**Diocese of Winona-Rochester**

**NEW HIRE EMPLOYEE BENEFITS CHECKLIST\***

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| --- | --- |
| **EMPLOYEE’S NAME:** |  |

Please note, all links contain current forms. All links below will take you directly to the form or information.

Forms to be completed for new hires (links):

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| --- |
| * [Form 001](https://giving.parishsoft.com/App/Form/a16d3f25-7b78-470b-817b-04284e072ebb) - completed by the hiring location, not by the employee
 |
| * [Online benefit forms](https://giving.parishsoft.com/App/Form/8dc9f339-1b0c-4636-a8ff-0238ea24bec6) – use this link if you want your new hire benefit-eligible employee to complete the online benefit documents, which DOW-R Benefits receives and then uploads to Dropbox for your records. This link includes the applicable A-1 through E-1DOW-R benefit documents for your location. If you submit a new hire form for the employee and email them this link and if the employee does not complete the forms, DOW-R Benefits will request you to contact the employee.
* You will still need to give the employee information about their benefits.

Please note, tell the employee their “Employee’s Location,” which is the same location you used for their Form 001. Typically, this is the entity that issues your W-2, considered your main parish or school. If you work at a school that is not consolidated, your location may be your parish. Consolidated locations are Cotter, Loyola, Pacelli, and Rochester Catholic Schools. For instance, you may work at Holy Spirit School, but you are a Rochester Catholic School (RCS) employee. If you don’t know your location, it is on the online new hire form you completed. |
|  |  |
| Benefit Documents – paper documents | Payroll Forms |
| * [Form A-1 Link](https://www.dowr.org/img/offices/human-resources/Ins-Health-Dental/2024/FormA-1Health.pdf)\* or if waiving, [Form A-2 Link](https://www.dowr.org/img/offices/human-resources/Ins-Health-Dental/2024/FormA-2HealthWaive.pdf)\*
 | * [Form I-9 Link](https://www.dowr.org/img/offices/human-resources/Hire-Term/FormI-9.pdf)
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| * [Form B-1 Link](https://www.dowr.org/img/offices/human-resources/Ins-Life-LTD-ADD/FormB-1-InsuranceEnrollmentforBasicGroupLife-LTD-ADD.pdf)\*
 | * [Form W-4 Link](https://www.irs.gov/pub/irs-pdf/fw4.pdf)
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| * [Form C-2 Link](https://www.dowr.org/img/offices/human-resources/Pension/FormC-2-SalaryReductionAgreement.pdf)\*
 | * [Form W-4MN Link](https://www.revenue.state.mn.us/sites/default/files/2023-12/w-4mn.pdf)
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| * [Form D-2 Link](https://www.dowr.org/img/offices/human-resources/Flex/2024/FormFlexD2.pdf)\*
 | * [Form MN New Hire Link](https://newhire-reporting.com/downloads/MNform.pdf)
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| * [Form E-1 Link](https://www.dowr.org/img/offices/human-resources/Ins-SuppLife/FormE-1-InsuranceEnrollmentSupplementalLife.pdf)\*
 |  |

 \*upload to Dropbox; the rest of the forms are for you to process.

**HIRE:**

* Send completed form to Diocese of Winona-Rochester

[ ]  Notice of New Employee Hire/Increase of Hours Form 001: [Form 001 Link](https://giving.parishsoft.com/App/Form/a16d3f25-7b78-470b-817b-04284e072ebb). **Preference is completion of form using the online link, which you can obtain through Dropbox;** by using this link, benefits receives your form and will upload acknowledgement back to you. If you use the printed format, you will need to upload the document to Dropbox.

* Please note name format must match what you have in your accounting/payroll system, contains no titles (you can designate title in a non-name area). The format is full legal first and last name, along with the middle initial, no period. Please include middle initial.

**HEALTH/DENTAL INSURANCE – if location is participating in benefit.**

* Upload completed form to Diocese of Winona-Rochester

[ ]  Health Insurance Enrollment Group Coverage Form A-1 [Form A-1 Link](https://www.dowr.org/img/offices/human-resources/Ins-Health-Dental/2024/FormA-1Health.pdf)

[ ]  Waiver for Medical/Dental Group Coverage Form A-2 (used only for new hires or changes) [Form A-2 Link](https://www.dowr.org/img/offices/human-resources/Ins-Health-Dental/2024/FormA-2HealthWaive.pdf)

* Information to give to employee (you may print information or direct employee to DOW-R website)

[ ]  Health Insurance Marketplace Coverage Option [Link](https://www.dowr.org/img/offices/human-resources/Ins-Health-Dental/20192020/HealthInsuranceMarketplaceCoverageOptions.pdf)

[ ]  Premium Assistance Under Medicaid and the Children’s Health Insurance Program (CHIP) [Link](https://www.dowr.org/img/offices/human-resources/Ins-Health-Dental/20192020/CHIPNotice.pdf)

[ ]  Medica Summary Comparing $2500/$5000 Deductibles [Link](https://www.dowr.org/img/offices/human-resources/Ins-Health-Dental/2024/MedicaSummary.pdf)

[ ]  Dental Insurance Highlights and Coverage [Link](https://www.dowr.org/img/offices/human-resources/Ins-Health-Dental/2024/DentalSummary000918.pdf)

* If enrolling

[ ]  Directions for Online Access to Medica and Delta Dental [Link](https://www.dowr.org/img/offices/human-resources/Ins-Health-Dental/2024/DirectionsforOnlineAccesstoMedicaandDeltaDental.pdf)

* Employees can print their own identification card replacements
* Access to coverage information and vital plan information
* Employee receives their “Summary Plan Booklet” by registering accessing their accounts online.

**LIFE/LTD/AD&D – if location is participating in benefit.**

* Send completed form to Diocese of Winona-Rochester
	+ Insurance Enrollment For: Basic Group (Term) Life, Long Term Disability (LTD), Accidental Death and Dismemberment (AD&D) – [Form B-1 Link](https://www.dowr.org/img/offices/human-resources/Ins-Life-LTD-ADD/FormB-1-InsuranceEnrollmentforBasicGroupLife-LTD-ADD.pdf)
* Information to Give to Employee

[ ]  Benefits at a Glance

* + Life Insurance Plan (Basic Life) [Link](https://www.dowr.org/img/offices/human-resources/Ins-Life-LTD-ADD/BenefitsataGlance-LifeInsurance.pdf)
	+ LTD Plan [Link](https://www.dowr.org/img/offices/human-resources/Ins-Life-LTD-ADD/BenefitsataGlance-LongTermDisabilityPlan.pdf)
	+ AD&D 24-Hour Accident Insurance [Link](https://www.dowr.org/img/offices/human-resources/Ins-Life-LTD-ADD/BenefitsataGlanceADD.pdf)
* Direct employee to DOW-R benefit website Section B

[ ]  Summary Plan Booklet - Basic Group Life Insurance Plan [Link](https://www.dowr.org/img/offices/human-resources/Ins-Life-LTD-ADD/SummaryPlanBooklet-LifeIns.pdf)

[ ]  Summary Plan Booklet – LTD [Link](https://www.dowr.org/img/offices/human-resources/Ins-Life-LTD-ADD/SummaryPlanBooklet-LTD.pdf)

[ ]  Summary Plan Booklet – AD&D [Link](https://www.dowr.org/img/offices/human-resources/Ins-Life-LTD-ADD/SummaryPlanBooklet-ADD.pdf)

**RETIREMENT – 403(b) Lay Employees Retirement Plan** **– if location is participating in plan.**

* Send completed form to Diocese of Winona-Rochester

[ ]  Salary Reduction Agreement Form C-2 - [Form C-2 Link](https://www.dowr.org/img/offices/human-resources/Pension/FormC-2-SalaryReductionAgreement.pdf)

* Information to Give to Employee

[ ]  403(b) Lay employees Retirement Plan Information [Link](https://www.dowr.org/img/offices/human-resources/Pension/403bLayEmployeesRetirementPlanDescriptionJan2020.pdf)

[ ]  Lincoln Enrollment Booklet – Direct employee to DOW-R HR/Benefit website Section B or give employee booklet which you can obtain from the diocese [Link](https://www.dowr.org/img/offices/human-resources/Pension/LincolnFinancialEnrollmentBooklet.pdf)

**FLEXIBLE BENEFITS – if location is participating in benefit.**

* Send completed form to Diocese of Winona-Rochester

[ ]  Flexible Spending Account Enrollment Form D-2 [Form D-2 Link](https://www.dowr.org/img/offices/human-resources/Flex/2024/FormFlexD2.pdf)

* Information to give to employee (you may print information or direct employee to DOW-R website)

[ ]  Medical Flexible Spending Account Guide [Link](https://www.dowr.org/img/offices/human-resources/Flex/2024/FSA-Medical%20Guide.pdf)

[ ]  Limited Purpose Flexible Spending Account (used if employee also has an HSA) [Link](https://www.dowr.org/img/offices/human-resources/Flex/2024/Limited%20FSA%20Guide.pdf)

[ ]  Dependent Care Flexible Spending Account Handout [Link](https://www.dowr.org/img/offices/human-resources/Flex/2024/DepCare-FSA-Handout.pdf)

[ ]  Contribution Limits and Changes [Link](https://www.dowr.org/img/offices/human-resources/Flex/2024/FSA_DCA_Limits_and_Changes.pdf)

[ ]  FSA Calculator (online only) [Link](https://www.wexinc.com/insights/benefits-toolkit/fsa-calculator/)

[ ]  Accessing Flexible Spending Account Information Online [Link](https://www.dowr.org/img/offices/human-resources/Flex/2024/AccessingFSAOnline.pdf)

[ ]  Accessing Flexible Spending Account Information Mobile [Link](https://www.dowr.org/img/offices/human-resources/Flex/2024/AccessingFSAMobile.pdf)

* If enrolling, direct employee to accessing their flexible spending account online to obtain further information.

**SUPPLEMENTAL LIFE**

* Send completed form(s) to Diocese of Winona-Rochester

[ ]  Insurance Enrollment Form for Supplemental (Term) Life Form E-1 [Form E-1 Link](https://www.dowr.org/img/offices/human-resources/Ins-SuppLife/FormE-1-InsuranceEnrollmentSupplementalLife.pdf)

[ ]  **Complete only if** employee chose life coverage over the Guarantee Issue amount of $200,000 for self or $25,000 for spouse Evidence of Insurability (EOI) – contact benefits@dowr.org for online form information.

* + Information to Give to Employee

[ ]  Benefits at a Glance – (Supplemental) Life Insurance Plan [Link](https://www.dowr.org/img/offices/human-resources/Ins-SuppLife/BenefitsataGlance-SupLifeInsurance.pdf)

[ ]  Supplemental Life - Term Life Insurance Coverage Highlights [Link](https://www.dowr.org/img/offices/human-resources/Ins-SuppLife/SupplementalLifeTermLifeInsuranceHighlightSheet.pdf)

[ ]  “Beneficiary Guide for Term Life Insurance” flyer [Link](https://www.dowr.org/img/offices/human-resources/Ins-Life-LTD-ADD/BeneficiaryGuideforTermLifeInsurance.pdf)

[ ]  “What Would Your Family Do Without Your Income” flyer [Link](https://www.dowr.org/img/offices/human-resources/Ins-SuppLife/WhatWouldYourFamilyDoWithoutYourIncomeFlyer.pdf)

[ ]  “Group term life insurance” flyer [Link](https://www.dowr.org/img/offices/human-resources/Ins-SuppLife/GroupTermLifeInsuranceFlyer.pdf)

* If enrolling, direct employee to DOW-R HR/Benefit website Section E

[ ]  Summary Plan Booklet - Supplemental Life Insurance [Link](https://www.dowr.org/img/offices/human-resources/Ins-SuppLife/SummaryPlanBooklet-SupLife.pdf)

**PAYROLL FORMS** (Forms current)

* + Do not send completed form(s) to Diocese of Winona-Rochester

[ ]  I-9 Employment Verification [Form I-9 Link](https://www.dowr.org/img/offices/human-resources/Hire-Term/FormI-9.pdf)

* + - Form I-9 Instructions Only [Link](https://www.dowr.org/img/offices/human-resources/Hire-Term/FormI-9-InstructionsOnly.pdf)

[ ]  W-4 Federal [Form W-4 Link](https://www.irs.gov/pub/irs-pdf/fw4.pdf)

[ ]  W-4MN – (Note: All employees who complete an IRS W-4 form must complete the W-4MN form) [Form W-4MN Link](https://www.revenue.state.mn.us/sites/default/files/2023-12/w-4mn.pdf)

[ ]  MN New Hire Report (Note: For all newly hired and re-hired employees) [Form MN New Hire Link](https://www.dowr.org/img/offices/human-resources/Hire-Term/MN%20New%20Hire%20Form.pdf)

* + - Form MN New Hire Instructions Only [Link](https://newhire-reporting.com/mn-newhire/default.aspx)
			* The link above will also take you to the electronic reporting directions

**\*This checklist is for parish/school/cemetery/institution only and does not need to be sent to the Diocese of Winona-Rochester.**