



DIOCESE OF SANTA ROSA - EMPLOYEE BENEFITS ACTION FORM

Please complete for all employees regardless of benefits eligibility (see back of form)

New Hire
 Rehire
 Increase Benefits
 Reduce Benefits
 End Employment
 Information Change as of Date: _____ Address/Name -reason for change: _____

Employee Name: _____ Entity: _____ # _____
 Please print First name (M) Last Parish/School As in health bill

Social Security Number: _____ Date of Birth: _____ M/F (circle)

Mailing Address: _____
 Street #/name City Zip

Personal Phone: (____) _____ Work Phone: (____) _____ E-mail: _____

Estimated ANNUAL Earnings \$ _____ Job Title: _____

EXEMPT NON-EXEMPT \$ _____/Hour
 Needed to estimate value of life ins.

New/Increase Benefits

All benefits are effective on the first day of month following eligibility date unless eligibility date is on the 1st of the month.
 Please indicate *Work Status below for any of the following situations:

___ New: Hire Date: _____ (___ Rehire Date: _____ Original hire date: _____)
 ___ Transfer from another Diocesan entity (name): _____
 Cleared to Hire by Department of Catholic Schools? Yes No Contract MOU Sub _____ term
 ___ Hours increased effective date _____ to: _____
 *Work Status:
 Less than 20 hrs./wk. (ONLY eligible for CA paid sick leave of 24 hours per calendar year)
 20-29 hrs./wk. Eligible for:
 SUN LIFE Insurance
 ONE AMERICA Defined Contribution Plan. Employer contributions begin after a 1 year waiting period.
 30+ hrs./wk. Eligible for:
 SUN LIFE Insurance
 ONE AMERICA Defined Contribution Plan. Employer contributions begin after a 1 year waiting period.
 HEALTH Benefits. Location administrator must enroll employee via www.RetaTrust.org.
 Waive Health Benefits – Employee must complete “New Hire Open Enrollment” process via www.RetaTrust.org and Sec. 125 form

Comments: _____

End/Reduce Benefits

All benefits will end on the last day of the month in which employment/contract ends or full time hours end.
 Location administrator must “terminate” employee’s health benefits [including those who waived] via www.RetaTrust.org.

___ Employment ended - as of date _____ due to: _____ (Original hire date: _____)
 Termination Resignation Contract Ended indicate health benefits ending date: _____
 Retirement/ Early Retirement -If eligible for Deferred Pension (frozen plan), benefits start date: _____
 Transfer to another Diocesan entity (name): _____
 Other _____
 Cleared to Terminate by Human Resources? Yes No Eligible for Rehire? Yes No
 Pay out Vacation hours? Yes: number of hours? _____ No
 Employee had no Diocesan Benefits (less than 20 hrs./wk.)
 ___ Hours reduced effective date _____ to: _____
 Less than 20 hrs./wk. (ONLY eligible for CA paid sick leave of 24 hours per calendar year)
 20-29 hrs./wk. (No longer eligible for HEALTH Benefits)

Comments: _____

Approved by: _____ Submitted by: _____ Date: _____
 Pastor or Principal

Mail/Fax this form to: _____ Fax: (707) 566-3381 For questions call: (707) 566-3349
 (Include SUN LIFE Beneficiary form if applicable) Benefits Office
 Diocese of Santa Rosa
www.santarosacatholic.org Santa Rosa CA 95402 Faxed to Benefits Office on: _____

Benefits Office use only: _____ Hire history: _____

() Logged Blue sheet	() Logged Pink sheet	() Copy Accounting Dept.
() Added to RETA	() Sent Conversion forms _____	() Copy Dept. of Catholic Schools
() Sent ACA Notice _____	() Status change OneAmerica _____	
() Added -20 or 20-29 list	() Status change RETA _____	
BAS#	() Removed -20 or 20-29 list _____	() Faxed Pension Services _____

12/28/2018

New Hire/Increase in Benefits

Definition of *Work Status*

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:

- Only eligible for CA paid sick leave of 24 hours per calendar year

Contact information:

-Rachael de la O, Benefits Coordinator, 707-566-3349 or rdelao@srdiocese.org

-Annette Carroll, Benefits Assistant, 707-566-3348 or acarroll@srdiocese.org

-Diocesan website: 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

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

-Adrienne Moran, Diocesan Attorney, 707-544-5858 or ade@shapirogalvinlaw.org