



# Departmental New Employee Checklist

Department: \_\_\_\_\_ Dept. Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

Employee ID #: \_\_\_\_\_ Hire Date: \_\_\_\_\_

Employee Name: \_\_\_\_\_ Job Title: \_\_\_\_\_

## **GENERAL EMPLOYMENT** – New hire forms are due in Human Resources, Position Control by the 1<sup>st</sup> Weds of the PP, no later than 5:00 p.m.

- Oath of Office
- \*Verification of Receipt of Information
- \*Employment Eligibility Verification, I-9 form. **Must include copies of documents provided for I-9 form**
- EEO4 Information / Emergency Contact
- IRS Form W-4 (2022) Federal - **must include 2 copies of Social Security Card, no exceptions**
- State of California DE 4 Rev 49 (2-20) Form (Employee's Withholding Cert)
- Electronic Funds Transfer Form 1.03.20 - **OPTIONAL**

## **RETIREMENT** - send forms directly to SJCERA within first week of employment

- \*Member Certification Form
- Employee's Proof of Birth - **copy of birth certificate, valid U.S. Passport, or REAL ID**  
(See [2019.07.12 Age Verification Policy \(sjcera.org\)](https://www.sjcera.org/2019.07.12-Age-Verification-Policy) for alternate acceptable documents)
- \*Beneficiary Designation Form
- SSA-1945 - Safety Member Windfall Elimination Provision - **For Full-time Safety Members Only**

## **HEALTH BENEFITS** - send forms to Human Resources Benefits within first week of employment

- \*Health Benefits Enrollment
- Copy of Dependents Birth Certificate(s), marriage certificate/Registered Domestic Partnership, and Social Security Card(s) for each person being enrolled.
- \*Life Insurance Enrollment

## **DEFERRED COMP** - send forms directly to **Nationwide** within first week of employment, or as soon as possible.

Email: [rpublic@nationwide.com](mailto:rpublic@nationwide.com); Fax 877-677-4329; Mail: PO Box 182797 Columbus, OH 43218

- \*Deferred Compensation 457 Form - Nationwide
- \*Deferred Compensation 401(a) Form - Nationwide **(for Physicians and CRNA's only)**

## **UNION** - send forms directly to Union

- \*Member Enrollment Form

**\* Please collect from employee -- Forms distributed at New Employee Orientation.**