

## Human Resources Services

### PARISH and AGENCY NEW EMPLOYEE CHECKLIST/PERSONNEL FILE GUIDELINES

Please date each action as it is performed. Upon completion of all items, the new employee and pastor/supervisor will sign and date this checklist and place it in the personnel file.

**PRE-INTERVIEW CHECKLIST:**                      Employee Name \_\_\_\_\_

DATE	ITEM	REQUIRED ACTION
	Is the potential employee a practicing Catholic?	If the candidate meets the criteria, proceed. If the candidate does not, please contact Anna Schiele at (916) 733-0240.
	Pre-application, Questionnaire, and Application are signed and complete <ul style="list-style-type: none"> <li>• Confirm the candidate has provided at least 3 references with phone numbers</li> <li>• Pastor/Supervisor confirms and approves that all questions are answered and are accurate</li> </ul>	If hired, place in site Personnel File. It is important that the Pastor/Supervisor reads and reviews these documents thoroughly.
	Resume provided	Pastor/Supervisor Review. If hired, place in site Personnel File.

**POST-INTERVIEW/PRE-OFFER CHECKLIST:**

DATE	ITEM	REQUIRED ACTION
	Complete 3 Reference Check Forms	Pastor/Supervisor contacts all three references and documents conversations with each on the Reference Check Form attached at the end of this document.

**POST-OFFER/PRE-HIRE CHECKLIST: (Hire contingent upon successful completion)**

DATE	ITEM	REQUIRED ACTION
	Complete Background Check for applicable positions.	Pastor/Supervisor follows "Steps for Conducting a Background Check" found on Diocesan website and waits for clearance.

Fingerprint Clearance	Fax Live Scan Verification form to Safe Environment Office: (916) 733-0195. Once cleared, please record date on this form.
Date: DOJ _____ FBI _____	

**FIRST DAY OF EMPLOYMENT:**

Complete New Employee form (PT100)	Original placed in site Personnel File.
<ul style="list-style-type: none"> <li>If the new hire is a Religious please use the Religious PT Form instead of the PT100</li> </ul>	Contact Bianka Torres for all Religious new hires at <a href="mailto:btorres@scd.org">btorres@scd.org</a> or (916) 733-0241
Employee completes required safe environment and sexual harassment training through CMG Connect: Parish Employees: <a href="https://sacramento.cmgconnect.org/">https://sacramento.cmgconnect.org/</a> School Employees: <a href="https://sacramento-schools.cmgconnect.org/">https://sacramento-schools.cmgconnect.org/</a> Charities/Agencies Employees: <a href="https://sacramento-charities-camps.cmgconnect.org/">https://sacramento-charities-camps.cmgconnect.org/</a> Pastoral Center Employees: <a href="https://sacramento-pastoral-center.cmgconnect.org/">https://sacramento-pastoral-center.cmgconnect.org/</a>	Pastor/Supervisor verifies Safe Haven and Sexual Harassment training is complete. Place a copy of the Certificate of Completion in the site Personnel File.
Complete I-9	Original place in I-9 file at the site – <b>NOT IN PERSONNEL FILE</b>
Employee completes W-4	Original placed in site Personnel File.
Direct Deposit Authorization Form PT 800 (voided check required) OPTIONAL	Original placed in site Personnel File.
Employee is given copy of job description; principal / supervisor and employee discuss key elements	Original placed in site Personnel File.
<b><u>Pastor/Supervisor</u></b> reviews the Lay Personnel Employee Handbook <b><u>in person</u></b> with the employee. Provide the employee with a copy to keep. Employee signs and dates the following acknowledgment forms: <i>Acknowledgement of Receipt of Handbook (pages 46 -47)</i> <i>Acknowledgement of Diocesan Policies as Religious Employer (page 48)</i> <i>Antidiscrimination/Antiharassment Policy Acknowledgement (page 49)</i> <i>Electronic Communications Policy Acknowledgement (page 50)</i> <i>Agreement Regarding Arbitration of Disputes (page 54)</i>	Originals placed in site Personnel File.
Employee is advised of required State of California online Sexual Harassment Course (All employees are required to complete; non-supervisors take one hour training and managers/supervisors take two hour training)	The training is completed on CMG Connect. Work or personal email address to register is acceptable.
Employee completes and submits Emergency Information form (PT 120)	Place in site Personnel File

	Employee is given fiscal year Employee Holiday list /and or school calendar.	Discussion item only
	Employee is given copy of Disability Insurance brochure (DE 2515)	Discussion item only
	Employee is given copy of Paid Family Leave brochure (DE 2511)	Discussion item only
	Employee is given copy of SDI/PFL Weekly Benefit Amounts (DE 2589)	Discussion item only
	Employee is given copy of Sexual Harassment brochure (DFEH 185)	Discussion item only
	Employee is given copy of Facts about Workers' Compensation pamphlet with the Pre Designation of Personal Physician included in pamphlet. (Employee is not required to sign this; only if employee chooses to)	If signed, place in Personnel File
	Employee is given copy of Health Insurance Marketplace Coverage Notice.	Complete employer section before distribution to employee
	Employee is asked to read IIPP (Injury and Illness Prevention Program)	Employee signs New Employee Safety Orientation Checklist (page 4a in IIPP). This signed document is placed in Personnel File at the site.
	Employee is provided copies of appropriate time reporting systems and/or time reporting forms (PT 500 Time Sheet – hourly employees only), PT 501 Time Off Request, PT 400 Employee Request For Leave and PT505 Make up Time Form (hourly employees only).	Discuss vacation/sick time accruals.

The Pastor/Supervisor and the employee discuss diocesan employee benefits; eligible employees (regularly scheduled to work 20 hours or more per week) are provided a copy of the *Reta Trust User Guide*, a *Group Benefit Plans Premium Sheet* and the *Employee Benefits Brochure*. Details on all of the group benefit plans, including the *Summary of Benefits and Coverage* as well as the *Evidence of Coverage* can be found online at the Reta Trust home page.

***Non-Optional Benefits***

DATE	ITEM	REQUIRED ACTION
	The benefit administrator will “add” a new eligible employee to the RETA Trust database. This action will enroll the employee in Basic Life/AD&D and Long Term Disability Insurance.	The employee will need to designate their beneficiary information online
	Pension Plan Pamphlet	Discussion and explanation
	Pension Plan Beneficiary Designation form (SACL 201)	Original to Office of Lay Personnel. Copy placed in site Personnel File.

***Optional Benefits***

DATE	ITEM	REQUIRED ACTION
	After the benefit administrator has added a new eligible employee to the RETA TRUST database, the employee will log onto <a href="https://www.retatrust.org/c/home">https://www.retatrust.org/c/home</a> to register as a new user.	
	The employee will use the Enrollment section of the website to elect/decline benefit coverages for themselves and for their dependents.	
	Benefit Payroll Deduction Authorization Form (PT1001)	Original to Payroll Copy to be placed in Personnel File Copy to Employee
	Section 125 Employee Benefit Election Form (PT10) (pre-tax deductions for medical/dental/vision)	Original to Payroll Copy to be placed in Personnel File Copy to Employee
	403(b) Plan – The Standard	Provide employee with current 403(b) booklet.

\_\_\_\_\_  
Pastor/Supervisor Name

\_\_\_\_\_  
Pastor/Supervisor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Employee Name

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

## Reference Check Form

Name of person completing the reference check: \_\_\_\_\_

Date reference check completed: \_\_\_\_\_

Name of person contacted: \_\_\_\_\_

Position of person contacted: \_\_\_\_\_

Questions to ask during the reference check:

1. How long have you known the applicant? \_\_\_\_\_

2. When did the applicant work for (or with) you? \_\_\_\_\_

3. In what role did you serve in relation to the applicant? (For example, were you their supervisor, peer, etc.?) \_\_\_\_\_

4. What are the applicant's strengths? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

5. Are there any areas of challenge for the applicant? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

6. Would you hire the applicant again? \_\_\_\_\_

\_\_\_\_\_ Reference refused to answer questions and would only confirm dates of employment.