

New Employee Paperwork Checklist

All Employees

- ☐ Employee's Withholding Allowance Certificate (W-4)-Federal
 - File in the parish personnel file.
- ☐ Minnesota residents only: W-4MN, Minnesota Employee Withholding Allowance/Exemption Certificate
 - File in the parish personnel file.
 - If the employee is claiming exemption from withholding, a copy of the form also needs to be sent to Minnesota Department of Revenue. This must be done annually.
- ☐ North Dakota residents only: Form MWR, Reciprocity Exemption/Affidavit of Residency
 - One copy is mailed to the Minnesota Department of Revenue and one copy goes into the parish personnel file.
 - The original must be mailed to Minnesota Department of Revenue.
 - This form must be completed annually.
- ☐ Employment Eligibility Verification (I-9)
 - Must be completed within 3 business days of the date employment begins.
 - Must be kept in the parish's personnel file for three years after the date of hire or one year after the date employment ends, whichever is later.
- ☐ Exchange Notice Packet
 - Includes the Exchange Notice Receipt Form (the appropriate one for their state) and either the MNsure Coverage Option document (if the employee lives in Minnesota) or the Notice: New Health Insurance Marketplace Coverage Options document (if the employee lives in North Dakota).
 - Employees need to sign the Exchange Notice Receipt Form. One copy is sent to the Group Insurance Office at the Diocese, and one copy goes into the parish personnel file.
- ☐ 403b Enrollment packet
 - Includes the following items: 403b Enrollment Brochure (Get Real with Your Retirement), Savings Form, Beneficiary Form, Mainspring Managed Savings Form, Investing Form, Rollover Contribution Form.
 - If the employee wants to participate in the 403b plan, they can either enroll online or by filling out the following forms: Savings Form, Beneficiary Form, and either the Mainspring Managed Savings Form or the Investing Form (depending on the option they are choosing). One copy is sent to the Group Insurance Office at the Diocese, and one copy goes into the parish personnel file.
- ☐ Employment Background Check
 - One copy of this form is sent to the previous or other current employer, along with a Response by Employer form and a stamped envelope addressed to the Diocese of Crookston, Attn: Safe Environment Office. One copy is sent to the Safe Environment Office at the Diocese and one copy is put in the parish safe environment file.

☐ Safe Environment Training

- Available online at crookston.org/secertification

☐ BCA Background Check (only for parishes with schools)

- Send the following items to the Minnesota BCA: a copy of the Acknowledgement and Consent Form for Employees (note: the employee needs to sign the front of the form or BCA will send it back), the BCA cover letter, a check for \$8 written to the BCA, and a stamped return envelope addressed to the Safe Environment Office at the Diocese

Full-time Employees Only

☐ Information Sheet for New Employees

- One copy is sent to the Group Insurance Office at the Diocese, and one copy goes into the parish personnel file.

☐ Group Employee Enrollment and Change Form

- One copy is sent to the Group Insurance Office at the Diocese within 30 days of the employee's start date, and one copy goes into the parish personnel file.

☐ Flexible Spending Account enrollment packet

- Includes the following items: Medical Flexible Spending Account guide, Dependent Care Flexible Spending Account guide, Flexible Spending Account Enrollment Form
- If the employee elects to participate, send one copy of the Enrollment Form to the Group Insurance Office at the Diocese, and one copy goes into the parish personnel file.

☐ Summary of Benefits and Coverages packet

- Includes the following items: Summary of Benefits and Coverage and Uniform Glossary Delivery Receipt, Glossary of Health Coverage and Medical Terms, and three Summary of Benefits and Coverage packets (one for \$500 deductible, one for \$3500 deductible, one for \$6350 deductible)
- Employee needs to sign the Summary of Benefits and Coverage and Uniform Glossary Delivery Receipt. One copy is sent to the Group Insurance Office at the Diocese, and one copy goes into the parish personnel file.

☐ Employee Notices Receipt packet

- Includes the following items: Employee Notices Receipt, Special Enrollment Notice, Premium Assistance Under Medicaid and Children's Health Insurance Program Notice, Michelle's Law Notice, and Newborn's Act Notice.
- Employee needs to sign the Employee Notice Receipt form. One copy is sent to the Group Insurance Office at the Diocese, and one copy goes into the parish personnel file.