



DIOCESE OF SACRAMENTO

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LAY PERSONNEL

April 14, 2026

2026 Administrator Meeting Q & A

1. Where can we find the list of out-of-pocket costs for preventative care for Kaiser?

You can find a detailed Summary of Benefits Coverage and the Benefit Booklet in the RETA portal in the RETA Documents button.

2. Is the VSP \$150 allowance one time for all or is it \$150 allowance for each Frames and Contact Lenses?

The VSP \$150 allowance is for only one, either frames or contacts. You will have to pay out of pocket for whichever one you decide not to be covered by the insurance.

3. Do we still have Vision Coverage under Kaiser as well as the VSP plan?

Yes, Kaiser members will still benefit from having vision coverage. The information for coverage can be found on page 57 of the Benefit Booklet on the RETA portal under the RETA Documents button.

4. Can employees sign up for the HSA at any time in the year or only during the open enrollment period?

An employee can contribute to their HSA account only if they are part of an HSA plan. If they did not elect an HSA plan during Open Enrollment, they will not be allowed to make changes. The employee will have to wait until Open Enrollment the following year or submit a Qualifying Life Event (QLE) with supporting documentation that will allow them to switch plans. The Qualifying Life Event guide can be found in the following link <https://www.scd.org/sites/default/files/2020-01/RETA%20Life%20Event%20Model%20Employee%20%20%5B3%5D.pdf>. The Qualifying Life Event's allowed can be found in the Benefit Booklet, <https://www.scd.org/sites/default/files/2026-04/Diocese-Lay-Benefits-Booklet-2026.pdf>.

5. Rosa, will you also update religious Sisters in RETA?

No, each site is responsible for updating any information, adding or terminating Sisters in RETA.

6. If an employee is not eligible for benefits, do they have to sign the waiver?

No, only benefit eligible employees.

7. Can someone change their coverage at anytime with Sunlife? Currently they have 250K But want to go down to say 150K outside of open enrollment.

If the employees does not make any changes during Open Enrollment, they will not be allowed to make changes throughout the year unless they have a Qualifying Life Event. The employee will have to wait Open Enrollment the following year or submit a Qualifying Life Event with supporting documentation that will allow them to make changes. <https://www.scd.org/sites/default/files/2026-04/Diocese-Lay-Benefits-Booklet-2026.pdf>.

8. 403(b) what are the vesting percentages by years?

The vesting percentages depend on the number of years that an employee has been employed at the

diocese. Highlights of the 403(b) Retirement Plan can be found in the Enrollment Guide and Forms, page 23, using the following link <https://www.scd.org/sites/default/files/2026-03/2026%20403%28b%29%20Enrollment%20Guide%20and%20Forms.pdf/>

Years of Service	Vested Percentage
Less than 3	0%
3	20%
4	40%
5	60%
6	80%
7 or more	100%

9. If a person is Temporary Part-Time for 180 days. Do they need to fill out the form from the Standard?

No, this employee is not benefit eligible.

10. If after the 180 days the employee is offered a Regular Part-Time job do they fill out the form then?

The beneficiary forms for SunLife and The Standard 403(b) should be completed by all benefit eligible employees and kept in the personnel file. Please send a copy to Lay Personnel or Rosa.

11. Can Part-Time Employees take out a loan?

If the employee has a vested amount in the 403(b), they can take a loan no greater than 50% of the vested amount in their account.

12. How do I know what my employee contribution amount is for my 403(B)?

All employees have online access to their account where they can view day by day investments and contributions being made by both the employer and employee (if the employee is making any contributions). Page 6 in the Enrollment Guide and Forms provides instructions on how to create an online account. <https://www.scd.org/sites/default/files/2026-03/2026%20403%28b%29%20Enrollment%20Guide%20and%20Forms.pdf/>

13. Is the 6% placed in a Roth if the employee has a Roth designation?

The 6% is the employer contribution as a pre-tax contribution. The Roth contribution can be made only by the employee. The employee may elect to make contributions as either a pre-tax contribution or Roth contribution or the employee can contribute to both. The form used to make employee contributions can be found on page 7 in the Enrollment Guide and Forms <https://www.scd.org/sites/default/files/2026-03/2026%20403%28b%29%20Enrollment%20Guide%20and%20Forms.pdf/>

14. What constitutes a family member working together? For example, can a daughter work for summer school if the mother is the summer school director?

No, the mother and daughter cannot work within the same department or under the same supervisor. In some locations the size of the staff is so small that it is not possible to have enough separation for family members to work at the same site.

15. How about sister-in-law? Can she work for the same school department?

No, this would be the same as the question above.

16. How do we know which positions are mandated reporters?

Please contact the Office of Safe Environment for further clarification.

17. Does the new acknowledgement form for the Handbook need to be sign by Priest, Sisters, Cantors?

Priest are not employees and do not need to sign the Handbook Acknowledgements. Sisters are treating just as lay employees and should sign the Handbook Acknowledgements. If the Cantor is an employee, they too will need to sign the Handbook Acknowledgements.

18. Will we still receive the benefits calculation worksheet that prefills the PT 10 and PT 1001?

Yes, the PT10 and PT1001 will be updated, shared and posted online for your use.

19. I have our I9's in a separate file, but the file is in the personnel file cabinet. Should I move the I9 file somewhere else?

No, you have the correct set-up.

20. If a person retires and comes back to work a few hours per week, how long should the break be?

If a retiree would like to come back to work, you will have to make sure that they have already received a distribution from the Lay Pension if eligible and 90 days or more have passed. Please partner with the Benefits Manager (Rosa) to make sure that these two items have been met before you hire the employee.

21. What is the vetting process for former employees that return to volunteer?

The vetting process is the same as any volunteer. Do not assume they are cleared because they have been previously employed. When you reach out to vet the person, if something has already been completed we will notify you.

22. If we have volunteers that have been volunteers for years, do we have to go back and get the volunteer forms filled out and sent to the diocese or are they kind of grandfathered in?

There is no grandfathering of volunteers. If you do not have the completed Volunteer Agreement Form on file, you need to obtain one. The form needs to be maintained onsite and does not need to be sent to the diocese.

23. Do all volunteers need to have Safe Environment Training and Live Scan Background Check? Or is it only for the volunteers with children?

Please contact the Office of Safe Environment for further clarification.

24. If we do not offer a teacher a contract for the 2026-2027 school year will that need to pass through Anna?

Yes.

25. Is there any plan to allow employees to correct their timecards themselves in ADP instead of requiring PT503's?

If/when ADP has the capabilities with the web platform, then we will evaluate the use of self-edits but at this time that is not an option.

26. Can you address separation of a teacher contract at end of school year? Confirming we do not need to provide check on last day.

Correct, specifically to teachers on a contract, the contract stipulates the pay dates so payment on July 7th is acceptable. This only applies to contracted teachers.

27. What about Subs? They have not logged in normally we have manually entered their hours worked.

If they are hourly, they must clock in/out to record their hours worked. Manual entries should not

occur.

28. Overtime- if an employee doesn't know in advance that they are going to work overtime, how can they fill out a form in advance? Examples: school ee gets caught up with kids or parents, facilities are on the roof and cannot stop to fill a form out, etc.

These are not the circumstances that we are referring to. These should be the one-off situations that only equate to minutes of overtime. We are referring to a substantial amount of overtime that was not authorized.

29. Where can the volunteer form be found for no pay or compensation be located?

The form can be found on the Diocesan website under the Office of Lay Personnel. Here is the link to access the form <https://www.scd.org/sites/default/files/2017-06/VolunteerAgreementFormV2.pdf>.

30. Can we hire individuals with a visa? What types of visas do we work with or allow?

No, we do not support visas for lay employment.

31. Will garnishments be discussed? ADP is sending a tool to handle them but at an added cost?

No, we will not be discussing garnishments. Please partner with Don if you are supporting a school or Celeste/Nina if you are supporting a parish and they can guide you through the process.

32. We were told by CMG that volunteers cannot drive school vehicles.

Please follow the directions provided by CMG. Irina is your contact and will be able to assist you if you have any questions.

33. Will the mandated reporter training for volunteers take effect by the start of the 2026-27 school year?

Yes, I believe so, but the Office of Safe Environment would be able to offer further clarification.

34. Are existing employee drivers required to go through the Defensive Driving Course?

Yes, if they are operating an organization owned vehicle.

35. Regarding Defensive Driving Course - are priest required to take this course?

This would be a question for CMG. Please contact Irina.

36. The PT503 is to be filed with payroll or and in the personal file?

It must be placed with the payroll records, but a copy can be placed in the personnel file.

37. What is expected for Drivers who are using their own Vehicle transporting Students for a School sports or School sponsored events?

Please partner with the Catholic School Department for guidance as we only oversee employment affairs.

38. You said there are special requirements when hiring minors. I am not hiring minors. But if we have volunteers that are minors, I assume the need to conduct background checks?

No, you cannot conduct a background check on any minor, which is why they should not have access to financial or proprietary information. In addition, they cannot be counted as an adult for the adult to child ratio.

39. Will employees with family coverage for benefits be transitioned into employee + children

automatically on July 1st? Or do they need to make that change themselves?

If the employee only has their children in the plan, yes, they will default to employee + children. But if the employee has their spouse and children in the plan then they will continue to be in the family tier. If they wish to drop their spouse, then they will have to make the changes in RETA during Open Enrollment.

40. Do the volunteer collection counters need to complete the financial background check?

No, there should be three counters at all time, thus they do not need to complete the financial background check.

41. When there are minimum wage increases and cost of living goes up as well, do we have to offer both increases?

The minimum wage increase is required by law. You must provide the minimum wage increase. However, the COLA increase is an advisement. If you cannot afford to offer the COLA increase, you do not have to provide it. You just need to be consistent with the application of the COLA increase; everyone should receive the same percentage.

42. If a volunteer is 17 years old and helps as a cashier but has an adults supervising is this ok?

Yes, this is ok.

43. Can we e-file through Quickbooks?

Yes, you can e-file.

44. What if the parish pays for the contractor or service and the school is reimbursing the parish, does the school still need the W-9 and liability and other docs on file?

No, the parish is the party contacting the service and will be the one responsible for maintaining the required documents.

Additional Resources:

For your ease a tab under Lay Personnel has been dedicated to all open enrollment information.

If you have any questions or concerns, please feel free to contact the Office of Lay Personnel at 916-733-0239.