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 ____________