New Hire Checklist - LAY EMPLOYEES/ PARISH EMPLOYEES

SECTION

Complete each section as instructed and check mark when complete. INSTRUCTIONS Place checkmark in box when complete **Completed Safe and Sacred** Must complete before hiring- Can not offer position until completed! W-4 Supply to Employee Employee must fill out 3 M- W4 Supply to Employee Employee must fill out 4 I-9 Filled out Give Instruction sheets to Employee Employee must fill out page 1/Employer Page 2 Direct Deposit form Employee must fill out 6 **Emergency Contact Info** Employee must fill out Policy & Procedure Handbook Give Handbook to Employee Employee must Sign Acknowledgment Sheet **7**A Payroll Status Change Form Complete and place in Employee's Personnel File 8 Does this employee work (30 hrs per week or More) Complete Section 8B then skip to Section 11 Skip to Section 9B 8B Blue Shield of California (Medical) Give Open Enrollment Benefit Guide Cafereria Plan BAS (F.S.A) (PPO Medical Plan) Cafereria Plan Health Equity (H.S.A.) HSA Medical Plan Make FSA and HSA elections in Reta AFLAC Give Info Sheets to Employee Vision (VSP- Reta) Give Open Enrollment Benefit Guide Dental (Delta Dental) Give Open Enrollment Benefit Guide Life Insurance (Lincoln) Give Open Enrollment Benefit Guide Keep copy for your file send original to Diocese Employee Must Fill out Christian Brothers Enrollment Instruct employee to fill out this form Send Christian Brother Forms to Diocese of GFB Keep copy for your file send original to Diocese **Employee must complete Life Insurance- Lincoln** Send copy of beneficiary form to Diocese Keep copy for your file send original to Diocese Does this employee work (1-29 hours per week) Complete Section 9B then skip to Section 10 Complete section 11 through 14 9B Offered Employee AFLAC Give info sheet to Employee 10 Complete section 11 through 14 Employees working only (1-19 hours per week) or Seasonal 10B Offered Employee AFLAC Give Info Sheet to Employee 11 MUST COMPLETE SECTION 11-16 on all New Hires Enter Employee information into Paylocity www.paylocity.com MUST COMPLETE SECTION 11-16 on all New Hires 12 Enter Employee Information into BAS/RETA MyEnroll - www.RETATrust.org MUST COMPLETE SECTION 11-16 on all New Hires 13 Enter Employee Information in Christian Brothers- cbservices.org/index.php 14 **Employee Name** Fill out all of Section 14 Address: City, State, Zip Parish/School Name: Date of Hire: 15 Signature of Parish/School Representative 16 A Copy of this form MUST be sent to HR @ the Diocese of GFB on all new EE Fax: 406-727-5976 Fmail: HR@diocesegfb.org Mail: **Diocese of Great Falls-Billings**

C/O HR Department PO Box 1399 Great Falls, MT 59403