HR Connect

• • • Staying In Touch Volume 1 Issue 88 September 2011

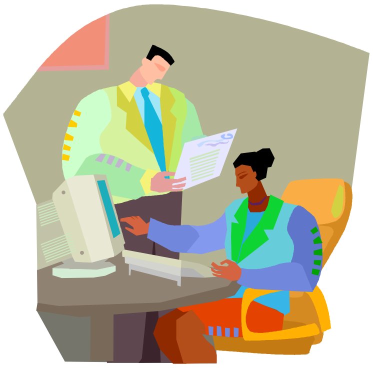
New Hire Checklist – 2011 Update

So many important things come together at the point of hiring someone to serve the Church alongside us. The excitement and trepidation we might feel at welcoming a new person mixes with the emotions a new employee feels as they adjust to a new place, new people, and different ways of doing things. Getting started on the right foot is critical for the new person to be successful in their new position. In this issue we will address the basic checklist items that we need to give and get in order to establish a healthy professional employment relationship with a new employee.

Forms to be filled out by the Site Administrator:

- **<u>Master File Input Form</u>** - This is the key form that the Payroll office needs in order to process the employee's paychecks. Please make sure that all of the information is clear and accurate. One tricky part is indicating the timing of the health deductions for a new hire, since an employee usually starts before they are eligible for health insurance. The date of eligibility is always the 1^{st} of the following month after the hire date. If the employee is hired on the 1^{st} of the month, they can be eligible on the 1^{st} day of work only if the first day of work is the 1^{st} calendar day of the month. (If the calendar month starts on Saturday as the 1^{st}, Sunday is the 2^{nd} and Monday is the 3^{rd}, and the first workday is Monday the 3^{rd}, the benefits start the following month) Please indicate in the comments section the effective date of the health deductions.

- **<u>Creating the Employee Benefit Record</u>** (if eligible) - If the employee is benefit eligible, the designated Site Administrator must create a benefit record in www.RetaTrust.org / BAS system. The transaction must be input on the 1^{st} day of actual work. The transaction will be "New Hire Employee". During this transaction process, at step 3, it will ask about an Enrollment Kit. Click on the NO radio button. You do not want to generate an enrollment kit. You do want to select option 3 which is to send an email directly to the new employee. By doing this, BAS will send 2 emails directly to the new employee within 24 hours after you submit this new hire transaction. 1 Email will be the new employee's User ID and the



other email is their password. The new employee must then go online to the BAS system within 30 days of hire date and select their benefits. If the employee does not want to select our medical/dental/vision (they want to "waive" coverage) they still must go on-line to the BAS system and make this waiver in the system. All benefit eligible employees are covered by a group life insurance policy and must make a beneficiary designation on-line in their BAS Benefit record.

There are no paper enrollment forms and none may be sent to BAS. If the employee fails to go online within the 30 days from the hire date, they may not enroll for benefits until the next Benefits Open Enrollment period.

Note: If an employee works at more than one Archdiocesan location, the employee must advise each location of the other Archdiocesan work hours. I f those total hours exceed 20, the employee is eligible for Archdiocesan Benefits. The location where the employee works the most hours, will be designated as the "home" location and that home location will create the BAS benefit record. T he home location will be billed monthly for the full amount of all benefit costs. Those "employer" benefit costs should be spread proportionately across all work locations; however it is the responsibility of the home location to handle this process.

- **I-9** - this legally required Federal form needs to be completed either before hire or within 3 days of hire; otherwise they cannot continue to work. Upon submission of the required documents, they may return to work. The person examining the identity and employment eligibility documents presented by the new employee must sign and date the bottom of the I-9 form. Copies of the new I-9 form, revised 8/07/09 can be downloaded from: http://www.uscis.gov/files/form/i-9.pdf

Documents to be given to the New Employee:

- **Offer letter** - stating the basic terms of employment, including salary, exempt or non-exempt status, position title, start date, basic schedule, the "at will" employment clause, and any other essential aspects of the new employee's employment. See Issue 8 (April 2003) on pay guidelines and Issue 9 (May 2003) on reasonable expectations for guidance.

- **Employee Handbook** - acknowledgments to be signed and returned are listed below. Offer the new employee time during Orientation or later to talk about any questions that are raised once they get a chance to read it.

Forms to be given to the New Employee and returned by them promptly:

- Employment Application - the new employee should complete this form either before or on the first day of hire. It contains important information that will help the site administrator check references and verify basic information. Please examine the responses closely and compare against the resume and other information you have. Also, please pay attention to the responses relating to a person's criminal background as these may disqualify the new employee depending on the position they've been hired for. Inaccuracies on the employment application can lead to immediate termination. Consult with HR if you find anything that raises a yellow flag.
- Authorization to Release Information
- Confidentiality Agreement
- Contraception Equity Act Acknowledgment
- Direct Deposit Authorization
- Emergency Form—make sure that these are updated each year
- W-4/DE-4 (Federal & State withholding) forms
- Acknowledgment and Agreement of Handbook (inside left cover)
- Acknowledgment and Agreement to Arbitrate (inside left cover)
- Child Abuse and Harassment Acknowledgment (last page of Exhibit B) - please send the original to HR and keep a copy in the personnel file
- Addendum Acknowledgment to Child Abuse & Harassment Policy (last page of Exhibit B1) - please send the original to HR and keep a copy in the personnel file
- User Acknowledgment of Internet/Email Policy (last page of Exhibit C) - retain at your location

Note: It is a good practice to keep a copy of each of the above forms in the employee's personnel file at your location.

Paperwork to be given to the New Employee:

- Employee Benefits List—Employee should be given this website address and asked to visit the website where they may print what they want. Website: http://www.sfarchdiocese.org/about-us/departments-and-offices/human-resources/information-for-new-employees/
- Timecard & Timecard instructions
- Holiday and Vacation schedule, if applicable - subject to the addendum to the Handbook written at each parish and approved by Legal and HR
- For employees working in San Francisco only, who work less than 20 hours a week but more than 8 hours a week, must be given the Archdiocese of San Francisco Health Reimbursement Account (HRA) Information booklet and an Employee Voluntary Waiver Form.

- Workers' Compensation - written notice to new employees and the pre-designation of personal physician Form (4 pages). This is a required form to be given out, but is an optional form for the employee to return. If it is returned by the employee, the form must be placed in the personnel file at your location.
- To read information about, and to actually submit a claim for Benefits regarding Short Term Disability, Paid Family Leave and Unemployment, employees go directly to website: www.edd.ca.gov.
- Sexual Harassment Prevention Training for Supervisors (AB 1825) if employee is a Supervisor

Paperwork to be given to New Employees eligible for benefits:

- All benefits information is on the Archdiocese website at: http://www.sfarchdiocese.org/about-us/departments-and-offices/human-resources/information-for-new-employees
- 403(b) Savings Plan enrollment packages from Diversified Investment Advisors.
- Flexible Spending Account information for Health Care, Dependent Care or Transportation administered by Flex-Plan may be found on the archdiocese website. Enrollment forms must be given to the employee and submitted to the Archdiocese with the Master File Input Form setting up the payroll deduction. Forms may be obtained at: www.flex-plan.com. Company ID is: ASF
- For employees working in San Francisco only, who work less than 20 hours a week but more than 8 hours a week, must be given the Archdiocese of San Francisco Health Reimbursement Account (HRA) Information booklet and an Employee Voluntary Waiver Form.

Remember to have the employee fingerprinted or background checked if their position requires it. Please call the Office of Child & Youth Protection at (415) 614-5576 to help you identify required positions. We would also suggest that you take a picture of your new employee for the personnel file. And take them to lunch! See Issue 19 (March 2004) on personnel files, Issue 26 (November 2004) on handbook implementation, and Issue 30 (April 2005) on health working relationships as well.