

THE DIOCESE of HELENA



Employee Handbook Policies and Procedures LAY EMPLOYEES

Issue Date: April 2019

Table of Contents

	<u>Page</u>
INTRODUCTION.....	1
FORMER BISHOPS	1
WELCOME	1
100 EMPLOYEE/EMPLOYMENT SPECIFICATIONS.....	2
101 Introduction	2
102 ADA Accommodation.....	2
103 Requirement for Employment.....	2
103.1 Nature of Employment	2
103.2 Employee Relations.....	3
103.3 Probationary Period.....	3
103.4 Employment Categories.....	4
200 PERSONNEL RECORDS.....	5
201 Maintenance of Records.....	5
202 Personnel Data Changes	6
300 EMPLOYMENT GUIDELINES	6
301 Work Hours	6
302 Overtime	6
303 Compensatory Time Off.....	6
304 Pay Periods	7
304.1 Timekeeping.....	7
304.2 Payroll Deductions	8
304.3 Child Support/New Hire Law	8
304.4 Garnishments.....	8
304.5 Pay Advances	8
304.6 Administrative Pay Corrections	9
305 Lunch and Rest Periods.....	9
305.1 Lunch Period	9
305.2 Breaks	9
306 General Hiring Policies and Practices	9
306.1 Equal Employment Opportunity.....	9
306.2 Sexual and Other Unlawful Harassment.....	10
306.3 Safety	11
306.4 Workers’ Compensation Insurance	11
306.5 Job Descriptions.....	12
306.6 Job Posting	12
306.7 Employment Applications.....	13
306.8 Employment Reference Checks	13

	<u>Page</u>
306.9	Resignation..... 14
306.10	Termination..... 14
306.11	Re-Employment Policy 14
306.12	Immigration Reform and Control Act 15
306.13	Drug and Alcohol Use..... 15
306.14	Non-Smoking Policy 16
307	Confidentiality..... 16
308	Employee Performance Appraisals..... 17
308.1	Performance Evaluation 17
309	Personal Gain/Conflict of Interest 17
400	LEAVES OF ABSENCES – PURPOSE AND OBJECTIVE..... 18
401	Vacation Leave 18
402	Sick Leave 19
403	Family Medical Leave Act..... 20
404	Parental Leave..... 23
405	Holidays/Religious Feasts 23
406	Others Leaves of Absence..... 24
406.1	Bereavement Leave 24
406.2	Military Leave..... 24
406.3	Military Caregiver Leave 25
406.4	Jury Duty 25
406.5	Voting 26
406.6	Witness Duty..... 26
500	EMPLOYEE BENEFITS 27
501	Retirement 27
501.1	Retirement Savings Plan – 403(b)..... 27
501.2	Social Security 28
501.3	Retirement Medicare.....28
502	Medical Health Insurance.....28
503	Dental/Vision Insurance..... 29
504	Flexible Spending Accounts 29
505	Health Savings Accounts 29
506	Wellness Program 30
507	Employee Assistance Program..... 30
508	Life Insurance 31
509	Long-term Disability..... 31
510	Ancillary Products 31
511	HIPAA Policy.....32

600	GRIEVANCE PROCEDURE.....	32
601	Problem Resolution – Grievance Procedure.....	32
	601.1 Informal Review Process.....	32
	601.2 Formal Grievance Process.....	33
700	ADDITIONAL EMPLOYEE INFORMATION	33
701	Employee Conduct and Work Rules.....	33
702	Attendance and Punctuality	34
703	Personal Appearance and Business Casual Dress Policy	34
704	Computer and e-mail Usage	35
705	Use of Phone and Mail Systems.....	36
706	Cell Phone Usage	36
707	Use of Equipment/Company Property	37
708	Professional Development.....	37
709	Business Travel Expenses.....	37
710	Visitors in the Workplace.....	38
711	Criminal/Immoral Activity.....	39
712	Non-disclosure	39
713	Emergency Closings	39
714	Return of Property	39
715	Recycling	40
	Acknowledgement of Receipt of Diocesan Handbook	41

Introduction

History of the Diocese of Helena

The Diocese of Helena was established on March 7, 1884, and initially included the entire state of Montana. Its present boundaries were established on May 18, 1904, when the Diocese of Great Falls (now Great Falls-Billings) was formed from its territory. The diocese covers 51,922 square miles of western and north central Montana, encompassing 21 counties and parts of two others. The diocese's 58 parishes and 38 missions are structured into six deaneries: Bozeman, Butte, Conrad, Helena, Kalispell, and Missoula. Its diocesan church is the Cathedral of St. Helena, which was dedicated in 1914 and is located in Helena.

Former Bishops

The nine bishops to serve the Helena Diocese prior to Bishop Thomas are:

- Bishop John B. Brondel, 1884-1903
- Bishop John P. Carroll, 1904-25
- Bishop George J. Finnigan, CSC, 1927-32
- Bishop Ralph L. Hayes, 1933-35
- Bishop Joseph M. Gilmore, 1936-62
- Bishop Raymond G. Hunthausen, 1962-75
- Bishop Elden F. Curtiss, 1976-93
- Bishop Alex J. Brunett, 1994-97
- Bishop Robert C. Morlino, 1999-2003

Welcome

We believe that every employee helps to make the Diocese of Helena successful. We hope that you will be proud to be a member of our team. This handbook describes many of our policies and outlines the programs and benefits available to eligible employees.

The handbook will answer many questions you may have about your employment at the Diocese of Helena. We hope that your experience here will be challenging, enjoyable, and rewarding.

100 EMPLOYEE/EMPLOYMENT SPECIFICATIONS

101 INTRODUCTION

This handbook is designed to provide information about working conditions, employee benefits, and some of the policies affecting your employment at the Diocese of Helena, its parishes, missions and entities (“the Diocese”). Employees should read, understand, and comply with all provisions of the handbook. It describes many responsibilities as an employee and outlines the programs developed by the Diocese to benefit employees.

No employee handbook can anticipate every circumstance or question about policy. The Diocese reserves the right to revise, supplement, or rescind any policies or portion of this handbook from time to time as it deems appropriate, in its sole and absolute discretion.

102 ADA ACCOMMODATION

Reasonable accommodation is available to an employee with a disability when the disability affects the performance of job functions. We make our employment decisions based on the merits of the situation in accordance with defined criteria, not the disability of the individual. Qualified individuals with disabilities are entitled to equal pay and other forms of compensation (or changes in compensation) as well as job assignments, classifications, organizational structures, position descriptions, and lines of progression. The Diocese is also committed to not discriminating against any qualified employee or applicant because the person is related to or associated with a person with a disability. The Diocese will follow any state or local law that gives more protection to a person with a disability than the ADA gives. The Diocese is committed to taking all other actions necessary to ensure equal employment opportunity for persons with disabilities in accordance with the ADA and any other applicable federal, state, and local laws.

103 REQUIREMENT FOR EMPLOYMENT

103.1 Nature of Employment

Employment with the Diocese is voluntarily entered into and the employee is free to resign at any time, with or without cause. (For the purpose of definition, the Diocese shall mean all diocesan employees including those employed at parishes and missions, and entities.)

Policies set forth in this handbook are not intended to create a contract, nor are they to be construed to constitute contractual obligations of any kind or a contract of employment between the Diocese and any of its employees. The provisions of the handbook have been developed at the discretion of management and may be amended or cancelled at any time at the Diocese’s sole discretion.

These provisions supersede all existing policies and practices and may not be amended, deleted or added to without the express written approval of the Bishop of the Diocese of Helena. Diocesan school employees must adhere to the Montana Catholic Schools Policy Handbook.

Employees of the Diocese are expected to respect all of the moral and religious teachings and beliefs of the Roman Catholic Church. Employees are expected to not engage in any personal conduct or lifestyle which would be at variance with or contrary to the policies of the Diocese, its parishes, entities or the moral and religious teachings of the Roman Catholic Church.

As a condition of employment, employees of the Diocese of Helena must complete a background check, attend the *Protecting God's Children* class and remain in compliance by completing monthly bulletins as mandated by the USCCB.

103.2 Employee Relations

The Diocese believes that the working conditions, wages and benefits it offers to its employees are competitive with those offered by other similar-sized dioceses. If employees have concerns about working conditions or compensation, they are strongly encouraged to voice these concerns openly and directly to their supervisors.

Our experience has shown that when employees deal openly and directly with supervisors, the work environment can be excellent, communications can be clear, and attitudes can be positive. We believe that the Diocese amply demonstrates its commitment to employees by responding effectively to employee concerns.

103.3 Probationary Period

The probationary period is intended to give new employees the opportunity to demonstrate their ability to achieve a satisfactory level of performance and to determine whether the new position meets their expectations. The Diocese uses this period to evaluate employee capabilities, work habits and overall performance. During the probation period, either the employee or the Diocese may terminate the employment relationship at any time, with or without cause.

All new and rehired employees work on a probationary basis for the first six months after their date of hire. Any significant absence will automatically extend a probationary period by the length of the absence. If the Diocese determines that the designated probation period does not allow sufficient time to thoroughly evaluate the employee's performance, the probationary period may be extended for a specified period.

Upon satisfactory completion of the probationary period, employees enter the "regular" employment classification.

During the probationary period, probationary employees are eligible for those benefits that are required by law, such as workers' compensation insurance and Social Security. In addition, health insurance, dental/vision, life and long term disability insurance is provided during the probationary period for eligible employees. After achieving regular employment status, employees may also be eligible for other diocesan benefits, subject to the terms and conditions of each benefit program. Employees should read the information specific to each benefit program for details on eligibility requirements.

Employees who are not new to diocesan employment or new to diocesan positions may also be placed on probationary status for disciplinary purposes. This gives the Diocese the opportunity to further evaluate the employee's capabilities, work habits and overall performance. Employees who are under disciplinary probation shall continue all benefits to which they would otherwise be entitled absent the probationary status.

103.4 Employment Categories

It is the intent of the Diocese to clarify and define employment classifications so that employees understand their employment status and benefit eligibility. These classifications do not guarantee employment for any specified period of time.

Each employee is designated as either NONEXEMPT or EXEMPT from federal and state wage and hour laws. NONEXEMPT employees are entitled to overtime pay under the specific provisions of federal and state laws. EXEMPT employees are excluded from specific provisions of federal and state wage and hour laws. An employee's EXEMPT or NONEXEMPT classification may be changed only upon written notification by the Human Resources Director or Parish administrator.

In addition to the above categories, each employee will belong to one other employment category:

- **REGULAR FULL-TIME** employees are those who are not in a temporary status and who are regularly scheduled to work the full-time schedule. Generally, they are eligible for the Diocese's benefit package, subject to the terms, conditions and limitations of each benefit program.
- **REGULAR PART-TIME** employees are those who are not assigned to a temporary status and who are regularly scheduled to work less than the full-time work schedule, but at least thirty hours per week (1560 hours per calendar year.) Regular part-time employees are generally eligible for some benefits sponsored by the Diocese of Helena, subject to the terms, conditions and limitations of each benefit program.
- **PART-TIME** employees are those who are not assigned to a temporary status and who are regularly scheduled to work less than thirty hours per week. While they do receive all legally mandated benefits (such as Social Security and workers' compensation insurance), they are ineligible for all other Diocesan benefit programs.

- **PROBATIONARY** employees include those who are new to employment with the Diocese. This generally is for the first six months of employment. An employee may also be placed on probationary status for disciplinary purposes. Probationary employees may be full-time, or part-time. During the probationary time, the Diocese may terminate the employee at will or the employee may terminate employment at will.
- **TEMPORARY** employees are those who are hired as interim replacements to temporarily supplement the work force, or to assist in the completion of a specific project. Employment assignments in this category are of a limited duration. Employment beyond any initially stated period does not in any way imply a change in employment status. Temporary employees retain that status unless and until notified of a change. While temporary employees receive all legally mandated benefits (such as Social Security and workers' compensation insurance), they are ineligible for all of the Diocese's other benefit programs.
- **SEASONAL** employees are those who are hired for seasonal work to temporarily supplement the work force. Employment assignments in this category are of a limited duration. While seasonal employees receive all legally mandated benefits (such as Social Security and workers' compensation insurance), they are ineligible for all of the Diocese's other benefit programs.

200 PERSONNEL RECORDS

201 MAINTENANCE OF RECORDS

The Diocese maintains a personnel file on each employee. The personnel file includes such information as the employee's job application, resume, records of training, emergency contact information, documentation of performance appraisals and salary increases, and other employment records.

In addition to the general personnel file, the Diocese maintains a separate file for:

1. Form I-9, Employment Eligibility Verification;
2. All medical information is kept in a separate file and its availability is strictly limited to personnel on a need-to-know basis.

Personnel files are the property of the Diocese and access to the information they contain is restricted. Generally, only supervisors and management personnel of the Diocese who have a legitimate reason to review information in a file are allowed to do so. **Employees are reminded to notify Human Resources in the event of a change of address, phone number, and emergency notification information so their record may be kept current.**

Employees who wish to review their own file should contact the Human Resource Department. With reasonable advance notice, employees may review their own personnel files in the presence of an individual appointed by the Diocese to maintain these files.

202 PERSONNEL DATA CHANGES

It is the responsibility of each employee to notify the Diocese promptly of any changes in personnel data. Personal mailing addresses, telephone numbers, number and names of dependents, individuals to be contacted in the event of an emergency, educational accomplishments and other such status reports should be accurate and current at all times. If any personnel data has changed, notify Human Resources.

300 EMPLOYMENT GUIDELINES

301 WORK HOURS

Generally, subject to the needs of the organization and specific directives by management, the work shift for full-time employees is 8 hours per day. These hours normally are worked within the period of 8:00 a.m. to 5:00 p.m., Monday – Friday, with a lunch break of between one-half hour and one hour. Supervisors have some flexibility to schedule work hours commensurate with their department responsibilities.

The Fair Labor Standards Act requires the Diocese to maintain an accurate record of hours worked and to pay one and one-half times the regular hourly rate of pay to nonexempt hourly employees who work overtime. Overtime will be defined as all hours worked over forty in a given workweek.

Days of work per week will be five, normally Monday through Friday. The workweek is 12:01 a.m. Saturday to midnight the following Friday.

302 OVERTIME

When operating requirements or other needs cannot be met during regular working hours, non-exempt employees may be scheduled to work overtime hours. When possible, advance notification of these mandatory assignments will be provided. All overtime work must receive the employee's supervisor's prior authorization. Overtime assignments will be distributed as equitably as practical to all employees qualified to perform the required work.

Overtime compensation is paid to all nonexempt hourly employees in accordance with federal and state wage and hour restrictions. Overtime pay is based on actual hours worked. Time off for sick leave, vacation leave or any leave of absence will not be considered hours worked for purposes of performing overtime calculations.

Employees who work overtime without receiving prior authorization from their supervisor may be subject to disciplinary action up to, and including, possible termination of employment.

303 COMPENSATORY TIME OFF

With exempt employees, the need to work extra hours arises occasionally. These employees normally work over 40 hours or more per week without additional monetary compensation of

any sort. There is no payment of bonuses, overtime or other monetary compensation for extra work by exempt employees.

The Diocese has no legal requirement or obligation to grant compensatory time off to exempt employees. A supervisor **may choose to grant** compensatory time off to exempt employees who are required to work in excess of **45 hours per week** for special projects, during weekends or any other normally scheduled time off.

Exempt employees, with the approval of their supervisor, may take compensatory time off when projects or events require work for excessive hours. In addition, accrual for compensatory time may not exceed sixteen hours in a calendar month.

Compensatory time must be taken within 30 days of extra time worked and cannot unduly disrupt the operations of a parish or entity of the Diocese.

304 PAY PERIODS

The Diocese encourages direct deposit of your paycheck to your bank account. Employees are paid either semi-monthly on the 15th and last day of the month, or monthly on the last day of the month. Every employee will receive an itemized pay stub each payday. If available, employees may utilize payroll direct deposit for automatic depositing of their paychecks. Please submit a voided check or bank deposit slip with the bank's routing number to Human Resources to initiate direct deposit. It may take one or two pay periods before the transaction can be completed. In the meantime, you will receive a manual check. Remember to notify payroll before you change the financial institution(s) where your check is being sent. It takes one to two weeks to retrieve a check which has been sent via electronic mail.

In the event that a regularly scheduled payday falls on a day off, such as a weekend or holiday, employees will receive pay on the last day of work **before** the regularly scheduled payday. Parishes may vary payroll.

In the event an employee is terminated from employment, all unpaid wages will be paid on the employee's next regular payday for the pay period or within 15 days from the separation, whichever occurs first.

304.1 Timekeeping

Accurately recording time worked is the responsibility of every nonexempt employee. Federal and state laws require the Diocese to keep an accurate record of time worked in order to calculate employee pay and benefits. Time worked is all the time actually spent on the job performing assigned duties.

Nonexempt employees should accurately record the time they work each day. Overtime work must always be approved before it is performed.

Altering, falsifying, tampering with time records, or recording time on another employee's time record may result in disciplinary action, up to and including termination of employment.

Nonexempt employees should report to work no more than a few minutes prior to their scheduled starting time nor stay more than a few minutes after their scheduled stop time without the express, prior authorization from their supervisor.

It is the employees' responsibility to "sign" their time records to certify the accuracy of all time recorded. The supervisor will review and then approve the time record for payroll processing. In addition, if corrections or modifications are needed for the time record, both the employee and the supervisor must indicate their agreement by noting the agreement in the electronic timekeeping system.

304.2 Payroll Deductions

The Diocese is required by law to deduct Federal and state withholding taxes from your paycheck. The amount of tax is determined by your earnings and the number of dependents you claim. At year end, you will receive a W-2 form showing your total earnings and the amount of taxes withheld. Deductions for Social Security at the rate established by law are deducted from your paycheck. The Diocese matches your contributions to the Social Security tax. Other deductions may include premiums for insurance, savings plans, garnishments, etc. If an employee believes there has been an error in pay, the employee should contact Human Resources or payroll administrator.

304.3 Child Support/New Hire Law

The Diocese complies with the law of the land regarding New Hire/Child Support Law. If you are subject to a child support order, monies will be withheld from your paycheck in accordance with our state's regulations. Child support is the court-ordered payment by the non-custodial parent to the custodial parent for the care and welfare of the child.

304.4 Garnishments

A court-ordered legal claim against the wages of an employee by a creditor for nonpayment of a debt and served by the constituted legal authority is called a garnishment, and it must be recognized and executed by diocesan entities. When a garnishment is received by the Diocese, the employee will be advised that a garnishment has been served on the Diocese. The employee will be counseled to seek assistance in working out his/her financial problems.

304.5 Pay Advances

In the event of a personal emergency, employees may submit a written request for a pay advance to their supervisor or the Chancellor/Pastor, indicating the nature of the emergency involved. The supervisor or the Chancellor/Pastor will evaluate the request

and determine whether a pay advance can be granted. After supervisory approval, the written request must be submitted to payroll and the Human Resources Department.

304.6 Administrative Pay Corrections

The Diocese takes all reasonable steps to ensure that employees receive the correct amount of pay in each paycheck and that employees are paid promptly on the scheduled payday.

In the unlikely event that there is an error in the amount of pay, the employee should promptly bring the discrepancy to the attention of the Human Resource Director/payroll administrator so that corrections can be made as quickly as possible.

305 LUNCH AND REST PERIODS

305.1 Lunch Period

The lunch period is a time for the employee to take care of personal issues and to relax and catch their breath from the toils of the business. Employees are not permitted to forgo the lunch period to shorten the work day. Employees needing extra time on their lunch period must receive prior approval from their supervisor.

A lunch period must be at least 30 minutes long and the employee is completely relieved of duty.

305.2 Breaks

The Diocese provides an official rest break of no more than 15 minutes duration for every 4 hours of daily work. Montana employers are not required to provide rest breaks, but if a break of less than 30 minutes is allowed, the time spent on the break must be paid.

306 GENERAL HIRING POLICIES AND PRACTICES

306.1 Equal Employment Opportunity

In order to provide equal employment and advancement opportunities to all individuals, employment decisions in the Diocese will be based on merit, qualifications and abilities. The Diocese does not discriminate in employment opportunities or practices on the basis of race, color, sex, national origin, age, disability, marital status or any other characteristic protected by law. The Diocese does, however, reserve the right to hire persons of the Roman Catholic religion for certain positions within the Diocese.

Any employees with questions or concerns about any type of discrimination in the workplace are encouraged to bring these issues to the attention of their immediate supervisor or the Pastor or parish/entity administrator. Employees can raise concerns

and make reports without fear of reprisal. Anyone found to be engaging in any type of unlawful discrimination will be subject to disciplinary action, up to and including termination of employment.

306.2 Sexual and Other Unlawful Harassment

We expect every person at the Diocese to be treated with fairness, respect, and dignity. This includes customers and vendors as well as employees. Accordingly, any form of harassment based on an individual's race, color, sex, religion, national origin, age or disability is a violation of this policy and will be treated as a disciplinary matter.

The term harassment includes slurs and any other offensive remarks, jokes, graphic material, or other offensive verbal, written, or physical conduct. Unwelcome sexual advances, requests for sexual favors, and any other unwelcome, unbecoming verbal or physical conduct will not be tolerated and is not a condition of employment. Neither submission to nor rejection of such conduct will be used as a basis for employment decisions.

The Diocese is committed to maintaining a safe and healthy work environment and takes all appropriate health and safety precautions consistent with current medical knowledge. Employees may not refuse to work with or cooperate with, withhold services from or otherwise harass, intimidate, degrade or isolate a coworker because of a known or suspected disability or disease, or because of a coworker's association with a person with a disability or disease. Any employee who believes that he or she has been subject of harassment shall immediately report the conduct to Human Resources. The Diocese will promptly investigate all complaints and will endeavor to handle these matters expeditiously, confidentially, and in a professional manner so as to protect the offended individual and other individuals providing relevant information.

Upon completion of a thorough investigation by management, prompt and appropriate action will be taken. There will be no retaliation against anyone for stepping forward with a concern regarding any type of harassment. All employees are to cooperate with any investigation into a harassment complaint.

False accusations of harassment cause harm to innocent people and such conduct will not be tolerated. The Diocese will take all steps necessary to prevent any form of harassment from occurring. All supervisors and managers are informed of this policy and have been instructed as to what constitutes proper and improper behavior. The Diocese is prepared to promptly take steps necessary to enforce this policy. Violations of the diocesan harassment policy will result in disciplinary action, up to and including discharge.

306.3 Safety

To assist in providing a safe and healthy work environment for employees and visitors, the Diocese has established a workplace safety program. This program is a top priority for the Diocese. The Safety Officer has responsibility for implementing, administering, monitoring and evaluating the safety program. Its success depends on the alertness and personal commitment of all.

The Diocese provides information to employees about workplace safety and health issues through regular internal communication channels such as supervisor-employee meetings, bulletin board postings, memos or other written communications.

Some of the best safety improvement ideas come from employees. Those with ideas, concerns, or suggestions for improved safety in the workplace are encouraged to raise them with their supervisor, or with another supervisor or manager, or bring them to the attention of a member of the safety advisory group. Reports and concerns about workplace safety issues may be made anonymously if the employee wishes. All reports can be made without fear of reprisal.

Each employee is expected to obey safety rules and to exercise caution in all work activities. Employees must immediately report any unsafe condition to the appropriate supervisor. Employees who violate safety standards, who cause hazardous or dangerous situations, or who fail to report or, where appropriate, fail to remedy such situations, may be subject to disciplinary action, up to and including termination of employment.

In the case of accidents that result in injury, regardless of how insignificant the injury may appear, employees are required to immediately notify Human Resources or the appropriate supervisor. Such reports are necessary to comply with laws and initiate insurance and workers' compensation benefits procedures.

306.4 Workers' Compensation Insurance

Employees are provided workers' compensation coverage from the day they begin work. The Diocese pays the entire cost of this coverage. Employees are covered by workers' compensation if they are incapacitated by injury or illness arising out of their employment. **Employees must report all accidents to their supervisor immediately, regardless of how minor.** If a work-related injury requires medical attention by a physician or any other medical facility that produces a bill, a claim must be made out the same day by the employee's supervisor. If the injury causes the person to be away from work beyond three days, this injury must be reported to the state Workers' Compensation Division (State Fund). The employee's supervisor is responsible for submitting a copy of the original claim to the state office. Additionally, a copy of this claim must be forwarded to the Human Resource Department, who will forward it to the insurance company. Employees are not authorized to go to a physician without first advising their supervisor or manager. Employees will not be eligible for regular compensation or vacation or holiday pay in addition to any workers' compensation

received.

Employees who sustain work-related injuries, regardless of how insignificant the injury may appear, should immediately inform their supervisor. The supervisor will, in turn, immediately call the accident into the current insurance carrier. ***No matter how minor an on-the-job injury may appear, it is important that it be reported immediately.*** This will enable an employee to qualify for coverage as quickly as possible. If more than 30 days have elapsed since the work-related injury is reported, neither the insurance carrier nor the Diocese will cover the worker's job-related injury.

Neither the Diocese nor the insurance carrier will be liable for the payment of workers' compensation benefits for injuries that occur during an employee's voluntary participation in any off-duty recreational, social or athletic activity sponsored by the Diocese /parish.

Employees between 16 and 18 years of age are limited in the operation of some motorized equipment. Montana Department of Labor allows workers to operate motorized lawn mowers and weed eaters. Required protective clothing is long pants for weed eating and shoes to be worn when performing either activity.

306.5 Job Descriptions

We strive to have accurate job descriptions for all jobs in the Diocese. A job description includes the following sections: Job information; Job summary (gives a general overview of the job's purpose); Competencies; Essential duties and responsibilities; Supervisory responsibilities; Qualifications (includes education and/or experience, language skills, reasoning ability, and any certification required); Physical demands; and Work environment.

We use job descriptions to identify the requirements of a job, set up the hiring criteria, set standards for employee performance evaluations, and establish a basis for making reasonable accommodations for individuals with disabilities. The Human Resource Department or parish/entity administrator will prepare a job description when a new job is created. The Diocese reviews existing job descriptions and updates them when a job changes. The job description does not necessarily cover every task or duty that an employee might be assigned. The employee may be assigned additional responsibilities as necessary. If the employee has questions or concerns about the job description, the employee should contact their immediate supervisor.

306.6 Job Posting

The Diocese generally provides employees an opportunity to indicate their interest in open positions and to advance within the organization according to their skills and experience. In general, notices of all regular, full-time job openings are posted; although the Diocese reserves the right, in its sole discretion, not to post a particular opening.

Job openings will generally be posted on the website and will remain open for a minimum of 3 days. Each job posting notice will include the dates of the posting period,

job title, department, location, job summary, essential duties and qualifications (required skills and abilities).

To be eligible to apply for a posted job, employees must have performed competently for six months in their current position. Employees who have a written warning on file, or are on probation or suspension are not eligible to apply for posted jobs. Eligible employees should only apply for those posted jobs for which they possess the required skills, competencies and qualifications.

To apply for an open position, employees should submit a job application with job-related skills and accomplishments. It should also describe how their current experience with the Diocese and prior work experience and/or education qualifies them for the position.

The Diocese recognizes the benefit of developmental experiences and encourages employees to talk with their supervisors about their career plans. An applicant's supervisor may be contacted to verify performance, skills and attendance. Any staffing limitations or other circumstances that might affect a prospective transfer may also be discussed.

Job posting is a way to inform employees of openings and to identify qualified and interested applicants who might not otherwise be known to the hiring manager. Other recruiting sources may also be used to fill open positions in the best interest of the organization.

306.7 Employment Applications

The Diocese relies upon the accuracy of information contained in the employment application, as well as the accuracy of other data presented throughout the hiring process and employment. Any misrepresentations, falsifications or material omissions in any of this information or data may result in the Diocese's exclusion of the individual from further consideration for employment or if the person has been hired, termination of employment.

306.8 Employment Reference Checks

To ensure that individuals who join the Diocese are well-qualified and have a strong potential to be productive and successful, it is diocesan policy to check employment references and do background checks of all applicants.

For former diocesan employees who have listed the Diocese as an employment reference, the former employee must direct all references through Human Resources, the Pastor, or parish/entity administrator. Responses to such inquiries will confirm the dates of employment, wage rates and position(s) held. Responses to such inquiries will be limited to factual information that can be substantiated by the Diocese's records.

306.9 Resignation

Employees who do not give an appropriate notice will not be eligible for rehire. All terminating employees will have an exit interview. The purpose of the interview is to be certain the reasons for the employee's termination are not founded on a misunderstanding or erroneous situation. Employees who choose to leave the Diocese are asked to give at least two weeks' notice. The interview will also cover what compensation the employee has coming and when termination of benefits will occur. Employees are expected to turn in all Diocesan property at the time of termination.

306.10 Termination

Termination of employment is an inevitable part of personnel activity within any organization and many of the reasons for termination are routine. Below are examples of some of the most common circumstances under which employment is terminated:

- Resignation/Retirement - voluntary employment termination initiated by an employee.
- Discharge - involuntary employment termination initiated by the organization.
- Layoff - involuntary employment termination initiated by the organization for non-disciplinary reasons.

The Diocese will generally schedule exit interviews at the time of employment termination. The exit interview will afford an opportunity to discuss such issues as employee benefits, conversion privileges and return of diocesan property. Suggestions, complaints and questions can also be voiced.

All the unpaid wages of the involuntary or voluntary terminated employee are due and payable on the next regularly scheduled pay day for the pay period or within 15 days from the separation, whichever occurs first. Vacation is paid out but not sick leave.

Employee benefits will be affected by employment termination in the following manner. All accrued, vested benefits which are due and payable at termination will be paid. Some benefits may be continued at the employee's expense if the employee so chooses. The employee will be notified in writing of the benefits that may be continued and of the terms, conditions and limitations of such continuance.

306.11 Re-Employment Policy

Employees who left the Diocese in good standing will be considered for open positions along with other applicants. Employees who left without giving proper notice or who were discharged for cause will not be eligible for re-hire.

306.12 Immigration Reform and Control Act

It is diocesan policy to fully comply with the regulations of the Immigration Reform and Control Act of 1986 (as amended) and enforced by the Department of Homeland Security. We will hire only American citizens and aliens who are authorized to work in the United States. The law requires the Diocese to do five things:

1. All new employees must complete Section 1 of the I-9 form within three business days of hire.
2. Check documents establishing employee's identity and eligibility to work. (Note: The verifier is not allowed to tell the employee which documents to present and cannot ask for more than is required.)
3. The person examining the documents must complete Section 2 of the I-9 Form and the Certification Section.
4. Retain the form for at least three years. (If the company employs the person for more than three years, the company must retain the form until one year after the person leaves diocesan employment.)
5. Present the form for inspection to the Department of Homeland Security or Department of Labor officer upon request. (At least three days advance notice will be given.)

If an employee is hired for less than three days, the company must complete Form I-9 before the end of the employee's first working day. The I-9 Form contains instructions for completion. The employee assigned to this task must follow those instructions completely. I-9 records are to be kept separate from all other personnel records.

306.13 Drug and Alcohol Use

It is the Diocese's desire to provide a drug-free, healthy and safe workplace. To promote this goal, employees are required to report to work in appropriate mental and physical condition to perform their jobs in a satisfactory manner.

While on diocesan premises and while conducting business-related activities off of diocesan premises, no employee may use, possess, distribute, sell, or be under the influence of alcohol or illegal drugs. The legal use of prescribed drugs is permitted on the job only if it does not impair an employee's ability to perform the essential functions of the job effectively and in a safe manner that does not endanger other individuals in the workplace.

Violations of this policy may lead to disciplinary action, up to and including immediate termination of employment and/or required participation in a substance abuse rehabilitation or treatment program. Such violations may also have legal consequences.

Employees with questions or concerns about substance dependency or abuse are encouraged to use the resources of the Employee Assistance Program. They may also

wish to discuss these matters with their supervisor or the Pastor or parish administrator to receive assistance or referrals to appropriate resources in the community.

Employees with drug or alcohol problems that have not resulted in, and are not the immediate subject of disciplinary action, may request approval to take unpaid time off to participate in a rehabilitation or treatment program. Leave may be granted if the employee agrees to abstain from use of the problem substance; abides by all diocesan policies, rules and prohibitions relating to conduct in the workplace; and if granting the leave will not cause the Diocese any undue hardship.

Employees with questions on this policy or issues related to drug or alcohol use in the workplace should raise their concerns with their supervisor or the Human Resource Director without fear of reprisal.

306.14 Non-Smoking Policy

The Diocese is a smoke-free workplace in order to maintain the highest possible safety conditions and because we are concerned about our employees' health. We also encourage smokers to quit smoking.

In keeping with the Diocese's intent to provide a safe and healthy work environment, smoking is prohibited throughout the workplace and within 25 feet from any door when smoking outside.

This policy applies equally to all employees and visitors.

Any questions regarding our Non-Smoking policy, please contact the Human Resource Director/ parish or entity administrator.

307 CONFIDENTIALITY

Information regarded as confidential, including payroll, financial statements, mailing lists and other information, should be handled carefully. Supervisors should instruct their staff coming in contact with this information as to what is confidential and should require staff to write "PERSONAL AND CONFIDENTIAL" on such materials on the outside of any envelopes and correspondence. Upon receipt of materials marked "PERSONAL AND CONFIDENTIAL," employees should be instructed that these materials be left sealed, to be opened by the individual to whom they are addressed. Confidential information regarding the Diocese/parish/entity or the people the Diocese serves should in no way be divulged verbally, in written correspondence or email. Failure to abide by this policy will result in disciplinary action, up to and including discharge.

308 EMPLOYEE PERFORMANCE APPRAISALS

308.1 Performance Evaluation

Generally, a formal performance evaluation will be conducted at the end of an employee's initial period of hire, known as the probationary period. Additional formal performance evaluations may be conducted annually to provide both supervisors and employees the opportunity to discuss job tasks, identify and correct weaknesses, encourage and recognize strengths and discuss positive, purposeful approaches for meeting goals.

309 PERSONAL GAIN/CONFLICT OF INTEREST

Employees have an obligation to conduct business within guidelines that prohibit actual or potential conflicts of interest. This policy merely establishes the framework within which the Diocese wishes to conduct business. The purpose of these guidelines is to provide general direction so employees can seek further clarification on issues related to the subject of acceptable standards of operation. Contact the Pastor or parish/entity administrator for more information or questions about conflicts of interest.

An actual or potential conflict of interest occurs when an employee is in a position to influence a decision which may result in a personal gain for that employee or for a relative as a result of the Diocese's business dealings. For the purposes of this policy, a relative is any person who is related by blood or marriage, or whose relationship with the employee is similar to that of persons who are related by blood or marriage.

No "presumption of guilt" is created by the mere existence of a relationship with outside firms. However, if employees have any influence on transactions involving purchases, contracts, or leases, it is imperative that they disclose as soon as possible to the Pastor or parish/entity administrator of the Diocese the existence of any actual or potential conflict of interest so safeguards may be established to protect all parties.

Personal gain may result not only in cases where an employee or relative has a significant ownership in a firm with which the Diocese does business, but also when an employee or relative receives any kickback, bribe, substantial gift, or special consideration as a result of any transaction or business dealing involving the Diocese.

The employment of relatives in the same area of an organization may cause serious conflicts and problems with favoritism and employee morale. In addition to claims of partiality in treatment at work, personal conflicts from outside the work environment can be carried into day-to-day working relationships. Relatives of persons currently employed by the Diocese may be hired only if they will not be working directly for or supervising a relative.

400 LEAVES OF ABSENCE – PURPOSE AND OBJECTIVE

To establish and outline the general parameters and guidelines for granting leave(s) from work, in general, two types of leave may be granted: paid leaves and unpaid leaves. The following definitions of the various types of leave will assist in understanding the benefits provided under this policy.

401 VACATION LEAVE

Vacation time off with pay is available to eligible employees to provide opportunities for rest, relaxation and personal pursuits. Employees in the following employment classification(s) are eligible to earn and use vacation time as described in this policy:

- Regular full-time employees
- Regular part-time employees

The amount of paid vacation time employees receive each year increases with the length of their employment as shown in the following schedule:

- Upon initial eligibility, the employee is entitled to 10 vacation days each year, accrued monthly at the rate of 0.833 days (or 6.664 hours per month) – maximum of 80 hours.
- After 1 year of eligible service, the employee is entitled to 15 vacation days each year, accrued monthly at the rate of 1.250 days (or 10 hours) per month – maximum of 120 hours.
- After 5 years of eligible service, the employee is entitled to 18 vacation days each year, accrued monthly at the rate of 1.500 days (or 12 hours) per month – maximum 144 hours.
- After 12 years of eligible service, the employee is entitled to 21 vacation days each year, accrued monthly at the rate of 1.750 days (or 14 hours) per month – maximum 168 hours.
- After 19 years of eligible service, the employee is entitled to 24 vacation days each year, accrued monthly at the rate of 2.000 days (or 16 hours) per month – maximum 192 hours.

The length of eligible service is calculated on the basis of a "benefit year." This is the 12-month period that begins when the employee is hired. An employee's benefit year may be extended for any significant leave of absence except military leave of absence. Military leave has no effect on this calculation.

Once employees enter an eligible employment classification, they begin to earn paid vacation time according to the schedule. However, before vacation time can be used, a waiting period of six months must be completed. After that time, employees can request use of earned vacation time including that accrued during the waiting period.

Non-exempt employees can use paid vacation time in minimum increments of one-half hour. For exempt employees, vacation can be used in minimum increments of one day.

Vacation time off is paid at the employee's base pay rate at the time of vacation. It does not include overtime.

As stated above, employees are encouraged to use available paid vacation time for rest, relaxation and personal pursuits. Employees may accumulate vacation time only to the maximum of the number of days the employee can earn in the employee's year of service based on the schedule set forth above. If an employee has any vacation days beyond the maximum allowable, then the employee will not be eligible to accrue any additional vacation days. Once all excess vacation days have been consumed, the employee will again earn additional vacation days. No vacation days can be used before vacation days are accrued. Use of vacation days must be arranged in advance with the employee's supervisor.

Upon termination of employment, eligible employees will be paid for unused vacation time that has been earned through the last day of work.

Former employees who return to diocesan employment may bridge, after one year, their vacation accrual rate as though there were no break in employment, provided previous employment was at least 30 hours per week.

402 SICK LEAVE

The Diocese provides paid sick leave benefits to all eligible employees for periods of temporary absence due to illnesses or injuries. Eligible employee classification(s):

- Regular full-time employees
- Regular part-time employees

Regular full-time employees accrue sick leave benefits at the rate of 12 days per year (1 day for every full month of service). Sick leave benefits are calculated on the basis of a "benefit year," the 12-month period that begins when the employee is hired.

Employees can request use of paid sick leave after completing a probationary period. For exempt employees, paid sick leave must be used in minimum increments of one day. Non-exempt employees may use paid sick leave in half hour increments. Eligible employees may use sick leave benefits for an absence due to their own illness or injury or that of a family member.

Employees who are unable to report to work due to illness or injury should notify their direct supervisor before the scheduled start of their workday if possible.

Sick leave benefits will be calculated based on the employee's base pay rate at the time of absence.

Unused sick leave benefits will be allowed to accumulate until the employee has accrued a total of 63 days' worth of sick leave benefits. If the employee's benefits reach this maximum, further accrual of sick leave benefits will be suspended until the employee has reduced the balance below the limit.

Sick leave benefits are intended solely to provide income protection in the event of illness or injury and may not be used for any other absence. Unused sick leave benefits will not be paid to employees while they are employed or upon termination of employment.

403 FAMILY MEDICAL LEAVE ACT

The Diocese follows the Federal Family and Medical Leave Act (the "FMLA") and will comply with the requirements of the Act. Under the provisions of the FMLA, eligible employees are entitled to take a leave for the following reasons:

Parental Leave:

1. Birth of a child or in order to care for a child (must be taken within twelve months of the birth).
2. The adoption or foster care of a child (must be taken within twelve months of the adoption or placement in foster care).

Medical Leave:

The need to care for an employee's spouse, son, daughter, or parent who has a serious health condition or employee's own serious health condition.

Children must be either under the age of eighteen or older and "incapable of self-care" because of a mental or physical disability. An employee is entitled to a total of twelve weeks of FMLA-covered leave within a rolling twelve-month period, measured backward from the date of the most recent request for a covered leave of absence.

This means that each time an employee requests a leave under the provisions of this policy, the available time for a leave of absence will be the balance of the total twelve weeks that has not been used during the twelve month period immediately preceding the commencement of leave.

ELIGIBILITY: To be eligible for leave, an employee must have been employed for at least twelve months and have worked for at least 1,250 hours during the twelve-month period immediately preceding the commencement of leave.

The twelve months need not be consecutive; however, employment prior to a continuous break in service of 7 years or more will not be counted unless the break is due to an employee's fulfillment of military obligations or governed by a collective bargaining agreement or other written contract.

Employees may be eligible for additional leave if he/she is a spouse, son, daughter, parent or next of kin of a current member of the Armed Forces, including members of the National Guard or Reserves, with a serious injury or illness. Employees may take up to 26 weeks of leave in a single 12-month period to care for the service member. This leave is not in addition to the 12 weeks available for other FMLA reasons.

SERIOUS HEALTH CONDITION: Serious health condition means an illness, injury, impairment or physical or mental condition that involves inpatient care in a hospital, hospice or residential medical care facility or continuing treatment by a health care provider which prevents an employee or family member from performing the functions of their job. Please contact your

immediate supervisor if you have any questions regarding what qualifies as a serious health condition.

NOTICE REQUIREMENTS: Anyone requesting a leave of absence under this policy should see his/her supervisor and complete the proper leave request form. Where the need for leave is known in advance, the request must be submitted at least thirty days prior to the desired beginning of the leave of absence. Failure to give at least 30 days' notice of foreseeable need for a leave of absence may delay the start of such leave until thirty days after the date the notice is received by the Diocese. If the request is less than 30 days, the employee may be required to give an explanation of why advance notice was not feasible. If timely notice is not given, the period of delay counts as a non-FMLA absence.

If the need for a leave is not foreseeable or is an emergency situation, the employee must provide at least verbal notification to their immediate supervisor as soon as possible and must follow call-in procedures. Employees must supply sufficient information to enable the Diocese to determine if the leave qualifies for FMLA and the duration and timing of the leave.

CERTIFICATION OF THE NEED FOR LEAVE: Any employee who needs to have an FMLA-covered Medical Leave of Absence must present certification of the need for a leave of absence along with the leave request form. This certification must be provided within fifteen days of the request unless it is not feasible under the circumstances. The diocesan Human Resource Director's office has forms available for an employee to have completed by their health-care provider. Failure to provide certification may result in the employee's leave being delayed, denied, or revoked.

Note: The Diocese reserves the right to a second or third medical certification at diocesan expense. The Diocese also reserves the right to require recertification of the continuance of a serious health condition every six months. Recertification may also be required if:

1. An employee requests an extension of leave;
2. Circumstances described by the original certification have changed significantly;
3. The Diocese receives information that casts doubt upon the continuing validity of the certification;
4. An employee is unable to return to work because of the continuation, recurrence, or onset of a serious health condition.

INTERMITTENT LEAVE: Generally, FMLA leave must be taken in a single block. Under certain circumstances, however, FMLA leave may be taken on an intermittent or reduced work schedule basis.

A Parental Leave of Absence may be taken intermittently or on a reduced work schedule basis if the employee and the Diocese can agree on the schedule requested by the employee and it does not interfere with business needs.

A Medical Leave of Absence may be taken intermittently or on a reduced work schedule basis if the requesting employee produces the required certification that there is a medical need for a leave of absence and that the medical need is best accommodated through an intermittent leave or reduced work schedule.

NOTE: The Diocese reserves the right to require a second or third medical opinion in appropriate cases where authorized to do so by the FMLA. If medical leave is requested on an intermittent or reduced work schedule basis, the Diocese may, at the discretion of management, transfer the employee temporarily to an available alternative position for which the employee is qualified and which better accommodates recurring periods of leave than does the employee's regular position. Any such transfer will be to a job that offers pay and benefits that are equivalent to those available in the employee's regular job. Employees on unforeseeable intermittent leave will not be required to transfer to an alternative job. A fitness for duty certification can be required every 30 days in the case of intermittent or reduced schedule leaves if reasonable safety concerns exist. The employee has 15 days to provide this certification.

FMLA LEAVE IS UNPAID LEAVE: Employees on approved FMLA leave of absence will be required to use any earned, unused sick and vacation days during the approved leave of absence unless the leave is for the employee's own serious health condition. Employees must follow the same terms and conditions of our leave policy as those employees not on FMLA. The Diocese and employee may mutually agree to supplement worker's compensation or other disability benefits with any other form of paid time off benefits the employee may be entitled to, if state law permits.

SPOUSE AGGREGATION: In the case where both an employee and his/her spouse are employed by the Diocese, the aggregate number of weeks to which both employees are entitled because of the birth or placement of a child or to care for a parent with a serious health condition will be limited to twelve workweeks during any twelve-month period. This limitation does not apply in instances where leave is taken because of an employee's own serious health condition or to care for a spouse or child with a serious health condition.

HEALTH INSURANCE: Since the Diocese provides group health insurance, employees are entitled to the continuation of the group health insurance coverage during FMLA Leave on the same terms as if he or she had continued to work. If family member coverage is provided to an employee, family member coverage must be maintained during the FMLA leave. The employee must continue to make any normal contributions to the cost of the health insurance premiums.

If paid leave is substituted for FMLA leave, the employee's share of the group health plan premiums must be paid by the method normally used during paid leave (usually payroll deduction). An employee on unpaid FMLA leave must make arrangements to pay the normal employee portion of the insurance premiums in order to maintain insurance coverage. If the employee's premium payment is more than 30 days late, the employee's coverage may be dropped. Written notice will be provided to the employee that payment has not been received and will allow 15 days after the date of the letter before terminating coverage.

If an employee does not return to work at the end of an approved FMLA leave, he/she may be required to repay the Diocese for the insurance premiums it paid and is also subject to termination. Benefit accruals, such as vacation, sick leave, or holiday benefits, will be suspended during the leave and will resume upon return to active employment.

404 PARENTAL LEAVE

Parental leave is available for parents at the time of birth or adoption of a child. The Diocese will grant three months' parental leave, with the first month fully paid and the second and third months unpaid with the understanding that no employment rights will be lost because of parental leave. Second and/or third month's leave may be taken working one-half time, extending the benefit into the fourth and fifth month. Vacation may also be used to extend the leave.

During the two months of unpaid parental leave time, benefit application is the same as leave of absence without pay except the Diocese will continue to pay the Diocesan portion of the medical insurance premiums on the two-month unpaid time of parental leave.

405 HOLIDAYS/RELIGIOUS FEASTS*

The Diocese will grant holiday time off to all employees on the holidays listed below:

- Two to four Holidays designated by the Pastor or parish administrator each year
- New Year's Day (January 1)
- Martin Luther King, Jr (Third Monday in January)
- Good Friday (Friday before Easter)
- Easter Monday (Monday after Easter)
- Memorial Day (last Monday in May)
- Independence Day (July 4)
- Labor Day (first Monday in September)
- Thanksgiving (fourth Thursday in November)
- Day after Thanksgiving
- Christmas Eve (December 24)
- Christmas (December 25)

The Diocese will grant paid holiday time off to all eligible employees immediately upon assignment to an eligible employment classification. Holiday pay will be calculated based on the employee's straight-time pay rate (as of the date of the holiday) times the number of hours the employee would otherwise have worked on that day. Eligible employee classification(s):

- Regular full-time employees
- Regular part-time employees
- Probationary employees

A recognized holiday that falls on a Saturday will be observed on the preceding Friday. A recognized holiday that falls on a Sunday will be observed on the following Monday. If a recognized holiday falls during an eligible employee's paid absence (such as vacation, sick or family leave), holiday pay will be provided instead of the paid time off benefit that would otherwise have applied.

If eligible nonexempt employees work on a recognized holiday, wages will be paid at their straight-time rate for the hours worked on the holiday.

Paid time off for holidays will not be counted as hours worked for the purposes of determining overtime.

When the following days fall on a workday, employees may take up to one hour off for the celebration of Mass during working hours:

- Ash Wednesday
- August 15 - Feast of the Assumption
- November 1 - All Saints Day
- December 8 - Immaculate Conception

***Holiday schedules may vary among diocesan parishes and entities.**

406 OTHER LEAVES OF ABSENCE

406.1 Bereavement Leave

Employees who wish to take time off due to the death of an immediate family member should notify their supervisor immediately. Up to five days of paid bereavement leave will be provided to eligible employees in the following classification(s):

- Regular full-time employees
- Regular part-time employees
- Probationary employees

Bereavement pay is calculated based on the base pay rate at the time of absence.

Bereavement leave will normally be granted unless there are unusual business needs or staffing requirements. Employees may, with supervisor's approval, use any available paid leave for additional time off as necessary.

The Diocese defines "immediate family" as the employee's spouse, parent, child, sibling; the employee's spouse's parent, child, or sibling; the employee's child's spouse; grandparents or grandchildren.

With approval from their supervisor, employees may have time off to attend funerals of non-family members. This time will either be paid or unpaid, at the sole discretion of management.

406.2 Military Leave

The Diocese will grant a military leave of absence if an employee is absent from work because he/she is serving in the U.S. uniformed services in accordance with the Uniformed Services Employment and Reemployment Rights Act (USERRA).

The employee must give the Human Resource Department advance notice of upcoming military service, unless military necessity prevents advance notice or it is otherwise impossible or unreasonable. The employee will not be paid for military leave. However, the employee may use any available accrued paid time off, such as vacation or sick leave, to help pay for the leave. Continuation of health insurance benefits is available as required by USERRA based on the length of the leave and subject to the terms, conditions and limitations of the applicable plans for which the employee is otherwise eligible.

Employee benefits, such as vacation, sick leave, or holiday benefits, will not accrue during a military leave. When the employee returns from leave, the benefits will start accruing again. If the employee is on military leave for up to 30 days, the employee must return to work on the first regularly scheduled work period after the service ends (allowing for reasonable travel time). If the employee is on military leave for more than 30 days, the employee must apply for reinstatement in accordance with USERRA and applicable state laws. When the employee returns from military leave (depending on the length of the military service in accordance with USERRA), the employee will be placed either in the position the employee would have attained if the employee had stayed continuously employed or in a comparable position.

For the purpose of determining benefits that are based on length of service, the employee will be treated as if he/she had been continuously employed. If the employee has questions about military leave, contact the Human Resource Director for more information.

406.3 Military Caregiver Leave

The Military Caregiver Leave permits eligible employees to take up to 26 weeks of leave to care for a covered service member during a single 12-month period. A covered service member is a current member of the Armed Forces, including a member of the National Guard or Reserves, who has a serious injury or illness incurred in the line of duty on active duty which may render the service member medically unfit to perform his or her duties for which the service member is undergoing medical treatment, recuperation, or therapy, or is in outpatient status, or is on the temporary disability retired list. Caregiver may be a spouse, son, daughter, parent or next of kin of the covered service member. The same timing requirements for certification apply to all requests for FMLA Leave, including those for military leave.

406.4 Jury Duty

The Diocese encourages employees to fulfill their civic responsibilities by serving jury duty when required. If an employee receives a jury duty summons, the employee will need to show it to their immediate supervisor as soon as possible so arrangements can be made to accommodate the employee's possible absence from work.

Jury duty pay will be calculated at the employee's base pay rate times the number of hours the employee would otherwise have worked on the day of absence subtracting any compensation received from the court. Employee classifications that qualify for paid jury duty leave are:

- Regular full-time employees
- Regular part-time employees
- Probationary employees

406.5 Voting

The Diocese encourages employees to fulfill their civic responsibilities by voting in elections.

Generally, the polls are open for several hours in the morning and evening and the Diocese expects that employees will be able to vote either before or after work hours. If employees are unable to vote in an election during their nonworking hours, the Diocese will grant up to one hour of paid time off to vote.

Employees should request time off to vote from their supervisor at least two working days prior to Election Day. Advance notice is required so that the necessary time off can be scheduled at the beginning or end of the work shift; whichever provides the least disruption to the normal work schedule.

406.6 Witness Duty

The Diocese encourages employees to appear in court for witness duty when subpoenaed to do so.

If employees have been subpoenaed or otherwise requested to testify as witnesses by the Diocese, they will receive paid time off for the entire period of witness duty.

Employees will be granted a maximum of two hours of paid time off to appear in court as a witness at the request of a party other than the Diocese of Helena. Additional paid time off may be allowed an employee for extenuating circumstances as deemed appropriate by the employee's supervisor. Employees will be paid at their base rate and are free to use any remaining paid leave benefits (such as vacation leave) to receive compensation for any period of witness duty absence that would otherwise be unpaid.

The subpoena should be shown to the employee's supervisor immediately after it is received so that operating requirements can be adjusted, where necessary, to accommodate the employee's absence. The employee is expected to report for work whenever the court schedule permits.

500 EMPLOYEE BENEFITS

Eligible employees of the Diocese are provided a wide range of benefits. A number of the programs (such as Social Security, workers' compensation and unemployment insurance) cover all employees in the manner prescribed by law.

Benefits eligibility is dependent upon employment category. An employee's supervisor or Human Resources can identify the programs for which an employee is eligible. Details of many of these programs can be found elsewhere in the employee handbook.

The following benefit programs are available to eligible employees:

- 403(b)(7) Retirement Savings Plan
- Bereavement Leave
- Dental/Vision Insurance
- Employee Assistance Program
- Family Leave
- Flextime Scheduling
- Discretionary Benefit Compensation
- Critical Care Insurance (fully paid by the employee)
- Accident Insurance (fully paid by the employee)
- Holidays
- Jury Duty Leave
- Life Insurance
- Long-Term Disability
- Sick Leave Benefits
- Flex/HSA
- Vacation Benefits

Some benefit programs require contributions from the employee, but most are fully paid by the Diocese.

501 RETIREMENT

501.1 Retirement Savings Plan - 403(b)

The Diocese has established a 403(b) savings plan to provide employees the potential for future financial security for retirement.

To be eligible to join the 403(b) savings plan, an employee must complete the probationary period of six months of service, work a minimum of 30 hours per week and be 18 years of age or older. Eligible employees may participate in the 403(b) plan subject to all terms and conditions of the plan.

The 403(b) savings plan allows an employee to elect a percentage of his/her salary, as allowed by law, so the employee can tailor their own retirement package to meet their individual needs. After the probationary period ends, the Diocese matches the

employee contribution up to 3% of base salary to a designated 403(b) plan for each eligible employee. (i.e. For each percentage an employee contributes, the Diocese will match that percentage up to 3%.) Schools may have different contribution rates.

Because an employee's contribution to a 403(b) plan is automatically deducted from his/her pay before federal and state tax withholdings are calculated, the employee saves tax dollars now by having current taxable amounts reduced. While the amounts deducted generally will be taxed when they are finally distributed, favorable tax rules typically apply to 403(b) distributions.

Contact Human Resources for more information about the 403(b) plan.

501.2 Social Security

The payment of Social Security and Medicare benefits is made by the employee and the Diocese. The Diocese matches the employee's contribution to the Social Security and Medicare and thereby pays one-half of the cost of the employee's retirement and Medicare benefits under the Social Security Act. Social Security provides a variety of benefits, including retirement income, death benefits, disability benefits and monthly income for certain dependent survivors of covered employees. For additional information regarding Social Security eligibility and benefits, go to www.socialsecurity.gov.

501.3 Retirement Medicare

An employee who retires at age 65 or older and has 20 years or more of service with the Diocese **and was hired before 1/1/2005**, has the option of joining the group Medicare Advantage plan and dental/vision insurance. The Diocese will continue paying one-half of the cost of the Group Medicare Advantage Plan premium and one-half of the dental/vision premium for retirees. Premium payment is through the local entity and the retiree is responsible for paying their half to avoid losing coverage. This benefit does not pertain to family members.

502 MEDICAL HEALTH INSURANCE

The Diocese of Helena provides full-time eligible employees with employer-paid group health insurance and dental/vision plans. Employees in the following classifications are eligible to participate in the health insurance:

- Regular full-time employees
- Regular part-time employees (no pro-ration)
- Probationary employees

Details of the health and dental/vision insurance plans are described in the yearly Summary Plan Description (SPD). Comprehensive health coverage is available for spouses and/or dependent children at subsidized rates. These benefits are offered on date of hire, at open enrollment or through a qualifying event (i.e. birth, death, change of health coverage, etc.) The SPD and information on the cost of coverage through payroll deduction will be provided in advance of

enrollment to eligible employees. Contact Human Resources for more information about health benefits.

Members of our group health plan are also able to use an on-line teleconference with a doctor. This service provides 24/7 access to certified providers to employees and their family members for more common “urgent” health problems through phone or online through a video conference. Please see the yearly benefit guide for details.

Employees working past age 65 are encouraged to stay on the Diocese’s Group Health Plan despite being eligible for Medicare.

503 DENTAL/VISION INSURANCE

The Diocese’s dental/vision insurance plan provides employees and their dependents access to dental and vision insurance benefits. Employees in the following employment classifications are eligible to participate in the dental-vision insurance plan:

- Regular full-time employees
- Regular part-time employees (no pro-ration)
- Probationary employees

Employees may include their spouse/children under their dental/vision insurance. The employee is responsible for the premium for dependent coverage.

Contact Human Resources for more information about dental/vision insurance benefits.

504 FLEXIBLE SPENDING ACCOUNTS

Those on a traditional health care plan can elect to contribute money to a medical flex account on a pre-tax basis. This money can be used to help pay for out of pocket medical, prescription, dental or vision expenses for themselves and family members.

Employees on a traditional plan or a high-deductible health plan may use flexible dependent care spending. This account allows employees to pay for dependent daycare with pre-tax dollars.

These spending accounts are completed on a calendar year, not fiscal year basis (i.e. January 1 to December 31). Funds not withdrawn and used before year-end are forfeited. Contact Human Resources or your payroll office arrange payroll deductions.

505 HEALTH SAVINGS ACCOUNT

A Health Savings Account (HSA) is available for eligible employees enrolled in a High-Deductible Health Plan (HDHP). Under the HSA, pre-tax contributions are placed into an employee’s account to allow payment for out-of-pocket eligible expenses for medical, prescription, dental, and vision costs. HSA monies carry over from year to year and do not have to be used by year’s end.

506 WELLNESS PROGRAM

In accordance with the Diocese's commitment to health and safety, a Wellness Program has been established for the following purposes:

- To manage risk(s) in the group health plans resulting in affordable premiums and better provide for employee health;
- To maintain and enhance employee interest in health and safety issues;
- To ensure that managers, supervisors and employees are aware through training activities that they are responsible for the prevention of workplace accidents;
- To help make health and safety activities an integral part of the organization's operating procedures, culture and programs;
- To provide an opportunity for discussion of health and safety problems and possible solutions;
- To inform and educate employees and supervisors about health and safety issues and research findings, etc.;
- To help reduce the risk of workplace injuries and illnesses;
- To help ensure compliance with federal and state health and safety standards.

The Diocese will review the wellness policy on a yearly basis and reserves the right to change, revise, or rescind the policy at any time.

507 EMPLOYEE ASSISTANCE PROGRAM

The Diocese provides an Employee Assistance Program (EAP) to all employees. This program provides confidential assistance for personal problems that may be interfering with the employee's life or work.

The EAP can help employees and their loved ones cope with issues such as:

- family or relationship problems
- parenting difficulties
- work-related problems
- financial and legal issues
- substance use and abuse
- grief and loss
- emotional and physical abuse
- anxiety and fear
- child or elder care concerns

The Employee Assistance Program may be reached at 1-800-854-1446. Additional information on the EAP is available from Human Resources, the Pastor, or a parish/entity administrator.

508 LIFE INSURANCE

Life insurance offers the employee and his/her family important financial protection. The Diocese provides a basic life insurance plan for eligible employees. The basic life insurance plan includes Accidental Death and Dismemberment (AD&D) insurance. AD&D provides benefits in case an accident causes a serious injury or death. Employees in the following employment classifications are eligible to participate in the life insurance plan:

- Regular full-time employees
- Regular part-time employees
- Probationary employees

Eligible employees may participate in the life insurance plan subject to all terms and conditions of the agreement between the Diocese and the insurance carrier.

Details of the basic life insurance plan, including benefit amounts, are described in the Summary Plan Description provided to eligible employees. Additional life insurance may be purchased by individuals. Upon termination, an employee can elect to “port” (keep the insurance by assuming the individual premium) their life insurance coverage. Please contact Human Resources for more information about life insurance benefits.

509 LONG-TERM DISABILITY

The Diocese provides long-term disability (LTD) benefits plan to help eligible employees cope with an illness or injury which results in a long-term absence from employment. LTD is designed to ensure a continuing income for employees who are partially or fully disabled and unable to work.

Employees in the following employment classifications are eligible to participate in the LTD plan:

- Regular full-time employees
- Regular part-time employees

Eligible employees may participate in the LTD plan subject to all terms and conditions of the agreement between the Diocese and its insurance carrier.

LTD benefits are offset with amounts received under Social Security or workers' compensation for the same time period.

Details of the LTD benefits plan, including benefit amounts, limitations and restrictions, are described in the Summary Plan Description provided to eligible employees. Contact Human Resources for more information about LTD benefits.

510 ANCILLARY PRODUCTS

- Critical Illness insurance
- Term Life insurance

- Accident insurance

Contact Human Resources for more information on the above products.

511 HIPAA POLICY

The Diocese is not covered by the requirements of the Health Insurance Portability and Accountability Act (HIPAA). However, since the Diocese does have health care plan(s) which are subject to HIPAA regulations, the Diocese will follow the HIPAA privacy and security provisions which apply to Protect Health Information (PHI) maintained by the Diocese. PHI is individually identifiable health information including demographic data relating to: the individual's past, present or future physical or mental health or condition; the provision of health care to the individual; or the past, present or future payment for the provision of health care to the individual. Individually-identifiable health information includes many common identifiers (e.g., name, address, birth date, Social Security number). All employees who have access to PHI will receive the appropriate training relating to HIPAA regulations. Any breach of privacy or confidentiality will be subject to disciplinary action. The Human Resource Director is designated as the HIPAA Compliance Officer (HCO). Any questions or concerns regarding HIPAA regulations should be referred to the HCO. All records governed by the HIPAA policy will be maintained for a period of six years, unless state law requires a longer period of retention. After the required retention period, the records will be destroyed according to the Diocese's record destruction policy.

600 GRIEVANCE PROCEDURE

601 PROBLEM RESOLUTION – GRIEVANCE PROCEDURE

The Diocese is committed to providing the best possible working conditions for its employees. Part of this commitment is encouraging an open and frank atmosphere in which any problem, complaint, suggestion or question receives a timely response from diocesan supervisors and management.

The Diocese strives to ensure fair and honest treatment of all employees. Supervisors, managers and employees are expected to treat each other with mutual respect. Employees are encouraged to offer positive and constructive criticism.

There are times when interpretation and application of diocesan policies and procedures may lead to differences among personnel. Two means are provided for resolving such differences:

601.1 Informal Review Process

When a dispute arises, the most efficient means of communicating is for the employee and immediate supervisor to engage in a thorough discussion of the matter. At times, discussion with other management personnel may help. Supervisors will act and advise the employee of any resulting decisions.

601.2 Formal Grievance Process

Step 1. The grievance must be presented in writing to the employee's immediate supervisor within 5 days of the incident's occurrence. The written grievance should include the facts related to the incident, diocesan policy or procedures involved, and the remedy sought.

Step 2. The supervisor will meet with the employee and provide the employee with a written decision that includes the reasons supporting the decision. The supervisor will also provide his or her own supervisor with copies of the grievance and the written decision.

Step 3. If the employee remains dissatisfied with the immediate supervisor's decision, he or she will notify the immediate supervisor in writing within 5 working days after receiving the decision. The immediate supervisor will then arrange a meeting between the employee and the next highest supervisor. The procedure outlined in *Step 2* above will be repeated, with the results and copies forwarded to the Director of Chancery Services and the Human Resource Director/Pastor.

If the employee remains dissatisfied with the decision reached in *Step 3*, he or she may notify the Human Resource Director and the Director of Chancery Services or Pastor, who will proceed as outlined in *Step 2*.

If the matter is then not able to be resolved, it will be directed to the Bishop of Helena. The Bishop will make the final decision, taking into consideration all documentation and information to this point.

700 ADDITIONAL EMPLOYEE INFORMATION

701 EMPLOYEE CONDUCT AND WORK RULES

To ensure orderly operations and provide the best possible work environment, the Diocese expects employees to follow rules of conduct to protect the interests and safety of all employees and the Diocese.

It is not possible to list all the forms of behavior considered unacceptable in the workplace. The following are examples of infractions of rules of conduct that may result in disciplinary action, up to and including termination of employment:

- Employees are expected to respect all of the moral and religious teachings of the Roman Catholic Church and not to engage in any personal conduct or lifestyle which would be at variance with or contrary to the policies of the Diocese, or the moral and religious teachings of the Roman Catholic Church;
- Theft or inappropriate removal or possession of property;
- Falsification of timekeeping records;
- Working under the influence of alcohol or illegal drugs;

- Possession, distribution, sale, transfer, or use of alcohol or illegal drugs in the workplace, while on duty, or while operating employer-owned vehicles or equipment;
- Fighting or threatening violence in the workplace;
- Boisterous or disruptive activity in the workplace;
- Violation of safety or health rules;
- Smoking in prohibited areas;
- Sexual or other unlawful or unwelcome harassment;
- Possession of dangerous or unauthorized materials, such as explosives or firearms, in the workplace;
- Excessive unexcused absenteeism or any absence without notice;
- Unauthorized use of telephones, mail system or other employer-owned equipment;
- Violation of personnel policies;
- Unsatisfactory performance or conduct.

702 ATTENDANCE AND PUNCTUALITY

To maintain a safe and productive work environment, the Diocese expects employees be reliable and punctual in reporting for scheduled work. Absenteeism and tardiness place a burden on other employees and on the Diocese. In the rare instances when employees cannot avoid being late to work or are unable to work as scheduled, they should notify their supervisor as soon as possible in advance of the anticipated tardiness or absence.

Poor attendance and excessive tardiness are disruptive. Either may lead to disciplinary action, up to and including termination of employment.

703 PERSONAL APPEARANCE AND BUSINESS CASUAL DRESS POLICY

Dress, grooming and personal cleanliness standards contribute to the morale of all employees and affect the business image the Diocese presents to visitors.

Guide to Business Casual Dressing for Work

This is a general overview of appropriate business casual attire. Items that are not appropriate for the office are listed, too. Neither list is all-inclusive and both are open to change. The lists describe what is generally acceptable as business casual attire and what is generally not acceptable as business casual attire.

No dress code can cover all contingencies so employees must exert a certain amount of judgment in their choice of clothing to wear to work. If there is uncertainty about acceptable, professional business casual attire for work, please ask your supervisor or consult Human Resources.

Slacks, Pants, and Suit Pants

Slacks that are similar to Dockers and other makers of cotton or synthetic material pants, wool pants, flannel pants, dressy capris, and nice looking dress synthetic pants are acceptable. Inappropriate slacks or pants include jeans, sweatpants, exercise pants, Bermuda shorts, shorts,

bib overalls, and any spandex or other form-fitting pants such as people wear for biking.

Skirts, Dresses, and Skirted Suits

Casual dresses and skirts, and skirts that are split at or below the knee are acceptable. Dress and skirt length should be at a length at which you can sit comfortably in public. Mini-skirts, sun dresses, beach dresses, and spaghetti-strap dresses are inappropriate for the office.

Shirts, Tops, Blouses, and Jackets

Casual shirts, dress shirts, sweaters, tops, golf-type shirts, and turtlenecks are acceptable attire for work. Most suit jackets or sport jackets are also acceptable attire for the office.

Inappropriate attire for work includes tank tops; midriff tops; shirts with potentially offensive words, terms, logos, pictures, cartoons, or slogans; halter-tops; tops with bare shoulders; sweatshirts, and t-shirts unless worn under another blouse, shirt, jacket, or dress.

Shoes and Footwear

Conservative athletic or walking shoes, loafers, clogs, sneakers, boots, flats, dress heels, and leather deck-type shoes are acceptable for work. Wearing no stockings is acceptable in warm weather. Flashy athletic shoes, thongs, flip-flops, and slippers are not acceptable in the office.

If clothing fails to meet these standards, as determined by the employee's supervisor, the employee will be asked not to wear the inappropriate item to work again. If the problem persists, the employee may be sent home to change clothes and will receive a verbal warning for the first offense. All other policies about personal time use will apply. Progressive disciplinary action will be applied if dress code violations continue.

704 COMPUTER AND E-MAIL USAGE

Computers, computer files, the e-mail system, internet access and software furnished to employees are diocesan property intended for business use. Employees should not use a password unknown to management, access a file or retrieve any stored communication without authorization.

The Diocese strives to maintain a workplace free of harassment and a workplace sensitive to the diversity of its employees. Therefore, the Diocese prohibits the use of computers, the e-mail system and the internet in ways that are disruptive, offensive to others, or harmful to morale.

For example, the display or transmission of sexually explicit images, messages and cartoons is not allowed. Other such misuse includes, but is not limited to, ethnic slurs, racial comments, off-color jokes, or anything that may be construed as harassment or showing disrespect for others.

E-mail may not be used to solicit others for commercial ventures, political causes, outside organizations, or other non-business matters.

The Diocese purchases and licenses the use of various computer software for business purposes and does not own the copyright to this software or its related documentation. Unless authorized by the software developer, the Diocese does not have the right to reproduce such software for use on more than one computer. Licenses are maintained and tracked by Information Services.

Employees are not allowed to bring or install software into diocesan /parish computers which is unauthorized by the Diocese.

Employees may only use software on local area networks or on multiple machines according to the software license agreements. The Diocese prohibits the illegal duplication of software and its related documentation.

Employees should notify their immediate supervisor, Information Services, or any member of management upon learning of violations of this policy. Employees who violate this policy will be subject to disciplinary action, up to and including termination of employment.

705 USE OF PHONE AND MAIL SYSTEMS

Employees are required to reimburse the Diocese for any charges resulting from their personal use of the telephone. Also, employees must reimburse parishes for any personal postage charges.

To ensure effective telephone communications, employees should always speak in a courteous and professional business manner. Please confirm information received from the caller and hang up only after the caller has done so.

706 CELL PHONE USAGE

The Diocese provides cellular telephones to some employees as a business tool. Cell phones are provided to assist employees in communicating with management and other employees, their clients, associates, and others with whom they may conduct business. Cell phone use is primarily intended for business-related calls. However, occasional, brief personal use is permitted within a reasonable limit. Cell phone invoices may be regularly monitored.

Employees may have access to a cell phone while in their cars and should remember that their primary responsibility is driving safely and obeying the rules of the road. Employees are prohibited from using cell phones to conduct business while driving and should safely pull off the road and come to a complete stop before dialing or talking on the phone.

Use of personal cell phones is discouraged, as it is disruptive to the workflow of the office. Personal cell phones should be turned off while at work. Personal cell phone use is permitted during breaks and lunch breaks.

As a representative of the Diocese, cell phone users are reminded that regular business etiquette employed when speaking from office phones or in meetings applies to conversations conducted over a cell phone.

707 USE OF EQUIPMENT/COMPANY PROPERTY

Equipment essential in accomplishing job duties is often expensive and may be difficult to replace. When using property, employees are expected to exercise care, perform required maintenance and follow all operating instructions, safety standards and guidelines.

Please notify the supervisor if any equipment, machines, or tools appear to be damaged, defective or in need of repair. Prompt reporting of damages, defects and the need for repairs could prevent deterioration of equipment and possible injury to employees or others. If there are any questions about an employee's responsibility for maintenance and care of equipment used on the job, please contact a supervisor.

The improper, careless, negligent, destructive or unsafe use or operation of equipment can result in disciplinary action, up to and including termination of employment.

Equipment owned by the Diocese will not be loaned or rented to a non-church entity.

708 PROFESSIONAL DEVELOPMENT

The Diocese recognizes the skills and knowledge of its employees are critical to the success of the organization. Professional staff members are expected to pursue professional growth.

Time off for study toward a degree can be a leave of absence with or without pay. Generally, the Diocese will not pay for degree programs of lay employees. Time off and compensation will be determined by length of employment, position, future growth potential and diocesan benefit derived.

Employees are encouraged to pursue professional growth. They are also encouraged to attend workshops, conventions and seminars to advance their knowledge, skills and ability to progress in employment. Employees may attend after obtaining approval from their supervisor.

709 BUSINESS TRAVEL EXPENSES

The Diocese will reimburse employees for approved, reasonable business travel expenses incurred while on assignments away from the normal work location. All business travel must be approved in advance by the immediate supervisor or Pastor.

Employees whose travel plans have been approved are responsible for making their own travel arrangements.

When approved, the actual costs of travel, meals, lodging and other expenses directly related to accomplishing business travel objectives will be reimbursed by the Diocese/parish/entity.

Employees are expected to limit expenses to reasonable amounts.

Expenses that generally will be reimbursed include the following:

- Airfare or train fare for travel in coach or economy class or the lowest available fare.
- Car rental fees, only for compact or mid-sized cars.

- Fares for shuttle or airport bus service, where available; costs of public transportation for other ground travel.
- Taxi fares, only when there is no less expensive alternative.
- Mileage costs for use of personal cars at the current IRS rate.
- Cost of standard accommodations in low to mid-priced hotels, motels, or similar lodgings.
- Cost of meals, no more lavish than would be eaten at the employee's own expense.
- Tips not exceeding 20% of the total cost of a meal or 10% of a taxi fare.
- Charges for telephone calls fax and similar services required for business purposes.
- Charges for one personal telephone call each day.

Employees who are involved in an accident while traveling on business must promptly report the incident to their immediate supervisor. Vehicles owned, leased, or rented by the Diocese may not be used for personal use without prior approval.

With prior approval, employees on business travel may be accompanied by a family member or friend, when the presence of a companion will not interfere with successful completion of business objectives. Generally, employees are also permitted to combine personal travel with business travel, as long as time away from work is approved. Additional expenses arising from such non-business travel are the responsibility of the employee.

When travel is completed, employees should submit completed travel expense reports to their supervisors for review within 30 days. Reports are to be accompanied by receipts for all individual expenses. **All business travel or meeting expenses must include detailed receipt(s) (not credit card summary receipts) for purchases. Included with any receipt(s) for purchased food must be a list of those who attended the meeting(s) anytime food is purchased with diocesan funds. Gas receipt(s) must include the purpose of the trip (ex. – ‘Deanery Meeting – Helena to Missoula and return’.)**

Employees should contact the business office for guidance and assistance on procedures related to travel arrangements, expense reports, reimbursement for specific expenses or any other business travel issues.

Abuse of this business travel expenses policy, including falsifying expense reports to reflect costs not incurred by the employee, can be grounds for disciplinary action, up to and including termination of employment.

710 VISITORS IN THE WORKPLACE

To provide for the safety and security of employees and the facilities at the Diocese, only authorized visitors are allowed in the workplace. Restricting unauthorized visitors helps maintain safety standards, protects against theft, ensures security of equipment, protects confidential information, safeguards employee welfare, and avoids potential distractions and disturbances.

All visitors should enter the Diocese at the main entrance and check in with the receptionist. Authorized visitors will receive directions or be escorted to their destination. Employees are responsible for the conduct and safety of their visitors.

If an unauthorized individual is observed on diocesan premises, employees should immediately notify their supervisor or, if necessary, direct the individual to the main entrance.

711 CRIMINAL/IMMORAL ACTIVITY

The Bishop, Director of Chancery Services or Pastor may impose disciplinary action, including termination, leave of absence, or suspension with or without pay, for an employee against whom formal charges have been filed for: the commission of a crime; violating moral turpitude; or being arrested or accused of same; pending the outcome of investigation or adjudication of innocence or guilt.

712 NON-DISCLOSURE

It is very important to the Diocese that confidential business information is protected. Confidential information includes, but is not limited to the following:

- Compensation/Payroll data
- Computer Process
- Computer Programs and Codes
- Donor Lists
- Financial Data and Information
- Technological Data

An employee may be asked to sign a non-disclosure agreement as a condition of employment. If an employee improperly uses or discloses confidential business information, the employee will be subject to disciplinary action, up to and including termination of employment and legal action.

713 EMERGENCY CLOSINGS

At times, emergencies such as severe weather, fires, power failures or earthquakes can disrupt diocesan operations. In extreme cases, these circumstances may require the closing of a work facility and employees will be notified.

In cases where an emergency closing is not authorized, employees who fail to report to work will need to contact their supervisor. They may request to take available leave time or time off without pay.

714 RETURN OF PROPERTY

Employees are responsible for all Diocese of Helena's property, materials, or written information issued to them or in their possession or control. All Diocese of Helena's property must be returned by employees on or before their last day of work.

715 RECYCLING

The Diocese supports environmental awareness by encouraging recycling and waste management in its business practices and operating procedures. This support includes a commitment to the purchase, use, and disposal of, products and materials in a manner that will best use natural resources and minimize any negative impact on the earth's environment.

The simple act of placing a piece of paper, can or bottle in a recycling container is the first step in reducing demand on the earth's limited resources. Success of this program depends on active participation by all. Employees are encouraged to make a commitment to recycle and be a part of this solution.

The Diocese encourages reducing and, when possible, eliminating the use of disposable products. Source reduction decreases the consumption of valuable resources through such workplace practices as:

- communication through computer networks with e-mail
- posting memos for all employees
- two-sided photocopying
- routing slips for reports
- eliminating fax cover sheets
- reusing paper clips, folders and binders
- turning off lights when not in use

Whenever possible, diocesan employees are encouraged to purchase products for the workplace which contain recycled or easily recyclable materials. Buying recycled products supports recycling and increases the markets for recyclable materials.

By recycling, the Diocese is helping to solve trash disposal and control problems facing all of us today.

Acknowledgement of Receipt of Diocesan Handbook and Policy to Report Wrong-Doing

The Diocesan personnel handbook and the Policy to Report Wrong-Doing have been prepared to provide our employees with a general understanding of our personnel policies, work rules and benefits. All employees are responsible for becoming familiar with our policies and procedures.

If you have any questions regarding the material in the handbook or the policy to report wrong-doing, please contact your supervisor or the Human Resources Director for clarification. The handbook should not be construed as an employment contract or agreement for employment for any specified period of time. The Diocese reserves the right to make changes to these policies at any time. When changes are necessary, we will provide you with amended pages for your handbook.

I acknowledge receipt of the company handbook, and
the Policy to Report Wrong-Doing as promulgated by Bishop on May 1, 2011:

Employee Name (Please Print)

Employee Signature

Date: _____