

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

LAY EMPLOYEES	CLERGY EMPLOYEES
<ol style="list-style-type: none"> 1. Employee Data & Benefit Eligibility Form 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) 4. IRS Form W-4 (dated current year) 5. Defined Contribution Retirement Plan Payroll Deduction Authorization (required if working at least 20hr/week) 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) * 8. Insurance Premium Cost Share Pre-Tax Payroll Deduction Authorization (if policy was adopted by vestry/bc/board) 	<ol style="list-style-type: none"> 1. Employee Data & Benefit Eligibility Form 2. Payroll Authorization 3. Clergy Tax Withholding Request (or W4) 4. Housing Allowance Resolution Certificate 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) 7. 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 Enrollment Paperwork (clergy or lay) available online:

www.diocal.org/employeebenefits

Employee working less than 20hr/week:

- Employee Data & Benefits Eligibility Form

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

- Employee Data & Benefits Eligibility Form
- Medical / Dental Enrollment or Change Form
- 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”:

- Employee Data & Benefits Eligibility Form
- Medical / Dental Enrollment or Change Form
- 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

~Keep originals onsite in secure personnel file~