

# SOUTHERN LOCAL SCHOOL DISTRICT TREASURER'S OFFICE

## Treasurer

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We welcome you as an employee of Southern Local School District. You have joined a team of professionals whose goal is to prepare, with community involvement, our students to meet the challenges of tomorrow by modeling excellence and teaching fundamental skills today.

The follow information is intended to provide you with information concerning Southern Local Schools Districts employment policies, employee responsibilities, and to provide a summarization of employee benefits that are available to you.

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## GENERAL INFORMATION

### NEW EMPLOYEE

As a new employee of Southern Local School District, you will receive a New Employee Packet for completion. This packet includes the following employment forms that **must be submitted** before you can be added to the payroll system:

- ✚ W2 Federal Tax Form
- ✚ State Tax Form
- ✚ Direct Deposit Form/Voided Check
- ✚ Retirement Forms (STRS or SERS)
- ✚ SSA-1945
- ✚ DRM Form-Division of Homeland Security
- ✚ I-9 Form (Proper Documents)
- ✚ Drug Test
- ✚ Medical, Vision, Dental, Life Form (If Applicable)

**\*\*All new certified employees must submit the following documentation to the Athens-Meigs Educational Service Center prior to employment. All certified employees must continue to submit documentation when additional hours/degrees are earned to ensure proper placement on the pay scale:**

- + College transcripts
- + Other district experience
- + State Teaching Certificate or License
- + BCI/FBI verification
- + PPST or NTE/Praxis Scores (Certified Staff)

## **PAYROLL PROCEDURES**

Employees are paid, per the payroll schedule, every other Friday; 26 times per year (unless the occasional payroll creep adjustment). Depending on whether you are a contracted employee or a time sheet employee, will determine when you will receive your first pay.

### **Calculations of Pay**

#### **Certified Staff**

Your salary amount is dependent on your degree and your number of qualified years of experience. With proof of both, you will be placed on the current salary schedule as adopted by the Board of Education and the SLEA. Your salary amount will be divided by 26 equal pays. This means you will be paid biweekly for a full year. Occasionally, the need arises for a payroll creep adjustment. This will be implemented as necessary with advanced notice given.

#### **Classified Staff**

Your hourly amount is dependent on your years of qualified experience. With proof of that experience, you will be placed on the current salary schedule as adopted by the Board of Education and OAPSE. From that, your salary amount is calculated and your salary amount will be divided by 26 equal pays. This means you will be paid biweekly for a full year. Occasionally, the need arises for a payroll creep adjustment. This will be implemented as necessary with advanced notice given.

### **Payroll Withholdings**

#### **Mandatory Withholdings**

- + Federal Income Tax
- + State Income Tax
- + City Income Tax
- + Medicare Tax

- ✚ Retirement-14% STRS or 10% SERS-Contributions are tax deferred-SLSD contributes 14% of your gross earning.
- ✚ Union membership dues, per contract, if hired as a regular employee-Southern Local Education Association or Ohio Association of Public School Employees

#### Voluntary Withholdings

- ✚ Employee Medical Insurance Contribution
- ✚ Life, Disability, and Additional Health Insurance
- ✚ Auto Insurance
- ✚ Annuities

### **EMPLOYEE KIOSK**

The employee Kiosk provides on-demand access for employees to manage:

- ✚ Leave requests
- ✚ Leave balances
- ✚ View pay slips
- ✚ Access personal information
- ✚ View/print W-2

Employees can access the Kiosk through the district website. Kiosk is located under the Forms and Links section of the website.

Please reference the employee Kiosk handout for instructions on its use.

### **Time Sheets**

Time sheet employees must have their time sheets signed by their supervisor; you will not be paid without supervisor approval. You must turn your time sheet into your supervisor by the deadline date and time indicated on the pay schedule in order to allow adequate time for their approval and transfer to the Treasurers office. If your time sheet is not received by the due date, you will not be paid until the following payroll date. Separate/special pays cannot be run for this situation. If you will be absent and cannot turn in your time sheet on time, it is your responsibility to notify your supervisor so that necessary arrangements can be made with the Treasurers office.

\*\*Employees paid from multiple pay sources (grant monies) must complete time and effort sheets per pay period. Employees paid from a single pay source (grant monies) must complete a single certification form every six months.

## Leave Requests

**\*\*ALL LEAVE REQUESTS ARE TO BE SUBMITTED USING EMPLOYEE KIOSK! PLEASE SEE EMPLOYEE KIOSK HANDOUT FOR INSTRUCTIONS.**

Employees can access the Kiosk through the district website. Kiosk is located under the Forms and Links section of the website.

## Supplemental Payout

Supplemental contracts will be paid out three times a year; during a Fall, Spring, and Summer pay date. Supplemental forms are available in the Treasurers office or on the district website.

**Please remember that all payroll data is due on the date specified on the payroll schedule.** All leave requests (KIOSK), professional leave requests (KIOSK), time sheets, substitute teacher forms, and any special payment forms are all needed in order to begin the next payroll. It is important that the “gathering” and “sending” of payroll data be viewed as a priority, as it takes a considerable amount of time to compute and input all the absences and payroll variances.

## Direct Deposit

All employees are required to receive their pay through direct deposit. You must complete a direct deposit authorization form and supply the Treasurers office with a voided check. You will receive your direct deposit notice by e-mail (Southern Local address) on the Thursday before payday. Direct Deposit notices are also available for viewing/printing in Employee Kiosk. Notify the Treasurer’s office immediately of any banking changes (routing or account numbers). **Please never close and account or change banks without first contacting the Treasurers office so that the transition may be made smoothly with no interruption in your pay.**

## Payroll Errors

We strive to make sure that errors do not occur, however, there are times when we do have to deal with this situation. Errors will be researched as they present and will be dealt with appropriately. The majority of errors will be corrected on the next scheduled pay.

## Employee Data Changes

Employees are responsible to report any personal data changes to the Treasurers office. Data change forms are available in the Treasurers office and on the district website. Data changes can also be submitted using Employee Kiosk. It is very important that we have your current personal data and contact information on file.

Changes to personal information for insurance purposes need to be completed on forms provided by the individual insurance companies. Employees must request these change forms from the Treasurers office.

## **EMPLOYEE BENEFITS**

### **Medical Benefits**

Anthem BlueCross BlueShield is your provider. The board pays 88% and the employee pays 12% of the premium. You can obtain a list of providers and/or verify if your provider participates at the following website or phone number:

[www.anthem.com](http://www.anthem.com) or call Member Services at 1-833-639-1634.

Reference your Anthem benefits booklet for additional information regarding your benefits.

### **2022-2023 Employee Health Insurance Rates**

#### **PPO 500/1,000**

Single	\$139.55 per month
Family	\$309.61 per month

#### **HDHP**

Single	\$121.86 per month
Family	\$270.38 per month

**\*\*New hires.....Further education will be provided regarding medical benefits**

### **Prescription Drug Coverage**

Prescription drug benefit is provided by Anthem BlueCross Blue Shield Rx. You can find out more about their services by calling Rx Provider Services at 1-833-267-2133 or viewing the website [www.anthem.com](http://www.anthem.com).

## **Vision Benefits**

VSP is the districts vision insurance carrier. Your on-line gateway to benefit information is [www.vsp.com](http://www.vsp.com). Vision Benefits are 100% board paid.

## **Dental Benefits**

Delta Dental is the district's plan name. The plan sponsor is the South Eastern Ohio Voluntary Education Cooperative and is contracted with Delta Dental. Your on-line gateway to benefit information is <http://www.deltadentaloh.com>. Dental benefits are 100% board paid.

## **Life Insurance**

American United Life Insurance Company (AUL), an OneAmerica company is your term life and voluntary life insurance provider. Your on-line gateway to benefit information is [www.oneamerica.com](http://www.oneamerica.com). Term life benefits are 100% board paid.

The Anthem Benefits Summary and links to employee benefits can be found in the Treasurers section on the district website.

## **Employee Benefit Enrollment Requirements**

New hires will receive enrollment applications upon hire. The effective date of coverage for health, dental, vision, and life is the first of the month following their start date. If an employee elects to not participate in the benefit plans, written notification is required by August 31<sup>st</sup> of each year that insurance is being waived. An employee's next opportunity to enroll in a medical plan will be during the annual open enrollment (Month of November) of each year, or upon the employee's change in family status. Open enrollment for dental and vision is the month of June, or upon the employee's change in family status. Please notify the Treasurer's office of any change in family status; changes must be made within 30 days after the qualifying event.

If you have any questions in regards to your benefits, please feel free to contact your school, the Vaughan Agency and/or Schenwendeman Agency, Inc. at:

Vaughan Agency 740-992-9784  
Schwendeman Agency 740-373-6793

## Personal/Sick/Vacation Leave

### Certified Staff

- ✚ Three personal leave days per school year are granted. Two unused personal leave days can be carried over into the following year. Unused personal leave days, or any increment, not carried over shall be converted to sick leave days. Unless the bargaining unit member notifies the Treasurer in writing by June 15th, unused personal leave days shall be converted to sick leave.
- ✚ Fifteen sick leave days with pay per year at the rate of one and one-quarter days per month are granted, with the accumulative days being 260 days. New teacher will be granted five days of sick leave credit with written request.

### Classified Staff

- ✚ Three personal leave days per year are granted. Two unused personal leave days can be carried over into the following year.
- ✚ Fifteen sick leave days with pay per year at the rate of one and one quarter days per month are granted, with the accumulative days being 260 days
- ✚ All regular twelve month employees shall receive vacation in accordance with the following schedule:

1-8 years of service	2 weeks
9-16 years of service	3 weeks
17-24 years of service	4 weeks
25 years +	5 weeks

\*\*There must be twelve consecutive months of service before vacation will be granted.

\*Please reference the appropriate agreement for further clarification on employee benefits.

## PURCHASING PROCEDURES

### Placing an order without a Purchase Order

- ✚ According to the Ohio Revised Code Section 5705.41 (D) (1), the Treasurer is required to certify that adequate revenues are available to pay every purchase order. By signing a purchase order, the Treasurer is entering the District into a legal contract. This legal contract is approved for specific items and a specific amount.
- ✚ The Treasurer of the Board of Education has the authority to sign a fiscal certificate allowing a purchase order to be issued after an order is placed. This fiscal certificate states that the funds were available at the time the order was

placed and the Treasurer would have approved the purchase order, if processed correctly. The Board of Education must authorize the Treasurer to sign the fiscal certificate. A record of all incidences pertaining to orders being placed without approval is kept at the Administration Office and is viewed annually by the Auditor of State and periodically by the Board of Education.

✚ If any order is placed without a purchase order, all documentation will be returned to the employee to correct. It will be the employee's responsibility to submit the correct documentation to rectify this error. If an employee places an order without a purchase order, the following action will be taken:

FIRST OFFENSE:                      A warning memo will be sent to the employee.

SECOND OFFENSE:                    The employee is personally responsible for payment.

The following procedure for submitting and processing a purchase request must be followed to ensure compliance with State requirements and Board policy. A requisition must be completed for every purchase request. Requisitions for department needs must be made or approved by the building Principal and forwarded to the Superintendent for processing. **Please allow two weeks processing time for each order.**

### **Requisitioner**

Before requesting any supplies, equipment, or subscription renewals, determine that the desired material is not in stock and cannot be borrowed from another teacher. If not, proceed as follows:

- A. Obtain a purchase requisition form from the Principal.
- B. Select "BEST" price-from vendor quotes
- C. Complete all areas of the purchase order by indicating the following:
  1. Desired vendor, including address and phone number
  2. Name and address of site items are to be delivered
  3. Date requested
  4. Requested By
  5. Quantity, unit, description, unit price, and total amount of purchase
  6. Whether price is actual, catalog, or approximate, and **include shipping charges if applicable**
  7. Your building, phone number, and the subject or grade in which the material will be used
  8. Sign and date the request and obtain approval by Principal
  9. For your records, make a copy of all paperwork



When paper work has been completed and a purchase order is created, a copy of the purchase order will be returned to the requisitioner for ordering purposes. **Allow two weeks processing time.**

### **Building Principal**

- ✚ Upon receipt of a purchase requisition, determine whether the material should have been included in a supply bid. Inform staff members of the normal purchasing procedures. Then proceed as follows:
  - A. Ascertain the material cannot be borrowed from another building Principal
  - B. Determine whether it is within the budget of the school.  
(Changes in budget items can be made if the line amount is not increased.)

### **CREDIT CARD**

**\*\*ONLY ADMINISTRATORS WILL HAVE ACCESS TO THE CREDIT CARD AND WILL BE RESPONSIBLE FOR UNAUTHORIZED CHARGES\*\***

- ✚ Follow steps for requisitions. A purchase order will need to be issued in advance of your purchase. Upon receipt of the purchase order, sign out the credit card at the Treasurer's office. When purchase is complete, return card and sign sheet as returned. Give purchase receipts to Accounts Payable person. The receipts must be signed by the employee along with the purchase order issued for that purchase. Finance charges may be added to the billing statement for a delay of payment. If payment cannot be made on time as a result of a lost receipt on the employee's behalf, the employee's account will be responsible for payment of the finance charge. This type of billing statement is very time-sensitive.
- ✚ The credit card is to be used only when there are time restraints or the company does not accept purchase orders.
- ✚ The district is limited on the number of cards available. Therefore, it is necessary to return the cards as soon as possible. The card should only be in the employee's possession for two business days.

### **MERCHANDISE RECEIVED**

Orders must be shipped to either the elementary or high school depending on where the employee works. The employee and building principal will check the order to verify accuracy. All invoices and documentation, such as receipts or packing slips, should be dated, initialed and forwarded to Accounts Payable at the Treasurer's office. Please note if the order is complete or has been partially filled. Also, please indicate company name on shipping forms, if not shipped directly from company.

In the event of a duplicate shipment or in which items need to be returned, it is the employee's responsibility to return the shipment. Most companies require prior return authorization and will be the employee's responsibility to obtain. Remember that it is very important to notify the Treasurer's office. Please contact the Treasurer's office in advance if the purchase order, check, or any other materials need to be picked up. This will ensure that the items are available and ready to be picked up.

If an employee has requisitioned items from a local vendor, the Treasurer's office will assume the items will be picked up. An original, signed copy of the purchase order will be sent to the employee. The employee should take the purchase order or the purchase order number to the vendor.

If the company keeps the original purchase order, please request a copy for your records to track amount spent. This will help the employee know when the funds have expired on that purchase order, when using a blanket purchase order.

If the invoice or receipt is given to the employee, please forward it to the Treasurer's office. When the Treasurer's office does not receive the cash register receipt with the detail of items, the employee will be responsible for payment. The invoice/receipt should include the purchase order number, signature payment approval, and any other pertinent information.

All employees should remind all businesses of the school system's tax exemption status. The Southern Local School District is exempt from state and federal taxes. A tax exemption certificate is available from the Treasurer's office.

Once the Treasurer's office receives the invoice and notification of receipt of items on the purchase order, the purchase order will be processed for payment. If there is a problem with a purchase order, the Treasurer's office must be notified immediately so the payment will be stopped until the problem is resolved.

## PROFESSIONAL MEETINGS

- ✚ In order to attend a professional meeting, a "Professional Meeting Request" form must be submitted (KIOSK) before the date of the meeting and **a requisition must be completed for all professional meeting expenses**. Remember to include all charges for out of town trips such as taxi, parking, toll charges, etc. on the form. Upon approval, the employee must inform your building principal to report off and request a substitute, if needed.
- ✚ A completed "Travel Expense" form must be submitted following a professional trip to be reimbursed for expenses. Mileage requires a Google map to be attached. All itemized receipts must be stapled to this form. Meal receipts must be itemized. Reimbursement will not be made on non-itemized receipts or for lost receipts.
- ✚ **Currently, the mileage rate is \$.625 per mile (7/1-12/31/2022). Tips/gratuities will not be reimbursed.**

## NEOLA

All Southern Local School District's Bylaws and Policies, Administrative Guidelines, and Forms are available for review on the district website. All employees are encouraged to review and become familiar with all policies. Board Policy (NEOLA) are available on the District's website at [www.southernlocalmeigs.org](http://www.southernlocalmeigs.org)

## PUBLICSCHOOL WORKS

The Southern Local School District is fully committed to the health and safety of all faculty, staff, students and visitors. The district believes that occupant safety and a healthy environment are important factors in the functioning of the total educational program, making the district schools a better place to learn and work, creating positive relationships with the district customers and stakeholders, and preparing students to be responsible citizens and to work safely in the community.

As part of the district's ongoing program to meet this safety commitment, comply with regulatory requirements, and contain health care costs, we have implemented a comprehensive safety and regulatory compliance program called PublicSchoolWORKS. This program has been built by public school officials specifically for public schools. This system improves our health and safety programs and thereby helps us gain greater control of our healthcare costs – which means more dollars available in the district for new benefit, safety and educational programs.

PublicSchoolWORKS provides integrated programs and services that minimize environmental, health and safety risks to our district community, including:

- ✚ Online reporting of employee accidents, blood/chemical exposures, safety hazards, and more.
- ✚ Online staff safety training.
- ✚ Online access to district safety plans, procedures and forms.
- ✚ Employee telephone access to Material Safety Data Sheets and chemical safety specialists.
- ✚ And much more!

PublicSchoolWORKS helps us:

- ✚ Drive down our Workers' Compensation costs.
- ✚ Keep our employees at work.
- ✚ Lower our healthcare expenses.
- ✚ Reduce our time and effort to complete required tasks.
- ✚ Sustain an effective safety and regulatory compliance program.

Employees can access the PublicSchoolWORKS through the district website. PublicSchoolWORKS is located under the Forms and Links section of the website.

## FMX

FMX provides easy-to-use facility management software.

- ✚ Maintenance Management
- ✚ Work Order Management
- ✚ Technology Ticketing
- ✚ Transportation Scheduling

## PUBLIC RECORDS POLICY

### 8310 - PUBLIC RECORDS

The Board of Education is responsible for maintaining the public records of this District and to make such records available to residents of Ohio for inspection and reproduction in strict adherence to the State's Public Records Act.

The Board will utilize the following procedures regarding the availability of public records. "Public records" are defined as any document, device, or item, regardless of physical form or characteristic, including an electronic record created or received by or coming under the jurisdiction of the Board or its employees, which serves to document the organization, functions, policies, decisions, procedures, operations, or other activities of the District. "Electronic record" is defined as a record created, generated, sent, communicated, received, or stored by electronic means. "Public records" do not include medical records, documents containing genetic information, trial preparation records, confidential law enforcement investigatory records, records the release of which is prohibited by State or Federal law, and any other exceptions set forth in R.C. 149.43. Confidential law enforcement investigatory records, medical records, and trial preparation records are as defined in R.C. 149.43. No public records, including, but not limited to personnel records, personnel files, or staff directories or student records shall include the actual/confidential addresses of students, parents, or employees who are participating in the Safe at Home/Address Confidentiality Program administered by the Secretary of State. Such public records and student records shall only contain the address designated by the Secretary of State to serve as the student's, parent's or employee's address.

The District's public records shall be organized and maintained so that they are readily available for inspection and copying. As such, public records will be available for inspection during regular business hours, with the exception of published holidays. The District's public records shall be promptly prepared and made available for inspection. A reasonable period of time may be necessary due to the volume of records requested, the proximity of the location where the records are stored, and/or for the District to review and redact non-public/confidential information contained in the record. Upon request, a person may receive copies of public records, at cost, within a reasonable period of time.

Each request for public records shall be evaluated for a response at the time it is made. Although no specific language is required to make a request, the requester must minimally identify the record(s) requested with sufficient clarity to allow the District to identify, retrieve, and review the record(s). If a requestor makes an ambiguous or overly broad request or has difficulty in making a request for inspection or copies of public records such that the District's Record Officer cannot reasonably identify what public records are being requested, the District Record Officer or designee may deny the request but shall provide the requestor with an opportunity to revise the request by informing the requestor of the manner in which records are maintained by the District and accessed in the ordinary course of business. The request for records need not be in writing. The requestor shall not be required to provide his/her identity or the intended use of the requested public record(s).

At the time of the request, the records custodian shall inform the person making the request of the estimated length of time required to gather the records. All requests for public records shall be satisfied or

acknowledged by the District promptly following the receipt of the request. If the request for records was in writing, the acknowledgement by the District shall also be in writing.

Any request deemed significantly beyond routine, such as seeking a voluminous number of copies and/or records, or requiring extensive research, the acknowledgement shall include the following:

- A. an estimated number of business days necessary to satisfy the request
- B. an estimated cost if copies are requested
- C. any items within the request that may be exempt from disclosure

The Superintendent is authorized to grant or refuse access to the records of this District in accordance with the law. Any denial, in whole or in part, of a public records request must include an explanation, including legal authority. If portions of a record are public and portions are exempt, the exempt portions are to be redacted and the rest released. If there are redactions, the requester must be notified of the redaction and/or the redaction must be plainly visible, and each redaction must be accompanied by a supporting

explanation, including legal authority. If the request for records was in writing, the explanation shall also be in writing.

A person may obtain copies of the District's public records upon payment of a fee. A person who requests a copy of a public record may request to have said record duplicated on paper, on the same medium on which the District keeps the record, or on any other medium in which the custodian of records determines that said record reasonably can be duplicated as an integral part of normal operations. A person who requests a copy of a public record may choose to have that record sent to him/her by United States mail or by other means of delivery or transmission provided the person making the request pays in advance for said record as well as the costs for postage and the mailing supplies.

Those seeking public records will be charged only the actual cost of making copies.

There is no charge for documents e-mailed.

Documents in electronic mail format are records as defined by the Ohio Revised Code when their content relates to the business of the District (i.e., they serve to document the organization, functions, policies, decisions, procedures, operations, or other activities of the District). E-mail shall be treated in the same fashion as records in other formats and shall follow the same retention schedule.

Records in private e-mail accounts are subject to disclosure if their content relates to public business, and all employees or representatives of the District are responsible for retaining e-mails that meet the definition of public records and copying them to their District e-mail account(s) and/or to the records custodian.

The records custodian shall treat such e-mail/records from private accounts as records of the District. These records shall be filed appropriately, retained in accordance with the established schedules, and made available for inspection and copying in accordance with the Public Records Act.

Private e-mail, electronic documents, and documents ("private records") that do not serve to document the District's organization, functions, policies, decisions, procedures, operations or other activities are not public records. Although private records do not fall under Policy 8310 or AG 8310A, they may fall under Policy 8315 - "Information Management" and/or AG 8315 - "Litigation Hold Procedure".

No public record may be removed from the office in which it is maintained except by a Board officer or employee in the course of the performance of his/her duties.

Nothing in this policy shall be construed as preventing a Board member, in the performance of his/her official duties, from inspecting any record of this District, except student records and certain confidential portions of personnel records.

A School District Records Commission shall be established consisting of the Board President, Treasurer, and Superintendent of Schools in accordance with law to judge the advisability of destroying District records. Record retention schedules shall be updated regularly and posted prominently. The Commission shall meet at least once every twelve (12) months.

The Superintendent shall provide for the inspection, reproduction, and release of public records in accordance with this policy and with the Public Records Law. Administrative guidelines shall be developed to provide guidance to District employees in responding to public records requests. The Superintendent shall require the posting and distribution of this policy in accordance with statute.

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Forms, reports, and other important information are available on the District's website, Treasurer's section: [www.southernlocalmeigs.org](http://www.southernlocalmeigs.org)

If you have any questions regarding the procedures provided to you feel free to contact the Treasurer's office at 740-949-2667.