



Change of Status Form Instructions

Purpose of the Change of Status form: This informs the Human Resources office of a change in status and/or salary for an employee enrolled in the Free Methodist Church of North America Pension Plans.

When to Use: This form should be filled out any time a compensation and/or other change occurs that affects the status of the employee's participation in the plan. Changes that should be reported include compensation changes (salary and/or housing), first-time appointments, changes in marital status, transfers to other churches and/or conferences, leaves of absence, terminations and retirements. Sending in the completed forms as soon as possible helps Human Resources keep conference billing information up to date and avoids time-consuming adjustments to later billing statements.

Section 1 - Employee Information

Fill out this section with the employee's name, date of birth, Social Security number, and spouse information (if applicable). This information is important because the Human Resources office uses the date of birth and Social Security number to confirm the employee's identity.

Section 2 - Current Conference and Church Information

Always fill out this section, including the name of the current or former conference served. If conference service does not apply, please enter the name of the employer under "Current Conference Name." If the employee is or was employed by a church, please complete the church address section and fill in the church I.D. number (the three-digit identifier found in the yearbook's church listings). If this is a transfer being reported after the fact, this "current" section is where information on the former church should be entered.

Section 3 - Change Effective Date

Fill out this section with the exact effective date of the change. This is an extremely important piece of information - the Human Resources office cannot process changes of status without the effective date.

Section 4 - New Church Information

Fill out this section if the change is a first-time appointment or a notice of a transfer to a new church or conference. Please complete the church address section and the church I.D. number (the three-digit identifier found in the yearbook's church listings). If the employee will not be appointed to a church, his or her personal address should be entered on the church address line in this section.

Section 5 - Specification of Change and Compensation Information

Mark the appropriate box to indicate the nature of the status change. If marking the box does not adequately explain the change, write comments in Section 6 to clarify the situation. In the box, please provide complete compensation information, even if compensation has not changed (this is very helpful for confirmation purposes). For assistance in determining how to correctly report compensation, see the Pastor's Compensation Reporting webpage, http://hr.freemethodistchurch.org/pension/defined_benefit_plan/compensation_reporting.php. Exact compensation amounts should be specified as this is the documentation used in determining pension benefits; be sure to specify whether weekly, monthly, or annually for all compensation figures.

Section 6 - Other Information

Note any other information about the change that would help the Human Resources office better understand the nature of the situation.

Section 7 – Signatures

Be sure to sign and date the form on the appropriate line (use "pastor" if the pastor is filing the form personally, or "conference official" if the form is being submitted by the conference office).

Section 8 - Submitting the Form

Make sure that both the Human Resources office and the conference office receive copies of this form. It is important that it be received within 30 days of the change. Please mail or fax the form to the HR office.

Prompt filing of your Change of Status Forms saves time and resources! When the Human Resources office receives late notices, all of the quarterly statements issued since the change effective date must be reviewed and adjustments made to the current statement so that the difference can either be credited or charged to the employing organization.