

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

**DIOCESAN PAYROLL – all forms available online: [www.diocal.org/pba](http://www.diocal.org/pba)**

LAY EMPLOYEES	CLERGY EMPLOYEES
<p><b>Documents 1-4 are required</b> of all new hires regardless of schedule. <b>Documents 5-6 required only if</b> new hire meets criteria, see parenthetical notes for each</p> <ol style="list-style-type: none"> <li>Employee Data &amp; Benefit Eligibility Form</li> <li>Payroll Authorization to set hourly rate or salary.</li> <li>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)</li> <li>Direct Deposit &amp; Paperless Payroll Enrollment Form (If possible, attach a blank voided check or call bank to obtain routing &amp; account numbers. Do not use information from a deposit slip)</li> <li>Defined Contribution Retirement Plan Payroll Deduction Authorization (<b>required if</b> working at least 20hr/week)</li> <li>Health Insurance Reimbursement by Pre-Tax Payroll Deduction Authorization (<b>required if</b> 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)</li> <li>Health Care or Dependent Care Flexible Spending Account (<b>required if</b> eligible &amp; FSA benefit is elected by employee)</li> </ol> <p>No tax documents are needed for lay hires. Employee will receive an invitation to set-up their Fed &amp; State taxes through their PaychexFlex account (<a href="http://www.paychexflex.com">www.paychexflex.com</a>)</p>	<p><b>Documents 1-5 are required</b> of all new hires regardless of schedule. <b>Documents 6-7 required only if</b> new hire meets criteria, see parenthetical notes for each</p> <ol style="list-style-type: none"> <li>Employee Data &amp; Benefit Eligibility Form</li> <li>Payroll Authorization to set compensation for either an hourly rate or to allocate stipend &amp; housing allowance</li> <li>Clergy Tax Withholding Request</li> <li>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)</li> <li>Direct Deposit &amp; Paperless Payroll Enrollment Form (If possible, attach a blank voided check or call bank to obtain routing &amp; account numbers. Do not use a deposit slip)</li> <li>Health Insurance Reimbursement by Pre-Tax Payroll Deduction Authorization (<b>required if</b> 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)</li> <li>Health Care or Dependent Care Flexible Spending Account (<b>required if</b> eligible &amp; FSA benefit is elected by employee)</li> <li>Clergy RSVP Pre-Tax Payroll Deduction Authorization for RSVP (<b>required if</b> cleric is enrolled in an eligible plan)</li> </ol>

**Benefits Enrollment Paperwork (clergy or lay) available online: [www.diocal.org/employeebenefits](http://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](mailto:sarahc@diocal.org)**

**~Keep original documents onsite in secure personnel file~**