The Episcopal Diocese of
Central New York

Dear New Clergy, Wardens, and Treasurers,

Once a new clergy person has been "on the job" for a couple of months, please do a thorough check of pay and benefits. This can be confusing and it's easy to make mistakes. Please use this checklist to follow up to be sure you and your parish are on the right track. Errors are much easier to fix when they're caught soon.

Faithfully,

The Rev. Canon Carrie Schofield-Broadbent
Canon for Transition and Church Development
carriesb@cnyepiscopal.org | (315) 474-6596 x129

Payments and Benefits Checklist

☐	Clergy:	If you earn a Housing Equity Allowance, did you set up an account? Is the right amount of money going into that account?
☐	Clergy:	If you have a health insurance policy with a Health Savings Account, did you set up that account? Is the right amount of money in that account now, or is there a plan for payments?
☐	Clergy:	Look at the taxes being withheld from your paycheck. Are they correct? *(no withholdings for Social Security and Medicare. Federal and State withholdings only if you requested it)*
☐	Treasurer:	Did you notify Church Pension Fund of the new hire? *(Each time compensation changes, CPG must be notified either with their paper form or through the Employee Roster)*
☐	Treasurer:	If the cleric has elected a contribution to a retirement account (RSVP), are those payments being made regularly?
☐	Treasurer:	Are funds being allocated for both clergy continuing education and sabbatical accrual in the annual church budget?
☐	Treasurer:	Are health care/dental premiums being paid? *(If applicable, is money being contributed directly to the cleric's Health Savings Account?)*
☐	Treasurer:	Are payments being made **monthly** to the Church Pension Fund? *(You should receive a monthly bill from CPF; if not, please make sure the clergy is enrolled.)*
☐	Treasurer:	Are contributions being made for the equity allowance, if applicable?