

EMPLOYEE FORMS CHECKLIST

**APPLIES TO ALL LAY EMPLOYEES REGARDLESS OF
NUMBER OF HOURS WORKED -- ALL FORMS MUST HAVE
PROPER SIGNATURES.**

EMPLOYEE NAME: _____ **D.O.B.** _____

PERSONNEL /PAYROLL FILES (Required & Confidential)

- _____ W-4
- _____ I-9 (must be accurately completed with copies of documentation attached)
- _____ New Employee Benefits and Information form
- _____ Workers' Comp written notice to new employees (WC 88 04 05 D)
- _____ Notice to employees – Labor Code 2801.5
- _____ California Disability Ins and Paid Family Leave pamphlet
- _____ DIRECT DEPOSIT FORM
- _____ PAYROLL DEDUCTIONS (health/403B)
- _____ PAYROLL CHANGE SLIPS
- _____ EXIT DOCUMENT (if applicable) and/or Employee Benefits Action Form
- _____ EMPLOYEE HANDBOOK RECEIPT (showing that the handbook has been read and is understood)
- _____ APPLICATION/RESUME, if received—the law mandates that an application for employment cannot require a date of birth or social security number
- _____ FINGERPRINTING—All personnel and volunteers who have regular contact with children and all school employees
- _____ Safe Environment training
- _____ Sexual Harassment training (required for all employees as of 01/01/2019)
NOTE: trainings are available online at: <https://santarosa.cmgconnect.org/>. All locations will be notified when it is time for training. At the end of training, a certificate of completion is available. The certificate should be placed in the employee file.
- _____ Emergency Form (some locations find it easier to maintain a separate file for the emergency forms)

BENEFITS FILE: (Required & Confidential)

- _____ EMPLOYEE BENEFITS ACTION FORM—Employer completes to report any:
 - work status changes (hire, separation from service, hours increase/decrease (Pastor/principal approval required)
 - changes in personal information (address change and marital status).
- _____ Beneficiary forms: Sun Life and (if applicable) Frozen Pension
- _____ Qualified Life Event if making changes to dependent coverage.

Please retain a copy of this form for each new hire's personnel file.