

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 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 <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.

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.
	Employee Signs Job Description	Original included with this packet, which is to be sent to the Catholic School Department. A copy placed in site Personnel File.

PRIOR TO FIRST DAY OF EMPLOYMENT:

	Complete New Employee form (PT100) <i>Bookkeeper does not process until receiving confirmation from Lay Personnel.</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 from Lay Personnel.
	Employee completes required safe environment and Diocesan policy training through https://sacramento.cmgconnect.org/ Date: _____	Principal verifies Safe Haven training is complete. Copy of certificate of completion placed in 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.

	<p>Principal reviews the Lay Personnel Employee Handbook in person 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></p>	<p>Originals placed in site Personnel File. Copies to be included in this packet, which is to be sent to the Catholic School Department.</p>
	<p>Employee completes and submits Emergency Information form (PT 120)</p>	<p>Place in site Personnel File</p>
	<p>Employee is given copy of Disability Insurance brochure (DE 2515)</p>	
	<p>Employee is given copy of Paid Family Leave brochure (DE 2511)</p>	
	<p>Employee is given copy of SDI/PFL Weekly Benefit Amounts (DE 2589)</p>	
	<p>Employee is given copy of Sexual Harassment brochure (DFEH 185)</p>	
	<p>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)</p>	<p>If signed, place in Personnel File</p>
	<p>Employee is asked to read IIPP (Injury and Illness Prevention Program)</p>	<p>Employee signs New Employee Safety Orientation Checklist (page 4a in IIPP). This signed document is placed in Personnel File at the site.</p>
	<p>AB1432 is the bill which requires all employees who work with children to be certified as a Mandated Reporter each year. The link to the course is: http://mandatedreporterca.com/</p> <p>AB1207 is a law for licensed preschools only. The link for this is the same: http://mandatedreporterca.com/ (Click on AB1207) Each staff member must view this course and take the test individually.</p>	<p>Make sure to have each staff member print out the certificate and place in his/her personnel file.</p> <p>This training is to be done every TWO years and must be completed by March 30, 2018. Make sure to have each staff member print out the certificate and place in his/her personnel file. Please be</p>

		prepared to show the certificates of completion of all preschool employees when the state preschool licensing visits.
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The Pastor/Supervisor 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 online at 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
	Pension Plan Pamphlet	Discussion and explanation
	Pension Plan Beneficiary Designation form (SACL 201)	Original to Office of Lay Personnel. Copy placed in site Personnel File.

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 retatrust.org to register as a new user.	
	The employee will use the Enrollment section of the website to elect/decline benefit coverages for themselves and for their dependents.	
	Benefit Payroll Deduction Authorization Form (PT1001)	Original to Payroll Copy to be placed in Personnel File Copy to Employee
	Section 125 Employee Benefit Election Form (PT10) (pre-tax deductions for medical/dental/vision)	Original to Payroll Copy to be placed in Personnel File Copy 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. Be sure to keep a copy of all information for your records. The following items MUST be included:

_____ This document with the date each item was completed. Be sure to include dates for TB Test and LiveScan Clearance. **(To CSD)**

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

_____ Signed Job Description **(To CSD)**

_____ PT100 **(To Lay Personnel)**

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

_____ Pension Plan Beneficiary Designation form (SACL 201) **(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

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.