

# CHECKLIST - ALL NEW EMPLOYEES

(Revised 09/2009)

(A Personnel File to be established no later than the first day of work for each new employee. Refer to the *Funding of Benefits Chart – Lay Employees* for eligibility and funding.)

Name: \_\_\_\_\_ Date File Created: \_\_\_\_\_ Hire Date: \_\_\_\_\_

Address: \_\_\_\_\_ Employee No: \_\_\_\_\_ Department: \_\_\_\_\_

Classification: \_\_\_\_\_

Work Hours: \_\_\_\_\_ Hours/Week: \_\_\_\_\_ Hourly Rate/Salary: \_\_\_\_\_

- 1. Completed Employment Application (use Catholic Diocese of Baton Rouge Application For Employees & Volunteers (Eapps form) found at [www.diobr.org](http://www.diobr.org), Documents, Child & Youth Protection)  Yes  No
- 2. Payroll forms
  - a) Withholding forms (W-4, L-4, etc.) completed  Yes  No
  - b) Direct deposit forms completed  Yes  No
- 3. Determine if employee also works at another diocesan unit (hours must be combined between the units to determine eligibility for benefits, for example, 15 hours at church and 15 hours at school would be 30 diocesan hours and benefits must be offered.)  Yes  No
- 4. Eligible for health insurance participation  Yes  No
  - a) Completed application and forms  Yes  No
  - b) Completed dental insurance application  Yes  No
  - c) Completed Election Not to Participate Form (for benefits eligible for but not participating in)  Yes  No
- 5. Eligible for Life Insurance and Disability  Yes  No
  - a) Completed application for life insurance  Yes  No
  - b) Completed application for optional short-term disability (if applicable)  Yes  No
- 6. Eligible for 401 (k) Retirement Plan  Yes  No
  - a) Enrollment/Change form completed  Yes  No
  - b) Beneficiary Designation form completed  Yes  No
  - c) Establish reminder to start deductions after 3 month eligibility period met  Yes  No
- 7. Completed USDHS Form I-9, "Employment Eligibility Verification"  Yes  No
- 8. Completed Workers Compensation Questionnaire  Yes  No
- 9. Establish reminder to evaluate employee and adjust salary after probationary period  Yes  No
- 10. Sent W-4 or employee & employer name, address, Social Security number/Federal ID number to Support Enforcement Services  Yes  No
- 11. Completed Employee Contact Information form  Yes  No
- 12. Fax completed New/Change/Terminate Employee Data form to DBR Benefits Office  Yes  No
- 13. Employee received all current brochures, forms, etc., pertaining to retirement and health/disability/dental/life insurances  Yes  No
- 14. For positions required by DBR OCYP, background checks, fingerprints, sex registry, child protection requirements (Code of Ethics, Safe in Place, references checked, etc.) etc., completed.  Yes  No
- 15. What keys, if any, are assigned to new employee: \_\_\_\_\_

KEY ASSIGNMENT APPROVED: \_\_\_\_\_

*Signature of Pastor/Principal/Administrator*

APPLICATION (plus all documents)

REVIEWED AND APPROVED: \_\_\_\_\_

*Signature of Pastor/Principal/Administrator*

## Distribution of above forms

1, 2, 4(c), 5, 7, 8, 11, 12 and Checklist 4a and 4b

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- to the new employee's Personnel File
- originals to Diocesan Health Insurance Office and copy to Personnel File
- send originals to Diocesan Benefits Office and copy to Personnel File
- see <http://www.dss.state.la.us/index.cfm?md=pagebuilder&tmp=home&pid=164>; file via internet at [www.la-newhire.com](http://www.la-newhire.com) or Fax to 888-223-1462 or 225-342-4529) or mail to Louisiana New Hire Reporting, P. O. Box 142513, Austin, TX 78714-2513 and copy to Personnel File

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- Send Eapps to appointed parish or school Child Protection officer