



DIocese of OWENSBORO

New Employee Checklist

NAME: _____

HIRE DATE: _____

- ✓ **Employment Application, Resume, Offer/Position Letter or Contract, College Transcripts, Certifications** – Place in Personnel file.
- ✓ **State K-4 form and Federal W-4 form**–Use the number designated for allowances in payroll processing, along with entering married or single for the proper pay calculations.)
- ✓ **Employment Eligibility Verification (I-9)** - Record information from the required documents for employment eligibility; one item from List A or, one item from List B **and** C. Retain all I-9's in a separate file. Do **not** keep in the employee's personnel file.
- ✓ **Health Insurance Enrollment** – Provide employee with Summary of Health Insurance Benefits, Enrollment Form, and Schedule of Premiums. Requires 20 + hours per week to be eligible to participate. Premium is pre-taxed. Must send forms to BAS.
- ✓ **UNUM Life insurance Beneficiary form** – Provide full time employee with UNUM beneficiary form to complete. Requires 20 + hours per week to be eligible to participate. Must send forms to BAS.
- ✓ **Diocese Retirement Plan** – Provide full time employee with Enrollment and Beneficiary Designation Form. Requires 20 + hours per week to be eligible to participate. Must send forms to Christian Brothers.
- ✓ **403 B Retirement Plan** – Provide employee with Enrollment and Beneficiary Designation Form if they chose to participate in the 403B plan. Requires 20 + hours per week to be eligible to participate. Must send forms to Christian Brothers.
- ✓ **Employee Handbook** – Provide employee with the Employee Handbook and have the employee sign the acknowledgment form. Keep form in the employee personnel file.
- ✓ **Direct Deposit of Payroll Authorization** - Payroll information for auto deposit of payroll.
- ✓ **Background Check and Safe Environment Training** – Employee must complete prior to first day of employment.
- ✓ **Job Description** – Provide employee with copy of their job description.
- ✓ **Issue Keys, provide copy of phone directory, tour building and introduce to staff**
- ✓ **Review procedures for computer login and voice mail set up.**
- ✓ **Review Emergency Evacuation, Fire Exit, Accident and Worker's Compensation Reporting procedures.**

Sign (Pastor, Principal, Business Manager, HR or Bookkeeper)

Date