Catholic School Department
New Teacher 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 taken place **prior** to the first day of employment.

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 Tosha Tillotson at (916) 733-0118.
	Pre-application, Questionnaire, and Application are signed and complete • Confirm a minimum of 3 references are provided 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 in this packet 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 credential or Master's Degree. Extension Director's are exempt. CA State Teaching Credential Expires_____	Principal Review. If the candidate does not have a credential or Master's Degree, call Tosha Tillotson at (916) 733-0118.

POST-INTERVIEW/PRE-OFFER CHECKLIST:

DATE	ITEM	REQUIRED ACTION
	Complete 3 Reference Check Forms	Principal conducts reference checks with previous supervisors listed on the employment application (PT 80) and documents conversations with each on the Reference Check Form attached at the end of this document.

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

DATE	ITEM	REQUIRED ACTION
	TB Test Results Date:_____	Results in Personnel File **Reminder: It is the principal's responsibility to ensure this is updated every 4 years for each employee**
	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.
	Employee Signs Teaching **Contract** and **Job Description**	**Copy included in this packet, which is to be sent to the Catholic School Department**. Original placed in site Personnel File.
	Teacher is given a New Teacher Orientation letter and form to be completed for the next August meeting.	Principal to submit form to the Administrative Assistant in the Catholic School Department at csd@scd.org upon completion.

FIRST DAY OF EMPLOYMENT:

	Complete New Employee form (PT100) • If the new hire is a Religious, please use the Religious PT Form instead of the PT 100 ***Bookkeeper does not process until receiving confirmation email from Department of Lay Personnel.***	Original placed in site Personnel File. Copy included in this packet, which is to be sent to the Department of Lay Personnel. Contact Lay Personnel for all Religious new hires at personnel@scd.org or (916) 733-0239. **Bookkeeper does not process until receiving confirmation from HR.**
	Employee completes required safe environment and sexual harassment training through https://sacramento-schools.cmgconnect.org/ Date:_____	Principal verifies Safe Haven and Sexual Harassment training is complete. Original certificate of completion placed in site Personnel File. Copy of certificate of completion to be sent to Lay Personnel at personnel@scd.org.

	Complete I-9	Original placed in I-9 file at the school site – ***NOT IN PERSONNEL FILE***
	Employee completes W-4 and DE 4	Original placed in site Personnel File.
	Principal reviews the Lay Personnel Employee Handbook ***in person*** with the employee. Employee signs and dates the following acknowledgment forms: *Acknowledgement of Receipt of Handbook (pages 55-56)* *Acknowledgement of Diocesan Policies as Religious Employer (page 57)* *Antidiscrimination/Anti-harassment Policy Acknowledgement (page 58)* *Electronic Communications Policy Acknowledgement (page 59)*	Originals placed in site Personnel File. Copies included in this packet, which is to the Administrative Assistant in the Catholic School Department at csd@scd.org.
	Principal reviews the Arbitration Agreement ***in person*** with the employee. Employee and Principal both sign and date the Arbitration Agreement. Employer.	Originals placed in site Personnel File. Copies included in this packet, which is to the Administrative Assistant in the Catholic School Department at csd@scd.org.
	Transcripts provided by employee for salary placement	Place in site Personnel File
	Employee completes and submits Emergency Information form (PT 120)	Place original in site Personnel File and copy in site binder.
	Employee is given New Hire Memo for State-Required New-Hire Documents	Discussion item only
	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)	If signed, place in Personnel File
	Employee is asked to read IIPP (Injury and Illness Prevention Program). Ensure each employee is provided a copy of the Infectious Disease Preparedness and Response Plan.	Employee signs New Employee Safety Orientation Checklist (page 4a in IIPP). This signed document is placed in Personnel File at the site.
	Employee is provided with access to Time Reporting System (ADP) and time reporting forms PT 501 Time Off Request, PT 400 Employee Request For Leave and the following forms to hourly employees only: PT502 Meal/Break Waiver Form, PT503 Punch Correction/Missing Punch Request Form, PT505 Make up Time Form, PT510 Overtime Request Form.	Discuss vacation/sick time accruals.

	AB1432 is the bill which requires ***all employees*** (including preschool employees) who work with children to be certified as a Mandated Reporter each year. This training must be renewed ***every YEAR***. The link to the course is: https://invite.mandatedreportertraining.com/k6vo5 ***The Mandated Reporter Acknowledgement Form must also be completed at the time of hire.***	Ensure each staff member prints out the certificate and place in his/her personnel file to reflect compliance with the renewal years. Ensure the Mandated Reporter Acknowledgement Form has been signed and placed in his/her personnel file. A copy should be provided to the employee. Note: Please be prepared to show the certificates of completion of all preschool employees when the state preschool licensing visits.

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 *RETA Trust User Guide*, 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 on the RETA Trust home page.

Non-Optional Benefits

DATE	ITEM	REQUIRED ACTION
	The benefit administrator will "add" a new eligible employee to the RETA Trust 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
	403(b) Enrollment Guide and Forms	Discussion and explanation
	403(b) Beneficiary Designation Form	Original placed in site Personnel File. Copy included in this packet, which is to be sent Lay Personnel at personnel@scd.org and to the Administrative Assistant in the Catholic School Department at csd@scd.org.

Optional Benefits

DATE	ITEM	REQUIRED ACTION
	After the benefit administrator has added a new eligible employee to the RETA Trust database, the employee will log onto https://www.retatrust.org/c/home to register as a new user.	Benefit Administrator needs to verify no later than 21 days after being hired that the employee has taken action.
	The employee will use the Enrollment section of the website to elect/decline benefit coverages for themselves and for their dependents.	Enrollment must be completed within 30 days of being hired.
	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 Administrator must ensure completed before payroll deductions are 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.
	Discuss and review direct deposit with employee. Complete PT800 for direct deposit.	Employee will need to submit a voided check with the PT800. Originals placed in Personnel File and copy to payroll.

Please ensure this packet is complete prior to sending to the Administrative Assistant in the Catholic School Department at csd@scd.org. Copies of the following items MUST be included:

_____ This document with the date each item was completed. Be sure to include dates for TB Test, Live Scan Verification Form, and Teacher Credential Information. **(To CSD)**

_____ Pre-Application, Questionnaire, and Application **(To CSD)**

_____ Signed Teachers Contract and Job Description (**To CSD)**

_____ PT100 **(To Lay Personnel)**

_____ Signed Handbook Acknowledgment Forms: pages 37 – 41 and 45. **(To CSD)**

_____ 403(b) Beneficiary Designation Form **(To Lay Personnel)**

_____ _____ _____

Principal Name | Principal Signature | Date mailed to CSD

_____

School Name

_____

Employee Name

For Office Use Only:

Date Received: _____

☐ Completed document

Reference Check Form

REFERENCE CHECKS SHOULD BE CONDUCTED WITH PREVIOUS SUPERVISORS LISTED ON THE EMPLOYMENT APPLICATION (PT 80)

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?_____

   _____

   Are there any areas of challenge for the applicant?_____

   _____

5. Would you hire the applicant again? _____

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