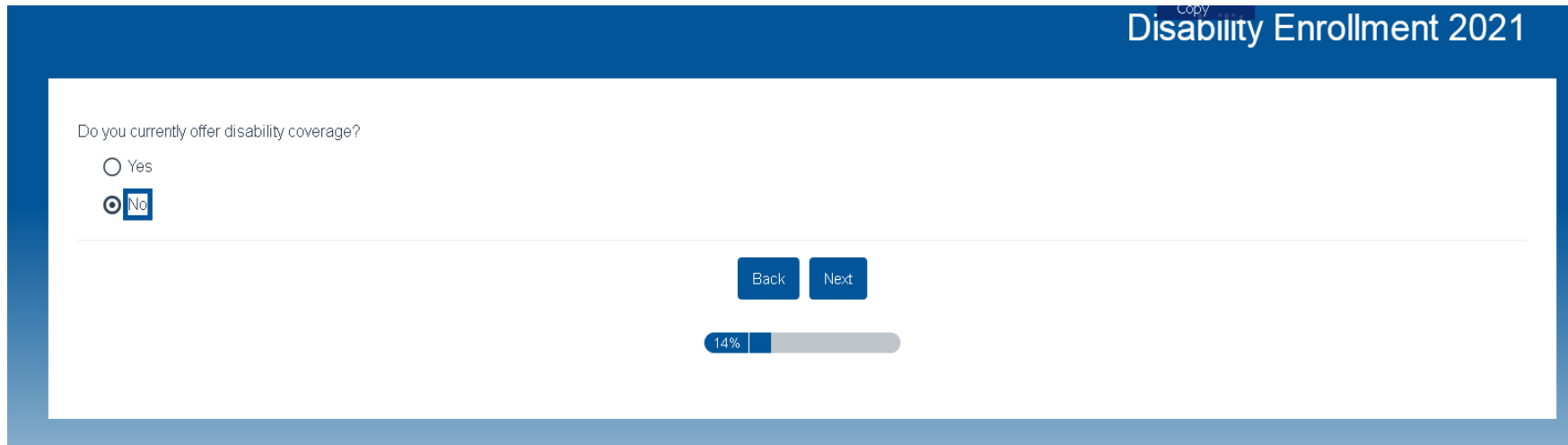
Do you currently offer disability coverage?

Yes

No

Back Next

14%



Step 3

Would you like to offer new short-term disability (STD) or long-term disability (LTD) coverage during Open Enrollment, effective January 1, 2021? Select “Yes,” and click “Next”.

Disability Enrollment 2021

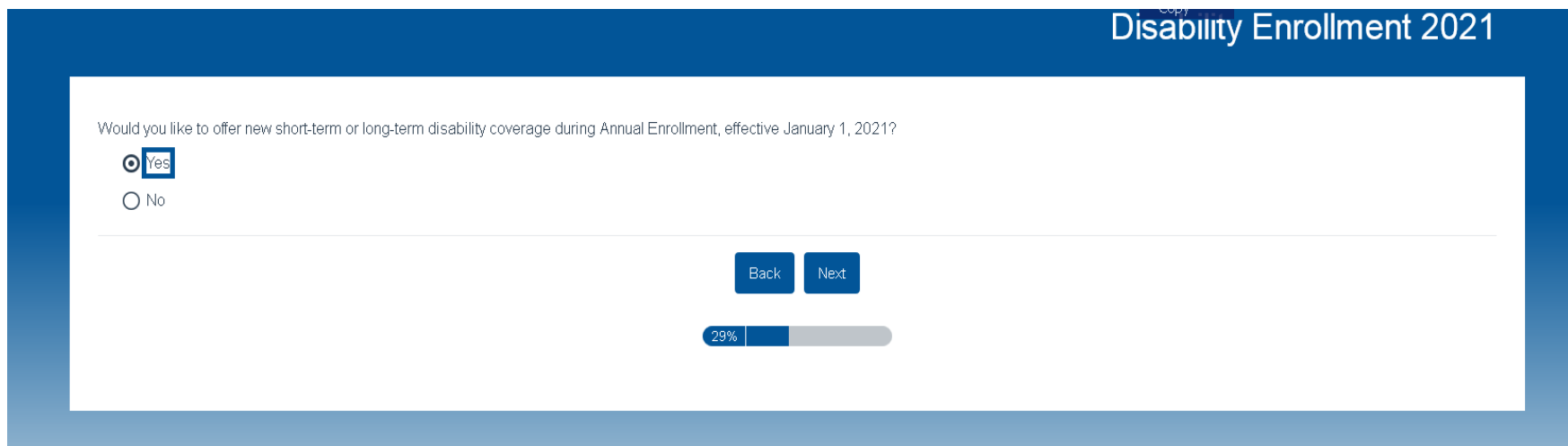
Would you like to offer new short-term or long-term disability coverage during Annual Enrollment, effective January 1, 2021?

Yes

No

Back Next

29%



Step 4 – Short Term Disability (STD)

Are you electing to offer Short-Term Disability (STD) Insurance? Select “Yes, I will make a selection from coverage options”.

Select your desired coverage option.

Select employer-paid or employee-paid coverage, and click “Next”.

Note: If you elect “Employer Paid”, please select if you are offering to Lay only or Lay and Clergy:

Are you electing to offer Short-Term Disability (STD) Insurance? *

Yes, I will make a selection from coverage options

No, I decline coverage

Please select whether the premium payments will be employer paid or employee paid. *

Employer Paid

Employee Paid

Select an STD insurance coverage option: *

26 Weeks at 60.00%

26 Weeks at 66.67%

13 Weeks at 60.00%

13 Weeks at 66.67%

Who will you offer STD insurance coverage to?

Lay employees only

Lay employees and Clergy

Click "Next" to make your Long-Term Disability Insurance selections.

[Back](#) [Next](#)

43%

Step 5 – Long Term Disability

Are you electing to offer Long-Term Disability (LTD) Insurance? Select “Yes, I will make a selection from coverage options.”

Select your desired coverage option, including whether the coverage is employer- or employee-paid.

Note: If you elect “Employer Paid”, please select if you are offering to Lay only or Lay and Clergy:

Are you electing to offer Long-Term Disability (LTD) Insurance? *

Yes, I will make a selection from coverage options

No, I decline coverage

Please select whether the premium payments will be employer paid or employee paid.

Employer Paid

Employee Paid

Select an employer paid LTD Insurance coverage option: *

180 Days at 40.00%

180 Days at 60.00%

180 Days at 66.67%

90 Days at 40.00%

90 Days at 60.00%

90 Days at 66.67%

Who will you offer LTD disability insurance coverage to?

Lay employees only

Lay employees and Clergy

[Back](#) [Next](#)

57%

Step 6

Enter your name, and the name of your organization. Select the appropriate description of your role at your organization. Read the User Consent Agreement section, and click "Submit".



Copy
Disability Enrollment 2021

Please enter your name. *

For verification, please enter the organization for which you have made these coverage selections. *

Please select which of the following best characterizes your roll at your organization. *

- Benefits Administrator/Payroll Officer
- Rector/Priest-In-Charge/Senior Clergy
- Treasurer/Warden
- Other - please specify:

Step 7

You have completed the 2021 Open Enrollment Disability Survey. Please retain this screen as confirmation of your coverage option choices.

Disability Enrollment 2021

Thank you. Your disability insurance coverage selections have been entered. This will serve as your confirmation statement.

The following information summarizes the Zurich STD Insurance and LTD Insurance coverage options you selected for your organization. Please print this page and keep it for your records.

Organization Name: Diocese Of California,Church of the Resurrection, Pleasant Hill
Client Number: 563-295-68

Name: Damon Tutein
Role: Benefits Administrator/Payroll Officer

Selection Date: 08/25/2020
Effective Date of Coverage: 01/01/2021

STD Insurance Coverage Selection: STD - 13 Weeks at 60.00% (Employer Paid), Lay employees and Clergy
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100%

