

**Diocese of Winona-Rochester**

**NEW HIRE EMPLOYEE BENEFITS CHECKLIST\***

**EMPLOYEE'S NAME:** \_\_\_\_\_

**HIRE/TERM:**

- Send completed form to Diocese of Winona-Rochester
    - Notice of New Employee Hire/Increase of Hours Form 001
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**HEALTH/DENTAL INSURANCE**

- Send completed form to Diocese of Winona-Rochester
    - Health/Dental Enrollment/Change/Waive Group Coverage Form A-1
  - Information to Give to Employee
    - New Health Insurance Marketplace Coverage Options and Your Health Coverage
    - Premium Assistance Under Medicaid and the Children's Health Insurance Program (CHIP)
    - FAQs about Health/Dental Insurance Enrollment and Change Form
    - Fitness Discount Member flyer
    - Summary of Benefits and Coverage for \$1000 and \$5000 Deductibles
    - Lay Employee Dental Plan Summary
  - If enrolling
    - Directions for Online Access to BCBS and Delta Dental
    - Direct employee to DOW-R HR/Benefit website Section A
      - Summary Plan Booklet - BCBS for either \$1000 or \$5000 deductible
      - Summary Plan Booklet – Delta Dental
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**LIFE/LTD/AD&D**

- 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
  - Information to Give to Employee
    - Benefits at a Glance
      - Life Insurance Plan (Basic Life)
      - LTD Plan
      - AD&D 24-Hour Accident Insurance
  - Direct employee to DOW-R benefit website Section B
    - Summary Plan Booklet - Basic Group Life Insurance Plan
    - Summary Plan Booklet - LTD
    - Summary Plan Booklet – AD&D
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## **PENSION – 403(b) Lay Employees Retirement Plan**

- Send completed form to Diocese of Winona-Rochester
    - Salary Reduction Agreement Form C-2
  - Information to Give to Employee
    - 403(b) Lay employees Retirement Plan Information
    - Lincoln Enrollment Booklet – Direct employee to DOW-R HR/Benefit website Section B or give employee booklet which you can obtain from the diocese
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## **FLEXIBLE BENEFITS**

- Send completed form to Diocese of Winona-Rochester
    - Flexible Spending Account Enrollment Form D-2
  - Information to Give to Employee
    - FSA - The Medical Flexible Spending Account
    - Medical FSA Worksheet
    - FSA - The Dependent Care Spending Account
    - Getting Reimbursed for Dependent Care Expenses
    - Accessing Flexible Spending Account Information Online
  - If enrolling, direct employee to DOW-R HR/Benefit website Section D
    - Summary Plan Booklet
      - Medical FSA
      - Dependent Care FSA
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## **SUPPLEMENTAL LIFE**

- Send completed form(s) to Diocese of Winona-Rochester
  - Insurance Enrollment Form for Supplemental (Term) Life Form E-1
  - 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) Form 1143-01 MN (or the employee may submit the EOI directly to Unum)
- Information to Give to Employee
  - Benefits at a Glance – (Supplemental) Life Insurance Plan
  - Supplemental Life - Term Life Insurance Coverage Highlights
  - “What Would Your Family Do Without Your Income” flyer
  - “Group term life insurance” flyer
  - Benefits at a Glance – Supplemental Life Insurance
- If enrolling, direct employee to DOW-R HR/Benefit website Section E
  - Summary Plan Booklet - Supplemental Life Insurance

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