

**New Hire Checklist - LAY EMPLOYEES/ PARISH EMPLOYEES**

**Complete each section as instructed and check mark when complete.**

## SECTIONS

## INSTRUCTIONS

<b>1</b>	<b>Completed Safe and Sacred</b>	
<b>2</b>	W-4 Supply to Employee	
<b>3</b>	M- W4 Supply to Employee	
<b>4</b>	I-9 Filled out	Give Instruction sheets to Employee
<b>5</b>	Direct Deposit form	
<b>6</b>	Emergency Contact Info	
<b>7</b>	Policy & Procedure Handbook	Provide online Link to Employee
<b>7A</b>	Payroll Status Change Form	

8
---

**Does this employee work (30 hrs per week or More)**

8B
----

Elections for Group Insurance coverages made through RETA Trust- My Enroll 360 by BAS  
(See the Benefits Open Enrollment Guide on the Diocese website under RESOURCES Tab)

Medical coverage plan (Blue Shield of California)

- Flexible Spending Account (FSA) - PPO Medical Plan enabled plans
- Health Equity Account (HAS) – High Deductible Medical Plans only

Vision (VSP)

Dental (Delta Dental)

Life Insurance (Lincoln Financial)

- Employee complete and retain copy of beneficiary form
- HR retain beneficiary form in employee file and enter online in system

Retirement (Fidelity Investment managed by Christian Brothers) if eligible

- Employee must complete contribution amount information to HR
- HR enroll new employee in 403(b) plan through Christian Brother
- Retain any forms in employee file.

[illegible]

9	Does this employee work (1-29 hours per week) or seasonal
---	---

Yes ☐ *Complete Section 9 then complete section 10 through 14*

10	Enter Employee information into Paylocity <a href="http://www.paylocity.com">www.paylocity.com</a>
11	Enter Employee Information into BAS/RETA MyEnroll - <a href="http://www.RETATrust.org">www.RETATrust.org</a>
12	Enter Employee Information in Christian Brothers- <a href="http://cbservices.org/index.php">cbservices.org/index.php</a>
13	<p>Employee Name _____</p> <p>Address: _____</p> <p>City, State, Zip _____</p> <p>Parish/School Name: _____</p> <p>Date of Hire: _____</p>

	<i>MUST COMPLETE SECTION 10-14 on all New Hires</i>
	<i>MUST COMPLETE SECTION 10-14 on all New Hires</i>
	<i>MUST COMPLETE SECTION 10-14 on all New Hires</i>
	<i>Fill out all of Section 13 (required)</i>

<b>14</b>	Signature of Parish/School Representative: _____	Date: _____
-----------	--	-------------

**15** Original of this form **MUST** be retained in the employee's file and retained for the duration of the IRS retention schedule for employee records