

## INFORMATIONAL MATERIAL TO BE PROVIDED TO EMPLOYEE:

- Personnel Policies & Procedures Manual (2025)
- Summary Plan of Benefits Coverage and Benefits Summary
- Health and Dental Benefits Guide
- Flexible Spending Account information
- Catholic Archdiocese Employee Retirement Plan Summary Description
- Paycheck Contribution Election Form & Beneficiary Form for Retirement program
- Information regarding attendance at Safe Environment Training

## PERSONNEL FOLDERS

### Personnel Folder (one per employee)

- New Hire Checklist, including Emergency Contact information
- Application / Resume
- Position Description
- Contract / Agreement / Offer Letter / Compensation Forms
- W-4 Withholding Certificate for Federal Tax Withholding
- Withholding Certificate for State Tax Withholding
  - K-4 (Kentucky) or I-4 (Indiana)
- Payroll ACH Authorization & Voided Check
- Personnel Policies & Procedures Manual – Signed Acknowledgement of Receipt
- Criminal Records Check – file report
- (if applicable) Credit Check – file report
- Safe Environment Certificate (*May be filed separately but must be accessible*)
- 401(k) Forms - Paycheck Contribution Election Form & Beneficiary Form
- Pay increase or job change information (Current Hourly Wage or Salary)
- Record of Paid Leave
- Reviews (if performed)
- Disciplinary Documents (if applicable)
- Any other documents (Teaching Certificate, for example)

### Benefits Folder (one per employee)

- Benefit Enrollment Confirmation
- Reliance Standard Forms - if applicable include Enrollment Forms, Evidence of Insurability, Beneficiary Designation, short-term or long-term disability applications
- Doctor's notes or Other Health Records
- Worker's Compensation claims & documentation
- FMLA documentation

### I-9 Folder (one containing all active personnel, one for terminated personnel)

Do **not** include in regular personnel file

- I-9 Forms, with copies of supporting documentation