

**Diocese of Sacramento  
NEW EMPLOYEE CHECKLIST/PERSONNEL FILE GUIDELINES  
PARISHES AND SCHOOLS**

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

**Please date each action as it is performed. Upon completion, the new employee and pastor/principal /supervisor sign and date the checklist and place in personnel file.**

DATE	ITEM	REQUIRED ACTION
	Signed Pre-Application Statement and signed Applicant Questionnaire	Place both in Personnel File
	Signed and completed PT80 or Catholic Schools Department Employment (CSD) Application Form	Place in Personnel File (Send copy if contracted employee to CSD)
	Principal / supervisor and employee complete I-9 Sections I and II	Original placed in I-9 File
	Complete and distribute New Employee form (PT100).	Original to Office of Lay Personnel Copy to Payroll Copy placed in Personnel File
	Fingerprints required (fingerprint records from sources other than the Diocese of Sacramento are not acceptable).	Applicable employees only
	Employee is given copy of job description; principal / supervisor and employee discuss key elements	Place signed copy in Personnel File
	Employee is provided with hiring pay rate and explanation for potential step increases on the Recommended Compensation Ranges For Schools / Parishes.	Discussion item only
	Employee is given personal copy of <i>Diocese of Sacramento Personnel Handbook</i>	Discuss pertinent policies
	Employee signs and dates <i>Acknowledgement of Receipt of Handbook</i>	Place original in Personnel File (Copy to Office of Lay Personnel)
	Employee signs and dates <i>Acknowledgement of Diocesan Policies as Religious Employer</i>	Place original in Personnel File (Copy to Office of Lay Personnel)
	Employee signs and dates <i>Antidiscrimination/Antiharassment Policy Acknowledgement</i>	Place original in Personnel File (Copy to Office of Lay Personnel)
	Employee signs and dates <i>Electronic Communications Policy Acknowledgement</i>	Place in Personnel File (Copy to Office of Lay Personnel)
	Employee signs and dates <i>Agreement Regarding Arbitration of Disputes</i>	Place in Personnel File (Copy to Office of Lay Personnel) Pastor or Principal signs also

DATE	ITEM	REQUIRED ACTION
	Employee is advised of required State of California on line <i>Sexual Harassment Course</i> (Employees required for this training are usually in supervisory capacity) <b>(email address is required on PT 100 if applicable)</b>	Provide email address to Office of Lay Personnel by fax or email. Employee home email addresses are acceptable.
	Employee completes required safe environment and Diocesan policy training through <a href="http://www.shieldthevulnerable.org">www.shieldthevulnerable.org</a>	No other action required
	Employee is given fiscal year Employee Holiday list /and or school calendar.	Discussion item only
	Employee completes W-4	Original to payroll Copy in Personnel File
	Direct Deposit Authorization Form (voided check required)	Original to Payroll. Copy in Personnel File
	Employee completes and submits Emergency Information form (PT 120).	Place in Employee Medical File
	Employee is given copy of Disability Insurance brochure (DE 2515).	Discussion item only
	Employee is given copy of Paid Family Leave brochure (DE 2511).	Discussion item only
	Employee is given copy of SDI / PFL Weekly Benefit Amounts (DE 2589).	Discussion item only
	Employee is given copy of Sexual Harassment brochure (DFEH 185).	Discussion item only
	Employee is given copy of Facts about Workers' Compensation pamphlet with the Pre Designation of Personal Physician included in pamphlet. (Employee is not required to sign this; only if employee chooses to)	Discussion item only If signed place in personnel file
	Employee is given copy of IIPP (Injury and Illness Prevention Program) General Safety Rules and Instructions IIPP-3b	Discussion item only
	Employee is provided copies of appropriate time reporting forms (PT-500 Time Sheet (hourly), PT 501 (salaried) Employee Leave, PT 400 Employee Request For Leave forms and PT505 Make up Time Form (hourly employees only).	Discuss vacation/sick time accruals

Principal / Pastor/Supervisor and employee discuss diocesan employee benefits; eligible employee (regularly scheduled to work 20 hrs or more Week) is provided with benefits packet to include information on:

***Non Optional Benefits***

DATE	ITEM	REQUIRED ACTION
	Basic Life Insurance	PT1000 Beneficiary for life required
	Long Term Disability	PT1000 Annual compensation
	Pension Plan Pamphlet	Discussion and explanation
	Pension Plan Beneficiary Designation Form	Original to Office of Lay Personnel Copy to be placed in Personnel File

***Optional Benefits***

***Important: If an employee adds a spouse to any coverage, proof of marriage is required.***

DATE	ITEM	REQUIRED ACTION
	If employee does not need medical, dental and or vision benefits.	PT1000 Refusal of Coverage page
	Medical Insurance – Western Health Advantage (WHA), Kaiser HMO, Blue Shield PPO High and Blue Shield PPO Low	PT1000 Group Benefit Enrollment Application PT 1000 Arbitration Agreement
	Dental Insurance	PT1000 Group Benefit Enrollment Application
	Vision Plan	PT1000 Group Benefit Enrollment Application
	Basic Dependent Life Insurance (\$3.00/month plan)	PT1000 Group Benefit Enrollment Application
	Voluntary Supplemental Life Insurances	PT1000 Group Benefit Enrollment Application PT1001 Deduction Authorization Form
	Flexible Benefit Plan (Sec. 125) (Pre tax deductions for medical/dental/vision)	PT10 Form Section 125 Plan Copy to Personnel File/Copy to Payroll
	403B Plan – The Standard	Discussion item. Provide employee with 403b packet.

**What do you do with enrollment forms?**

- ***PT1000 Enrollment Application – signed and dated form must be faxed to Benefits Coordinators and provide original to the Office of Lay Personnel and copy to personnel file.***
- ***Standard Voluntary Life Insurance – signed and dated form must be faxed to Benefits Coordinators – provide original to the Office of Lay Personnel and a copy to the Personnel file.***

**FOR SCHOOLS ONLY:**

- \_\_\_\_\_ Handbooks and Major Policies distributed (Parent/Student Handbook; Faculty Handbook; Location of Administrative Handbook; FYI pamphlet;).
- \_\_\_\_\_ Discuss child abuse mandate reporters/location of CPS forms
- \_\_\_\_\_ School tour should include introductions to pastors, priests, fellow teachers and support staff and include the following: parking area, buildings, classrooms, cafeteria, library, church, work room, faculty lounge, restrooms, playground, entrances and exits, emergency exits and telephone.
- \_\_\_\_\_ Explanation of Emergency Control Plans
- \_\_\_\_\_ TB test results
- \_\_\_\_\_ Blood borne Pathogen Training
- \_\_\_\_\_ Off hours procedures/alarm codes, keys, etc.
- \_\_\_\_\_ Sick call in procedures
- \_\_\_\_\_ Website access
- \_\_\_\_\_ School telephone system procedures

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**New Employee Signature**                      **Date**

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**Pastor/Principal/Supervisor Signature**                      **Date**