

## 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 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 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 conducts reference checks with previous supervisors listed on the employment application (PT 80) and Document's 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 <b>Reminder: it is the principal's responsibility to ensure this is updated every 4 years for each employee.</b>
	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 <b>Job Description</b>	Copy included with this packet, which is to be sent to the Administrative Assistant in the Catholic School Department at <a href="mailto:csd@scd.org">csd@scd.org</a> upon completion. Original placed in site Personnel File.

**FIRST DAY OF EMPLOYMENT:**

	Complete New Employee form (PT100) <ul style="list-style-type: none"><li>If the new hire is a religious please use the religious PT form instead of the PT 100</li></ul> <b>Bookkeeper does not process until receiving confirmation email from CSD.</b>	Original placed in Personnel File. Copy included in this packet, which is to be sent to the Catholic School Department. Contact Lay Personnel for all the Religious new hires at <a href="mailto:personnel@scd.org">personnel@scd.org</a> or (916) 733-0239. <b>Bookkeeper does not process until receiving confirmation from Lay Personnel.</b>
	Employee completes required Safe Environment and the Anti Sexual Harassment Training.  Date:_____	Principal verifies Safe Haven and Sexual Harassment training is complete. Original certificate of completion placed in site Personnel File. Copy sent to lay Personnel at <a href="mailto:personnel@scd.org">personnel@scd.org</a> in the Lay Personnel department.

	Complete I-9	Original place in I-9 file at the school site – <b><i>NOT IN PERSONNEL FILE</i></b>
	Employee completes W-4 and DE 4	Original placed in site Personnel File. Copy to Bookkeeper.
	<p><b><i>Principal</i></b> reviews the Lay Personnel Employee Handbook <b><i>in person</i></b> with the employee. Employee signs and dates the following acknowledgment forms:</p> <p><i>Acknowledgement of Receipt of Handbook (pages 55-56)</i>  <i>Acknowledgement of Diocesan Policies as Religious Employer (page 57)</i>  <i>Antidiscrimination/Anti-harassment Policy Acknowledgement (page 58)</i>  <i>Electronic Communications Policy Acknowledgement (page 59)</i></p>	Originals placed in site Personnel File. Copies to be included in this packet, which is to be sent to the Catholic School Department.
	<b><i>Principal</i></b> 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 to be included in this packet, which is to be sent to the Catholic School Department.
	Employee completes and submits Emergency Information form (PT 120)	Original placed in 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). 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.
	<p>AB 1432 is the bill which requires all employees who work with children to be certified as a Mandated Reporter each year. This training must be renewed every YEAR. The link to this course is: <a href="https://mandatedreporterca.com/">https://mandatedreporterca.com/</a>  <b><i>The Mandated Reporter Acknowledgement Form must also be completed at the time of hire.</i></b></p> <p>AB 1207 is a law for licensed preschools only. Each staff member must view this course and take the test individually. This training must be renewed every TWO years. The link for this site is the same:  <a href="https://mandatedreporterca.com/">https://mandatedreporterca.com/</a> (Click on AB 1207)</p>	<p>Make sure to have each staff member print out the certificate and place in his/her personnel file to reflect compliance with the renewal years.</p> <p>Ensure the Mandated Reporter Acknowledgement Form has been signed and placed in his/her personnel file. A copy should be provided to the employee.</p> <p>Note: Please be prepared to show the certificates of completion of all preschool employees when the state preschool licensing visits.</p>

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	Copy included in this packet, which is to be sent to Lay Personnel at <a href="mailto:personnel@scd.org">personnel@scd.org</a> and the Administrative Assistant in the Catholic School

		Department at <a href="mailto:csd@scd.org">csd@scd.org</a> . Original placed in site Personnel File.
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### ***Optional Benefits***

<b>DATE</b>	<b>ITEM</b>	<b>REQUIRED ACTION</b>
	After the benefit administrator has added a new eligible employee to the RETA Trust database, the employee will log onto <a href="https://www.retatrust.org/c/home">https://www.retatrust.org/c/home</a> 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. Original in Personnel File and copy to Bookkeeper/ Payroll.

Please ensure this packet is complete prior to sending to the Catholic School Department at [csd@scd.org](mailto:csd@scd.org). Copies of the following items should be included *(Note: The Catholic School Department only needs copies for Preschool & Extension Directors. Aides and any Non-Teacher documents are to be filled on site):*

- \_\_\_\_\_ This document with the date each item was completed. Be sure to indicate dates for TB Test and LiveScan Clearance for PS/ED Directors. (To CSD. Please keep a copy for yourself)
- \_\_\_\_\_ Pre-Application, Questionnaire, and Application (To CSD)
- \_\_\_\_\_ Signed Job Description (To CSD)
- \_\_\_\_\_ PT100 (To Lay Personnel & Bookkeeper)
- \_\_\_\_\_ 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  
February 2025

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 or person completing the reference check: \_\_\_\_\_

Date reference check completed: \_\_\_\_\_

Name of the person contacted: \_\_\_\_\_

Position of person contacted: \_\_\_\_\_

Questions to ask during 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 the supervisor, peer, etc.?)

\_\_\_\_\_

4. What are the applicant's strengths?

\_\_\_\_\_

5. Are there any areas of challenge for the application?

\_\_\_\_\_

6. Would you hire the applicant again? \_\_\_\_\_

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