



New Clergy Checklist

Employee Name: _____

Date of Hire: _____

Employer Name: _____

- Add the new employee to My Admin Portal (MAP), more information regarding MAP can be found [here](#). MAP allows the employer to enroll new, eligible employees into the pension plan, the RSVP, and acknowledge medical coverage.
- If the new employee will be receiving medical benefits, send the [medical enrollment](#) form to Gallagher Benefits. The contact person is Amy Jones, who can be reached at: amy_jones@ajg.com.
- If the employee will be receiving dental benefits, send the [dental enrollment form](#) to amy_jones@ajg.com. Dental coverage may be an employer-paid or employee-paid benefit at the discretion of the vestry in each parish. The choice must apply to all employees.
- The diocese requires proof of a background check, Anti-Racism training, and Safeguarding training to be on file. Elizabeth Blake at the diocesan office will confirm these documents are on file. Contact Elizabeth with questions at eblake@dioala.org. *Note: This process is different for lay employees.*
- The parish needs to verify whether the new employee wants any taxes to be withheld. Clergy are exempt from tax withholding, but may request withholding by their employer by completing a [W-4](#) and an [A-4](#).
- The Diocese requires Clergy to read and sign the Covenant for Sexual Responsibility, which can be found [here](#), the Clergy Statement on Sexual Conduct, which can be found [here](#) and the Diocesan Drug/Alcohol Policy, which can be found [here](#) and the acknowledgment form can be found [here](#). Elizabeth Blake at the Diocesan office will collect and keep these forms on file. Contact Elizabeth at eblake@dioala.org with any questions.
- The new employee will need to read and acknowledge receipt of the Safety policies established by the parish. The signed acknowledgement form needs to be saved in Parish files. An example of a safety policy can be found [here](#).
- The new employee will need to successfully undergo review of the National Sex Offender Registry when hired and every five years. Access to a registry is available [here](#). The review should be documented in parish files.
- The new employee will need to be reported to the Alabama New Hire System, which can be done [here](#). The new employee will also need to be added to the E-Verify database, which can be done [here](#). The parish is responsible for keeping a paper copy of the I-9 form on file as well. The most recent I-9 can be found [here](#).
- Notify the new employee within 14 days of hire about the Health Insurance Marketplace. A model letter that can be given to employees can be found [here](#). Along with this letter, [this form](#), is a notice that gives information to the employee about the marketplace and the healthcare coverage that is being offered through the Medical Trust. [This form](#) is a FAQ for Episcopal Church employees that should be given to the new employee as well.

Additional Information

- Clergy are considered “exempt” under FLSA; Contact the diocesan office if you believe there is an exception.
- **Short-Term Disability, Long-Term Disability, and Life Insurance are provided for Clergy by the Pension Fund. There is no action required to enroll new clergy in these benefits. For more information regarding STD and LTD benefits for clergy, visit [here](#) and [here](#). For more information regarding the Life Insurance Policy for Clergy, visit [here](#).**