

New Employees Payroll and Benefits Forms Checklist

Mount Vernon Community School District

To access payroll forms referenced below on the school website www.mountvernon.k12.ia.us, select Resources, Forms, then Staff Forms, then use the column titled New Employee Forms

Print this checklist, complete the checklist and all the applicable forms, and return the checklist and all the forms to Matt Burke in the district office.

Anytime you have questions please call Matt at Extension 1002 or 895-8845, or email at mburke@mvcasd.org or stop by his office in the middle school building.

Government forms - required

- Form W-4 completed for federal income tax withholding, only bottom portion of page 1 needs to be completed.
- Form IA W-4 completed for state income tax withholding, only the bottom portion of page 1 needs to be completed.
- Form I-9 Section 1 completed
- Social security card and drivers license copied for Form I-9 purposes (see Form I-9 for alternative forms of identification allowed)

Foundation - optional

- I have completed the Mount Vernon Schools Foundation donation form to make a donation to the Foundation through payroll
- I decline to make a donation to the Foundation at this time

Substance-Free Workplace Notice to Employees - required

- I have signed the Substance-Free Workplace Notice to Employees.

Emergency Contact Information - required

- I have completed the emergency contact information form.

Direct Deposit - required

- Direct deposit form is completed to have my payroll directly deposited into my bank account. Direct deposit of your payroll is required.

Credit Card Use Agreement - required

- I completed the Credit Card Use Agreement.

Flexible Spending Plan – Health and dependent care expenditures – optional

- Flexible Spending participation form is completed by the August 24 deadline to save money on health or dependent care expenses. See the Flex Plans link on the Advantage Administrators website to calculate how much you can save <http://www.advantageadmin.com/flex-plans/>
- I realize that the Flexible Spending option can save me money on my medical and dependent care expenditures but I decline to participate in this option at this time

Iowa Public Employees Retirement System (IPERS) - required

- I am new to IPERS and I viewed the IPERS website Frequently Asked Questions verbiage to have a basic overview of the IPERS <https://www.ipers.org/members/members-faq>
- I am new to IPERS and I have completed the IPERS new member address information and beneficiary form
- I had previously completed the IPERS new member address and beneficiary form at a previous employer and I don't need to complete a new form.

Annuity Retirement savings plan - optional

- I have contacted a financial advisor and set up a State of Iowa RIC program 403b account and I have also completed the 403b tax sheltered retirement annuity savings plan form.
- I understand the benefits of investment planning for my retirement and the benefits of saving for retirement early but I decline to participate in the 403b retirement annuity option at this time and understand that I can always sign up for this retirement option at any time in the future

Pre-tax information sheet - optional

- I have looked at the Pre-Tax information sheet and understand that if I participate in the Mount Vernon Schools plans for Flexible Spending, Health Insurance Premiums, and 403b Retirement Annuity Savings, that my federal and state payroll taxes are reduced which will save me money.

Health Insurance – form must be completed whether or not electing health insurance

- I have seen the school district's two summary sheets of the four health insurance plans offered by the school district and I also understand that a detailed description of each plan is on the website.
- I have completed sections A, B, E, F, G, and I of the Mercer Administration form to sign up for the school district's health insurance plan effective on the first day of the month of _____ of the year _____.
- I decline to sign up for the school district's health insurance plan at this time and therefore I have completed sections A, H, and I of the Mercer Administration form
- Although I have declined health insurance coverage through the school district plan I understand that I have the option of enrolling in the plan next May in the open enrollment period or at a later date with a qualifying event
- I have declined coverage in the school's health insurance plan and have attached proof of my health insurance coverage in another plan.

Health Savings Account - HSA

- I read that a Health Savings Account is a way to save money if I enroll in the school district's 5000 high deductible health insurance plan or if I enroll in a high deductible plan outside the school district.

Long term disability form - required

- I have seen the long term disability summary sheet and understand this benefit is paid for by the school district.
- I have signed and dated the bottom of the Mercer Administration form to enroll in the long term disability plan

Leave days - information

- I understand that I can use up to three family leave days each year and if they are not used that they do not carryover to the next school year.
- I understand that I will earn 10 sick leave days in the first year of employment and then in the following years that number increases each year to 11, 12, 13, 14, and 15 days per year. Unused days carry over up to the limits set by the school board policy.
- As a teacher, I understand that I can use two personal leave days each year and if I have one unused day at the end of the year I will receive \$50 in my payroll.

Copyright

- I have reviewed the Copyright Guidelines document to reacquaint myself.

Required legal notices

- I have reviewed all the Legal Notices included on the school website under Staff Forms and New Employee Forms.

July and August paychecks in June – Teachers only - optional

- I would like to receive my salary contract pay over a 12 month period beginning in September, OR
- I would like to receive my July & August paychecks in June

Master Contract – Teachers only - information

- I have received a copy of the teacher’s master contract and understand how I can earn more salary by moving across the salary schedule lanes by further education.

Hepatitis B vaccination

The school provides free hepatitis B immunizations at Linn County Health Department to the following employees: Physical Education Teachers, Industrial Arts Teachers, Teachers Aides for children with special needs, Coaches, Custodians, Home Economics Teachers and Art Teachers. If you are in one of those categories, please contact our school nurse Missy Hauser at mhauser@mvcasd.org at the beginning of the school year if you wish to receive these shots.

Signed _____ Dated _____