



Date: 3/7/2025

Location: Parish Of Christ The King

DIOCESAN SELF-INSURANCE SUPPORT CHECKLIST

This Diocesan Self-Insurance Support Checklist (“Checklist”) serves to help entities, who are *both* part of the Diocese as a legal entity and part of the diocesan self-insurance program, understand the resources and support offered to them to manage risk at their location. Diocesan policies, form agreements, and other legal documents are available on the Diocesan website under “Chancellor” then “Online Documents Library” (“Online Documents Library”).¹ Good stewardship of the material goods and persons entrusted to us incorporates the concerns of insurance, legal, human resources (“HR”), and child and youth protection (“CYP”). Our self-insurance program is a group effort, and the action or inaction of a single entity can affect the entire Church in eastern Oklahoma. Good accountability and diligent responsibility toward our temporal goods will help your entity and all our Catholic entities better proclaim the Gospel of Jesus in eastern Oklahoma.

1. What documents are available to help my Diocesan Entity?

There are many resources available to help our Diocesan Entities. A library of all active diocesan forms and policies is available at the Online Documents Library. The library contains various contracts, liability waivers, and insurance documents that can help the Diocesan Entity navigate common situations and manage risk. It is recommended that Diocesan Entities *not* write their own contracts, liability waivers, or other legal documents, but rather have recourse to the Online Documents Library. If a Diocesan Entity needs a document reviewed or drawn up for a specific situation, please contact the Office of the Chancellor for assistance.

2. Who is here to help my Diocesan Entity with insurance and general risk management?

There is a team of individuals who are here to help you with your insurance and general risk management.

Dcn. Harrison Garlick
Chancellor & In-House Counsel
Diocese of Tulsa
dcn.harrison.garlick@dioceseoftulsa.org

Tim O’Brien
Human Resources Partner
Diocese of Tulsa
tim.obrien@dioceseoftulsa.org

Donna Eurich
Director of Safe Environment & Loss Prevention
Director of Child & Youth Protection
Diocese of Tulsa
donna.eurich@dioceseoftulsa.org

Ben Winfrey
Area Vice President
Gallagher
ben_winfrey@ajg.com

3. How do I complete this Diocesan Self-Insurance Check List?

It is recommended the pastor or principal delegate the completion of this form, if possible, to the employee at their parish who is most familiar with the risk management practices of the Diocesan Entity. At a large entity,

¹ <https://www.dioceseoftulsa.org/online-documents-library>

that individual may need to consult others to adequately complete this form. An entity may mark “yes” to a question below on adherence to a form or policy *even if* the entity has not had the opportunity to apply such form, e.g., marking “yes” to following the *Diocesan Employee Handbook* even if the entity has no employees. The purpose is that the entity is aware of such a document and would apply it if the opportunity presented. This support checklist does not replace an understanding of or adherence to the cited policies but rather should help the entity track substantial compliance and the sources available to them.

General (Applicable to all Diocesan Entities)

- ☒ Yes ☐ No The *Diocesan Employee & Volunteer Driver Application* is completed and on file for all employees (regardless of whether they drive) and for any volunteers for do drive for the Diocesan Entity).
- ☒ Yes ☐ No The *Facilities Use Agreement for Independent Contractors Who Work with Minors* is used when hiring or permitting third parties to serve minors, e.g., coaches, music instructors, academic tutors, etc., to serve minors under our care.
- ☒ Yes ☐ No The *Rental Agreement for Third-Parties Hosting an Event at a Parish or School* is used when allowing third parties to host an event, e.g., wedding receptions, family gatherings, etc., that is not a ministry of the Diocesan Entity.
- ☒ Yes ☐ No The *Policy on Personal Gifts* memorandum is understood and adhered to when giving gifts to employees, clerics, or other agents of the Diocese.
- ☒ Yes ☐ No The *Naming Opportunities for Diocesan Facilities* memorandum is understood and adhered to when working with donors to name facilities.

Human Resources (Only if the Diocesan Entity has employees)

- ☒ Yes ☐ No The *Diocesan Employee Handbook* is followed and all employees of the Diocesan entity have signed it in Paycor.
- ☒ Yes ☐ No The current year Federal and Oklahoma Labor Law, Worker’s Compensation and OSHA posters are displayed in a prominent position in the workplace.
- ☒ Yes ☐ No The *Employment Application Form for At-Will Employment* is used when hiring new at-will employees (employees who are not under a contract, e.g., teachers).
- ☒ Yes ☐ No All full-time employees scheduled to work 30 or more hours per week have been offered the opportunity to elect Medical insurance.
- ☒ Yes ☐ No All full-time and part-time employees are included in Paycor for reporting purposes and no non-employees (i.e., independent contractors) are included in Paycor.²
- ☒ Yes ☐ No All employees have access to Paycor and have the ability to log-in and access the system.

Continues on next page.

² Including non-employees in PayCor could result in a Diocesan Entity being unnecessarily charged for Workers’ Compensation.

☐ Yes ☐ No Employee files are maintained for each employee either electronically or in hard copies. They should include things such as: Employment application, Job Offer Letter, Signed Job Descriptions, and Benefits Coverage Election forms (Note: I-9 documentation should be kept in a separate file).

General OSHA / Employee Safety (Applicable to all Diocesan Entities)

☐ Yes ☐ No The *Health & Safety Program for the Diocese of Tulsa* is understood and followed.

☐ Yes ☐ No If the Diocesan Entity has Automatic External Defibrillators (“AEDs”), they are utilized in accordance with the *Health & Safety Program for the Diocese of Tulsa*.

☐ Yes ☐ No The Diocesan Entity has made portable fire extinguishers available in each high-risk area according to OSHA standards³ and train a reasonable amount of personnel in their use.

☐ Yes ☐ No The Diocesan Entity has an emergency action plan for a fire evacuation, which includes maps for fire exits, clearly marked exits, and making employees aware of such plans and maps.⁴

☐ Yes ☐ No The Diocesan Entity has no known hazards on their campus (e.g., EXAMPLES) that would warrant Personal Protective Equipment (PPE). The Diocesan Entity will notify Office of Loss Prevention if this circumstance changes.

☐ Yes ☐ No The Diocesan Entity has maintenance employees who perform electrical work (e.g., rewriting an outlet). The Diocesan Entity will notify Office of Loss Prevention if this circumstance changes

☐ Yes ☐ No The Diocesan Entity has made reasonable efforts to inform its employees that they are to report work-place injuries and illnesses per the *Health & Safety Program for the Diocese of Tulsa*.

Child & Youth Protection (“CYP”) (Applicable to all Diocesan Entities and to be Completed and Signed by the Local Administrator)

☐ Yes ☐ No The website of the Diocesan Entity includes a link to the diocesan CYP webpage on the diocesan website. (Ref.I.2.1).⁵

☐ Yes ☐ No *Diocesan Quick-Reference Guide: Reporting Procedures for Sexual Abuse of a Minor or Vulnerable Adult* is displayed prominently in public places where people gather (Ref.I.2.2).

☐ Yes ☐ No All Employees and Covered Volunteers in VIRTUS are compliant with the CYP Requirements.

☐ Yes ☐ No Active Candidates with affirmative responses on the Background Questionnaire and/or who have a criminal record have been reviewed and approved by the Office of Child & Youth Protection (Ref. II.4.5, 5.2).

³ <https://www.osha.gov/laws-regs/regulations/standardnumber/1910/1910.157>

⁴ <https://www.osha.gov/laws-regs/regulations/standardnumber/1910/1910.38>

⁵ <https://www.dioceseoftulsa.org/diocesanpolicies>

☐ Yes ☐ No

Children and youth have undergone abuse prevention education (Ref. II.8.4).

☐ Yes ☐ No

Opt-out Letters for children's abuse prevention education are obtained and retained for each child whose parents refuse abuse prevention education (Ref. Safe Environment Audit: Annual Duties & Procedures II.2.2.F).

☐ Yes ☐ No

Abuse prevention training material is sent home to parents who opt-out their children from the education. Record of such is documented on the opt-out letter and a copy is retained for audit (Ref. Safe Environment Audit: Annual Duties & Procedures II.2.2.H).

☐ Yes ☐ No

Documentation of children's training is recorded in VIRTUS (Ref. II.8.5).

Child & Youth Protection USCCB Audit (Ref. Safe Environment Audit: Annual Duties & Procedures pages 21-23)

☐ Yes ☐ No

VIRTUS database is maintained and updated regularly for new users, active/inactive user status (Ref. II.10.3-4).

☐ Yes ☐ No

Data to complete the annual audit document is supplied to the OCYP in a timely manner.

☐ Yes ☐ No

Documentation in support of the data is retained in a secure place for future reference.

☐ Yes ☐ No

The name and contact information for the CYP Local Administrator for the Diocesan Entity is:

Name: _____ Telephone: _____ Email: _____

Signature : _____

Date: _____

General Policies (Parishes Only)

☐ Yes ☐ No

The *Annual Permission Form & General Release for Minors* is used for those in religious formation at my parish.

☐ Yes ☐ No

The *Guidelines for Sacramental Records & Reports for Parish Personnel* are followed for all sacramental records at my parish.

☐ Yes ☐ No

The pastor is aware that the various forms for the Deliverance Ministry are available on the Online Documents Library.

☐ Yes ☐ No

The parish has an OSHA-approved first aid kit located in each high-risk areas, i.e., central locations with concentrated populations.⁶

⁶ Health & Safety Program for the Diocese of Tulsa.

☐ Yes ☐ No

The parish has consulted the *Chancery Emergency Action Plan* and has its own parochial emergency plan in place.

General Policies (Diocesan Elementary Schools Only)

☐ Yes ☐ No

Meets the requirement to train at least twenty percent (20%) of full-time employees in first-aid *and* at least twenty-percent (20%) of employees per floor, as reasonable.⁷

☐ Yes ☐ No

Meets the requirement to train at least twenty percent (20%) of full-time employees in CPR *and* at least twenty percent (20%) of employees per floor, as reasonable.⁸

☐ Yes ☐ No

School has an Emergency Action Plan. It is recommended that plan be reviewed with each employee according to OSHA standards.⁹

Diocesan Entity Feedback (Optional)

I have completed this form or overseen its completion to the best of my knowledge and ability.

Signature of the Pastor

Signature of the Principal (if applicable)

Name of the Diocesan Entity

Date Signed

*Office of the Chancellor
Office of Safe Environment & Loss Prevention
Date: September 14, 2023*

⁷ *Health & Safety Program for the Diocese of Tulsa, citing OCCSAA Area F: Standard 4.*

⁸ *Id.*

⁹ <https://www.osha.gov/laws-regs/regulations/standardnumber/1910/1910.38>