

2024 NEW HIRE PAPERWORK CHECKLIST
KEEP ORIGINALS FOR EMPLOYEE PERSONNEL FILE ON SITE

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

LAY EMPLOYEES	CLERGY EMPLOYEES
<p>Documents 1-4 required of all new hires regardless of schedule. Documents 5-6 required only if new hire meets criteria, see parenthetical notes for each</p> <ol style="list-style-type: none"> Employee Data & Benefit Eligibility Form Payroll Authorization to set hourly rate or salary. 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) 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) Defined Contribution Retirement Plan Payroll Deduction Authorization (required if working at least 20hr/week) Health Insurance Reimbursement by Pre-Tax Payroll Deduction Authorization (required if employee enrolled in a medical or dental plan that exceeds the employer policy and wants to reimburse through payroll deductions on a pre-tax basis) Health Care or Dependent Care Flexible Spending Account (required if eligible & FSA benefit is 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 their PaychexFlex account (www.paychexflex.com)</p>	<p>Documents 1-5 required of all new hires regardless of schedule. Documents 6-7 required only if new hire meets criteria, see parenthetical notes for each</p> <ol style="list-style-type: none"> Employee Data & Benefit Eligibility Form Payroll Authorization to set compensation for either an hourly rate or to allocate stipend & housing allowance Clergy Tax Withholding Request 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) Direct Deposit & Paperless Payroll Enrollment Form (If possible, attach a blank voided check or call bank to obtain routing & account numbers. Do not use a deposit slip) Health Insurance Reimbursement by Pre-Tax Payroll Deduction Authorization (required if employee enrolled in a medical or dental plan that exceeds the employer policy and wants to reimburse through payroll deductions on a pre-tax basis) Health Care or Dependent Care Flexible Spending Account (required if eligible & FSA benefit is elected by employee) Clergy RSVP Pre-Tax Payroll Deduction Authorization for RSVP (required if cleric is enrolled in an eligible plan)

Benefits Enrollment Paperwork (clergy or lay) available online: www.diocal.org/employeebenefits

Employee working less than 20hr/week (not eligible for benefits): No additional paperwork needed.

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

- Employee Data & Benefits Eligibility Form
- Medical / Dental Enrollment or Change Form OR the appropriate waiver of coverage
- Health Insurance 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 as PDF by email to: sarahc@diocal.org**

~Keep original documents onsite in secure personnel file~