

EMPLOYEE CHECKLISTS

New Employee

- Application and Job Description
- Background Screening Application
- Code of Conduct Acknowledgment
- Reference checks
- I-9
- Federal W-4
- State W-4
 - o This is also the Centralized Employee Registry Form – see directions for submission on the top of the W-4
- Direct Deposit Authorization if applicable
- Notice to LMC of New Hire (this will generate communication from LMC to employee regarding their benefits.)
If employee does not wish to take the health insurance, they still need to go out to the benefits site to ‘waive’ their enrollment. You will receive the employee deduction information from LMC.
 - o 28 hours eligible for all benefits
- 403(b) - All employees working 20 hours or more are eligible for this benefit. Effective 7/1/2017 LMC will no longer be sending the 403(b) notice to the employee so the folder and enrollment will come from your location. The match will begin after the first year. All matches are now 50% of the employee contribution up to a maximum of 8% of the employee’s wages.
- Exchange Notice for New Employees (benefits eligible employees)
- Receipt for Computer Usage Policy if applicable
- Access passwords for computer
- Receipt for handbook
- Software Authorizations if applicable
- Financial Institutions if applicable
- Keys, credit cards, equipment (phone, computer, etc.)
- VIRTUS Training
- Timesheet
- Vehicle Policy receipt and acknowledgement if applicable
 - o Be Safe certification if applicable
 - o Proof of insurance if applicable
- Notice to Catholic Mutual Group when employee is driving vehicle(s) owned by the location

I9 Form: <https://www.uscis.gov/sites/default/files/files/form/i-9.pdf>

State W-4: [https://tax.iowa.gov/sites/files/idr/IA%20W-4%20\(44019\)15.pdf](https://tax.iowa.gov/sites/files/idr/IA%20W-4%20(44019)15.pdf)

Federal W-4: [https://tax.iowa.gov/sites/files/idr/IA%20W-4%20\(44019\)15.pdf](https://tax.iowa.gov/sites/files/idr/IA%20W-4%20(44019)15.pdf)

Termination of Employment

Unless the employee is resigning, you must call HR at the Diocese 515-237-5085 before terminating an employee.

- Request a written letter of resignation
- If being terminated make sure you have called HR 515-237-5085
- Financial Institutions if applicable
- Software Authorization if applicable
- Notify LMC and Christian Bros via the on-line portal
- Collect keys, credit cards, equipment
- Notify payroll provider if applicable
- ParishSOFT Payroll Module – uncheck ‘calculate employee’ – **do not delete the employee**