

Checklist for New Employees

Employee Name: _____

Date: _____

All Employees - Full-time & Part-time

Check One:

On-line Paper

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Background Check Policy & Consent Form (must be 18 yrs old or older) |
| <input type="checkbox"/> | <input type="checkbox"/> | Acknowledgement Form - Code of Ethical Standards |
| <input type="checkbox"/> | <input type="checkbox"/> | Federal W-4 |
| <input type="checkbox"/> | <input type="checkbox"/> | Iowa Centralized Registry (Iowa W-4) |
| <input type="checkbox"/> | <input type="checkbox"/> | I-9 Form (Homeland Security) |
| <input type="checkbox"/> | <input type="checkbox"/> | Direct Deposit Form (ACH) |
| <input type="checkbox"/> | <input type="checkbox"/> | Resume and/or Application |
| <input type="checkbox"/> | <input type="checkbox"/> | Emergency Contact Form |
| <input type="checkbox"/> | | Driver / Vehicle Information Sheet (if applicable) |

Full-time Employee: work 30+ hrs/per week - at least 8 months per year;
Completed forms must be sent to Diocesan HR Dept within 31 days of hire.

All Summary Plan Description Booklets can be found on-line at www.scdiocese.org

5 forms to return to Diocesan HR office - send original forms only - no copies

#1 Health / Dental / Basic Life Insurance Coverage

- Enrollment Form ----- Completed & returned
- SBC - Summary of Benefits & Coverage
- Blue Dental Summary Page
- Life Insurance Summary

#2 Supplemental Life Coverage

- Supp Life Enrollment / Waiver ----- Completed & returned

#3 401(k) Enrollment Form ----- Completed & returned

#4 401(k) Beneficiary Form ----- Completed & returned

- Principal Enrollment Booklet to employee; both forms found within booklet

#5 Cafeteria Election Form

- Enrollment Form ----- Completed & returned
- Expense planning worksheet/booklet

→ LTD Summary Page (Give summary to employee; nothing to return)

Additional Items Given to Employee:

- Personnel Policy Manual
- Building Key(s) -- (Front door _____ / Office or master _____).