

New Employee Benefits Orientation - Employee Checklist

Please complete this checklist as you go through the **New Employee Benefits Orientation**. If you have questions, please contact your supervisor or Personnel Office. This process assures that you receive the relevant information related to *your* employment. Submit the applicable enrollment forms to your supervisor or Personnel Office along with the checklist.

Step One: Read about and sign up for *Essential Benefits and Services*, and complete required forms:

- Health Benefits
- Dental Benefits
- Vision Benefits
- Consolidated Benefits (CoBen)
- FlexElect Medical and Dependent Care Reimbursement Accounts
- Medical Provider Network - Physician and Medical Facility Designation
- Beneficiary Designation - Death Benefits
- Military Service Declaration
- Documents That May Be Requested By Your Department
- Employee Action Request (EAR)
- Oath of Allegiance

Step Two: Read about and sign up for *Optional Benefits and Services*, and complete required forms:

- Savings Plus (401(k) and 457)
- ScholarShare 529 College Savings Plan
- Direct Deposit
- Pre-Tax Parking
- Annual Leave
- Long-Term Disability (LTD) Insurance (Excluded Employees Only)
- Long-Term Care Program (Enrollment Temporarily Closed)
- Consolidated Omnibus Budget Reconciliation Act (COBRA)
- Group Legal Services Insurance Plan
- Address Protection - Safe at Home
- Home Address - Request for Non-Disclosure
- Designation of Person to Receive Warrants
- Employment and Salary Verification
- Variable Work Schedule
- Authorization to Use a Privately-Owned Vehicle on State Business
- Voluntary Personal Leave Program (Specific Bargaining Units)
- Supplemental Life Insurance (Excluded Employees Only)

Step Three: Read about *Automatic Benefits and Services:*

- Paychecks
- CalPERS Retirement
- Alternate Retirement Program
- Part-Time, Seasonal, and Temporary Program (PST)
- Employee Assistance Program (EAP)
- Sick Leave
- Family Medical Leave
- Bereavement Leave
- Catastrophic Leave
- Vacation Leave
- Leave of Absence
- Military Leave
- State Holidays and Personal Holiday
- Workers' Compensation - Industrial Disability Leave (IDL)
- Non-Industrial Disability Insurance (NDI)
- State Disability Insurance (Specific Bargaining Units)
- Basic Group Term Life Insurance (Excluded Employees Only)
- Travel and Accident Insurance (Excluded Employees Only)
- Jury Duty

Step Four: Read about *Informational Topics:*

- California State Government
- State Policies
- Employee Responsibilities
- Your Rights
- Career Development
- Excluded Employees
- Bargaining Units
- Awards
- California Works Well Health Promotion Program
- Travel and Per Diem
- Relocation
- Partial Service Retirement
- Retiree Vision Program
- Retiree Group Legal Services Insurance Plan
- Retiree Basic Group Life Insurance
- State-Owned Housing

Employee Department/Unit _____

Employee Name _____

Employee Signature _____ **Date** _____

Supervisor Signature _____ **Date** _____

Personnel Office Signature _____ **Date** _____