

ROMAN CATHOLIC
DIOCESE *of*
SACRAMENTO

ANNUAL ADMINISTRATIVE WORKSHOP

AGENDA

- 2025 Employee Benefits Program
 - ✓ Important Open Enrollment Dates and Notifications
 - ✓ What's New for 2025
 - ✓ Benefit Offerings from Reta
- Benefits Reminders
 - ✓ HSA Payroll Process / Updates
 - ✓ BAS Statements / Benefit Class Changes
 - ✓ Insurance Waivers
 - ✓ Qualifying Life Event Process
 - ✓ SunLife – EOI & LTD
 - ✓ Portability vs Conversion
 - ✓ Retirement
 - ✓ 403(b) Loan Process
- Personnel Reminders and Updates
 - ✓ Personnel Forms
 - ✓ Orientation Process
 - ✓ HR Record Retention
 - ✓ Benefit Eligibility
 - ✓ Transition of Key Players
 - ✓ Lay Personnel Background Check
 - ✓ Live Scan/Safe Haven
 - ✓ Sexual Harassment Training
 - ✓ LOA's and W/C Cases
 - ✓ Insurance Stoploss
 - ✓ Termination Requirements
 - ✓ ADP Items
 - ✓ Misc. Payroll Items
 - ✓ Workplace Violence Policy and Training
 - ✓ Breakroom Postings
 - ✓ Equifax and The Work Number
 - ✓ Weekly News on Website
 - ✓ Increased Insurance Premium
- Miscellaneous Bookkeeping Items



2025 EMPLOYEE BENEFITS PROGRAM



OPEN ENROLLMENT 2025

Open Enrollment Period:

Monday April 28th – Wednesday May 14th at 11:59 P.M.

- Coverage and premium cost share will become effective July 1, 2025 and last until June 30, 2026.
- Passive Enrollment
- If employees do not go online to elect coverage, **their existing benefits will default to current coverage and tiers.**
- Changes are not allowed outside Open Enrollment- unless employees experience a Qualifying Event. Examples can be found in the Employee Benefits Guide.
- Training Tuesday's will continue to offer training for administrators at 11 am
 - April 15th – Open Enrollment Training
 - May – All Month – Open Enrollment Training
 - June – Post Open Enrollment Training



ENROLLMENT PROCESS

- The benefits open enrollment process is completely online through RetaEnroll 360
- Reta Trust registered users will receive communication from Reta about what's coming for the new plan year closer to open enrollment date.
- The enrollment site is available 24 hours a day, 7 days a week during the Open Enrollment period. Steps for completing online benefits elections:
 1. Go to www.retatrust.org and click the Log In button in the top right hand corner.
 2. Enter your User Name and Password.
 3. Follow the easy enrollment steps in the Open Enrollment Wizard.
 4. Review and confirm your elections, making changes as necessary.
 5. Print your benefits confirmation statement.



WHAT'S NEW FOR 2025?

- **New CVS weight loss program will be mandatory for Reta members to receive coverage for GLP-1 weight loss meds.**

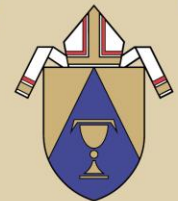
With the new year, current and future Reta members who have prescriptions to these weight loss drugs will be required to meet the current requirements, plus they will need to enroll and actively participate in Reta's new behavior lifestyle program in order to have their GLP-1 weight loss drugs covered by the Reta plans.

- **Medicare pop-up reminders when an employee reaches age 65.**
 - Educational presentations will be available for employees to view
 - Letters will also be sent to those employees who qualify for Medicare
 - Medicare Assistance Program through SGIA will be available to all benefit eligible employees to guide through the process



BLUE SHIELD OF CALIFORNIA (BSC) PLANS

	EPO plan	PPO	PPO with HSA
Network	PPO network providers only	PPO network + non-network providers	PPO network + non-network providers
Access to care	Visit any doctor you choose in the PPO network; can't go outside network	Visit any doctor you choose	Visit any doctor you choose
Availability	Nationwide	Nationwide	Nationwide
Health Savings Account with Health Equity	No	No	Yes
Telehealth (Teladoc) general medicine & mental health	Your office visit copay	Your office visit copay	After your deductible is met your office visit copay
Consider this plan if you want:	<ul style="list-style-type: none"> • Access to Full PPO network of doctors • More affordable plan than our regular PPO plan 	<ul style="list-style-type: none"> • Flexibility to see any doctor you choose, in or out of network 	<ul style="list-style-type: none"> • Flexibility to see any doctor you choose, in or out of network



BLUE SHIELD EPO-5139 PLAN

EPO gives you access to:

- 39,000+ doctors and specialists in BSC PPO network
- Self-referral to specialists without a referral from a primary care provider
- Care anywhere in the world through BlueCard

EPO does not cover:

- Non-network services

It's important to know who participates in your EPO plan's network. If you go to a doctor or hospital that doesn't accept your plan, you'll pay all costs.



BLUE SHIELD PPO-5119 PLAN

PPO gives you access to:

- 39,000+ doctors and specialists in BSC PPO network
- Self-referral to specialists without a referral from a primary care provider
- Care anywhere in the world through BlueCard

PPO also covers:

- Non-network services



BLUE SHIELD HSA-5070 PLAN

PPO with an HSA Plan offers:

- 39,000+ doctors and specialists in BSC PPO network
- Self-referral to specialists without a referral from a primary care provider
- Care anywhere in the world through BlueCard

PPO with an HSA Plan also includes:

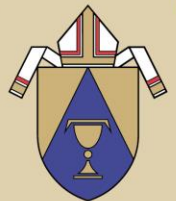
- Health Savings Account (HSA) with **Health Equity** to put aside tax-free money for qualified medical expenses
- Roll-over and portable HSA funds for qualified medical expenses

You will pay for all covered services until you reach your deductible.



BSC PROVIDER NETWORK

- To find doctors, urgent care centers, mental health providers and hospitals in California
 - **blueshieldca.com/networkPPO**
- To find a doctor and hospitals throughout the United States (outside of California)
 - **provider.bcbs.com**
- Access **blueshieldca.com/watchfindadoctor** to for quick video on the Find a Doctor tool



MEMBER ID CARD

- Members will have one (1) ID card for their Healthcare and Pharmacy needs.
- Same subscriber ID number for Medical and RX
- Subscribers will receive 2 ID cards in a welcome letter per family. Only the Members name appears on the ID card.
- How to get additional ID cards:
 - Call Member Services
 - Visit EngagementPoint at blueshieldca.com/engagementpoint



BLUE SHIELD ENGAGEMENT POINT



Tap into your health

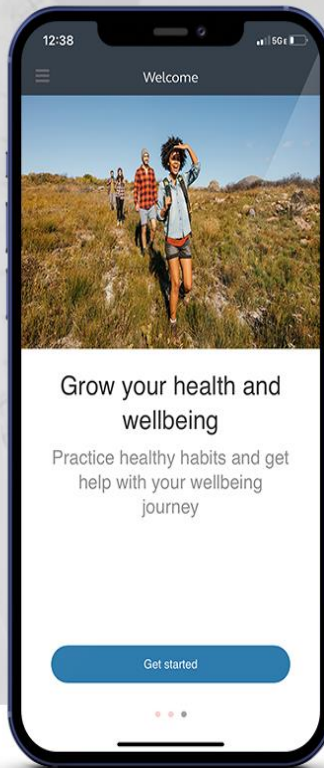
Earn rewards, manage your health, and view your member ID with EngagementPoint – available exclusively through your employer.

Create my account

Already have an account? [Sign in here.](#)



Scroll Down



CVS CAREMARK (CVS)

- Reta's Pharmacy Benefit Manager
- BSC members will receive Welcome Kits and a single ID card for BSC medical and CVS pharmacy benefits prior to July 1st.
- Nationwide network of pharmacies that includes Walgreens, Walmart, local pharmacies and CVS stores.
- Members can sign into their Caremark.com profile to locate an in-network pharmacy near them
- CVS direct member outreach for formulary disruption and specialty medications
 - To see a list of CVS non-specialty medications visit https://www.caremark.com/portal/asset/Advanced_Control_Specialty_Performance_Drug_List.pdf
 - To see a list of CVS Specialty Formulary medications visit https://www.caremark.com/portal/asset/Advanced_Control_Specialty_PREFERRED_Drug_List.pdf



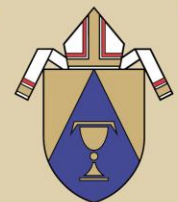
HEALTH EQUITY

- Reta is the HSA plan administrator
- Members will receive the following:
 - *Welcome Kit*
 - *New Health Equity debit card*
- PPD Account Numbers –
Employee's direct deposit bank
information



KAISER PERMANENTE PLANS

BENEFIT DESCRIPTION	KAISER EPO-4063	KAISER HSA-4085
Calendar Year Deductible: Individual / Family	\$1,000 / \$2,000	\$1,650 / \$3,300
Out of Pocket Maximum: Individual / Family	\$4,000 / \$8,000	\$3,300 / \$6,600
Hospitalization	10% after Deductible	\$250 after Deductible
Outpatient Surgery	10% after Deductible	\$150 after Deductible
Emergency Room (waived if admitted)	10% after Deductible	\$100 after Deductible
Office Visits	\$25	\$20 after Deductible
Routine Physicals	No Charge	No Charge
X-Ray/Lab	\$10 after Deductible	\$10 after Deductible
Chiropractic	\$15 (24 visits / calendar year)	\$15 after Deductible (20 visits / calendar year)
Ambulance	\$150 after Deductible	\$150 after Deductible
Routine Eye Care	No Charge (\$175 allowance every 24 months)	No Charge (\$150 allowance every 24 months)
Prescription Generic / Brand	Generic: \$10 (retail) / \$20 (mail order) Brand: \$30 (retail) / \$60 (mail order) 30 day supply at retail 100 days supply at mail order	After Deductible: Generic: \$10 (retail) / \$20 (mail order) Brand: \$30 (retail) / \$60 (mail order) 30 day supply at retail 100 days supply at mail order



KAISER EPO-4063 PLAN

- Preventative care at little or no out-of-pocket cost
- A personal doctor for routine medical care
- No referrals needed for certain specialties, like optometry and obstetrics/gynecology
- EPO plans do not cover care outside the Kaiser network unless it's an emergency.
 - 24/7 Away from Home Travel Line: 951-268-3900
 - Kp.org/travel
- Kaiser provides the pharmacy benefits



KAISER HSA-4085 PLAN

- Preventative care at little or no out-of-pocket cost
- A personal doctor for routine medical care
- Copays or coinsurance for most covered services after you meet your deductible
- No additional coinsurance needed after the annual out-of-pocket maximum is met
- A pre-tax health savings account to help pay for certain medical expenses
- Kaiser provides the pharmacy benefits



DELTA DENTAL PLANS

BENEFIT DESCRIPTION	LOW OPTION		HIGH OPTION	
	PPO	Non-PPO	PPO	Non-PPO
Annual Deductible - Individual / Family Max.	\$50 (x3)		\$50 (x3)	
Deductible Waived for Preventive Services	Yes		Yes	
Preventive Services	100%	100%	100%	100%
Basic Services	90%	80%	90%	80%
Major Services (includes Implants)	60%	50%	60%	50%
Waiting Period for Major Services	None		None	
TMJ (Separate \$1,000 Lifetime max)	60%	50%	60%	50%
Calendar Year Maximum Benefit	\$1,500	\$1,000	\$2,500	\$1,500
Orthodontia-Dependent Children	50%		50%	
Adult Benefit Ortho	50%		50%	
Orthodontia Deductible	N/A		N/A	
Orthodontia Lifetime Benefit	\$1,000		\$2,500	
Waiting Period for Orthodontia	None		None	

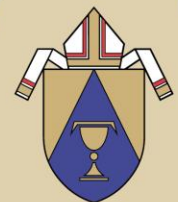
Coverage includes Brush Biopsies and 1 regular/1 periodontic cleaning every 6 months



VSP VISION PLANS

BENEFIT DESCRIPTION	LOW OPTION			HIGH OPTION		
	In-Network	Out of Network	Frequency	In-Network	Out of Network	Frequency
Exam	\$10 Copay	Up to \$45	Every 12 Months	\$10 Copay	\$10 Copay	Every 12 Months
Lenses	See below		Every 24 Months*	See below		Every 12 Months*
Single Vision Lenses	Covered in Full	Up to \$30		Covered in Full	Up to \$30	
Bifocal Lenses	Covered in Full	Up to \$50		Covered in Full	Up to \$50	
Trifocal Lenses	Covered in Full	Up to \$65		Covered in Full	Up to \$65	
Frames	\$25 Copay \$150 Allowance	Up to \$70	Every 24 Months	\$10 Copay \$150 Allowance	Up to \$70	Every 12 Months
Contact Lenses in Lieu of Glasses	\$150 Allowance for Exam and Contacts	Up to \$70	Every 24 Months	\$150 Allowance for Exam and Contacts	Up to \$105	Every 12 Months

**Interim Benefits: Lenses provided every 12 months with an Rx change of .50 diopter or more



RETA'S INTEGRATED WELLNESS PROGRAMS

- Wellvolution through BSC
 - Members will have 29 lifestyle well-being programs to choose from. And they will be eligible for disease prevention and condition reversal programs, which include intensive behavioral counseling for treating diabetes, hypertension, digestive health, obesity, and heart disease.
 - For complete details about Wellvolution, go to <https://www.wellvolution.com/>
- Workforce Health through Kaiser
 - A health assessment, telephonic coaching and healthy lifestyle programs will be offered to members to help them reach their unique goals. And this information can be shared with the member's care delivery team to provide a more holistic view of their patient's health status.
 - Online healthy lifestyle programs, videos, podcasts, recipes and more
 - On-site health education classes and support groups (classes vary at each location and some may require a fee)
 - For complete details about Workforce Health, go to <https://healthy.kaiserpermanente.org/northern-california/health-wellness>

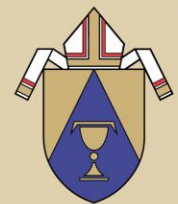


ADMINISTRATOR NOTES

- Invoices are generated on the 21st of every month
- Invoices should be printed and compared to the ADP roster on a monthly basis to ensure accuracy of employees being billed for
- Review bill for any changes
- Administrator accounts are separate from your employee account
- There should be absolutely NO sharing of credentials
- Administrator account must also be approved by the benefits administrator for the location



BENEFITS REMINDERS



HSA PAYROLL PROCESS/UPDATES

- Health Equity is the administrator for HSA plans.
- HSA set-up in ADP WorkforceNow available at <https://www.scd.org/sites/default/files/2020-12/HSA-Setup-in-ADP-111820.pdf>
 - Please contact the Lay Personnel Office to obtain employee's direct deposit bank information
- Employee HSA payroll deduction form available at https://www.scd.org/sites/default/files/2025-04/Employee_HSA_Payroll_Deduction_Form%202025.pdf



BAS STATEMENTS / BENEFIT CLASS

- Monthly invoices are generated and emailed on the 21st of the month.
- Invoices must be reviewed on a monthly basis.
- Priest health premiums are included in BAS Statements
- All Employees regardless of benefit eligibility must be in RETA to comply with ACA reporting
- ADP / Reta Enroll
- 2025-2026 Benefits calculation worksheet (PT 10 & PT1001)
- Benefit Class change must be done in RETA
 - Contact RETA Services if the employee will be changing from a class that is other than Benefit Ineligible



WAIVER OF GROUP HEALTH BENEFITS

- If an employee waives medical coverage, please provide them a waiver of group health benefits form.
- Waiver form must be completed annually.

- Waiver form:

<https://www.scd.org/sites/default/files/2024-01/Waiver%20of%20Group%20Health%20Benefits.pdf>



QUALIFYING LIFE EVENT PROCESS

- Employees must complete qualifying life events electronically in RetaEnroll.
- Employees will be prompted to upload proof documents specific to their Qualifying Life Event during the submission process.
- Location Administrators must submit all Benefits Class changes to Reta Trust Customer Service at: service@retaenroll.org.
- All life events for Reta are effective the 1st of the month following the date the Qualifying Life Event occurs. However, newborns are effective on the date of birth.
- Instructions on how to submit a life event available at <https://www.scd.org/sites/default/files/2020-01/RETA%20Life%20Event%20Model%20Employee%20%20%5B3%5D.pdf>



SUNLIFE - EOI & LTD

- Evidence of Insurance (EOI)
 - Needed when amount requested is above the guaranteed amount of \$200,000 for employee and \$50,000 for spouse
 - Increments are higher than the allowed \$10,000
 - If the employee did not elect Voluntary Life Insurance upon hire
 - If an employee is currently enrolled in Voluntary Life and only asks for an additional \$10,000 during OE, then an EOI is not required
- Long Term Disability (LTD)
 - Employee must be in an eligible benefit class and insured under the policy at the time disability commenced
 - Maximum benefit duration
 - 60% of your Total Monthly earning as a monthly benefit after claim has been approved
 - Benefits begin 180 days from date of disability – “Elimination Period”
 - Claim should be submitted no more than 30 days before the end of the Elimination Period or within 30 days after the termination of the policy
 - COBRA benefits should start after the 6 months
 - Partner with Benefits Manager to complete process



PORTABILITY & CONVERSION

VS CONVERSION

- Life Portability & Conversion
 - Employee meets one of the following:
 - *Not Retiring*
 - *Or, 69 years old or younger*
 - *Or, is not disabled*

<https://www.scd.org/sites/default/files/2023-04/Life%20Portability%20and%20Conversion%20Comparison%20012020.pdf>

- Life Conversion
 - Employee meets one of the following:
 - *Retiring*
 - *Or, over 70 years old*
 - *Or, is disabled*

<https://www.scd.org/sites/default/files/2023-06/Life-Conversion-Notice-June-2023.pdf>



RETIREMENT

- Retirement
 - Send PT200 to Lay Personnel
 - Term Employee in RETA and ADP
 - Retirement Planning Checklist
- <https://www.scd.org/sites/default/files/2017-06/THEDIOCESEOFSAKRAMENTO-RETIREMENTMATERIALS.pdf>



403(B) LOAN PROCESS

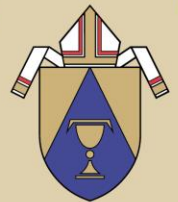
- 403(b) Loan Process
 - The Standard allows for eligible employees to take part in the Loan Program.
 - Employees request the loan via loan process online
 - *Loan shall be for a minimum of \$1,000 and a max of no more than 50% of the Participants Vested Account Balance*
 - *Rate of interest is paid by participant*
 - *Loan repayment is done through payroll deductions and in equal installments over a period not to exceed five years; exceptions may apply*
 - Payroll Administrators should be notified when an employee has requested a loan
 - *Employees should notify the Payroll Administrator that they have taken out a loan*
 - Loan Schedule
 - Payment to be included in the uploads sent to Veronica at Superior USA
 - *Allow two payroll dates to see the payments applied online*
 - *Partner with Finance if need assistance on how to submit the uploads*



BATHROOM BREAK – 5 MINUTES



PERSONNEL REMINDERS & UPDATES



PERSONNEL FORMS BEST PRACTICES

- All forms are found on our Diocesan Website under the Lay Personnel page.
 - <https://www.scd.org/lay-personnel/employee-forms>
 - Date is listed when forms have been updated
 - Print forms as needed as updated regularly
 - PT10/PT1001 Form located on website
- Paperwork required to be sent to Lay Personnel
 - i.e. PT 200 Personnel Transaction: Separation/Change



ORIENTATION PROCESS

- Using New Hire Checklist
 - Ensure Pre-Application and Application is completed before moving to hire
 - Pre-hire Section
 - *Ensure clearances are obtained*
 - *If previously employed in the Diocese, ensure they left in good standing*
 - Post-hire Section
 - *Onboarding, Memo for State Forms*
 - ***New Mandated Reporter Acknowledgement Form***
 - Completed at the time of hire
- Ensure all required clearances have been completed before entering new hire into ADP
- Recruiting/Employment Video



HR RECORD RETENTION

- The legal requirement for the record retention of employment records is 4 years
- Ensuring tabs are set-up (color coded)
 - Preferably in 2 drawer file cabinet
 - *Records older than 4 years should be stored separately from the records in the drawers*
 - ***The Diocese is still under a “do not destroy” order regarding personnel documents.***
 - Most current document on top when filing on tabs in personnel file



BENEFIT ELIGIBILITY

- Regular Part-Time and Full-Time Employees (20 hours or more a week) are eligible for all fringe benefits
- Occasional Part-Time Employees (19 hours or less a week) are not eligible for fringe benefits
 - Employees shared between sites may be eligible for medical benefits if the combined hours worked at all sites are 20 hours or more a week
 - Employees working more than 19 hours a week occasionally/frequently may be eligible for medical benefits, if weekly average is 20 hours or more a week
- Temporary Employees (assignment 6 months or less) are not eligible for fringe benefits (i.e. Long term subs)
 - If the temp assignment extends beyond 6 months, contact Lay Personnel as a status change may be necessary



TRANSITION OF KEY POSITIONS

- When possible, provide the Diocese with a 2 week notice when changes with key positions such as Bookkeeper, Payroll/RETA Contact, Office/Business Managers
 - Need to know to ensure access is appropriately transferred
 - *No sharing of credentials*
 - Would like to assist with orientation in respective areas of expertise

Please note: If an employee is retiring and would still like to work with the diocese, they must have a break in employment to complete the pension/403(b) distribution process.



LAY PERSONNEL BACKGROUND CHECK

- New hire candidates, independent contractors, or volunteers in certain positions are to complete and clear the general background check prior to beginning work.
 - The background check should be conducted when the employee or volunteer is performing the following duties:
 - *Will confer signing authority on a bank account maintained by Employer;*
 - *Will involve the handling of cash or checks on a regular basis;*
 - *Will access proprietary or confidential information or records; or*
 - *Will provide access to financial activities or operations of Employer.*
 - *Will operate a company vehicle.*
 - Note: This background check is processed through Lay Personnel and is not the same background check conducted through Live Scan with Safe Environment.



LAY PERSONNEL BACKGROUND CHECK CONT'D

Diocese of Sacramento — Human Resources Services

STEPS FOR CONDUCTING A BACKGROUND CHECK

1. Applicant should fill out all pre-application materials:

- a. Pre-Application Statement and Questionnaire
- b. PT 80 – Employment Application

 **Note: If the candidate is a volunteer these forms are not necessary.**

2. Conduct interview with applicant

3. Complete reference checks

4. If after these first three steps are completed, you would like to hire this applicant, the following should occur:

- a. Let the applicant know that they are moving forward in the application process and the final step is to conduct a background check. Let them know that this will consist of a criminal, credit, and employment history check. This check will take approximately 5 business days (please note, delays with the county clerk's office can occur).

- b. Provide the applicant a copy of our Background Check Policy.

- c. Provide the applicant the Background Disclosure, Authorization and Release Forms. **Applicants are to complete pages 3-5.**

 **Note: If the candidate is a volunteer please use the Volunteer Background Disclosure, Authorization and Release Forms.**

- e. Ensure the applicant is provided with a copy of the pages that they have completed and with the Summary of Your Rights Under the Fair Credit Reporting Act document.

5. Hiring manager to fill out Request for Background Check. Fax this along with the three forms from the applicant to: (916) 733-0239 or scan and email to personnel@scd.org.

6. A representative from Lay Personnel or Anna Schiele will contact hiring person once the check is completed and a determination has been made.

7. Please note that a fingerprint check must also be conducted for all new hires

8. Questions? Call Lay Personnel at (916)733-0239 or Anna Schiele at (916)733-0240.



LAY PERSONNEL BACKGROUND CHECK CONT'D

- All forms for the Background Check can be found by accessing the following link: <https://www.scd.org/lay-personnel/lay-personnel-policies-and-forms#background>



SAFE ENVIRONMENT

LIVE SCAN AND SAFE HAVEN TRAINING

- Employee vs. Volunteer
 - Employee cleared DoJ and FBI
 - Volunteer cleared DoJ only
 - High School Coaches always DoJ and FBI
 - If a volunteer becomes an employee, they must be reprinted as an employee.
- Parishes and Schools are cleared under different codes – information on fingerprinting cannot be shared between parishes and schools.
- School Employee vs. Parish Employee
 - Parish with school on site – all employees must complete both requirements
 - Employee Live Scan Verification Form must be submitted to the Safe Environment Office
 - What to do if employee is working at multiple sites
- Compliance Reports
 - Sent out automatically the first of the month to the site's Safe Environment Contact
 - Expiration dates need to be monitored
 - 3 reports:
 - ✓ Staff Complete (all requirements met)
 - ✓ Volunteer complete (all requirements met)
 - ✓ In Progress (volunteer and staff missing one of the requirements – either fingerprinting or training)
- Safe Haven Training
 - Offered through Catholic Mutual Group
 - Must be renewed every 3 years



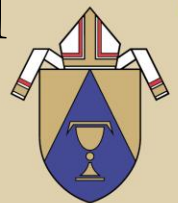
SEXUAL HARASSMENT TRAINING

- Sexual Harassment Training must be renewed every odd year for the Sacramento Diocese.
- All employees will be required to complete the training.
 - Employees must complete the one-hour training
 - Supervisors must complete the two-hour training
- All training should be completed by the Fall of 2025.
 - New Hires will need to complete training at time of hire and then again in the fall of 2027.
- All training is accessed through CMG. More information can be found through the following link:
 - <https://www.scd.org/sites/default/files/2020-12/SCD-Sexual-Harassment-Training.pdf>



MANDATED REPORTER ACKNOWLEDGEMENT FORM

- New Mandated Reporter Acknowledgement Form
 - Must ensure each employee who has completed the Mandated Reporter Training has signed the acknowledgement form.
 - Going forward the form will only need to be completed at the time of hire when the Mandated Reporter Training has been completed.
 - The first two pages the employer keeps, the Penal Code sections are for the employee to keep.



LOA'S AND WC CASES

- LOA forms are required to be completed anytime an employee is out of work for more than 7 days.
 - LOA Forms and information can be found by accessing the following link: <https://www.scd.org/lay-personnel/leave-absence>
- WC Paperwork must be completed immediately after an accident.
 - WC Forms and information can be found by accessing the following link: <https://www.scd.org/lay-personnel/workers-compensation-forms>
 - *LWP Claims Solutions*
Robin Mays, Senior Claims Adjustor
Phone: 916-609-3665
Email: r_mays@lwpclaims.com
 - Note: A WC incident requiring the employee to be off from work for more than 7 consecutive days will also require the leave of absence paperwork to be completed.
- **All accommodation/restriction request must be reviewed with the HR Director before returning the employee back to work.**



INSURANCE STOPLOSS

- Must remove employee from our benefits if out longer than 6 months
 - Per our policy, *“An employee taking medical/family leave will be allowed to continue participating in any employee benefit plans in which he/she was enrolled before the first day of the leave (for the duration of the approved leave up to the maximum of 6 months) at the level and under the conditions of coverage as if the employee had continued in employment for the duration of such leave.”*
 - After the 6-month period must offer Continuation of Coverage
- Loss of reimbursement if we do not follow our policy



TERMINATION REQUIREMENTS

- All terminations **must** have prior approval from the HR Director and Legal. Failure to receive approval will result with the loss of liability insurance provided by Catholic Mutual.
 - This includes any lay-off's.
- Performance Concerns need supporting documents
 - Reviews, PT900's, PIP's
- Only exception is when an employee voluntarily resigns.
- Completing documents at the time of termination
 - Separation Checklist PT690 From



ADP – TIME & ATTENDANCE

- Audits have identified sites not in compliance such as manually entering timesheets or lacking employee approvals.
 - Must ensure site complies by July 31st or penalties will incur.
- Electronic Approvals
 - Employee must review and approve their timesheet
 - Direct supervisor must review and approve the timesheet after the employee (i.e. Pastor, Principal) - **Backup approver should be identified.**
 - *This is an organizations largest expense and must be approved for the payroll administrator to administer the pay*
 - If there are changes with the supervisor or payroll processor a PT200 needs to be completed before the changes in Time and Attendance can be made.
- Punch Corrections and Edits must be requested by the employee using the PT503 Form
 - Everything is tracked in ADP, we can see what was entered, by who and when
 - Cannot be used to avoid meal premiums or overtime hours
- Ensures compliant with Labor Laws
 - Meal premiums cannot be removed
 - *Waivers can only be used in specific circumstances*
 - OT obligations will be met
 - Wage and Hour Claims are not covered by Catholic Mutual



ADP – EMPLOYEE SET-UP

- Reminder: Setting up sick time for Temporary and Occasional Part-Time Employees
 - All Temporary and Occasional Part-Time Employees will need to be manually frontloaded with 40 sick hours at the time of hire.
 - *Ensure they are placed on the 19 HR Clock*
 - The Sick Time Off Policy effective date will need to be after 90 days of employment for Temporary and Occasional Part-Time Employees.
 - *i.e. hire date 7/1/24, assignment start date is 10/1/24*



ADP – EMPLOYEE SET-UP

CONT'D

- Payroll Codes
 - CA-75 (Taxing) vs. CA-25 (Non-Taxing)
 - *CA – 75 taxing is for ALL lay employees*
 - *CA – 25 non-taxing is for ALL priests and sisters*
 - Date 6 vs. Date 8
 - *Date 6 is for ineligible employees and must have 19HR clock*
 - *Date 8 is for eligible employees and must have a corresponding clock per PT100/PT200*
- Clock vs. Job Class
 - Employee Clock
 - *Required for vacation and sick accrual calculations*
 - Employee Job Class
 - *Required for 403(b) contributions*
- Cheat sheet available



ADP – EMPLOYEE SET-UP

CONT'D

IMPORTANT: THESE CHEAT SHEETS ARE INTENDED FOR THE SITES WHO PROCESS THEIR PAYROLL DIRECTLY TO ADP

ADP WORKFORCE NOW CHEAT SHEETS

JOB CLASS - required for 403(b) contribution

People > Employment Profile

Click on Position > on Job Class, select the correct hours the EE works per week

Note: If employee is working in multiple locations, get the total of the actual regular scheduled hours from all sites per PT 100/200, to determine the Job Class code to select.

Code Description

17 Priest

19 Ineligible
20 20 Benefit hrs/wk
21 21 Benefit hrs/wk
22 22 Benefit hrs/wk
23 23 Benefit hrs/wk
24 24 Benefit hrs/wk
25 25 Benefit hrs/wk
26 26 Benefit hrs/wk
27 27 Benefit hrs/wk
28 28 Benefit hrs/wk
29 29 Benefit hrs/wk
30 30 Benefit hrs/wk
31 31 Benefit hrs/wk
32 32 Benefit hrs/wk
33 33 Benefit hrs/wk
34 34 Benefit hrs/wk
35 35 Benefit hrs/wk

For Lay Employee:

50 20 R Benefit hrs/wk
51 21 R Benefit hrs/wk
52 22 R Benefit hrs/wk
53 23 R Benefit hrs/wk
54 24 R Benefit hrs/wk
55 25 R Benefit hrs/wk
56 26 R Benefit hrs/wk
57 27 R Benefit hrs/wk
58 28 R Benefit hrs/wk
59 29 R Benefit hrs/wk
60 30 R Benefit hrs/wk
61 31 R Benefit hrs/wk
62 32 R Benefit hrs/wk
63 33 R Benefit hrs/wk
64 34 R Benefit hrs/wk
65 35 R Benefit hrs/wk
66 R Benefit Ineligible

For Nuns/Sisters

ADP WAGE RATE PROGRAMS

- Wage Rate Programs define specific rates of pay used for specific labor charge value combinations.
- Generic vs Employee Specific
- Only 1 wage rate program can be assigned to an employee, but rates can be defined to include multiple department codes.



ADP WAGE RATE SET-UP

- SETUP> Time & Attendance> Wage Rate Programs
- To assign: PEOPLE> Employment> Employment Profile> Time & Attendance Tile> Edit> select Wage Rate Program

Home Resources ▾ Myself ▾ People ▾ Process ▾ Reports & Analytics ▾ Setup ▾

Wage Rate Programs

Wage Rate Program: SUB

Description: *

English (United States)

español (Estados Unidos)

Rate Comparison Options:

☒ Do Not Compare to Base Rate

☐ Always Higher of Wage Rate and Base Rate

☐ Always Lower of Wage Rate and Base Rate

☒ Do not apply Wage Rates to employee's home labor charge values

1 Found

Delete <input type="checkbox"/>	Row	Department		Effective Date	Type	Amount
		Company Code	ID			
	Filter:	<input type="text" value="~ANY~"/>	<input type="text" value="~ANY~"/>	<input type="button" value="Search"/>		
<input type="checkbox"/>	1	DA7	526000	1/1/2023 <input type="button" value="Calendar"/>	Substitute ▾	<input type="text" value="21.0000"/>



ADP NAME CHANGE FOR PAYROLL CHECKS

- Labor Code section 226(a), lists a variety of things that are legally required to be on a pay stub. One of those is “the name and address of the legal entity that is the employer.”
- Ex: When a school is part of the parish, pay stubs should list *“Pastor of St. Charles Borromeo Parish, Sac, A Corporation Sole”*
- **SETUP> Support>Legal Name & Address Change> ‘Names’ Tab> Payroll Checks/Pay Statements> Edit> SUBMIT**

← Back **Edit Name**

i Important: Changes will be reflected in payrolls processed on or after the selected effective date. To add or change your company logo, please contact your ADP Representative.

Feature

Payroll Checks/Pay Statements

Company Code

DA7

Effective Date *

04/03/2025

Line1

PASTOR OF ST. CHARLES

Line2

A CORPORATION SOLE

Line3

7580 CENTER PARKWAY

Line4

SACRAMENTO, CA 95823

Company Ph# *



+1 916 421 6189

Extn

Apply to all company codes that have the same name?

☐ Yes ☐ No

Cancel

Submit



MISC. PAYROLL ITEMS

- Minimum Wage Increase Jan. 1, 2025:
 - New hourly minimum of \$16.50/hour.
 - New salary minimum of \$68,640 annually.
 - ***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. The teacher salary can only be applied to those teaching TK-12th grade.***
- Advised COLA Increase July 1, 2025:
 - 3.5% increase
- Bonuses
 - While we do not advise providing bonuses, if a bonus is provided it must be processed through payroll.
- Stipends
 - Employees cannot be paid stipends. They earn wages and must be provided wages in accordance with labor laws.
- W-2's can only be obtained from employed site or payroll processor not the Pastoral Center
 - EITC required **annual notice** in January and March of each year



MISC. PAYROLL ITEMS CONT'D

- Wage and Hour Concerns
 - Employees cannot volunteer their time for duties they are compensated to perform.
 - Volunteers cannot be paid or compensated in other ways.
 - **Cannot recoup an overpayment of wages.**
- Additional duties for teachers should be included in the contract with correlating pay (i.e. coaching, summer school, tutoring).
- When employing Sisters must reach out to Lay Personnel.
 - Must be provided with a sister contract unless on a teacher contract
 - Must be provided with the same wages and benefits as lay employees, unless approval from Mother Superior
 - *This includes sick, vacation and holiday hours*
 - Must undergo same screening processes as lay employees (i.e. background check and livescan)
 - Should not be set-up as an independent contractor unless they would qualify as a lay independent contractor



WORKPLACE VIOLENCE POLICY AND TRAINING

- Employers are now required to adopt workplace violence prevention plans.
 - Utilize the Workplace Violence/Workplace Security Prevention Plan document template created to modify for your site-specific information.
 - A copy of this plan is to be kept in the IIPP Binder.
 - Each employee at the time of hire should be provided with the IIPP Binder to review.
- **Annual training** is to be conducted which must include the following:
 - A review of the Workplace Violence/Workplace Security Prevention Plan
 - Definition of workplace violence
 - *Workplace violence as the act or threat of violence, ranging from verbal abuse to physical assaults, directed toward people at work or on duty. Workplace violence also may include acts that result in damage to an organization's resources or capabilities. Many employers consider workplace harassment and bullying to be forms of workplace violence. Also included in this context is domestic violence that spills over into the workplace in the form of assaults, threats or other actions by outside parties with whom employees have relationships and that occur at the workplace.*
 - 4 Types of workplace violence
 - *Criminal Intent*
 - *Customer/ Client*
 - *Worker on Worker*
 - *Personal Relationship*
 - Workplace violence hazards specific to the employees' jobs
 - How to protect themselves and report workplace violence



WORKPLACE VIOLENCE POLICY AND TRAINING CONT'D

Typology of Workplace Violence

Type	Description
I. Criminal Intent	The perpetrator has no legitimate business relationship to the workplace and usually enters the affected workplace to commit a robbery or other criminal act.
II. Customer/client	The perpetrator is either the recipient or the object of a service provided by the affected workplace or the victim. The assailant may be a current or former client, patient, customer, passenger, criminal suspect, inmate, or prisoner.
III. Co-worker	The perpetrator has some employment-related involvement with the affected workplace. Usually this involves an assault by a current or former employee, supervisor or manager.
IV. Personal relationship	The perpetrator is someone who does not work there but has or is known to have had a personal relationship with an employee.

WORKPLACE VIOLENCE POLICY AND TRAINING CONT'D

WORKPLACE VIOLENCE PREVENTION STRATEGIES BY TYPE

1. Strategies Specific to Type I (Criminal Intent) Prevention

➤ ENVIRONMENTAL INTERVENTIONS

- Cash control
- Lighting control (indoor and outdoor)
- Entry and exit control
- Surveillance (e.g., mirrors and cameras, particularly closed-circuit cameras)
- Signage

➤ BEHAVIORAL INTERVENTIONS

- Training on appropriate robbery response
- Training on use of safety equipment
- Training on dealing with aggressive, drunk, or otherwise problem persons

➤ ADMINISTRATIVE INTERVENTIONS

- Hours of operation
- Precautions during opening and closing
- Good relationship with police
- Implementing safety and security policies for all workers

2. Strategies Specific to Type II (Customer/Client Violence) Prevention

- Adequate staffing, skill mix
- Low responsiveness and quality of service can result in frustrated, agitated customers or clients

- Training specific to customer/client violence
 - Recognition of behavioral cues
 - Violence de-escalation techniques
 - Interpersonal communication skills
 - Proper restraint and take-down techniques for healthcare staff

3. Strategies Specific to Type III Violence (Worker-on-Worker) Prevention

- Hiring process
 - Conduct criminal background screens
 - Check former employer references

- Training in policies/reporting
 - New-hire orientation
 - Refresher training

4. Strategies Specific to Type IV (Personal Relationship Violence) Prevention

- Training in policies and reporting
 - Intimate partner violence (IPV) traits and cues
 - Identification of co-workers as victims or perpetrators of IPV

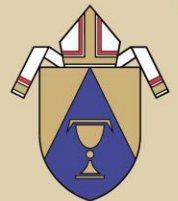
- Culture of support
 - No penalties for coming forward
 - Confidentiality
 - Safety and security protocols implemented
 - Community service referrals offered

Source: National Institute for Occupational Safety and Health



BREAKROOM POSTINGS

- All sites have been provided with custom made California and Federal Employment Notice Posters
 - Religious employers have a religious exemption for some laws, we should not be posting laws that do not apply to us
- Safe Environment postings were sent in 2023
 - Child Welfare Services Information
 - Victim Assistance Poster
- Action to take:
 - Post updated posters, ensure all posters not provided by the Diocese have been removed



EQUIFAX

- All unemployment claims must be submitted to Equifax.
- Equifax Workforce Solutions

Attention: Liza Parodi

Fax: (866) 219-8832

Phone: (833) 946-0624 ext. 7691

Email: liza.parodi@equifax.com



THE WORK NUMBER

- All Employment Verifications should be conducted through The Work Number.
- Accessing The Work Number
 - Start by going to www.theworknumber.com
 - Select “Log In” and follow the simple prompts
 - Enter the Employer code 26785
 - *If this is your first time – pick “Register Now”*
 - *If a returning user – enter your username and password you set up.*
 - The screens prompts will walk you through all the steps to help verify your identity and keep your account private while offering helpful messages if you have problems.
- A more detailed guide can be found by accessing the following link:

https://www.scd.org/sites/default/files/2021-03/Employee_Guide%20to%20The%20Work%20Number%20%28March%202021%29_0.pdf



WEEKLY NEWS ON WEBSITE

- Important to read:
 - Updates from all departments
- Always available on the website if not emailed to you (left hand side of home page)
 - Distributed on Mondays (unless it is a holiday)



INCREASED INSURANCE PREMIUM

- Sites that are not compliant with the requirements outlined in this presentation will be subject to a potential 25% increase in insurance premiums
 - Sites must comply by July 31st to prevent an incurred increase.



MISCELLANEOUS BOOKKEEPING ITEMS



MISC. BOOKKEEPING ITEMS –

DOCS FROM INDEPENDENT CONTRACTORS

- For both *major projects* and for *recurring services* obtain contractor vetting documents before the work begins.
- *Recurring services examples:* gardening, janitorial, contract bookkeeping, the parish should obtain contractor vetting documents before the work begins.
- *Major projects:* Construction, improvements/ major renovation contractors.
- Docs include form W9 (Request for taxpayer ID number), a signed agreement or contract, evidence of their liability insurance and worker compensation coverage if their employees are on site, proof of a current business license.
- Can lookup status of their business license and workers comp at CA Contractors State License Board, here:
<https://www.cslb.ca.gov/onlineservices/checklicenseII/checklicense.aspx>



MISC. BOOKKEEPING ITEMS –

DOCS FROM INDEPENDENT CONTRACTORS - CHECKLIST

OUTSIDE VENDOR CHECK LIST

Project Title: _____ Date: _____

Vendor Contact Information

Name of Vendor: _____

Address: _____

Phone Number: _____

E-mail: _____

The following documentation is required when hiring an outside vendor to perform work with the Sacramento Diocese.

All Contracts require:

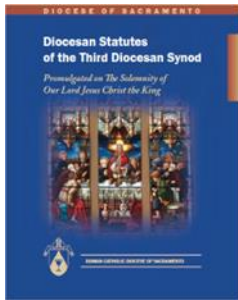
- ☐ Active Contractor License
 - <https://www.cslb.ca.gov/online-services/checklicense/checklicense.aspx>
- ☐ Proof of Liability Insurance (Certificate of Insurance- COI)
 - 1 million minimum per occurrence
 - 2 million liability aggregate coverage naming the legal title of the parish, a Corporation sole, and Roman Catholic Bishop, a Corporation sole
 - Proof of Workers Compensation per State of California
 - <https://www.dir.ca.gov/dwc/faqc.html>
- ☐ Waiver of Right to Recover Endorsement-California
- ☐ Hold Harmless and Indemnification Agreement
- ☐ Proof of Auto Insurance 1 million minimum per occurrence
- ☐ Signed W-9 Request for Taxpayer ID Number

Contracts over \$15,000 require an expenditure approval from the Diocesan Finance Department. These expenditure requests require consultation of the Parish Finance Council, how it will be funded, and three estimates from three different vendors with the same scope of work.



MISC. BOOKKEEPING ITEMS – MAJOR PROJECTS

Contracts over \$15,000:



152. Expenditures Greater than \$15,000

A parish may not expend on any one item or related items (that are a part of a single project) a total amount greater than \$15,000, without the pastor having first consulted with the Parish Finance Council and subsequently received formal diocesan approval.¹³⁰

https://www.scd.org/sites/default/files/2017-06/Statutes_Book_Web.pdf

- In addition to vendor doc requirements....
- Require an expenditure approvals from the Diocesan Finance Department. These expenditure requests require consultation of the Parish Finance Council, how it will be funded, and three estimates from three different vendors. It shall be noted which vendor is preferred on the request.

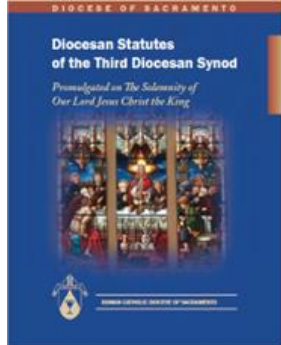


MISC. BOOKKEEPING ITEMS – MAJOR PROJECTS

Project Review and Parish Funds

- Parish cash balances may be requested and reviewed as part of the expenditure approval process
- “Excess funds” and PFI (Statute 153)

https://www.scd.org/sites/default/files/2017-06/Statutes_Book_Web.pdf



153. Parish Savings: All parish savings and parish school savings must be deposited at The Parochial Fund Inc. No parish or parish school may have savings invested in any financial institution other than The Parochial Fund Inc. For purposes of this statute, parish savings and parish school savings are defined as those funds in excess of the equivalent of two months operating expenses.



MISC. BOOKKEEPING ITEMS – SECOND COLLECTIONS

- All special second collections are to be remitted to the Diocesan Catholic Foundation, except for the Good Friday Holy Land Collection and all Disaster Relief Collections. The Good Friday Holy Land and all Disaster Relief Collections are to be remitted to the Diocesan Finance Office.
- Diocesan second collections are remitted to the diocese within a month after taking up the collection
- Priest retirement 2nd collections stays in the parish and posted under 569.xx. Any excess of the collections is remitted to the Diocese within a month.



MISC. BOOKKEEPING ITEMS –

FUNERAL STIPEND

- The maximum honorarium to be offered, regardless of the location or number of days required to provide the Catholic Funeral Rites, is \$300.
- The Parish may retain up to \$100 of the honorarium if any of the Catholic Funeral Rites are conducted in a Parish facility or if the parish sends an assigned priest.
- Active and Retired Priests may receive a maximum honorarium of \$200 for providing Catholic Funeral Rites regardless of location, number of days to officiate the Catholic Funeral Rites or the number of Catholic Funeral Rites officiated.
- Retired Priests shall receive an additional \$25 transportation stipend which shall be in addition to and outside of the honorarium maximum.
- Active Priests may only accept an honorarium if they have selected to not be compensated monthly for performing Catholic Funeral Rites. If an Active Priest has selected to be compensated monthly for performing Catholic Funeral Rites, the full honorarium shall be retained by the Parish
- The Diocese of Sacramento recommends the following distribution of honorariums when multiple Clergy officiate the Catholic Funeral Rites. However, honorariums distributed to Priests or other Parishes is at the discretion of the decedent's home Parish.

Vigil \$60

Funeral Mass \$100

Committal \$40



MISC. BOOKKEEPING ITEMS – PARISH/ SCHOOL EMPLOYER ID NUMBER

To search in a comprehensive non-profit list,
you will need to download from this link:

<https://www.irs.gov/charities-non-profits/exempt-organizations-business-master-file-extract-co-bmf>

All 101 parishes can be found here.



MISC. BOOKKEEPING ITEMS – PARISH FINANCES – KEY DATES

Diocesan & Parish Fiscal Year is July 1 – June 30

- **June 30:** Parish Budget
- **Early July:** Payroll changes (wage and benefits changes)
- **July/August:** New fiscal year billings distributed (Insurance and Priest Pension, 'Estimated' Assessment)

estimated assessment for 25-26 = actual assessment for 24-25, is actualized after your APFR is submitted)
- **August 31:** Completed Annual Parish Financial Report (APFR). A complete report includes:
 - Transmittal letter (signed by Father)
 - Completed cover sheet (signed by preparer)
 - Addendum A – List of/ info of Finance Council members
 - Addendum B – with
 - (1) all questions answered
 - (2) all attachments attached
 - (3) signed by Pastor and signed/attested by all members
 - P&L for the fiscal year just completed (7/1/x0 – 6/30/x1)
 - Balance sheet as of end fiscal year just completed (6/30/x1)



MISC. BOOKKEEPING ITEMS – PARISH FINANCES – ASSESSMENT

* **SOON AFTER APFR IS SUBMITTED** – ‘FINAL’ ASSESSMENT CALCULATED AND COMMUNICATED.

ASSESSMENT RATE SCHEDULE & EXAMPLE

<u>Min Offt'y</u>	<u>Max Offt'y</u>	<u>Assm't</u>
\$0	\$20,000	8%
\$20,000	\$30,000	10%
\$30,000	\$40,000	12%
\$40,000	\$60,000	13%
\$60,000	\$80,000	14%
\$80,000	\$100,000	15%
\$100,000	\$150,000	16%
\$150,000	\$200,000	17%
\$200,000	\$5,000,000	18%

WORKSHEET

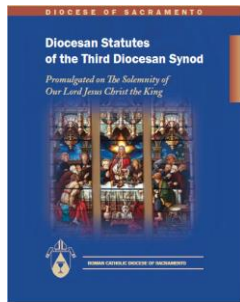
\$ 50,000	Offertory: Acct 501 7/1/24 - 6/30/25
\$ (1,200)	Minus: PFI Loan Interest Expense (from PFI Stmt) 2024-25
\$ 48,800	Equals: Net Offertory Subject to Assessment
	13% Assessment Rate
<u>\$ 6,344</u>	Final Assessment 2025-26



MISC. BOOKKEEPING ITEMS –

PARISH FINANCES – KEY DATES (CONT'D)

- **Fall/ Winter:** Annual Report to the Faithful communicated to parishioners (Statute 131)



131. Annual Report to the Faithful

A report of diocesan finances is to be made to the faithful annually, including the publishing of the audited Annual Financial Statements. A report of the finances of the supporting organizations, including their audited Annual Financial Statements, shall be made to the appropriate stakeholders each year.¹¹⁴

https://www.scd.org/sites/default/files/2017-06/Statutes_Book_Web.pdf

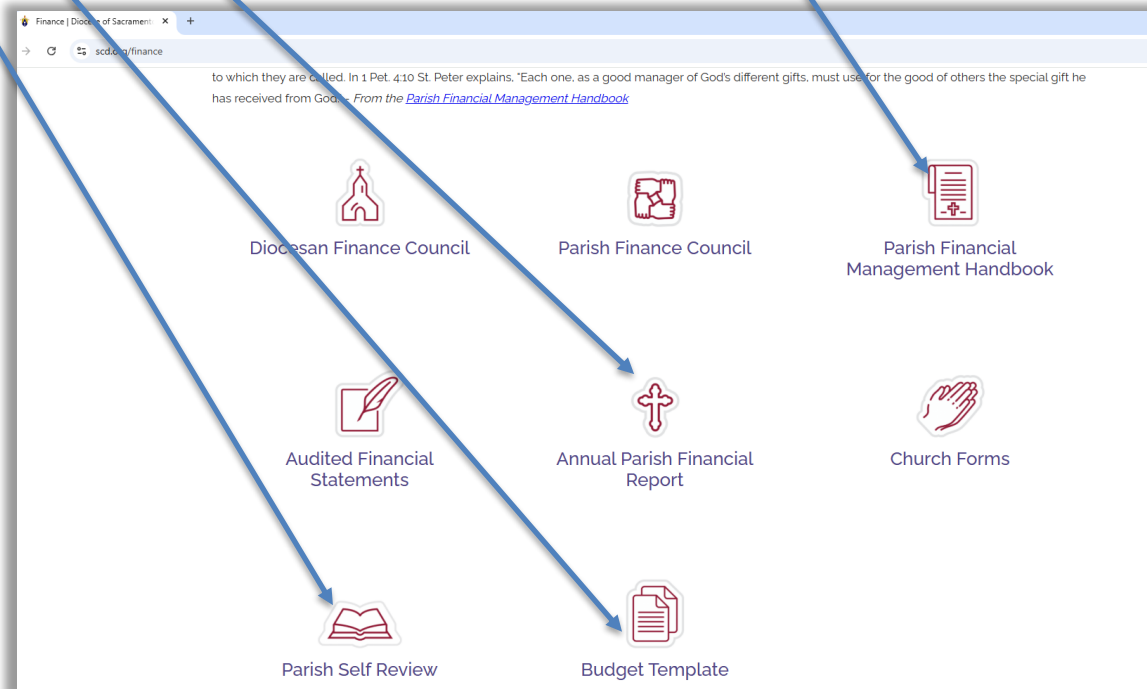
- **Early January:** mid year reporting of offertory to Diocese (7/1/xx – 12/31/xx)
- **Mid January:** reporting for Welfare Exemption filings
- **Mid March:** Budget Template Available. Plan for approval by Finance Council in May, and submission to Diocese by 6/30.
- **April/May** – benefits changes prepared and approved by employee (PT10, PT1001)



MISC. BOOKKEEPING ITEMS

[HTTPS://WWW.SCD.ORG/FINANCE](https://www.scd.org/finance)

- Parish Financial Management Handbook (PEMH)
- APFR Template (due 8/31)
- Budget Template (due 6/30)
- Parish Self Review (review as needed)



WRAP –UP AND QUESTIONS?

