

## 2023-2024 Open Enrollment Frequently Asked Questions

### When is Open Enrollment?

Open Enrollment begins **Monday, May 01, 2023** and ends on **Tuesday, May 16, 2023**. Coverage and premium cost share will become effective July 1, 2023 and last until June 30, 2024.

### Why should I enroll?

All benefits-eligible employees must make an active health plan election during Open Enrollment. **If you do not go online to elect coverage, your existing benefits will default to current coverage and tiers.**

In addition to making new elections, you can also:

- Confirm your current elections
- Confirm spouse coverage and dependents
- Update your Life Insurance Beneficiary
- Ensure all information is accurate

### How do I find out what my current benefits are today?

Employees can log into RetaEnroll 360 at [www.retatrust.org](http://www.retatrust.org) to access their current benefit elections. For assistance in obtaining your User ID and Password, please click [Reta Trust User Guide](#).

### Can I add or remove my eligible dependents during Open Enrollment?

Yes. You may add or remove eligible dependents during open enrollment. Eligible dependent(s) include: spouse, child(ren) up to their 26<sup>th</sup> birthday, step or adopted child(ren), and disabled children over age 26, with required documentation.

### What's new for the Reta Plan Year 2023-2024?

- Reta's integrated wellness plans are now offered through Reta's medical plan providers: Kaiser Workforce Health and BSC Wellvolution
- *MyCatholicDoctor* programs offered by BSC and now Kaiser

### When will these changes happen?

Coverage and premium cost share will become effective July 1, 2023 and last until June 30, 2024.

### Will I be able to keep my doctor?

Although there's a very good chance your providers are included in the BSC network, it's a good idea to check. To find doctors, urgent care centers, mental health providers and medical equipment providers in the BSC California provider network, click [here](#).

## How do I verify my Dependents?

If you are adding a dependent to your health insurance that has not been previously verified, you will need to provide documentation to prove dependency. All documents can be uploaded directly into the benefits platform via Reta Trust. Alternatively, you can fax your documents along with bar coded fax coversheet (provided by Reta) at 1-888-265-2144.

Dependent Type	# of Docs	Primary Required Document	Secondary Required Document	Tertiary Required Document
Spouse	2	Marriage Certificate	- Jointly filed 1040 * - Separately filed 1040 with same address * - Financial documents in both names - Utility bill in both names	N/A
Child	1	Birth Certificate Or Hospital Birth Record	N/A	N/A
Stepchild	3	Birth Certificate	Marriage Certificate	- Jointly filed 1040 - Separately filed 1040 with same address - Financial document in both names - Utility bill in both names
Disabled Dependent	2	Birth Certificate	- Employee's form 1040 with dependent listed - Dependents 1040 filed from employee's address - SSDI Documentation	N/A
Adopted child	1	Court document	N/A	N/A
Legal Guardian	1	Court document	N/A	N/A
Foster child	1	Court document	N/A	N/A
* Not Required if Marriage is less than 90 days old				

## How do I complete the enrollment process?

You must go online to the RetaEnroll 360 website (click Log In on the Reta Members and Employers corner at [www.retatrust.org](http://www.retatrust.org)) and complete the enrollment process.

### **What if I need to make a change after I've completed my enrollment?**

If you change your mind after submitting your enrollment online, simply go back to RetaEnroll360, make your changes, resubmit your elections online and print or email a summary of your employee benefit elections to your Benefits Administrator. The deadline for making changes is 11:59 p.m. on Tuesday, May 16<sup>th</sup>.

### **Can I enroll using a paper form?**

Open Enrollment is online only. If you need help enrolling, please contact your Benefits Administrator.

### **What should I do if I don't receive my ID card?**

Employees who have not received their identification card may not have a current mailing address on file. Please verify your current mailing address via the RetaEnroll 360 website. Otherwise, you may contact your provider to request a new card or register online to print a temporary card.

### **What if I need to make a change after open enrollment?**

Changes to your benefits elections after Open Enrollment require a Qualifying Life Event (QLE). You must go online to the RetaEnroll 360 website and submit life event. [Click here to access instructions on how to submit a Life Event.](#)

### **What is a Qualifying Status Change Event that will allow me to make changes to my Open Enrollment benefit elections?**

Qualifying Event means a change in your family, employment or group coverage status which would affect your benefits due to one or more of the following:

1. Marriage
2. Birth, adoption or placement for adoption of a dependent child
3. Divorce, legal separation or annulment
4. Death of a dependent
5. A change in your or your dependent's employment status, such as ending employment; strike; lockout; taking or ending a leave of absence; changes in worksite or work schedule, if it causes you or your dependent to gain or lose eligibility for group coverage.
6. Increase/Decrease in hours significantly changing cost charged to employee.
7. Ineligible Dependent

### **Where can I get more detailed information?**

Detailed information about your benefits plan is available on the Reta Benefits Center through the RetaTrust.org website. If you require assistance accessing your account, with information on the Reta Benefits Center, or you do not have access to the Internet, call the RetaEnroll Client Services Department toll free at 1.877.303.7382 from 8:30 AM to 8:00 PM ET, Monday through Friday, or send



an email to [Service@RetaEnroll.org](mailto:Service@RetaEnroll.org). The Reta Client Services team will either directly assist you or connect you with the best resource for help.

**Who do I contact If have questions?**

### **CARRIER DIRECTORY**

Blue Shield of California	<a href="http://www.blueshieldca.com">www.blueshieldca.com</a> (888) 772-1076
Kaiser	<a href="http://www.kp.org">www.kp.org</a> (800) 533-1833
Health Equity HSA	<a href="http://www.healthequity.com">www.healthequity.com</a> (877) 713-7712
CVS Caremark	<a href="http://www.caremark.com">www.caremark.com</a> (800) 844-0719
Delta Dental	<a href="http://www1.deltadentalins.com">www1.deltadentalins.com</a> (800) 765-6003
VSP	<a href="http://www.vsp.com">www.vsp.com</a> (800) 877-7195
Sun Life Financial	<a href="http://www.sunlife.com">www.sunlife.com</a> (800) 247-6875
EAP Services	<a href="http://www.guidanceresources.com">www.guidanceresources.com</a> (877) 595-5281
Travel Assistance Services	<a href="http://www.assistamerica.com">www.assistamerica.com</a> (800) 872-1414 inside USA - Toll Free (609) 988-1234 outside USA - Collect Call
Reta Trust	<a href="http://www.retatrust.org">www.retatrust.org</a> (877) 303-7382

### **LAY PERSONNEL OFFICE**

Phone: 916-733-0239

Fax: 916-733-0238

E-mail: [benefits@scd.org](mailto:benefits@scd.org)

### **Additional Information:**

- [Click here for Employee Benefits Brochure](#)
- [Click here for Reta Trust User Guide](#)
- [Click here for Employee Assistance Program](#)
- [Click here for Travel Assistance Program](#)
- [Click here for Sun Life Financial Enrollment Packet](#)
- [Click here for Sun Life Financial Evidence of Insurability \(EOI\)](#)
- [Click here for Benefits Directory](#)
- [Click here for 403\(b\) Enrollment Guide](#)



## HSA set-up in ADP WorkforceNow

To set up deductions, go to People > Pay Profile > On the Deductions, click on Add > Select Other > On the Deduction Code box, select the code needed to set up the deductions

All medical premium deduction, no matter who the medical carrier is, must be coded to M for pre-tax &/or N for post-tax

For employees enrolled in an HSA, there are steps to follow:

1. The employee's semi-monthly contribution to HSA must be entered in ADP under deduction code "HSA"
2. The same amount must also be entered/added to the employee's direct deposit information  
(Please contact the Lay Personnel Office to get the employee's direct deposit bank information for HSA)

Below is an example of setting-up the HSA direct deposit information in ADP.

Go to People > Pay Profile > On the Direct Deposit, select Add

- a. Select Deduction Code "30 - HSA DEPOSIT"
- b. Under the "Verify the account?", select "No, don't verify the account"
- c. Under the Amount to Deposit, select "Partial Net" and enter the same semi-monthly amount as in the deduction code HSA
- d. Enter the Routing Number & Account Number provided by the Lay Personnel Office  
(REMEMBER TO DOUBLE-CHECK THE NUMBERS since there will be no pre-note on this direct deposit)

Effective On  
11/1/2020

Effective for Current Week of: 47-1 Pay Date: 11/20/2020 Period End Date: 11/15/2020

Deduction Code  
30 - HSA DEPOSIT

Active

Routing Number  
000000000

Account Number  
000000000000

Verify the account?  
☒ Yes, verify the account  
We'll verify the account in real time. If we can't, then we'll give you the option to use the standard prenote process or verify the account yourself.

☒ No, don't verify the account  
Selecting No turns off both real-time validation and the standard prenote process

Amount to Deposit  
☐ Full Net  
☒ Partial Net \$100.00  
☐ Percent Net %

☐ For Bonus Pay Only  
Priority #

000000000000

000000000000



# Waiver of Group Health Benefits

Employee Name

Job Title

Employee Number (ID, Social Security, etc.)

For the plan year effective                      I am waiving Medical coverage for:

- ☐ Myself
- ☐ Spouse/Domestic Partner
- ☐ Dependents(s):

If selecting Dependent(s), please list their name(s):

I am waiving coverage due to:

- ☐ My preference not to have coverage
- ☐ Coverage under my spouse's/domestic partner's plan
- ☐ Other coverage

This other coverage is:

- ☐ Employer-sponsored Group Plan   ☐ Individual policy   ☐ Medicare   ☐ COBRA   ☐ TRICARE   ☐ Medicaid

**Special Enrollment Notice and Certification** – Please review and sign below if you wish to waive coverage

By signing below, I certify that I have been given an opportunity to apply for coverage for myself and my eligible dependents, if any. I am declining enrollment as indicated above. I understand that, if I am declining enrollment for myself or my eligible dependents (including my spouse) because of other health insurance or group health plan coverage, I may be able to enroll myself and my eligible dependents in this plan if I lose, or my eligible dependents lose, eligibility for that other coverage (or if the employer stops contributing towards my or my eligible dependents' other coverage).

I understand that I must request enrollment no more than 30 days after the date the other health plan coverage ends (or after the employer stops contributing toward the other coverage). If I do not do so, I will not be able to enroll until my employer's next annual open enrollment period.

In addition, I understand that if I have a newly eligible dependent as a result of marriage, birth, adoption, or placement for adoption, I may be able to enroll myself and my eligible dependent(s). However, I must request enrollment within 30 days after the marriage, birth, adoption, or placement for adoption.

I understand that in order to request special enrollment or obtain more information, I should contact my group administrator.

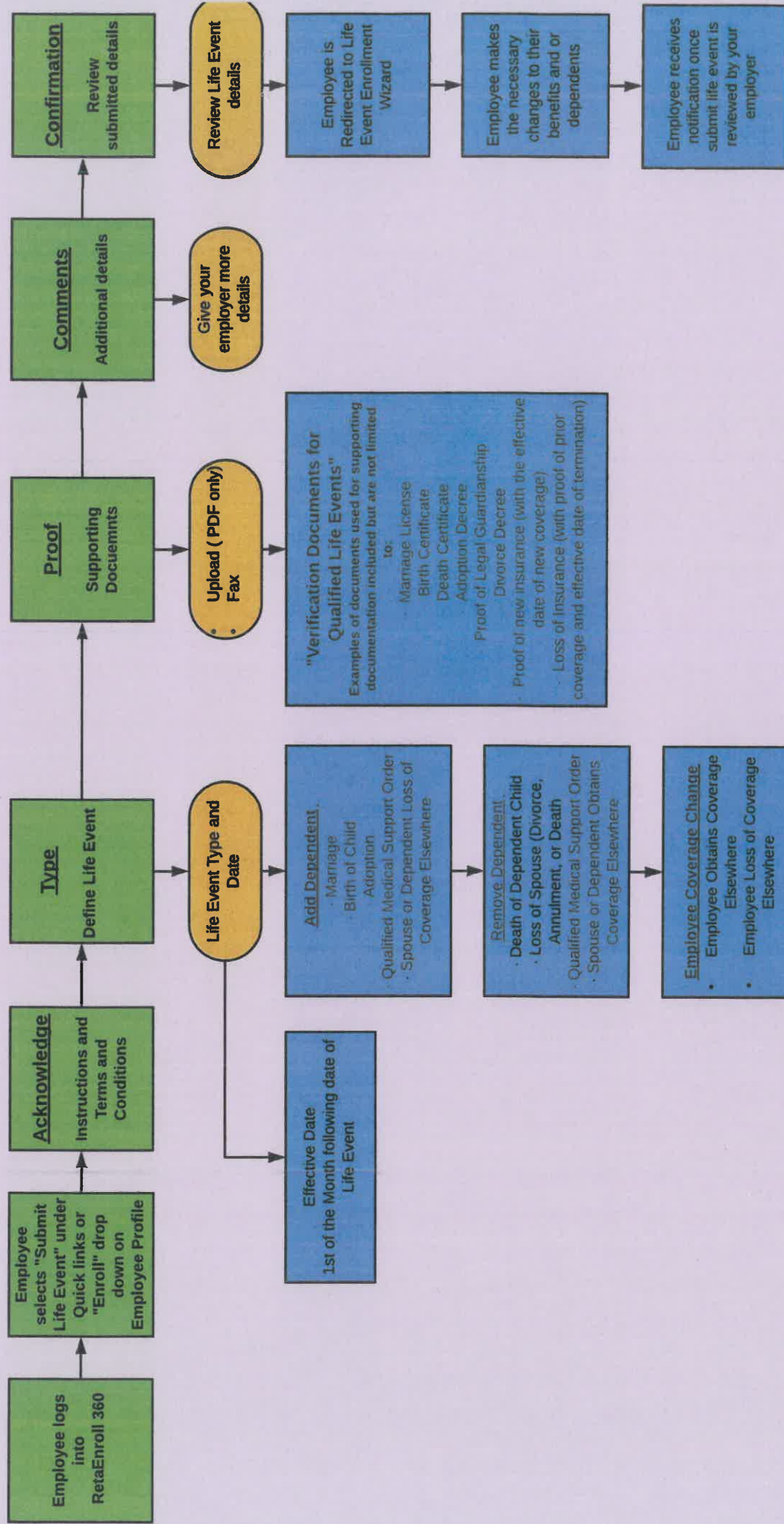
Employee Signature

Date





# Employee Experience Submitting a Life Event









## DIOCESE OF SACRAMENTO

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### LAY PERSONNEL

December 5, 2022

To: Pastors, Agency Directors, Office Managers, School Principals, and Human Resources Representatives

FR: Anna Schiele

RE: **Lay Personnel Handbook Revisions and NEW Arbitration Agreement**

There have been a number of updates made to the Lay Personnel Handbook, which will go into effect January 1, 2023. Below is an overview of the main changes but **does not** encompass all of the changes. Please provide each employee with a copy of the revised Lay Personnel Handbook. Ensure each employee reviews the revised Lay Personnel Handbook in its entirety. **The employee will then need to sign the acknowledgment forms from the back of the handbook and provide them to you no later than January 1, 2023.** The signed acknowledgements must be placed in the employee's personnel file. If the employee is a Diocesan employee, please send the acknowledgement forms to the Office of Lay Personnel.

In addition, there is a new Arbitration Agreement that is a standalone document. The Arbitration Agreement will need to be provided to each employee as well. **Once the agreement is signed by all parties, it will need placed in their personnel file.**

#### Overview of Changes:

##### **1. Revised 7.0 Work Hours/Attendance**

- a. The policy has been updated to include remote work as applicable.
  - i. All remote work will require prior approval by the supervisor and will only be granted on a case by case basis.

##### **2. Revised 31.2 Holidays**

- a. The policy has been updated to reflect the addition of the Juneteenth holiday.

##### **3. Revised 31.3 Sick Pay Policy**

- a. The policy has been updated to expand the relationships eligible for use of accrued sick pay.
  - i. An employee may use 50% of his or her accrued sick pay to address illnesses of a spouse, child, grandchild, sibling, grandparent, parent (biological, adoptive, foster, step-parent, or

legal guardian) of the employee or his or her spouse, or a "designated person".

- ii. "Designated person" under this policy includes any individual related by blood or whose association with the employee is the equivalent of a family relationship. Employer reserves the right to determine, in its discretion, whether the association is "the equivalent of a family relationship." Employee may identify one "designated person" per rolling 12-month period.

#### **4. Revised 31.4 Bereavement Pay Policy**

- a. The policy has been modified to extend bereavement time to ineligible employees.
  - i. An occasional part-time and temporary employee, who has been employed at least 30 days, may be granted up to five (5) days off from work without pay in the event of the death of a relative of the employee.

#### **5. Revised 32.1 Medical Family Leave Policy**

- a. The policy has been updated to expand the relationships eligible for a leave of absence.
  - i. An employee may take a leave of absence to care for their own needs or for the needs of a spouse, child, grandchild, sibling, grandparent, parent (biological, adoptive, foster, step-parent, or legal guardian) of the employee or his or her spouse, or a "designated person".
  - ii. "Designated person" under this policy includes any individual related by blood or whose association with the employee is the equivalent of a family relationship. Employer reserves the right to determine, in its discretion, whether the association is "the equivalent of a family relationship." Employee may identify one "designated person" per rolling 12-month period.

#### **6. Revised 42.0 General Standards of Conduct**

- a. The policy was modified to include expectations for reporting arrest/convictions of a crime.
  - i. Employees will be expected to notify the Employer within 3 days if they are arrested or convicted of a crime.

#### **7. Revised 51.0 Workplace Violence/Workplace Security**

- a. The policy has been updated to reflect the Employers right to permit a designated employee to carry a firearm.
  - i. The Employer may determine to permit a designated employee (who is duly-licensed) to carry a firearm on work premises. Such permission must be granted in writing by the Diocese. No other



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circumstances will allow for an employee to carry a firearm or other weapons of any kind on the premises.

### **8. Revised 56.0 Expense Reimbursement Allotment Policy (Policy specific to the Pastoral Center)**

- a. The policy has been updated to increase the daily per diem as the result of inflation.
  - i. This revision has increased the per diem reimbursement rates for meal expenses incurred by the employee when traveling on behalf of the Diocese and dining on an out-of-town business trip (90 miles or more one way). Approximate meal expense guidelines are as follows:
    1. \$15/day for breakfast, per person
    2. \$25/day for lunch, per person
    3. \$35/day for dinner, per person

### **9. Revised 57.0 Employee Referral Policy (Policy specific to the Pastoral Center)**

- a. This policy has been updated to increase the referral award.
  - i. An employee who refers a candidate, who is then hired and employed for at least 6 months will be awarded \$100.

#### New Policy:

### **1. New Agreement Regarding Arbitration of Disputes**

- a. The new Arbitration Agreement is a standalone document.
  - i. Ensure the employee has read and understands the document before accepting the terms of the document.
  - ii. Ensure that the Employer Name is filled in at the beginning of the document. Be sure to use the legal name of the organization such as Pastor of St. Mary Parish, Sacramento. Be sure to include the name of the city as we have multiple sites with the same name.  
**Note: Schools will use the same Employer Name as the parish, as you are under the same FEIN Number.**
  - iii. Ensure the form is also signed by the organizations designated representative (i.e. Pastor, Supervisor, Office/Business Manager).

If you have a question, please contact Lay Personnel at 916-733-0239.







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### LAY PERSONNEL

November 21, 2022

To: Pastors, Agency Directors, Office Managers, School Principals, and Human Resources Representatives

FR: Anna Schiele

RE: **State-Required New-Hire Documents**

As a nonprofit religious organization, we are exempt from the California Fair Employment and Housing Act (FEHA). (See California Government Code sections 12926(d) and 12926.2.) However, there are provisions in California law that require all employers to provide workers with pamphlets at the time of hire containing information regarding regulations that we are exempt from.

To ensure employees are informed of this discrepancy, we have created a template memo to be used as a cover letter informing employees that while we must remain compliant with our legal obligation and provide the pamphlets to them, the information contained does not necessarily apply to them (as we are exempt from FEHA).

Going forward we would like to ask each site to modify the attached template memo so it contains your site specific information, place it on your site letterhead, and immediately begin using the memo as a cover letter for the materials provided at the time of hire. The template memo has been placed on the Diocesan Website for your convenience.

Please feel free to contact the Lay Personnel Department with any questions or concerns at 916-733-0239.







## DIOCESE OF SACRAMENTO

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### LAY PERSONNEL

December 20, 2021

To: Pastors, Agency Directors, Office Managers, and School Principals

FR: Anna Schiele

RE: **Updated Legal Requirement for Retention of Personnel Records**

**Effective January 1, 2022:** Governor Newsom signed Senate Bill SB 807 which has expanded the number of years that an employer is required to maintain personnel records. All personnel files are now required to be retained for four (4) years opposed to the previous requirement of three (3) years. As such, we have updated our HR Records Retention Guide and HR Records Retention Drawer Set-Up to reflect our compliance with the new requirements. The revised documents are attached to this memo for your convenience.

**Note: The freeze on the destruction of personnel files is still in place. Any personnel files older than four (4) years should be placed in boxes marked with the year of separation and stored until the freeze has been rescinded.**

Please feel free to contact the Department of Lay Personnel with any questions or concerns at 916-733-0239.





## **Human Resources Records Retention Guide**

### **Statement**

It is the responsibility of the Diocese of Sacramento to comply with Federal, State, and Local laws and regulations with regard to the management and retention of its Human Resources records. Failure to properly maintain Human Resources records may lead to significant fines for our organization. These guidelines are intended to assist management. Litigation holds may necessitate deviation from the retention schedule. Please check with the Director of Lay Personnel with regard to records storage questions.

### **Definition**

Human Resources records are a collection of documents related to the hiring and employment of an employee retained under the employee's name, including but not limited to: new hire paperwork, annual reviews, performance counseling, employee wage/salary notices, pre-employment, post-employment documentation, etc. These records serve as the historical record of documents pertaining to the employment of an employee from the date of hire to the date of separation.

### **Confidentiality**

It is essential that employee information be kept confidential and secure. All records must be stored in a secured location at all times.

### **Record Categories**

There are seven (7) categories that make up the Human Resources Records:

- 1. Applicant Records (initial contact forms, applications, interview guides, and pre-employment screenings; this includes documentation for applicants not hired)**
- 2. Employee Personnel Files**
- 3. Form I-9 Employment Eligibility**
- 4. Employee Medical Documentation (ML, FML, LOA, etc.)**
- 5. Workers Compensation and Safety-Related Documents**
- 6. Inactive Employee Records**
- 7. Payroll Records (stored in a separate binder or drawer)**

## Record Categories (continued)

Human Resources records are retained in all of our locations. To assist our leaders in organizing their Human Resources records, the following Guide has been created. **See Drawer Setup Guide for how to properly set up each drawer.**

### Applicant Records

Applicant records are anything used in the interview and hiring process for a prospective employee. The documents include the initial contact form, job application, interview guide, and pre-employment screenings such as the background screening authorization form.

**NOTE: The documents for applicants who were extended a conditional offer of employment but not hired must be retained in the section labeled "Contingent Offer of Employment". The application, interview guide, and background authorization form for these applicants must be retained in the same manner as a hired employee per Fair Credit Reporting Act (FCRA) guidelines.**

### Employee Personnel Files

Employee Personnel Files contain records related to the employment of an employee. Active employees' personnel files should be retained together in a drawer or cabinet (depending on the number of files your building maintains). Please reference **Drawer Setup Guide** for additional information regarding permissible and non-permissible documents in an employee's personnel file.

**The following documents must legally be in each employee's personnel file:**

- Form W-4
- Notice of Wage Rate (Employees hired after 8/16/2010)
- Work permits for employees under the age of 18
- State required documents (please reference the HR Records Retention Document Checklist for the most current required forms)

Partner with the Lay Personnel Department if you have questions regarding documents that are not on the permissible list but that have employment history information before including the document in the personnel file. Do not destroy or throw away documents unless directed by your Human Resources Representative.

**NOTE: Each personnel file should contain an HR Records Retention Document Checklist to help make sure that all required documents are in the file.**

### Employee Employment Eligibility File (Form I-9)

All I-9 Forms are to be filed in a separate manila folder alphabetically along with proper supporting documentation (after 9/8/2009). Please refer to the **Drawer Set-Up Guide** for direction on retention of the I-9 Form and the **Form I-9 FAQs** for specific guidelines regarding procedures for completing the I-9 Form.

**NOTE: Form I-9 should never be placed in the personnel file.**

### **Employee Medical Documentation (ML, FML, LOA, etc.)**

Medical, Family, and Leave of Absence (LOA) documentation are not permitted in an employee's personnel file. You must create separate files for Medical/Family Leave documentation as well as all LOA documents and documents related to the interactive process. **Any doctor's notes brought in by an employee must be retained in the separate medical file.**

### **Workers' Compensation Documentation**

Workers' Compensation (W/C) Documentation: W/C documents are not permitted in the Employee's personnel file. All locations should create separate files for all Workers' Compensation related documentation.

### **Inactive/Terminated Employee Records**

Terminated employee personnel files must be kept in file cabinets for a period of four (4) years from the date of termination. After the period of four (4) years the files may be stored in records storage box until authorized to destroy per the Diocesan Document Retention Policy.

### **Payroll Records**

At the conclusion of each payroll cycle, the ADP Payroll Report for the previous pay period is generated. The ADP Payroll Report lists all employee time records (punches) from the selected pay period. All employees must review their pay records and revisions listed on the report. By signing the document (timesheet), the employee confirms that the time records are accurate.

Locations are required to retain payroll records for seven (7) years. Payroll records consist of time card reports, weekly work schedules, and State specific payroll documents. Records should be separated by year and stored in a secure manner in either binders or drawers. Payroll records older than four (4) years must be placed in a records storage box, labeled, and stored in a secure location.

### **Storage**

Each current employee must have a manila folder for personnel records. Documentation must be maintained as follows: New Hire Paperwork, Payroll, Training, Coaching/Counseling, Performance Reviews, and Miscellaneous. At each location, HR records must be stored in two separate drawers; one drawer for the current year and one drawer for the prior three years.

**DRAWER 1: Current/active employees and terminated employees in current year.**

**DRAWER 2: Inactive employees and files from the previous three years.**

Any records older than four (4) years must be stored in a records storage box in a secure location and labeled appropriately. Refer to the **Diocesan Document Retention Policy** for proper storage of inactive personnel files.



## **Recreating a Personnel File**

In the event that a personnel file has become lost or irreparably damaged, the file must be recreated. The required documents need to be put into the file and we must go back to the employee when necessary to fill out paperwork and obtain signatures where applicable. Only legally required documents should be obtained from the current employee if they are found to be missing from an employee's personnel file.

**Note: Never backdate a legally required document that is being replaced.**

## **Additional Resources**

**Website---Diocese---Lay Personnel---Handbook and Forms**

Drawer Setup Guide

Diocesan Document Retention Policy

I-9 Q & A

Auditing I-9's



## Human Resources Records Retention – Drawer Set-Up Guide

### Human Resources Record Retention Responsibility

It is the responsibility of each site to maintain complete and accurate Human Resources (HR) records at all times. HR records must be maintained in the appropriate file drawer, by year, utilizing section dividers. Section dividers sort the records by active/inactive employee status, document type, and year. Failure to properly maintain HR records may lead to significant fines for the location.

### HR Records: Current Year Drawer

The *Current Year Drawer* should contain HR records for all active employees as well as employees terminated during the current year. Section dividers are used to organize HR records for the current calendar year.

The following list describes the type of HR records to be filed in each section:

- **Employment Applications** – Employment applications, filed by month, for applicants who have not been hired.
- **Active Personnel Files** – All new hire paperwork, excluding the I-9 Form.
  - Note:** All I-9 Forms and supporting documents must be kept in a separate file apart from the personnel file labeled *Active Employee Employment Eligibility*. Refer to the *Permissible Documents List* on page 3 for more information.
  - The following documents are legally required and must be in each employee's personnel file:
    - W-4 Form
    - Notice of Wage Rate (Non-exempt employees hired after 8/16/10)
    - Work Permits (for employees 18 year of age or younger and still enrolled in school)
  - Any document required by law **must** be obtained from current employee, if missing from the personnel file.
    - Note:** Do **not** back date any forms.
  - If the Background Screening Consent and Authorization Form is missing from the personnel file, explain to the employee that we would like to have a complete personnel file for him/her and ask, **but do not require**, the employee to complete the missing form.
  - If the Diocese of Sacramento Application or Interview Guide is missing from the personnel file, do **not** complete the missing forms.
  - The following new hire documents should be in each employee's file:

- Employee Handbook Acknowledgement Forms
- Employee Live Scan Approval
- PT100
- Signed Job Description

Contact the Lay Personnel Department to determine where you should file any additional documents that are not on the *Permissible Documents List* **before** including these documents in the personnel file.

- **Do not destroy/throw away any documents not on the *Permissible Documents List*.**
  - Personnel files for all active employees must be maintained and retained for the duration of the employees' employment with the location.
  - When the employee terminates employment, move the file to the *Inactive Personnel File* section for the year they were terminated.
- **Active Employee Employment Eligibility (I-9 Form)** – I-9 Form Employment Eligibility Verification Forms
    - I-9 Form is NOT required for employees hired on or before November 6, 1986**
    - File I-9 Form documents in alphabetical order.
    - Staple copies of supporting documentation, such as passport, driver's license, social security card and/or other acceptable documents to the back of the I-9 Form.
    - When an employee terminates employment, his/her I-9 Form and supporting documentation must be moved to the *Inactive Employment Eligibility* file for the year they were terminated.
      - For example, if an employee terminates their employment in 2016, place their I-9 Form and supporting documentation in the *2016 Inactive Employment Eligibility* file.
  - **Workers' Compensation Documentation**
    - Create a separate file for each Workers' Compensation claim.
    - Maintain the Physical Capabilities/Work Restriction Forms and other supporting Workers' Compensation information in this file.
    - When the employee terminates employment, move the Workers' Compensation file to the *Inactive Workers' Compensation* file in your HR records drawer for the year they were terminated.
  - **Employee Medical Documentation (ML, FML, LOA, etc.)** – All Medical/Family Leave documentation as well as all LOA documents and documents related to the interactive process should be kept in this file.
    - Doctor's note pertaining to restrictions of the employee that are not Workers' Compensation related should be placed in this file.
    - When an employee terminates employment, move the file to the *Inactive Employee Medical Documentation (ML, FML, LOA, etc.)* section of your HR records drawer for the year he/she was terminated.
  - **Current Year Inactive Employee Personnel File**
  - **Current Year Inactive Employee Employment Eligibility File (Form I-9)**
  - **Current Year Inactive Employee Workers' Compensation File**
  - **Current Year Inactive Employee Medical Documentation (ML, FML, LOA, etc.) File**

## HR Records: Previous Three Years Drawer

HR records for the previous three (3) years are filed, by year, in a drawer separate from the current year. There are section dividers for records from the previous year and for records that are four (4) years old. Guidelines for documents filed in these sections are the same as those for the current year sections.

Only inactive employees HR records are filed in the *Previous Three Years* drawer. All HR records for active employees are maintained in the *Current Year* drawer.

Records older than four (4) years should be placed in a records storage box. The records are not to be destroyed until they meet the requirements of the *Diocesan Document Retention Policy*.

### **EXCEPTION: Inactive Employee Employment Eligibility File (I-9 Form)**

Destroy the I-9 Form four (4) years after the employee has been terminated.

The following dividers are used for records from the previous three (3) years:

- **Employment Applications**
- **Inactive Employee Personnel File**
- **Inactive Employee Employment Eligibility File (I-9 Form)**
- **Inactive Workers' Compensation File**
- **Inactive Employee Medical Documentation (ML, FML, LOA, etc.) File**

## Legally Required Documents

All employees must have the following legally required documents available in the appropriate file. If any of these documents are missing from the HR Record files, obtain a new copy from the employee.

- **Personnel File**
  - W-4 Form
  - Notice of Wage Rate (Non-exempt employees hired after 8/16/10)
  - Work Permits (for employees 18 year of age or younger and still enrolled in school)
- **Active Employee Employment Eligibility (I-9 Form) File**
  - I-9 Form
  - Clear copies of supporting documents used for employment eligibility verification

## Personnel File Permissible Documents List

The following documents should be filed in an employee's personnel file:

- Employment applicant and resumes
- Background Screening Consent and Authorization Form (if applicable)
- Employee Interview Guides
- Job Offer Letters
- All applicable new hire paperwork as listed below:
  - Employee Handbook Acknowledgement Forms/Addendums
  - Employee Live Scan Approval Email
  - PT100

- Signed Job Description
- W-4 Form
- Notice of Wage Rate (Non-exempt employees hired after 8/16/10)
- Work Permits (for employees 18 year of age or younger and still enrolled in school)
- PT800 Direct Deposit Form
- New Employee Safety Orientation Checklist
- Transcripts (if applicable)
- Letter of Recommendation (if applicable)
- New Hire Checklist
- Benefit Enrollment Items as listed:
  - PT1001 Benefit Payroll Deduction Authorization
  - PT10 Employee Benefit Election Form
  - SACL201 Lay Employee Pension Plan Beneficiary Designation
  - 403(b) Savings and Investment Forms
  - 403(b) Beneficiary Designation Form
- Notification Letter/Terms of Employment (PTOU)
- PT200 Personnel Transaction – termination/change
- PT690 Separation Checklist
- Resignation Letter
- Sexual Harassment Training Certificate (if applicable)
- Leadership Training (if applicable)
- Catechistic Training (if applicable)
- Blood Borne Pathogens Training (if applicable)
- TB Clearance (if applicable)
- Shield the Vulnerable Certificates
- Continuing Education Documents (if applicable)
- PT501 Paid Leave/Time Off Request
- Employee Evaluations/Reviews
- PT900 Documented Corrective Actions
- PT655 Request to Inspect Personnel File
- Credentials/Required Certification

**ATTENTION:** The I-9 Form and documentation **MUST** be kept in the *Employee Employment Eligibility Files*.

**Questions:** If you have any questions regarding the disposition of other documents not listed, contact the Lay Personnel Department.



## Payroll

At the conclusion of each payroll cycle, the ADP Payroll Report for the previous pay period is generated. The ADP Payroll Report lists all employee time records (punches) from the selected pay period. All employees must review their pay records and revisions listed on the report. By signing the document (timesheet), the employee confirms that the time records are accurate.

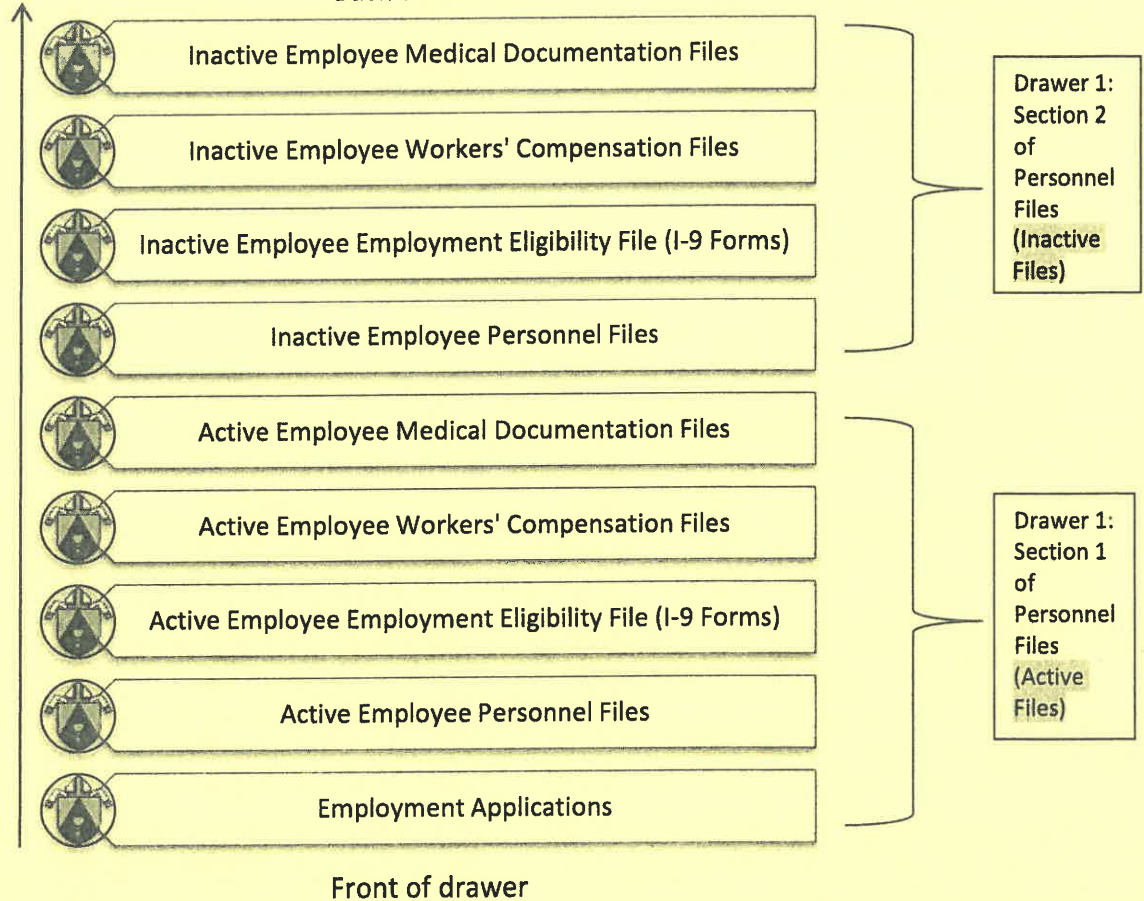
Locations are required to retain payroll records for seven (7) years. Payroll records consist of time card reports, weekly work schedules, and state specific payroll documents. Records should be separated by year and stored in a secure manner in either binders or drawers. Payroll records older than four (4) years must be placed in a records storage box, labeled, and stored in a secure location.

# Human Resources Retention Quick Reference Guide

## HR Records for the Current Year Drawer

Example: All 2016 Personnel Records

Back of drawer



### Two (2) HR Records Drawers:

#### 1. HR Records for the Current Year

\* Example: HR Records for Current Year 2016

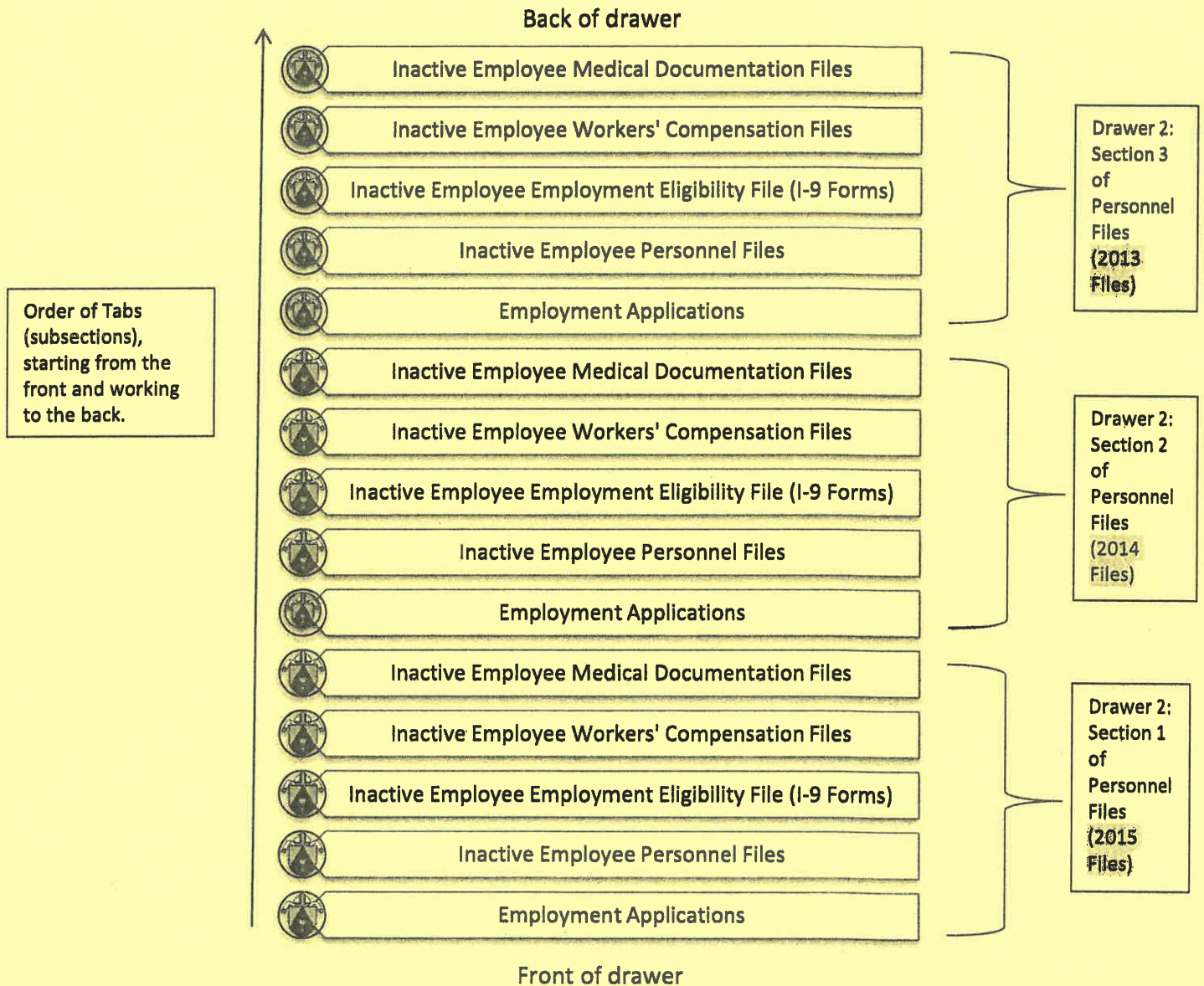
#### 2. HR Records for the Previous Three (3) Years

\* Example: Combined HR Records for Years 2013/2014/2015

# Human Resources Retention Quick Reference Guide

## HR Records for the Previous Three (3) Years Drawer

Example: All 2013/2014/2015 Personnel Records



### Two (2) HR Records Drawers:

#### 1. HR Records for the Current Year

\* Example: HR Records for Current Year 2016

#### 2. HR Records for the Previous Three (3) Years

\* Example: Combined HR Records for Years 2013/2014/2015



# ADP Workforce Timekeeping System



# Accessing Sign-on Screen

## Sign in to ADP®

Want to view your pay stub, download a W-2, enroll for benefits, or access your 401(k) account? You name it, and we can help you get to the right place to do it even if you have never signed in before!

Pick the option that describes you best:

Select	▼
Select	
My former employer uses ADP	
My former employer is out of business	
My current employer uses ADP	
I am an administrator/owner of a company that uses ADP	
I am an accountant for a company that uses ADP	
I am a financial advisor for a company that uses ADP	

# Accessing Sign-on Screen

## Sign in to ADP®

Want to view your pay stub, download a W-2, enroll for benefits, or access your 401(k) account? You name it, and we can help you get to the right place to do it even if you have never signed in before!

Pick the option that describes you best:


☐ My current employer uses ADP



☐ Cancel

☐ Next

# Sign-on Screen

 English (US) ▾

## Sign in to ADP®

User ID

☐ Remember User ID ⓘ

Next

Forgot your user ID?

---

New user ? ⓘ Create account

# Home Screen

ADP

Diocese of Sacramento

Home

Resources

Myself

Things to Do

Calendar

LH

Things to Do

Congratulations  
You've completed all of your  
Things to Do tasks

My Time

Started Work at 8:33 AM  
(04:36:54)

Clock Out

Meal Out

Transfer

1:10 PM

↓ SHOW MORE ACTIONS

What Would You Like to Do?

Update Tax Withholdings

Update Payment Options

Update Profile

My Pay

Compensation

TAKE HOME  
\$X.XX

GROSS PAY  
\$X.XX

Show

My Time Off

Balances as of  
02/02/2023

Show Balances

Request time off

Helpful Links

Salary Paycheck Calculator

Hourly Paycheck Calculator

Tax Withholding Estimator



# Recording Punches

- These are the time clock punch options:
- 1) To punch in – Clock In
  - 2) To start lunch – Meal Out
  - 3) To return from lunch – Meal Return
  - 4) To leave for the day – Clock Out

\*\*\* Note: If you do not need to take a lunch you will only have 2 punches for the day

My Time

1:12 PM

Started Work at 8:33 AM  
(04:38:52)

Clock Out

Meal Out

Transfer

Clock In

Clock Out

Meal Out

Meal Return

Transfer

Recent Punches

Show Less Actions




# Recording Punches Cont'd

My Time


>

Started Work at 8:33 AM  
(04:40:27)


1:13 PM




Clock Out




Clock In




Clock Out




Meal Out




Meal Return




Transfer



Meal Out



Transfer



Recent Punches

↑ Show Less Actions

Transfer with notes

Wh

My

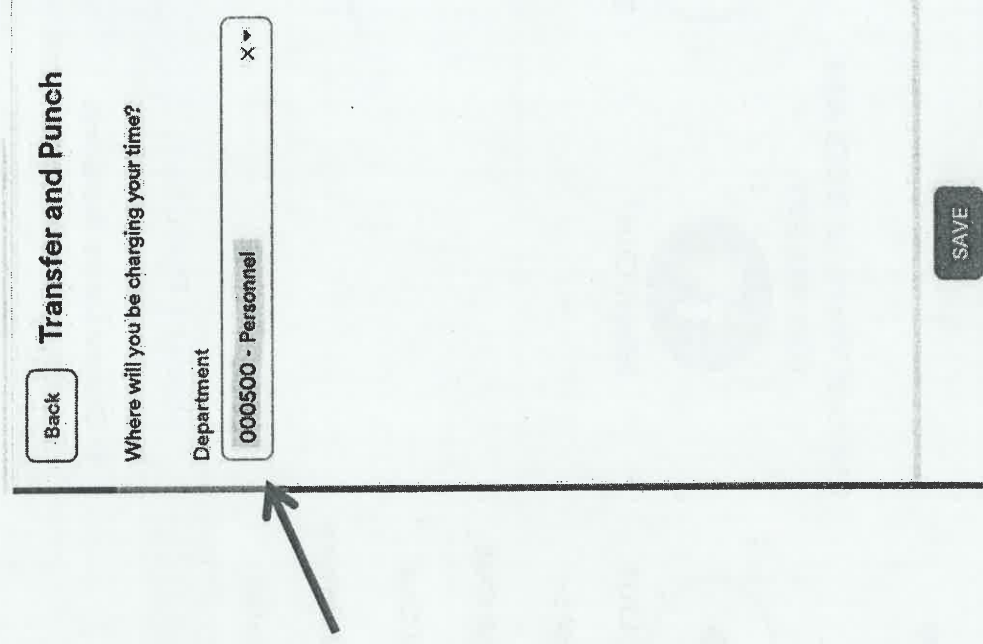
Balar

02

If an employee is established with 2 separate rates of pay (they perform different duties), then they would use the "Transfer" function to clock into a different work center.

- 1) To transfer to other work center select – Transfer

# Recording Punches Cont'd



The screenshot shows a web form titled "Transfer and Punch". At the top left is a "Back" button. Below the title is the question "Where will you be charging your time?". Underneath this is a "Department" label followed by a dropdown menu. The dropdown menu is open, showing the selected option "000500 - Personnel" and a small "X" icon to its right. A handwritten black arrow points from the bottom left towards the dropdown menu. At the bottom right of the form is a "SAVE" button.

After selecting Transfer, then the employee would use the looking glass icon to locate the department to transfer to.

Note: The employee would need to be informed of the department code to use.

# Viewing Timesheet



Things to Do

Calendar

ADP Diocese of Sacramento

Home

Resources

Myself

Myself

Myself

Myself

Myself

Myself

Myself

Myself

Myself

Myself

Myself

Myself

Myself

Myself

Myself

Myself

Myself

Myself

Myself

Myself

## Things to Do

Congratulations  
You've completed all of your  
Things to Do tasks

## My Time

1:10 PM

Started Work at 8:33 AM

(04:36:54)



Clock Out



Meal Out



Transfer

SHOW MORE ACTIONS

## What Would You Like to Do?

Update Tax Withholdings

Update Payment Options

Update Profile

## My Pay

Compensation



TAKE HOME  
\$X.XX

GROSS PAY  
\$X.XX

Show

## My Time Off

Balances as of

02/02/2023



Show Balances

Request time off

## Helpful Links

Salary Paycheck Calculator

Hourly Paycheck Calculator

Tax Withholding Estimator

# My Timecard @



Home Department : 003650 - Manuscript

2253-XI-XII  
T-1 ID (SSN)

Position ID  
PGW002450



Current Pay Period

2

1996.06.01

1206257



100

50

Time Off Balance

Week 1	In - Out	Pay Code	Hours	Department	Daily Totals	Regular	Overtime	Doubletime
Mon 01/16	08:00 AM - 04:00 PM	HOLIDAY	8.00	000500	8.00	0.00	0.00	0.00
Tue 01/17	08:33 AM - 12:16 PM		3.72	000500		3.72	0.00	0.00
Wed 01/18	08:34 AM - 12:44 PM		4.17	000500		4.17	0.00	0.00
Thu 01/19	08:51 AM - 12:29 PM		3.97	000500		3.97	0.00	0.00
Fri 01/20	01:00 PM - 05:20 PM		4.33	000500		4.03	0.30	0.00



Torres, Blanca

Home Department : 000500 - Personnel

BT

Next Pay Period

8/16/2019

8/31/2019

Q FIND

APPROVE TIMECARD

Timecard

Totals

Schedule

Time Off Balances

WEEK 1				PAY CODE	HOURS	DEPARTMENT	DAILY TOTALS	REGULAR	OVERTIME	DOUBLETIME
Fri	08/16	07:12 AM	-	12:04 PM	●	000500		4.87	0.00	0.00
	08/16	12:45 PM	=	03:30 PM	●	000500		2.75	0.00	0.00
Sat	08/17					000500		0.00	0.00	0.00
Sun	08/18					000500		0.00	0.00	0.00

WEEK 2				PAY CODE	HOURS	DEPARTMENT	DAILY TOTALS	REGULAR	OVERTIME	DOUBLETIME
Mon	08/19	07:46 AM	-	01:05 PM	●	000500		5.32	0.00	0.00
	08/19	01:56 PM	=	04:33 PM	●	000500		2.62	0.00	0.00
Tue	08/20	07:46 AM	=	01:07 PM	●	000500		5.35	0.00	0.00
	08/20	02:03 PM	-	04:33 PM	●	000500		2.50	0.00	0.00
Wed	08/21	07:47 AM	=	01:03 PM	●	000500		5.27	0.00	0.00
	08/21	01:42 PM	-	04:30 PM	●	000500		2.80	0.07	0.00
Thu	08/22	07:30 AM	-	01:00 PM	●	000500		5.50	0.00	0.00
	08/22	02:06 PM	=	04:36 PM	●	000500		2.50	0.00	0.00
Fri	08/23	08:00 AM	-	12:00 PM	●	000500		4.00	0.00	0.00
	08/23	12:30 PM	-	04:30 PM	●	000500		4.00	0.00	0.00

Pay Period (63.65)

Week 1 (76.2)

Week 2 (59.85)

Week 3 (16.18)

SAVE

REFRESH

PREFERENCES

Legend



# Approving Timesheet Cont'd

Next Pay Period

8/16/2019

8/31/2019

Q FIND

APPROVE TIMECARD

Time Off Balances

Time Off Balances

Timecard

Schedule

Totals

IN - OUT

PAY CODE

HOURS

DEPARTMENT

DAILY TOTALS

REGULAR

OVERTIME

DOUBLETIME

WEEK 1		WEEK 2	
Fri	08/16 07:12 AM - 12:45 PM	Mon	08/19 07:46 AM - 04:56 PM
Sat	08/17	Tue	08/20 07:46 AM - 02:03 PM
Sun	08/18	Wed	08/21 07:47 AM - 04:30 PM
		Thu	08/22 07:30 AM - 04:30 PM
		Fri	08/23 08:00 AM - 12:00 PM

Do you want to approve this timescard?

You are about to approve your timescard from 8/16/2019 to 8/31/2019. This approval is for both Time pair and Supplemental Pay Codes. Do you want to continue?

APPROVE

CANCEL

# Approving Timesheet Cont'd

Next Pay Period: ▼

8/16/2019

8/31/2019

Q END ▼

APPROVED ▼

Timecard

Totals

Schedule

Time Off Balances

WEEK 1		IN - OUT	PAY CODE	HOURS	DEPARTMENT	DAILY TOTALS	REGULAR	OVERTIME	DOUBLETIME
Fri	08/16	07:12 AM - 12:04 PM		4.87	000500		4.87	0.00	0.00
	08/16	12:45 PM - 03:30 PM		2.75	000500	7.62	2.75	0.00	0.00
Sat	08/17			0.00	000500	0.00	0.00	0.00	0.00
Sun	08/18			0.00	000500	0.00	0.00	0.00	0.00
WEEK 1 TOTALS						7.62	7.62	0.00	0.00



# Approving Timesheet Cont'd

My Timecard



Heredia, Lilian

Tax ID (SSN)  
XXX-XX-5472

Position ID  
PGW002560

Home Department: 000500 - Production

Current Pay Period



1/16/2023



1/31/2023



Find

Approved



Supervisor Approved

Timecard

Time Off Balances

Totals

Schedule

Hours

Department

Daily Totals



Regular

Overtime

Doubtline

Week 1

Mon

01/16 08:00 AM - 04:00 PM HOLIDAY

8.00

000500

8.00

0.00

0.00

0.00

0.00

Tue

01/17 08:33 AM - 12:16 PM

3.72

000500

3.72

0.00

0.00

0.00

0.00

Wed

01/17 12:46 PM - 05:16 PM

4.50

000500

4.22

0.22

0.00

0.00

0.00

Thu

01/18 08:34 AM - 12:44 PM

4.17

000500

4.17

0.00

0.00

0.00

0.00

Fri

01/18 01:15 PM - 05:30 PM

4.25

000500

4.42

0.42

0.00

0.00

0.00

Sat

01/19 08:31 AM - 12:29 PM

3.97

000500

3.97

0.00

0.00

0.00

0.00

Sun

01/19 01:00 PM - 05:20 PM

4.33

000500

4.30

0.30

0.00

0.00

0.00

# Requesting Time Off

Things to Do

Congratulations  
You've completed all of your  
Things to Do tasks

My Time

Started Work at 8:33 AM  
(04:36:54)

Clock Out Meal Out Transfer

1:10 PM

SHOW MORE ACTIONS

What Would You Like to Do?

Update Tax Withholdings

Update Payment Options

Update Profile

My Pay

Compensation

TAKE HOME  
\$X.XX

GROSS PAY  
\$X.XX

My Time Off

Balances as of  
02/02/2023

Show Balances

Request time off

Helpful Links

Salary Paycheck Calculator

Hourly Paycheck Calculator

Tax Withholding Estimator

# Requesting Time Off

>

My Time Off

Balances as of

02/02/2023

📅

Request time off

👁 Show Balances



# Requesting Time Off Cont'd

## My Time Off



**Balances**

[View more details](#)

Position : <No Job Title> - PGW002560

Status : Active

Balances as of : 02/02/2023

Sick Policy

60.07 hours

Vacation Policy

41.88 hours

Balances do not include pending requests

Request time off

Request balance carryover

**Time-Off Requests**

**Balance Carryover Requests**

**Calendar view >**

Filters

Displaying requests from Jan 2, 2023 and any future-dated requests.

Policy :

Request Period :

Status :

Vacation Policy

01/04/2023 - 01/04/2023 (8.00 hours)

Approved

Vacation Policy

01/03/2023 - 01/03/2023 (8.00 hours)

Approved

# Requesting Time Off Cont'd

[← Back](#)

## Time Off Request

Start Date *	MM/DD/YYYY	End Date *	MM/DD/YYYY
Time Off Policy *		Duration Type	
Select policy			
Reason Code *			
<input type="checkbox"/> Make Resuming			
Start Time *	HH:MM AM	Hours Per Day *	

[+ Add more Time Off](#)



# Requesting Time Off Cont'd

[← Back](#)

## Time Off Request

Sick Policy (4.00 hours)

Reason Code: Sick

Fri Feb 3, 2023 - Fri Feb 3, 2023

Start Date Is Required \*

MM/DD/YYYY

End Date \*

MM/DD/YYYY

Time Off Policy \*

Select policy

Reason Code \*

Duration Type

☐ Make Recurring

Start Time \*

Minimum AM

Hours Per Day Is Required \*

[Add more Time Off](#)



# Requesting Time Off Cont'd

[← Back](#)

## Time Off Request

Sick Policy (4.00 hours)  
Reason Code : Sick  
Fri Feb 3, 2023 - Fri Feb 3, 2023



[Add more Time Off](#)

Approve By Date

MM/DD/YYYY



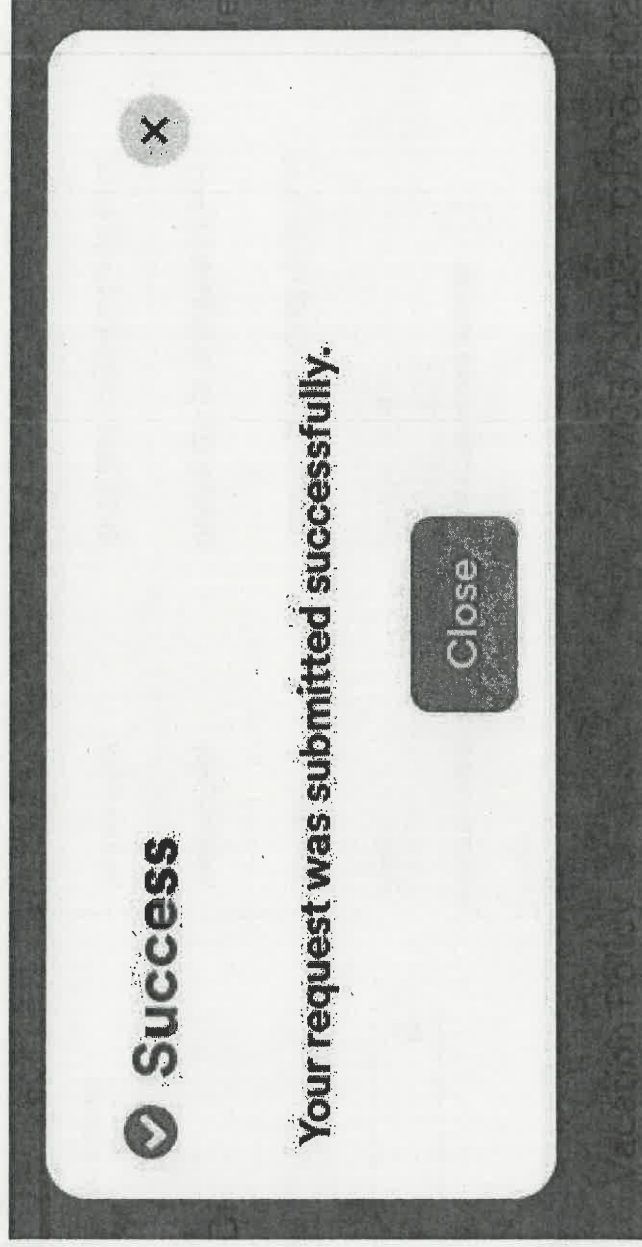
Comment (Optional)

0/250

Submit



# Requesting Time Off Cont'd





# Requesting Time Off Cont'd

## My Time Off



Balances

View more details

Position : <No Job Title> - PGW002560  
Status : Active  
Balances as of : 02/02/2023

Sick Policy

60.07 hours

Vacation Policy

41.88 hours

Balances do not include pending requests

Request time off

Request balance carryover

Time Off Requests

Balance Carryover Requests

Calendar view >

Filters

Displaying requests from Jan 2, 2023 and any future-dated requests.

Policy	Request Period	Status
Sick Policy	02/03/2023 - 02/03/2023 (4.00 hours)	Pending
Vacation Policy	01/04/2023 - 01/04/2023 (8.00 hours)	Approved
Vacation Policy	01/03/2023 - 01/03/2023 (8.00 hours)	Approved

ADP Workforce  
Timekeeping System  
Supervisor Section

# Accessing Sign-on Screen

## Sign in to ADP®

Want to view your pay stub, download a W-2, enroll for benefits, or access your 401(k) account? You name it, and we can help you get to the right place to do it even if you have never signed in before!

Pick the option that describes you best:

Select	▼
Select	
My former employer uses ADP	
My former employer is out of business	
My current employer uses ADP	
I am an administrator/owner of a company that uses ADP	
I am an accountant for a company that uses ADP	
I am a financial advisor for a company that uses ADP	



# Accessing Sign-on Screen

## Sign in to ADP®

Want to view your pay stub, download a W-2, enroll for benefits, or access your 401(k) account? You name it, and we can help you get to the right place to do it even if you have never signed in before!

Pick the option that describes you best:


My current employer uses ADP



✕ Cancel

Next

# Sign-on Screen

 English (US) ▾

## Sign in to ADP®

User ID

☐ Remember User ID ⓘ

Next


Forgot your user ID?

---

New user ? ⓘ Create account



# Home Screen

 Diocese of Sacramento

Home

Resources

Myself

My Team

What's New

Things to Do

Calendar

Bridge

Support

AC

Configure homepage

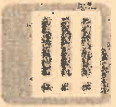
Things to Do

Notifications (2)

Easily comply with state-specific anti-harassment requirements with Brainier's standalone Anti-Harassment Training Library — no LMS required. Learn more on ADP Marketplace.

Click here to learn more and register for the Pro Summit!


My Time


VIEW TIMECARD


My Pay


Compensation

Dashboards

HR

Payroll

Reports

Self Service

My Time Off

Balances as of

# Accessing Timecards

Diocese of Sacramento

What's New Things to Do Calendar Bridge Support

AC

Home Resources ▾ Myself ▾ My Team ▾ Time & Attendance ▾ Reports & Analytics ▾ Setup ▾ Favorites ▾

Time & Attendance

Team Information

Delegated Activities

Team Calendar

Personal Information

Personal Profile

Employee Profile Report

Time Off

Request Time Off

Time Off Balances

List Of Requests

Request Carryover

Individual Timecard

Timecard Exceptions

Totals Summary

Group Timecard

Schedules

Schedule Templates

Actual vs. Scheduled

Monthly Schedule

Holiday List

Attendance

Quick Charge

Manage Employee Hours

VIEW TIMECARD

Dashboard

HR Payroll Reports Self Service

My Time Off

Balances as of 02/03/2023

Show Show Balances

Configure homepage

HOW TO ACCESS





[illegible]



[illegible]





[illegible]







# Approving Timesheet Cont'd

Next Pay Period

8/16/2019

8/31/2019

Q.FIND

APPROVE TIMECARD

Time Off Balances

Schedule

Totals

	IN	OUT	PAY CODE	HOURS	DEPARTMENT	DAILY TOTALS	REGULAR	OVERTIME	DOUBLETIME
WEEK 1									
Fri	08/16	07:12 AM					0.00	0.00	0.00
	08/16	12:45 PM					0.00	0.00	0.00
Sat	08/17						0.00	0.00	0.00
Sun	08/18						0.00	0.00	0.00
WEEK 2									
Mon	08/19	07:46 AM					0.00	0.00	0.00
	08/19	10:56 PM					0.00	0.00	0.00
Tue	08/20	07:46 AM					0.00	0.00	0.00
	08/20	02:03 PM					0.00	0.00	0.00
Wed	08/21	07:47 AM					0.00	0.00	0.00
	08/21	01:42 PM					0.00	0.00	0.00
Thu	08/22	07:30 AM					0.00	0.00	0.00
	08/22	02:00 PM					0.00	0.00	0.00
Fri	08/23	08:00 AM					0.00	0.00	0.00
	08/23	12:00 PM					0.00	0.00	0.00

Do you want to approve this timesheet?

You are about to approve your timesheet from 8/16/2019 to 8/31/2019.  
This approval is for both Time pair and Supplemental Pay Codes. Do you want to continue?

APPROVE

CANCEL

**HOME**

RESOURCES MYSELF MY TEAM PEOPLE REPORTS SETUP

MESSAGES CALENDAR BRIDGE SUPPORT LOG OUT

ANNA CONSUELO SCHRIER AC

# Individual Timecard

Torres, Blanca

Home Daydream : 000500 - Personnel

Next Pay Period 8/16/2019 8/31/2019

Q FIND

Show Pay Class DASHBOARD

APPROVED Employee Approved

Tax ID (SSN) XXX-XX-XXXX

Position ID PGW002254

Hire Date 10/20/2014

Status ACTIVE

Employee Search HR TEAM Q

Add to Favorites

Search Workforce Now

		Totals	Schedule	Time Off Balances
	Sun 08/25	-		

		WEEK 2 TOTALS						
<	✓ APPROVE	WEEK 3	IN - OUT	PAY CODE	HOURS	DEPARTMENT	DAILY TOTALS	
✓	Mon 08/26	07:30 AM - 01:00 PM			5.50	000500		
✓	Tue 08/27	07:43 AM - 01:07 PM			5.40	000500		
✓	Wed 08/28	01:51 PM - 04:38 PM			2.78	000500		
✓	Thu 08/29	-			0.00	000500		
✓	Fri 08/30	-			0.00	000500		
✓	Sat 08/31	-			0.00	000500		
					39.85		REGULAR OVERTIME DOUBLE	39.85 39.78 0.07

		Week 1 (7.62)	Week 2 (39.85)	Week 3 (16.18)
Pay Period (63.65)				

SAVE REFRESH

PREFERENCES Legend



# Entering Pre-Planned Time Off



Diocese of Sacramento



Home

Resources

Myself

My Team

People

P

## Team Information

Delegated Activities

Team Calendar

## Personal Information

Personal Profile

Employee Profile Report

## Time Off

Request Time Off

Time Off Balances

List Of Requests

Request Carryover

## Time & Attendance

Individual Timecard

Timecard Exceptions

Totals Summary

Group Timecard

Schedules

Schedule Templates

Actual vs. Scheduled

Monthly Schedule

Holiday List

Attendance

Quick Charge

Manage Employee Hours

# Entering Pre-Planned Time Off

## Request Time Off

My Calendar My Team My Peers

Week of 01/29/2023

Filters

Total Employees (2)

Search for an employee...

	29 Sunday	30 Monday	31 Tuesday	01 Wednesday	02 Thursday	03 Friday	04 Saturday
Heredia, Lilian			Hire Date				

Legend

Heredia, Lilian

Position ID: 1000000000

Job Title: -

Home Department: 000500 - Personnel

Hire Date: 01/29/2023

Status: Active

Select the employee and request date on the calendar, then click Request time off.

Request time off

Time Off Balances

Balances as of

02/02/2023

Time Off Policy Balance

Sick Policy 64.49 hours

Vacation Policy 45.57 hours



# Entering Pre-Planned Time Off

[← Back](#)

Time Off Request

Heredia,  
Lilian

Position ID:

Balances As Of \*

02/02/2023



Sick Policy

64.49 hours

Vacation Policy

45.57 hours

[Continue](#)



# Entering Pre-Planned Time Off

[← Back](#)

## Time Off Request

Heredia,  
Lillian

Position ID: XXXXXXXXXX

Start Date \*

MM/DD/YYYY



End Date \*

MM/DD/YYYY



Time Off Policy \*

Select policy



Reason Code \*

▼

Duration Type

☐

Make Recurring ?

Start Time \*

hh:mm AM



Hours Per Day \*

[+ Add more Time Off](#)

[← Prev](#)

[Review](#)



# Entering Pre-Planned Time Off

[← Back](#)

## Time Off Request

Heredia,  
Lilian

Position ID: **0000000000**

Sick Policy (8.00 hours)

Reason Code : Sick

Fri Feb 3, 2023 - Fri Feb 3, 2023



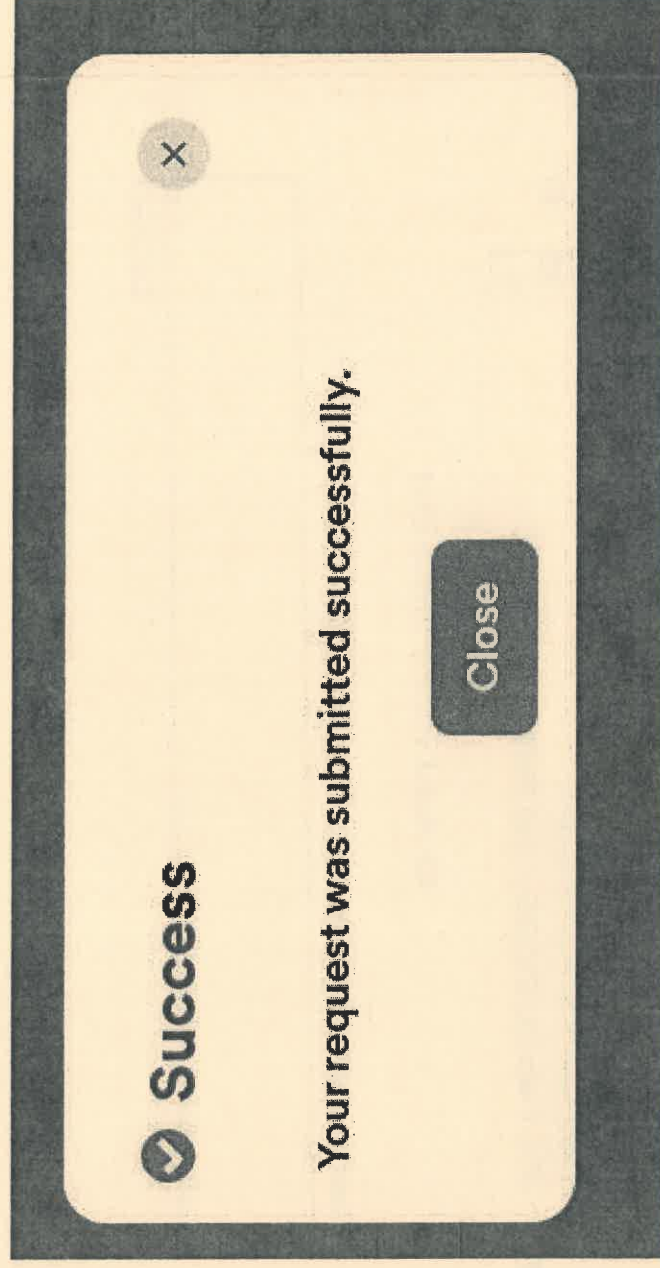
[+ Add more Time Off](#)

Comment (Optional)

0/250

Submit

# Entering Pre-Planned Time Off





# Reviewing Time off Request

Home Resources ▾ Myself ▾ My Team ▾ People ▾

## Team Information

Delegated Activities

Team Calendar

## Personal Information

Personal Profile

Employee Profile Report

Time Off

Request Time Off

Time Off Balances

List Of Requests

Request Carryover

## Time & Attendance

Individual Timecard

Timecard Exceptions

Totals Summary

Group Timecard

Schedules

Schedule Templates

Actual vs. Scheduled

Monthly Schedule

Holiday List

Attendance

Quick Charge

Manage Employee Hours

# Reviewing Time off Request Cont'd

Home Resources ▾ Myself ▾ My Team ▾ People ▾ Process ▾ Reports & Analytics ▾ Setup ▾ Favorites ▾

## List Of Requests



Employee

Requests from  Requests to  Policy

Pending Requests Request History

🔔 You have 0 pending requests

Mark all as approve

Employee Name Position ID	Request Period Amount	Time Off Policy	Status Last Reviewed By	Submitted On	Action
There are currently no entries					

Process request



# Reviewing Time off Request Cont'd

List Of Requests

Add to Favorites

Employee

Enter Name

Requests From

04/18/2021

Requests To

06/17/2022

Policy

Select Policy

Q FILTER

RESET

Pending Requests

Request History

You have 1 PENDING REQUESTS

MARK ALL AS APPROVE

EMPLOYEE NAME POSITION ID	REQUEST PERIOD AMOUNT	TIME OFF POLICY	STATUS LAST REVIEWED BY	SUBMITTED ON	ACTION
Miramontes, Rosa I PGW002491	06/21/2021 8.00 hours	Vacation Policy - Vacation	Pending	06/16/2021	<div>Mark to Approve</div> <div>Check Schedule   Comments</div>

PROCESS REQUEST



# Reviewing Time off Request Cont'd

ADP

HOME RESOURCES MYSELF MY TEAM PEOPLE REPORTS SETUP +

MESSAGES CALENDAR REPORT TO DO LIST

ANNA SCHLELE

Consulo-Schlele, Anna C

EMPLOYEE ID: 1000-XX-XXXX

WORKING: 0

POW002297

Home Department

ADD TIME

ADD TO FAVORITES

STATUS:

POLICY:

DATE RANGE: 8/4/2019 TO 8/4/2019

REQUEST PERIOD: 08/20/2019

TIME OFF POLICY: Vacation Policy - Vacation

AMOUNT: 3.00 HOURS

STATUS: Approved

LAST REVIEWED BY: Consulo-Schlele, Anna C

ACTION:

ADP

Multiple values exist for this request. Expand the request by clicking the + at the beginning of the row

SUBMITTED ON	REQUEST PERIOD	TIME OFF POLICY	AMOUNT	STATUS	LAST REVIEWED BY	COMMENTS	ACTION
08/20/2019	08/20/2019	Vacation Policy - Vacation	3.00 HOURS	Approved	Consulo-Schlele, Anna C		<input type="button" value="Q FILTER"/>

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## DIOCESE OF SACRAMENTO

2110 Broadway • Sacramento, California 95818 • 916/733-0100 • Fax 916/733-0195

### LAY PERSONNEL

October 17, 2022

To: Pastors, Parish Finance Council, Agency Directors, Office Managers, and School Principals  
FR: Anna Schiele  
RE: **Minimum Wage Increase**

***Please be advised of the following effective January 1, 2023:***

1. Any current non-exempt employee working at an hourly rate of \$15/hour will need to receive an increase to the new minimum of \$15.50/hour.
2. Any current exempt employee with a salary rate less than \$62,400 will need to receive an increase to the new minimum of \$64,480 annually.
3. The chart below details the breakdown of the minimum wage order:

Effective Date	Hourly Minimum Wage	Exempt Weekly Salary	Exempt Monthly Salary	Exempt Annual Salary
Jan. 1, 2023	\$15.50	\$1,240	\$5,373.34	\$64,480

***Please Note: If the employee is a teacher, the rates above do not apply to them as they have a different pay scale that is released from the Catholic School Department.***

Please feel free to contact me if you have any questions or concerns. I am also happy to discuss the pros and cons related to the decision to change an employee's status from exempt to non-exempt. I can be reached by phone at 916-733-0240 or by email at [aschiele@scd.org](mailto:aschiele@scd.org).





## DIOCESE OF SACRAMENTO

2110 Broadway • Sacramento, California 95818 • 916/733-0100 • Fax 916/733-0195

### LAY PERSONNEL

February 3, 2023

Dear Pastors, Parochial Administrators, and Parish Stewards:

Each year, pursuant to the Parish Services Agreements between the diocese and parish corporations, we prepare a salary adjustment guideline for lay employees of parishes and also the central administrative offices of the diocese. This guideline is intended as a resource to parishes in the preparation of their budgets for the coming fiscal year. Please note that the guideline for Catholic school employee salaries is addressed separately by the Catholic Schools Department.

The 2023/2024 salary adjustment guideline for Lay Employees is a 4.5% increase.

This guideline has been developed after consideration of relevant factors such as inflation; unemployment; national surveys of projected wage adjustments for 2023; FY21/22 parish offertory results; and recent salary adjustment history. Consultation was provided by the Diocesan Finance Council in addition to key management at the Pastoral Center.

Please give due consideration to this guideline as you prepare your 23/24 fiscal year budgets.

Thank your diligent care of those gifts and resources that have been provided to our local Church, both temporal and personnel. If you have any questions, please do not hesitate to contact me.

Sincerely yours in Christ,

A handwritten signature in dark ink, reading "Anna Schiele".

Anna Schiele  
Director of Lay Personnel







## DIOCESE OF SACRAMENTO

10 Broadway • Sacramento, California 95818 • 916/733-0100 • Fax 916/733-0195

### LAY PERSONNEL

January 9, 2023

To: Pastors, Parochial Administrators, Parish Stewards, Agency Directors, Office Managers, and School Principals

FR: Anna Schiele

RE: **Job Postings Pay Transparency Requirements per Senate Bill 1162**

As of January 1, 2023, California's new pay transparency law requiring pay scales in job openings went into effect. Although Senate Bill 1162 passed in September, we were awaiting direction from the California Labor Commissioner to interpret a few key elements of the law. Below are the requirements that will apply to all sites.

#### **Required Pay Transparency in Job Posting:**

California employers must include a position's **salary or hourly wage range** (not including bonuses or equity-based compensation) in any internal or external job posting. This requirement extends to job postings published by a third party at an employer's request.

#### **Expansion of pay scale disclosures upon request:**

Current employees who request the pay scale for the position in which they are currently employed, must be provided with the position's salary or hourly wage range. The employee should place the request in writing using the PT 656 Form. You will need to respond to the employee in a reasonable timely fashion. For your ease the PT 656 Form has been attached to this Memo.

Failure to comply with these requirements may subject the employer to a civil penalty up to \$10,000 per violation.

If you have any questions or concerns, please feel free to contact the Office of Lay Personnel at 916-733-0239.





## DIOCESE OF SACRAMENTO

2110 Broadway • Sacramento, California 95818 • 916/733-0100 • Fax 916/733-0195

### LAY PERSONNEL

March 13, 2023

To: Pastors, Parochial Administrators, Parish Stewards, Agency Directors, Office Managers, and School Principals

FR: Anna Schiele

RE: **Updated COVID-19 Safety Measures**

Governor Gavin Newsom announced that the California COVID-19 State of Emergency has ended. As more information has been released from the California Department of Public Health and to align our practices, the following changes have been implemented to our safety protocols for employees:

#### Use of Masks

1. Face coverings will only be required in the following circumstances:

- An outbreak has been reported, *OR*
- While using employer-provided transportation, *OR*
- CDPH has implemented a mask mandate.

**Note:** While face coverings are not required, they are highly encouraged.

2. Employer must supply an unvaccinated employee with a N95 mask upon request.
3. Employer must allow employees to wear face coverings if they voluntarily choose to do so, unless it would create a safety hazard, such as interfering with the safe operation of equipment.

#### International Travel

1. All employees (regardless of vaccination status) will **ONLY** need to quarantine after international travel if the following apply:
- a. The employee is feeling symptomatic or
  - b. The employee has been exposed to COVID

**Note:** All employees should proactively take a COVID test 3-5 days after returning to California in compliance with the CDC recommendation.

Please check the CDC website prior to international travel to ensure no additional restrictions apply.

#### Screening and Quarantine

- i. Self-Screening Measures
- a. Please ensure you refrain from reporting to work on-site if you are not feeling well



or are experiencing COVID symptoms.

- b. During the workday, if an employee begins to feel ill and exhibit any of the symptoms of the virus, especially a fever, a changing cough, or difficulty breathing, the employee should leave work immediately while wearing a face covering until they have exited the premises. After leaving the building, the employee is to immediately contact Lay Personnel to notify them that they are feeling ill and have left the building to ensure the safety of others. Lay Personnel will then notify the appropriate supervisor.
- c. The employee is expected to be in regular communication with Lay Personnel regarding the status of their condition. Further direction will be provided to the employee based upon their condition (such as the ability to work remotely, return to work date, etc.), the employee is expected to follow the direction provided including the required check-in's with Lay Personnel or their supervisor.

ii. Quarantine Protocol

a. **Employee COVID Positive (Regardless of Vaccination Status)**

- i. The employee will be asked to provide a list of the people in the building that they have had physical contact with 72 hours before the onset of symptoms.
- ii. To return to work the employee must meet the following criteria:
  - 1. At least 5 days have passed since symptom onset and at least 24 hours have passed since resolution of fever without the use of fever-reducing medications; and other symptoms have improved, **AND ONE OF THE FOLLOWING**
  - 2. They have a negative test for SARS-CoV-2 that has been collected on day 5 or later, **OR**
  - 3. A healthcare provider has provided documentation that the symptoms are typical of their underlying chronic condition (e.g., allergies or asthma), **OR**
  - 4. A healthcare provider has confirmed an alternative named diagnosis (e.g., Streptococcal pharyngitis, Coxsackie virus).
- iii. If an employee does not have a negative test for SARS-CoV-2 on day 5 or later, then the employee must remain in isolation until 10 full calendar days have passed since symptom onset. The same would apply for an employee refusing to be tested on day 5 or later.
- iv. The employee must wear a mask **at all times** for an additional **5 days** following the return to work.

**Note:** The date of exposure is day "0". Day "1" is the first full day after the day of exposure.

b. **Exposed Employee who is Asymptomatic (Regardless of Vaccination Status)**

- i. Employees who have potentially been exposed to the virus will be immediately informed.
- ii. Employees who have been exposed must test within 3-5 days.
  - 1. Employees who have been infected within the prior 90 days do not need to be tested unless symptoms develop.
- iii. The exposed employee must wear a mask **at all times** for 10 days following the exposure.

- iv. If the employee develops symptoms, they must refer to the steps outlined below for symptomatic exposure.

**Note:** The date of exposure is day "0". Day "1" is the first full day after the day of exposure.

**c. Exposed Employee who is Symptomatic (Regardless of Vaccination Status)**

- i. Employees who have potentially been exposed to the virus will be immediately informed.
- ii. Employees who are symptomatic must self-quarantine for a minimum of 5 full calendar days and test as soon as possible.
  - 1. The self-quarantine period may end after 5 full calendar days if the employee has been fever-free for 24 hours without the use of fever reducing medicine and other symptoms are improving, **AND**
  - 2. The exposed employee has tested negative for SARS-CoV-2, 5 days after being exposed.
- iii. If an employee does not have a negative test for SARS-CoV-2 on day 5 or later, then the employee must remain in isolation until 10 full calendar days have passed since the exposure occurred. The same would apply for an employee refusing to be tested on day 5 or later.
- iv. The exposed employee must wear a mask **at all times** for the 10 days following the exposure.
- v. For symptomatic employees who have tested positive within the prior 90 days, using an antigen test is preferred.

**Note:** The date of exposure is day "0". Day "1" is the first full day after the day of exposure.

**iii. Pay During Quarantine**

**a. Accrued Sick or Vacation Hours**

- i. The employee may either use their accrued sick or vacation hours to cover their missed time. Please note the employee will need to request the use of their sick or vacation hours via the PT501 Form or an electronic time off request in ADP.

**iv. Pay for Required Testing**

- a. If an employee is required to obtain a COVID test due to a workplace exposure or to return to work, then the employer must pay the employee for the time required to obtain the test. The employee must inform the supervisor of the time required to obtain the test, the employer will then need to enter the hours onto the employee's timesheet. The employer should make a note on the timesheet that the hours paid are due to obtaining a COVID test.

**General**

- 1. No physical distancing or barriers between workers are required, regardless of employees' vaccination status in the workplace.
- 2. Infectious Disease Preparedness and Response Plan
  - a. Each employee at the time of hire should be provided with a copy of this plan.
  - b. A copy of this plan is to be kept in the IIPP Binder.
  - c. An updated version has been added to the Diocesan Website. Please be sure to use

the most current draft. For your convenience we have provided the following link to access this document: <https://www.scd.org/sites/default/files/2023-03/Infectious%20Disease%20Preparedness%20and%20Response%20Plan%20v8%20-%20Final%203.23.pdf>

3. Occurrence Reporting with LWP (WC Provider)

- a. Occurrence Reporting must be completed within 24 hours of being notified that an employee is positive with COVID-19.
- b. For your convenience we have provided the following link to access this document: <https://www.scd.org/lay-personnel/coronavirus-covid-19>

Your safety and the safety of all our employees is of the utmost importance to us. We appreciate your flexibility and support as we navigate through this ever evolving time. If you have any questions or concerns, please contact the Office of Lay Personnel at 916.733.0239.