

## NEW HIRE PAPERWORK CHECKLIST

**KEEP ORIGINALS FOR EMPLOYEE PERSONNEL FILE ON SITE – fax forms to Diocese: 415-673-4863**

**DIOCESAN PAYROLL – all forms available online: [www.diocal.org/pba](http://www.diocal.org/pba)**

LAY EMPLOYEES	CLERGY EMPLOYEES
1. Employee Data & Benefit Eligibility Form	1. Employee Data & Benefit Eligibility Form
2. Payroll Authorization	2. Payroll Authorization
3. INS Employment Eligibility Verification Form I-9 – Required prior to employee starting work. (attach clear, legible copies of your eligibility verification documents)	3. Clergy Tax Withholding Request (or W4)
4. IRS Form W-4 (dated current year)	4. Housing Allowance Resolution Certificate
5. Defined Contribution Retirement Plan Payroll Deduction Authorization (required if working at least 20hr/week)	5. INS Employment Eligibility Verification Form I-9 – Required prior to employee starting work. (attach clear, legible copies of your eligibility verification documents)
6. Direct Deposit & Paperless Payroll Enrollment Form (optional. If possible, attach a blank voided check or call bank to obtain routing & account numbers. Do not use a deposit slip)	6. Direct Deposit & Paperless Payroll Enrollment Form (optional. If possible, attach a blank voided check or call bank to obtain routing & account numbers. Do not use a deposit slip)
7. Health Care or Dependent Care Flexible Spending Account (if eligible & elected by employee) *	7. Insurance Premium Cost Share Pre-Tax Payroll Deduction Authorization (if policy was adopted by vestry/bc/board)
8. Insurance Premium Cost Share Pre-Tax Payroll Deduction Authorization (if policy was adopted by vestry/bc/board)	8. Health Care or Dependent Care Flexible Spending Account (if eligible & elected by employee) *
	9. Clergy Pre-Tax Payroll Deduction Authorization for RSVP (if enrolled w/ CPG)

**Benefits Paperwork (clergy or lay) available online: [www.diocal.org/employeebenefits](http://www.diocal.org/employeebenefits)**

Employee working less than 20hr/week:

- [2019 Employee Data & Benefits Eligibility Form](#)

Employee working at least 20 but less than 30hr/week is “part-time benefits eligible”:

- [2019 Employee Data & Benefits Eligibility Form](#)
- [2019 Medical / Dental Enrollment or Change Form](#)
- [2019 Insurance Premiums Pre-Tax Payroll Deduction Authorization](#) (if any portion of the premiums are responsibility of employee)

Employee working at least 30 hr/week is “full-time benefits eligible”:

- [2019 Employee Data & Benefits Eligibility Form](#)
- [2019 Medical / Dental Enrollment or Change Form](#)
- [2019 Insurance Premiums Pre-Tax Payroll Deduction Authorization](#) (if any portion of the premiums are responsibility of employee)

Please have all forms complete and signed by the employee and the authorized official of the church / school / institution before sending to the Payroll & Benefits Office.

**FAX completed forms to: 415-673-4863 or email to: [sarahc@diocal.org](mailto:sarahc@diocal.org)**

**~Keep originals onsite in secure personnel file~**