

2023 NEW HIRE PAPERWORK CHECKLIST

KEEP ORIGINALS FOR EMPLOYEE PERSONNEL FILE ON SITE – fax forms to Diocese: 415-673-4863

DIOCESAN PAYROLL – all forms available online: www.diocal.org/pba

| LAY EMPLOYEES | CLERGY EMPLOYEES |
|--|---|
| <ol style="list-style-type: none"> 1. Employee Data & Benefit Eligibility Form 2. Payroll Authorization to set hourly rate or salary 3. INS Employment Eligibility Verification Form I-9 – Required prior to employee starting work. (keep clear, legible copies of your eligibility verification documents in your on-site personnel file) 4. Direct Deposit & Paperless Payroll Enrollment Form (If possible, attach a blank voided check or call bank to obtain routing & account numbers. Do not use information from a deposit slip) 5. Defined Contribution Retirement Plan Payroll Deduction Authorization (required if working at least 20hr/week) 6. Health Insurance Reimbursement by Pre-Tax Payroll Deduction Authorization (if employee enrolled in a medical plan that exceeds the employer policy and wants to reimburse through payroll deductions on a pre-tax basis) 7. Health Care or Dependent Care Flexible Spending Account (optional if eligible & elected by employee) <p>No tax documents are needed for lay hires. Employee will receive an invitation to set-up their Fed & State taxes through PaychexFlex.</p> | <ol style="list-style-type: none"> 1. Employee Data & Benefit Eligibility Form 2. Payroll Authorization to set hourly rate or allocate stipend & housing allowance 3. Clergy Tax Withholding Request 4. INS Employment Eligibility Verification Form I-9 – Required prior to employee starting work. (keep clear, legible copies of your eligibility verification documents in your on-site personnel file) 5. Direct Deposit & Paperless Payroll Enrollment Form (optional. If possible, attach a blank voided check or call bank to obtain routing & account numbers. Do not use a deposit slip) 8. Health Insurance Reimbursement by Pre-Tax Payroll Deduction Authorization (if employee enrolled in a medical plan that exceeds the employer policy and wants to reimburse through payroll deductions on a pre-tax basis) 6. Health Care or Dependent Care Flexible Spending Account (if eligible & elected by employee) 7. Clergy RSVP Pre-Tax Payroll Deduction Authorization for RSVP (optional if enrolled w/ CPG) |

Benefits Enrollment Paperwork (clergy or lay) available online:

www.diocal.org/employeebenefits

Employee working less than 20hr/week:

- No additional paperwork needed.

Employee working at least 20 but less than 30hr/week is “part-time benefits eligible”:

- Employee Data & Benefits Eligibility Form
- Medical / Dental Enrollment or Change Form (if employee opts into either plan)
- Health Insurance Premium Reimbursement by Pre-Tax Payroll Deduction Authorization (if any portion of premiums are the responsibility of the employee per annual policy adopted by vestry/bc/board)

Employee working at least 30 hr/week is “full-time benefits eligible”:

- Employee Data & Benefits Eligibility Form
- Medical / Dental Enrollment or Change Form OR the appropriate waiver
- Health Insurance Premium Reimbursement by Pre-Tax Payroll Deduction Authorization (if any portion of premiums are the responsibility of the employee per annual policy adopted by vestry/bc/board)

Please have all forms completed and signed by both the employee and the authorized official of the church / school / institution before sending to the Payroll & Benefits Office.

Submit completed forms by email to: sarahc@diocal.org

~Keep originals onsite in secure personnel file~