

Employment Documents

Business Office Forum

November 29 and 30, 2017

New Employee Checklist

- Application and Job Description
- Background Screening Application
- Code of Conduct Acknowledgment
- Reference checks
- I-9
- Federal W-4
- State W-4

This is also the Centralized Employee Registry Form - see directions for submission on the top of the W-4

New Employee Checklist continued

- Direct Deposit Authorization if applicable
- Notice to LMC of New Hire (28 hours eligibility 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)

New Employee Checklist continued

- 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
 - Be Safe certification if applicable
 - Proof of insurance if applicable
- Notice to Catholic Mutual Group when employee is driving vehicle(s) owned by the location

Important websites

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)