

PERSONNEL- ADMINISTRATIVE PROCEDURESGENERAL PERSONNEL – New Hire Personnel File Requirements – Compliance Procedures

Document / Requirement	Completion Recommendation	Deadline For Completion	Consequences	Comments
1. Teacher Retirement System Information (TRS) 2 Forms Required: ___ A. Member Beneficiary Form ___ B. SSA-1945 Form _____ Pers. File Date	At orientation with adm./department head.	On file with Dept. Head or Payroll Specialist before beginning work.	Will not begin work if paperwork is not completed and on file.	
2. Illinois Municipal Retirement Fund (IMRF) 2 Forms Required: ___ A. Enrollment Form ___ B. Beneficiary Form _____ Pers. File Date	At orientation with adm./department head.	On file with Dept. Head or Payroll Specialist before beginning work.	Will not begin work if paperwork is not completed and on file.	
3. Policy Knowledge Statement (Signature) 3 Forms Required: ___ A. Policy/Knowledge Req. & Awareness ___ B. Drug & Alcohol Free Workplace Policy ___ C. DCFS Mandated Reporter Status _____ Pers. File Date	At orientation with adm./department head.	On file with Dept. Head or Payroll Specialist before beginning work.	Will not begin work if paperwork is not completed and on file.	
4. Employee Handbook / Contract Delivery (Initial Below) ___ ROE #9 Handbook ___ RCCSEC Contract/Handbook _____ Pers. File Date	At orientation with adm./department head.	On file with Dept. Head or Payroll Specialist before beginning work.	Will not begin work if paperwork is not completed and on file.	
5. Fingerprint Requirement for New Employee _____ Pers. File Date	Initiated as soon as possible after orientation.	On file with Dept. Head or Payroll Specialist before beginning work.	Will not begin work until fingerprinted.	
6. Federal Immigration I-9 Information and Form (Copies of acceptable identification presented.) _____ Pers. File Date	At orientation with adm./department head.	On file with Dept. Head or Payroll Specialist before beginning work.	Will not begin work if paperwork is not completed and on file.	
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7. Physical Examination (Exam within last year will be accepted) _____ Pers. File Date	Must get a physical exam appointment date as soon as possible.	Must be completed within <u>2 months</u> from date of hire Mo____Day____Yr____	Will be removed from work until physical exam is completed and filed.	
8. Tuberculosis Test (Test within last year will be accepted) _____ Pers. File Date	Must get a tuberculosis test as soon as possible.	Must be completed within <u>1 month</u> from date of hire. Mo____Day____Yr____	Will be removed from work until tuberculosis test is completed and filed.	
9. Federal W-4 Withholding Information. _____ Pers. File Date	At orientation with adm./department head.	On file with Dept. Head or Payroll Specialist before beginning work.	Will not begin work if paperwork is not completed and on file.	
10. Illinois State W-4 Withholding Information _____ Pers. File Date	At orientation with adm./department head.	On file with Dept. Head or Payroll Specialist before beginning work.	Will not begin work if paperwork is not completed and on file.	
11. Direct Deposit Option ____Signature ____Voided Check/Saving Acct. # _____ Pers. File Date	At orientation with adm./department head.	On file with Dept. Head or Payroll Specialist before beginning work.	Will not begin work if paperwork is not completed and on file.	
12. Health Insurance Information Choices: POS or PPO _____ Pers. File Date	At orientation with adm./department head.	On file with Dept. Head or Payroll Specialist before beginning work.	Will not begin work if paperwork is not completed and on file.	
13. Dental Insurance, Life Insurance & Voluntary Life Insurance Choices _____ Pers. File Date	At orientation with adm./department head.	On file with Dept. Head or Payroll Specialist before beginning work.	Will not begin work if paperwork is not completed and on file.	
14. AFLAC Information _____ Pers. File Date	At orientation with adm./department head.	Schedule meeting with representative from AFLAC to receive information for choice (Payroll Specialist Assists)	May begin work before having the meeting.	
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15. Emergency Contact Information _____ Pers. File Date	At orientation with adm./department head.	On file with Dept. Head or Payroll Specialist before beginning work.	Will not begin work if paperwork is not completed and on file.	
16. 403b Investment Information _____ Pers. File Date	At orientation with adm./department head.	On file with Dept. Head or Payroll Specialist before beginning work.	Will not begin work if paperwork is not completed and on file.	
17. <u>Personnel File Items:</u> ____ Application (Req) ____ References (2) (Req) _____ Pers. File Date	At orientation with adm./department head.	On file with Dept. Head or Payroll Specialist before beginning work.	Will not begin work if paperwork is not completed and on file.	
18. Personnel File Items Cont... ____ Online ECS Printout (Req.) ____ Copy of Original Teaching Certificate (Req.) _____ Pers. File Date	At orientation with adm./department head.	On file with Dept. Head or Payroll Specialist before beginning work.	Will not begin work if paperwork is not completed and on file.	
19. Personnel File Items Cont... ____ Original Transcripts for Teachers (Req.) ____ Verification of Transcript (60 hours) for Teacher Aides (Req.) _____ Pers. File Date	At orientation with adm./department head.	On file with Dept. Head or Payroll Specialist within one month of employment.	Work will be stopped if not received one month after date of employment.	
20. Personnel File Items Cont... ____ Verification of Previous Teaching Experience for Teachers (Req.) _____ Pers. File Date	At orientation with adm./department head.	On file with Dept. Head or Payroll Specialist within one month of employment.	(A.) Placement will be at Step One (1) on the salary schedule until verification is received. (B.) Employee will remain at Step One (1) for year if verification not received by December 31 st .	Cont...

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21. Personnel File Items Cont... ____Cover Letter (Optional) ____Resume (Optional) ____ Pers. File Date	(1) While the ROE recommends that candidates complete a cover letter and resume as a part of the application process, neither is required. (2) If, however, the hiring administrator / dept. head lists either requirement in the official posting, they will become a matter of record and filed in the personnel file.	On file with Dept. Head or Payroll Specialist before beginning work if required in posting.	Will not begin work if paperwork is not completed and on file.	

Cc: *Personnel File*
 Department Head / Hiring Administrator-Supervisor
 Bookkeeping/Payroll Specialist

I. Recommendation for Employment [Regional Office of Education Staff Only]**(Page 30 in the Employment Process Packet)**

- a) Completed by hiring adm./dept. head and by the new employee after hire decision is made and returned immediately to Payroll Specialist for processing.
- b) Payroll specialist prepares employee packet and sends to hiring adm./dept. head.
- c) Hiring adm./dept. head:
 - meets with new employee,
 - explains information,
 - conducts an orientation,
 - helps the employee complete the forms, and
 - returns them to Payroll specialist.
- d) Employee completes and returns the remainder of the forms/information (listed above) and returns it to Payroll Specialist to meet the deadlines.

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II. Recommendation for Employment [RCCSEC Staff Only]

(Page 30 in the *Employment Process Packet*)

- a) Completed by department head/ hiring administrator and by the new employee after the hiring decision is made and returned to Payroll Specialist for processing.
- b) Payroll Specialist prepares the employee packet and sends to hiring administrator
- c) Hiring Administrator:
 - meets with the new employee,
 - explains information,
 - conducts orientation,
 - helps the employee complete the forms, and
 - returns the completed forms and Page 30 of the employment process packet to RCCSEC Administrative Assistant.

If the packet is incomplete, the Employee completes and returns the remainder of the forms/information (listed above) and returns it to the RCCSEC Administrative Assistant.

The RCCSEC Administrative Assistant delivers the *Employment Process Packet* to the payroll specialist and keeps a copy for the RCCSEC personnel files. (The only forms that may be missing when work begins are the Physical, TB Test and Transcripts. See items #7, #8, and #19 above.).