

Catholic School Department

Non-Teacher New Hire Checklist/Personnel File Guidelines

Please date each action as it is performed. Upon completion of all items, the principal will sign this document and affirm all actions have take place **prior** to the first day of employment. Once this signed document has been provided to the Catholic School Department, payroll will be notified of the new hire.

PRE-INTERVIEW CHECKLIST:

Employee Name _____

DATE	ITEM	REQUIRED ACTION
	Is the potential employee a practicing Catholic?	If the candidate meets the criteria, proceed. If the candidate does not, please contact Marci Greene at (916) 733-0118.
	Pre-application, Questionnaire, and Application are signed and complete <ul style="list-style-type: none">• Confirm the candidate has provided at least 3 references with phone numbers• Principal confirms and approves that all questions are answered and are accurate	If hired, place in site Personnel File and send a copy to the Catholic School Department. It is important that the Principal reads and reviews these documents thoroughly.
	Resume provided	Principal Review. If hired, place in site Personnel File.
	Confirm the candidate has the appropriate education for the position.	Principal Review.

POST-INTERVIEW/PRE-OFFER CHECKLIST:

DATE	ITEM	REQUIRED ACTION
	Complete 3 Reference Check Forms	Principal contacts all three references and documents conversations with each on the Reference Check Form attached at the end of this document. Include the 3 Reference Check Forms in this packet and send to the CSD

POST-OFFER/PRE-HIRE CHECKLIST: (Hire contingent upon successful completion)

DATE	ITEM	REQUIRED ACTION
	TB Test Results Date: _____	Results in site Personnel File Reminder: It is the principal's responsibility to ensure this is updated every 4 years for each employee
	Complete Background Check for bookkeepers and receptionists.	Principal follows "Steps for Conducting a Background Check" found on diocesan website and waits for clearance.
	Fingerprint Clearance Date: DOJ _____ FBI _____	Fax Live Scan Verification form to Safe Environment Office: (916) 733-0195. Once cleared, please record date on this form.

PRIOR TO FIRST DAY OF EMPLOYMENT:

	Complete New Employee form (PT100) <i>Bookkeeper does not process until receiving confirmation email from CSD.</i>	Original placed in site Personnel File. Copy included in this packet, which is to be sent to the Catholic School Department. Bookkeeper does not process until receiving confirmation email from CSD.
	Employee completes required safe environment and Diocesan policy training through www.shieldthevulnerable.org Date: _____	Principal verifies Shield the Vulnerable training is complete. Place a copy of the Certificate of Completion in the site Personnel File.
	Complete I-9	Original place in I-9 file at the school site – <i>NOT IN PERSONNEL FILE</i>
	Employee completes W-4	Original placed in site Personnel File.
	<i>Principal</i> reviews the Lay Personnel Employee Handbook <i>in person</i> with the employee. Employee signs and dates the following acknowledgment forms: <i>Acknowledgement of Receipt of Handbook (pages 37 & 38)</i> <i>Acknowledgement of Diocesan Policies as Religious Employer (page 39)</i> <i>Antidiscrimination/Antiharassment Policy Acknowledgement (page 40)</i> <i>Electronic Communications Policy Acknowledgement (page 41)</i> <i>Agreement Regarding Arbitration of Disputes (page 45)</i>	Originals placed in site Personnel File. Copies to be included in this packet, which is to be sent to the Catholic School Department.

	Employee completes and submits Emergency Information form (PT 120)	Place in site Personnel File
	Employee is given copy of Disability Insurance brochure (DE 2515)	
	Employee is given copy of Paid Family Leave brochure (DE 2511)	
	Employee is given copy of SDI/PFL Weekly Benefit Amounts (DE 2589)	
	Employee is given copy of Sexual Harassment brochure (DFEH 185)	
	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)	If signed, place in Personnel File
	Employee is asked to read IIPP (Injury and Illness Prevention Program)	Employee signs New Employee Safety Orientation Checklist (page 4a in IIPP). This signed document is placed in Personnel File at the site.

The principal and the employee discuss diocesan employee benefits; eligible employees (regularly scheduled to work 20 hours or more per week) are provided a copy of the *Employee Guide to BenXcel*, a *Group Benefit Plans Premium Sheet* and the *Employee Benefits Brochure*. Details on all of the group benefit plans, including the *Summary of Benefits and Coverage* as well as the *Evidence of Coverage* can be found online at the BenXcel home page.

Non-Optional Benefits

DATE	ITEM	REQUIRED ACTION
	The benefit administrator will “add” a new eligible employee to the BenXcel database. This action will enroll the employee in Basic Life/AD&D and Long Term Disability Insurance.	The employee will need to designate their beneficiary information online
	Pension Plan Pamphlet	Discussion and explanation
	Pension Plan Beneficiary Designation form (SACL 201)	Original included in this packet, which is to be sent to the Catholic School Department. Copy placed in site Personnel File.

Optional Benefits

DATE	ITEM	REQUIRED ACTION
	After the benefit administrator has added a new eligible employee to the BenXcel database, the employee will log onto https://www.benxcel.com/dos.htm to register as a new user.	The employee will use the <i>Employee Guide to BenXcel</i> to assist them with this process.
	The employee will use the Enrollment section of the website to elect/decline benefit coverages for themselves and for their dependents.	
	At the end of the online enrollment process, the employee will print and sign their “Enrollment Summary”. The signed summary will be submitted to the bookkeeper to support the selections the employee has made.	
	Benefit Payroll Deduction Authorization Form (PT1001)	Originals placed in site Personnel File and a copy provided to employee.
	Section 125 Employee Benefit Election Form (PT10) (pre-tax deductions for medical/dental/vision)	Originals placed in site Personnel File and a copy provided to employee.
	403(b) Plan – The Standard	Provide employee with current 403(b) booklet.

Please ensure this packet is complete prior to sending to the Catholic School Department. The following items MUST be included:

_____ This document with the date each item was completed. (Please keep a copy for yourself)

_____ Pre-Application, Questionnaire, and Application

_____ Three Reference Check Forms

_____ PT100

_____ Signed Handbook Acknowledgment Forms: pages 37 – 41 and 45.

_____ Pension Plan Beneficiary Designation form (SACL 201)

Principal Name

Principal Signature

Date mailed to CSD

School Name

Employee Name

For Office Use Only:

Date Received : _____

Completed document

Reference Check Form

Name of person completing the reference check: _____

Date reference check completed: _____

Name of person contacted: _____

Position of person contacted: _____

Questions to ask during the reference check:

1. How long have you known the applicant? _____
2. When did the applicant work for (or with) you? _____
3. In what role did you serve in relation to the applicant? (For example, were you their supervisor, peer, etc.?) _____
4. What are the applicants strengths? _____

5. Are there any areas of challenge for the applicant? _____

6. Would you hire the applicant again? _____

_____ Reference refused to answer questions and would only confirm dates of employment.