

Great Spirit Systems

2008 Year End / 2009 New Year Benefits Information

For MissionBase Customers

December 3, 2008

Dear Friends:

Greetings! This document is my annual letter to benefits customers with information that is vital to closing 2008 and opening 2009. Please email Lori Smith (lori@greatspirit.com) or me (bull@greatspirit.com) if you have any questions about the instructions and procedures below, or if anything does not appear to work correctly.

Before getting to the basic content of this communication, I want to thank all of you for your patience and support of Great Spirit Systems. We are starting to focus our efforts on "Falcon", the next evolution of our current MissionBase product. The next several years will see some exciting new features in Falcon that should be to the benefit of all.

The sections of this letter consist of:

- A. [A cautionary statement about starting the new year.](#)
- B. [Information and procedures about bringing benefits balances forward from 2008 to 2009.](#)
- C. [Special Information for CRSP/PPP billing conferences.](#)
- D. [Special information for Medical insurance billing conferences.](#)
- E. [Override lists.](#)
- F. [Clergy compensation data upload to GBOPHB.](#)
- G. [Database Ready for 2009 Transactions.](#)
- H. [Important items to remember.](#)
- I. [A listing of GSS customers who are using some or all of the benefits billing modules.](#)
- J. [Brief statement about the future and how you can contribute to the development of Falcon.](#)

Cautionary Word:

Please do not start the January 2009 billing process until you have completed the processes described in the next section. This is an important set of procedures designed to be run only once each year.

Benefits Balance Forwards From 2008 to 2009:

A critical step in opening the new year is to bring balances forward into the new year. ***THERE ARE FOUR IMPORTANT ITEMS TO REMEMBER WHEN BRINGING FORWARD BALANCES:***

1. Only run the balance forward procedures once for each benefit type. Running them more than once will cause database integrity issues and should only be done if directed by GSS.
2. You should run the balance forwards **ON or AFTER** January 1, 2009.
3. You should only run the balance forwards **AFTER** you are certain that all December payments and adjustments have been posted. Failure to do so will result in incorrect balance forwards.
4. If you have run the balance forwards and then decide that you need to enter additional December transactions, you should enter **TWO** complete sets of transactions. One would be dated in 2008. Then you would enter an identical set of transactions dated in 2009. This approach is the preferred accounting method. Not following this process will result in the balance forwards being incorrect for some entities. In extreme cases where this is not feasible, please ask us to manually remove the balance forward batches so you can make the necessary transaction entries in 2008 only, and then you will run the balance forwards again.

[Return to Top](#)

The balance forward procedures are found as follows:

1. Click the "Benefits" button on the list bar at the left of the screen.
2. Click the "Tools" eagle button. You may need to scroll the list of eagle buttons to see the "Tools" eagle button.
3. After clicking the "Tools" eagle button, a number of forms will load on the right. Look for the "Benefits Balance Forward" form.
4. On the form, make sure the "Prior Year" box shows "2008" and the "Current Year" box shows "2009." If not, please enter the correct years. If "Current Year" does not show 2009, you are attempting to run this procedure prior to January 1.
5. Select the appropriate benefit type from the tree on the left.
6. If you want to preview the balance forwards before they actually post, click the "Preview Balance Forwards" button. This button will produce a report that will show you what the balance forwards will be for the new year. You can use the report to make any adjustments in case you notice some problems in the balance forwards. Then you can run the report again. NOTE: This report is also available in the reports tree. The preview step may be run as many time as needed.
7. Click the "Bring Balance Forward Into The New Year" button which will process the balance forwards for the specific benefit type selected in the tree. This step is to be run **ONLY ONCE!**
8. The progress will be reported in the progress bar and information label just above the progress bar.

All credit and debit balances will be carried forward, except for Missouri which has a customized process related to specific retiree categories where certain debit balances do not carry forward.

Note: The balance forward procedures may take some time to execute if your conference has a large number of transactions. Please be patient as the process must retrieve, verify, add together, and validate all 2008 invoices, payments, and adjustments for every participant and billing entity in your database to calculate the balance forward amounts. The more transactions in your system, the longer the balance forward process will take.

Special Information For CRSP/ CPP Billing Conferences:

CRSP/ CPP billing customers should verify their 2009 CRSP and CPP settings are entered. If you haven't entered the CRSP/ CPP settings, I encourage you to do so now. You may enter these settings at any time during the year when you have the information, for any year into the future. If you have entered them, you may want to verify them at your convenience. Note that making any changes to these factors, will change the figures on both the CRSP/ CPP participation form and compensation forms. That is especially important for you to consider if your districts use MissionBase as it will change what they see displayed for CRSP and/or CPP on the compensation form.

To enter the 2009 CRSP/ CPP factors:

1. Click the "Benefits" button on the list bar at the left of the screen.
2. Click the "CRSP/ CPP Settings" eagle button.
3. Click the "Add New Year" button at the bottom of the form.
4. To copy the 2008 settings into 2009, click the "Copy Most Recent Year CRSP Settings" button and/or the "Copy Most Recent Year CPP Settings."
5. At the top of the form, enter:
 - a. Start date, which should be 01/01/2009.
 - b. Stop date, which should be 12/31/2009.
 - c. The 2009 DAC, which is \$58,226.
 - d. The 2009 CAC specific to your conference.
6. Click the "Save" button.

[Return to Top](#)

To edit the 2009 CRSP/ CPP factors:

1. Click the "Benefits" button on the list bar at the left of the screen.
2. Click the "CRSP/ CPP Settings" eagle button.
3. Make sure "0/1/01/2009" is highlighted.
4. Examine the 2009 data and make any changes as needed.
5. If you make changes, click the "Save" button.

Special Information For Medical Insurance Billing Conferences:

You will need to enter your 2009 premium amounts **IF** your premium categories have not changed from 2008 to 2009. You may enter the 2009 premium amounts at any time **AFTER** you have printed the final statements for your December billing. **SPECIAL NOTES:**

- The **Missouri and South Georgia** conferences should **NOT** complete this step as their 2009 premiums need to be set up by me since they are highly customized.
- The **Kansas East, Rocky Mountain, and Southwest Texas** conferences should **NOT** complete this step as their 2009 premiums need to be set up by me because they are completely changing their premium structures.

If any other conference other than those listed above is changing premium structure, please contact me immediately.

To enter the 2009 premiums:

1. Click the benefits button on the list bar at the left of the screen.
2. Click the "MFL Settings" button.
3. On the right look for the premiums setting form. It will probably be the second form in the list.
4. Change the premiums in the grid as needed.
5. Click the "Save" button on the form. The premiums will be changed for all participants in your database with the exception of overridden premiums and other special cases. After you click the "Save" button and the premium updating is completed, a report will be printed providing you with a list of those participants whose premiums were not changed, and why. This report can then be used to manually change the premiums for those persons on the list.

Override Lists for Premiums and Billings:

Each conference has some overrides for premiums and/or billing amounts. These overrides are used in instances where your regular billing formulas or other special reasons don't apply to unique circumstances.

Note that when a person has a 2008 override set, the override billing amount will also be used in 2009 unless it is changed. In other words, since compensation will likely change on January 1 affecting CRSP and CPP, and since insurance premiums change, you may want to look at the list of overrides to see what changes need to be made before running your January billing cycle.

To get a list of overrides, you can go to either any of the benefits reports trees. Look for the "Override List" report in the tree. If the tree has folders, it will be found in the "Other" folder. Note that UMPIP does not use the override concept at this time, so there is no override report in the UMPIP report tree.

[Return to Top](#)

Clergy Compensation Upload to GBOPHB:

Usually this is one of the two times during the year when clergy compensation changes need to be reported to GBOPHB. The program to prepare the file for uploading may be found in one of two places in your Report Tree, depending on which MissionBase modules you have installed. For

some, it will be found under Clergy Reports. For others it will be found under "Pension Reports". In both cases, the report name is "Clergy Compensation Reporting Batch File".

Here's how it works.

1. Select the report in the Reports Tree and click the "Print/Preview Report" button.
2. Select January 1, 2009 as the date, and click "Continue."
3. The report will process all compensation records that have a January 1, 2009 start date, where the pastor's appointment start date is prior to January 1, 2009 (see note below). The CashSal, Pars, HsngAllow, and HsngExcl fields should be calculated according to the same rules that are used on the Compensation form within MissionBase.
4. When processing is completed, you will see a grid display on the screen. The grid will display all of the compensation records that will be included in the batch file.
5. YOU MAY DELETE any compensation records from the grid at this time. Reasons to delete may include persons who receive compensation but are excluded from making CRSP/ CPP contributions; and any errors that you spot but do not have the correct information at the current time. (You will undoubtedly have to enter a few "late arrivals" manually through the PARK interface.)
6. After completing any deletions, you may click the "Export to ASCII" button. This will create a file in the format that is acceptable to GBOPHB's PARK system. Please make a note of the location of this file on your hard drive. You will need to enter this location later when you are logged into PARK.
7. You may also want to click the "Print Report" button to get a paper listing of the file. Some folks find it handy to run this report ahead of time and print it out, as a worksheet/checklist to be sure that they get all the compensation records entered prior to uploading.
8. Log into GBOPHB's PARK system, look for the Compensation Upload function, and upload the file. We at GSS do not have regular access to PARK, so if you have problems with this step, please contact GBOPHB's help desk.
9. The PARK system will let you know if you have any errors according to its filters. If so, edit the information in MissionBase and run this process again.

NOTE: GBOPHB's system will only accept uploaded compensation change records for clergy whose appointment is unchanged. Therefore if any of your clergy are changing appointments on January 1, you will need to enter that information manually through PARK.

Database Ready for 2009 Transactions:

Your database has already been prepared to receive 2009 transactions, so you can begin your January billing cycle when you are ready.

[Return to Top](#)

Important Items To Remember:

Here are some other important items for you to consider:

- ✓ **All Customers:** If you need to enter any 2008 transactions **AFTER** January 1, 2009, make sure you use a 2008 date for those transactions! For example, if you have a payment batch from December, 2008 to enter on January 3, 2009, make sure you use 12/31/2008 or some other 2008 date. If you fail to do this, the transactions will end up in 2009 business, throwing off both 2008 and 2009, requiring intervention by GSS to move the batch to the proper year.
- ✓ **CRSP/ CPP Billing Customers:** Make sure that you override both CRSP and CPP for district superintendents and clergy conference staff on the CRSP/ CPP form **AFTER** you have entered their 2009 compensation. Failure to override for these cases will mean that the January, 2009 billing will NOT automatically include them, or it will bill these persons at the

2008 rates. To do this, on the CRSP/ CPP Participation form, first set the "For Billing Date:" to the 1/1/2009. Then set the CRSP amounts and CPP amounts to bill with the new rates.

- ✓ **Flexible Benefits Customers:** Be sure to set the stop date for flexible benefits if you haven't already. Flexible benefits, by law, are only for one calendar year and must be elected each year by the participant. To stop the billing in 2008, you need to set stop dates for all participants. To set stop dates for all participants, you can use the tool for that purpose under "MFL Settings."
- ✓ **Flexible Benefits Customers:** After stop dates are set for all, then you will need to enter the flexible benefits elections for each participant and:
 - Change the start date to 2009. **NOTE:** Do **NOT** change the start date until **AFTER** your December statements have been run and printed.
 - Delete the stop date, or enter a 2009 stop date.
 - Enter the proper election amounts for each benefit as needed.
- ✓ **All Customers:** Remember to connect with our web site www.greatspirit.com periodically to check for new items, support, etc. We periodically update the web site with new items, and are steadily adding support pages to the knowledge base to help answer your "how do I" questions or solve problems.

GSS Benefits Customers:

For your information, here is the list of our current benefits billing customers:

Arkansas – Medical Insurance
East Ohio – CRSP/ CPP, medical Insurance, flexible benefits
Kansas East – CRSP/ CPP, medical insurance, flexible benefits, vision insurance, dental insurance.
Kansas West – CRSP/ CPP, medical insurance, flexible benefits
Louisiana – CRSP/ CPP, medical insurance, flexible benefits
Minnesota – CRSP/ CPP, medical insurance
Missouri – CRSP/ CPP, medical insurance, flexible benefits
North Central New York – CRSP/ CPP
Nebraska – CRSP/ CPP, medical insurance, flexible benefits
New Mexico – CRSP/ CPP, medical insurance, flexible benefits, life insurance (BPP)
Northwest Texas – CRSP/ CPP, medical insurance, flexible benefits
Puerto Rico – CRSP/ CPP
Rocky Mountain -- CRSP/ CPP, medical insurance, flexible benefits
South Georgia – CRSP/ CPP, medical insurance, flexible benefits
Southwest Texas – CRSP/ CPP, UMPIP, medical insurance, flexible benefits, life insurance
West Ohio – CRSP/ CPP, life insurance (BPP)
Wyoming (of NY and PA) – CRSP/ CPP, medical insurance, flexible benefits

[Return to Top](#)

Futuring ...

As you have undoubtedly read in the **Eagle Eye** and in some of our other communications, we are moving forward on creating the next evolution of MissionBase. The project, which is code named "Falcon", is in its early stages, but is also beginning to take shape. Our plan is that sometime in 2009, we will be able to release parts of Falcon for you to use. Over a couple of years, we expect to completely replace MissionBase with Falcon under a new name yet to be determined.

The benefits billing module will get a complete facelift in Falcon. In fact, most of it will change with an eye to being more "open" in design. An "open" design will allow for new benefits types, premium structure changes, billing entity control, etc. without GSS having to intervene and/or write highly specific customized code for each customer. At least that is my hope.

Great Spirit Systems
2008 Year End / 2009 New Year Benefits Information
Page 6 of 6

In order to get your ideas, feedback, suggestions, and comments, we are starting a blog. This will be a place for you to contribute to the design of Falcon and help us to make a product more suited to your needs. The blog is located at [on the GSS website \(http://www.greatspirit.com/blog/\)](http://www.greatspirit.com/blog/). The blog will be launched in mid-December, and you will see comments from the GSS staff there. You will then be able to respond to those comments, or even initiate some idea on your own to receive comment from others. We hope that you will take advantage of the blog regularly to see what others are saying about Falcon, to give your valuable "2 cents worth", and to shape the future of Falcon.

Thank You!

Thank you for your continued confidence in Great Spirit Systems to provide your benefits billing system needs. Also, please remember that GSS offers several other modules for MissionBase in addition to benefits billing when your conference is looking for software for other functions. Some of those include Safe Sanctuaries, Event Registration (such as camps), Cabinet, church Statistics (Tables I, II, and III), and others. Our web site www.greatspirit.com or each edition of the ***Eagle Eye*** lists our current modules.

Please let Lori or me know if you have any questions on any the above.

I hope your seasons of Advent and Christmas are blessed and that your New Year will be spiritually prosperous.

Bill Johnson
VP of Software Development
Great Spirit Systems
< bull@greatspirit.com >
< www.greatspirit.com >

[Return to Top](#)