



# DIOCESE OF SANTA ROSA - EMPLOYEE BENEFITS ACTION FORM

Please complete for **all** employees FT or PT with or without benefits (see back of form)

New Hire  Increase Benefits  Reduce Benefits  End Employment  Information Change: (name/address) \_\_\_\_\_  
Effective Date \_\_\_\_\_

**Employee Name:** \_\_\_\_\_ **Location:** \_\_\_\_\_ # \_\_\_\_\_  
Please print First name (M) Last parish/school  
**Social Security Number:** \_\_\_\_\_ **Date of Birth:** \_\_\_\_\_ M/F (circle)

**Mailing Address:** \_\_\_\_\_  
street number and name city zip

**Phone:** (\_\_\_\_\_) \_\_\_\_\_ **E-mail:** \_\_\_\_\_

**Estimated ANNUAL Earnings \$** \_\_\_\_\_  EXEMPT \$ \_\_\_\_\_ /Pay period  
Needed to estimate value of life ins.

**Job Title:** \_\_\_\_\_  NON-EXEMPT \$ \_\_\_\_\_ /Hour \$ \_\_\_\_\_ /Month

New Hire/Increase Benefits

**New Employee:** **Hire Date:** \_\_\_\_\_ **Re-hire Date:** \_\_\_\_\_  **Teacher Contract**  
 30+ hrs./wk. (Full benefits)  20-29 hrs./wk. (Retirement & Life Ins. Benefits)  Less than 20 hrs./wk. (No Diocesan Benefits)  
 Transfer from another Diocesan location (name): \_\_\_\_\_  
 Other/Comments \_\_\_\_\_

**Cleared to Hire** by Catholic Schools Department?  Yes  No

**Hours increased effective date:** \_\_\_\_\_ To:  30+ hrs./wk.  20-29 hrs./wk.  
(Original hire date: \_\_\_\_\_)

**Benefits** are effective on the first day of month following eligibility date unless eligibility date is the 1st of month.

- Ineligible for Diocesan Benefits (under 20 hrs./wk.)
- SUN LIFE Insurance\*** (20 +hrs./wk.)
- ONE AMERICA Defined Contribution Plan** (20+ hrs./wk.) Employer contributions begin after a one year waiting period.
- HEALTH Benefits** (30+ hrs./wk.) Location administrator must enroll employee via [www.RetaTrust.org](http://www.RetaTrust.org)

End/Reduce Benefits

**Employment ended - as of date:** \_\_\_\_\_ due to:  
 Termination^  Resignation  Teacher Contract Ended  
 Retirement /  Early Retirement -Deferred Pension (frozen plan) benefits start date: \_\_\_\_\_  
 Transfer to another Diocesan location (name): \_\_\_\_\_  
 Other/Comments \_\_\_\_\_

**Cleared to Terminate^** by Human Resources?  Yes  No **Eligible for Rehire?**  Yes  No

**Hours reduced effective date:** \_\_\_\_\_ To:  20-29 hrs./wk.  Less than 20 hrs./wk.  
(Original hire date: \_\_\_\_\_)

**Benefits** will end on the last day of month in which hours were reduced/employment ended except for 10 mo. contracted teachers.

- Employee had no Diocesan benefits (under 20 hrs./wk.)
- SUN LIFE Insurance**
- ONE AMERICA Defined Contribution Plan.**  403b participant
- HEALTH Benefits** - Location administrator must "terminate" employee via [www.RetaTrust.org](http://www.RetaTrust.org)

**Submitted by:** \_\_\_\_\_ **Date:** \_\_\_\_\_  Faxed to Benefits Office on: \_\_\_\_\_

**Mail/fax this form to:** Benefits Office **Fax: (707) 566-3381**  
 **Mail original Sun Life Beneficiary\* form to:** Diocese of Santa Rosa  
P.O. Box 1297  
Santa Rosa, CA 95402  
For questions call:  
(707) 566-3349

**Benefits Office use only:** \_\_\_\_\_ **Hire history:** \_\_\_\_\_  
( ) Logged Blue sheet ( ) Logged Pink sheet  
( ) Enrolled RETA ( ) Sent Conversion forms \_\_\_\_\_  
( ) Sent ACA Notice \_\_\_\_\_ ( ) Status change OneAmerica \_\_\_\_\_  
( ) Added -20 or 20-29 list \_\_\_\_\_ ( ) Status change RETA \_\_\_\_\_ ( ) Faxed Pension Services \_\_\_\_\_  
BAS# ( ) Removed -20 or 20-29 list ( ) Copy Dept. of Catholic Schools  
4/21/2017

## New Hire/Increase in Benefits

### 30+ Hours per Week = Full Diocesan Benefits:

- Retirement Plan-One America (Defined Contribution)
- Sun Life Insurance
- Health Benefits Package: medical, prescription, dental, vision

### 20-29 Hours per Week = Part Diocesan Benefits:

- Retirement Plan-One America (Defined Contribution)
- Sun Life Insurance

### Less than 20 Hours per Week = Ineligible for Diocesan Benefits

#### **Contact information:**

-Rachael de la O, Benefits Office, 707-566-3349 or [rdelao@srdiocese.org](mailto:rdelao@srdiocese.org)

-You can also refer to the diocesan website: [www.srdiocese.org](http://www.srdiocese.org)

### **Definition of Exempt/Non Exempt Employees**

**Exempt Employees-SALARY:** More than 50% of time must be spent doing the following:

- An executive, administrative, or professional employee.
- Have decision making authority.
- Usually supervises others.
- Regularly and customarily exercises discretion and independent judgment. The decisions must involve matters of consequence of real and substantial significance to the **policies** or **general operation** of the business.
- Must be paid at least two times the minimum wage for full time work.

### **Non-exempt employees-HOURLY:**

- Are directly supervised by an executive, administrative, or professional employee.
- May make decisions, but more in a routine manner. (i.e. ordering supplies)
- Are subject to the wage and hour laws of the state and federal government including overtime laws.
- Are required to take breaks and lunch breaks.

#### **Contact information:**

-Fran de la Forest, Human Resources, 707-566-3322 or [fdelaforest@srdiocese.org](mailto:fdelaforest@srdiocese.org)

## Termination

Termination of employment is a time consuming and stressful event. Though we are an “at will” State, documentation is a huge part of the process. With all of the pitfalls, it is mandatory that Human Resources be involved with the termination process. Therefore, effective April 30, 2013:

As a condition of coverage for any employment claims, our insurance carrier, Catholic Mutual, has notified us that either Fran de la Forest, Human Resources for the Diocese OR Adrienne Moran, Diocesan attorney, must be **promptly** contacted if there is a potential for termination. The Diocese will need to confirm that advice of either Human Resources or a qualified attorney was sought and followed prior to termination so that we can meet these insuring requirements. Catholic Mutual has advised that failure to follow this protocol will result in the denial of coverage of the employment claim.

Dave Adams, Diocesan Chief Financial Officer

#### **Contact information:**

-Fran de la Forest, Human Resources, 707-566-3322 or [fdelaforest@srdiocese.org](mailto:fdelaforest@srdiocese.org)

-Adrienne Moran, Diocesan Attorney, 707-544-5858 or [ade@shapirogalvinlaw.org](mailto:ade@shapirogalvinlaw.org)