



## New Hire Checklist

Employee (legal) Name: \_\_\_\_\_

School: \_\_\_\_\_

*For school records, date each action as it is performed:*

### Step 1: CANDIDATE PRE-INTERVIEW SCREENINGS

- \_\_\_\_\_ 1. Is the Teacher/Administrator candidate a **practicing Catholic**? Yes: \_\_\_\_\_ No: \_\_\_\_\_  
*If yes, proceed. If no, contact Superintendent Linda Norman*
- \_\_\_\_\_ 2. The **Diocese of Santa Rosa Pre-Application Statement** is signed and the **Diocese of Santa Rosa Application** is completed. Submitted by: Paper/hardcopy: \_\_\_\_\_ Edjoin/online: \_\_\_\_\_  
 Principal confirms and approves that all answers are appropriate for the position  
For Teachers/Administrator Candidates:
- \_\_\_\_\_ 3. **Resume** received and reviewed by principal
- \_\_\_\_\_ 4. Receive proof of appropriate **Credential or Master's Degree**  
*If yes, proceed to interview. If no credential or Master's Degree, contact Superintendent*

### Step 2: INTERVIEW

### Step 3: POST-INTERVIEW / PRE-OFFER CHECKLIST

- \_\_\_\_\_ 1. **Reference Checks:** Principal contacts most recent references for employment verification and documents each conversation on the application. If the candidate identifies previous employment with the Diocese of Santa Rosa, contact the Diocese of Santa Rosa Department of Catholic Schools and Human Resources for relevant personnel information.
- \_\_\_\_\_ 2. **Transcripts** provided by employee for salary placement (teacher/administrator candidates)  
 Placed in site Personnel File

### Step 4: CONDITIONAL OFFER

Principal confirms the job offer in writing stating the position title, job description, wages, benefits, name of the immediate supervisor, effective date of hire, and the 90-day introductory period with a performance evaluation at the end of this period. **Job offers are to include the statement, "This job offer is contingent upon satisfactory Department of Justice/FBI fingerprint clearance and completion of the Diocese of Santa Rosa Safe Environment online training."** The employee is required to sign the written offer to verify that employment conditions have been read and understood.

### Step 5: POST-OFFER / PRE-HIRE SCREENINGS

*After the candidate accepts the offer, please continue with the following pre-employment screenings:*

- \_\_\_\_\_ 1. **Tuberculin Screening**
- TB Test or TB Risk Assessment Clearance Date: \_\_\_\_\_
- Results/Documentation placed in the site Personnel File
- Reminder: It is the principal's responsibility to ensure each employee maintains current TB Clearance*
- \_\_\_\_\_ 2. **Safe Environment Screening**
- Safe Environment Training:** (Before fingerprinting) Candidate registers and completes required safe environment and Diocesan policy training through <https://cmgconnect.org>
- Principal verifies Safe Environment training is complete
- Fingerprinting:** From the candidate's Live Scan Verification Form, note Original ATI Number:  
# \_\_\_\_\_

Candidates are not cleared to hire until the candidate has received "green star" clearance notification on the school's cmgconnect database. This is achieved once the Training Completion, DOJ Clearance Report, and the FBI Clearance Report have been posted on cmgconnect.

### \_\_\_\_\_ 3. California Sexual Harassment Training

- Candidate completes required Sexual Harassment training through <https://cmgconnect.org>
- Principal verifies Sexual Harassment training is complete

## Step 6: CLEARANCE TO HIRE

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- \_\_\_\_\_ 1. **Candidate Completes the I-9 Form (Employment Eligibility Verification Form)** providing acceptable documentation. Principal is NOT to hire without acceptable and current documentation.
  - Original (with copy of document/s attached) placed in I-9 file at the school site – NOT in the employee's Personnel File
- \_\_\_\_\_ 2. **Candidate Signs Work Agreement and Code of Conduct:** All employees must sign either a Principal or Teacher Contract (if qualified) or MOU (all others) and all sign the Code of Conduct
  - Copies of each are given to employee
  - Copies are sent to the Department of Catholic Schools
  - Originals are placed in site Personnel File

## Step 7: PRIOR TO FIRST DAY OF EMPLOYMENT

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- \_\_\_\_\_ 1. **Human Resource Department - Responsibilities:**
  - Principal reviews the online Lay Personnel Employee Handbook IN PERSON with the employee.  
Note:
    - Acknowledgement of Diocesan Policies as Religious Employer
    - Antidiscrimination/Anti-harassment Policy
    - Agreement Regarding Arbitration of Disputes
    - Child Abuse Mandated Reporter Acknowledgement
  - Employee signs and dates the Acknowledgement of Receipt of Handbook
  - Employee is given Disability Insurance brochure (DE215)
  - Employee is given Paid Family Leave brochure (DE2511)
  - Employee is given SDI/PFL Weekly Benefit Amounts (DE2589)
  - Employee is given Sexual Harassment brochure (DFEH185)
  - Employee is given Workers Comp Time of Hire Pamphlet
- \_\_\_\_\_ 2. **Payroll - Responsibilities:**
  - Employee completes W-4 and original placed in site Personnel File
  - Employee completes Section 125 form if employee is health benefits eligible
  - Employee is given Direct Deposit Form
  - Employee is given Employee 403(b) Contribution Election Form
- \_\_\_\_\_ 3. **Benefits Office - Responsibilities:**
  - Principal or designee completes the Lay Employee Action Form\* and employee signs
  - Principal or Pastor authorizes and signs Lay Employee Action Form
    - FAX/mail Action Form to the Diocesan Benefits Office (707-566-3381-confidential FAX)
    - FAX/mail Sun Life Beneficiary Form (if applicable) to Diocesan Benefits Office
    - Benefits Administrator to enroll eligible employee via [www.RetaTrust.org](http://www.RetaTrust.org)
      - If waiving health benefits, FAX Section 125 form AND proof of coverage
    - Benefits Administrator to enroll eligible employee in One America system
  - Employee is given One America Retirement "Getting Started" packet
  - Employee is given copy of 30+ or 20-29 Lay Employees Benefit Guide and signs receipt
- \_\_\_\_\_ 4. **Department of Catholic Schools Office - Responsibilities:**
  - Principal or designee emails to Superintendent, Linda Norman (lnorman@srdiocese.org):
    - Both: Diocese of Santa Rosa Pre-Application Statement and Application
    - Both: Signed Work Agreement (contract/MOU) and Code of Conduct
  - Principal or designee updates the school's Labor Chart

***It is the Principal's responsibility that all actions have taken place prior to the first day of employment.***

\*please note: An Action Form must be completed and submitted to the Benefits Office for each new event. (ie. work status changes, separation of employment, address/name changes)

All forms can be accessed at [www.srdiocese.org](http://www.srdiocese.org)