

**Procedures and Policies Meeting**  
**October 3, 2019, 9:30 am Ed House**

**Agenda**

Topics of Discussion:

1. Purchasing: Toni Russo
  - New forms and updated policies
  - Hit the pause button
2. Account Codes: Marcy Moskowitz & Rochelle Retleff
  - Codes for overtime- Substitute/Temporary Employees
3. Facilities & Operations: Frank Stefanelli
  - Purchasing furniture, rugs and equipment
  - Work orders
4. Transportation: Sergio Alfonso
  - Updates to schedules for new student or address changes
  - Communication of new information procedures
5. Technology: Ron Velez
  - Infinite Campus
  - Copiers
6. Open Forum:
  - Discuss issues, problems and topics for upcoming meetings
  - Next meeting date: Thursday, December 5, 2019

Policy and Procedure Meeting

October 3, 2019, 9:30 am Ed House

SIGN IN SHEET

	<u>NAME:</u>	<u>SIGNATURE</u>
1.	Dnyllis Paul	Dnyllis Paul
2.	Eilish Buckley	Eilish Buckley
3.	FRANK STEFANELLI	Frank Stefanelli
4.	Grace Giuffre	Grace Giuffre
5.	Barbara Penasso	B Penasso
6.	Deana Guarino	D Guarino
7.	Jessica Torres	J Torres
8.	Monica Alvarez	M Alvarez
9.	Michelle Bartley	Michelle Bartley
10.	Sergio Alfonso	Sergio Alfonso
11.	Emilia Silva	Emilia Silva
12.	Maray Moskowitz	M Moskowitz
13.	Samantha Grubbs	S Grubbs
14.	Milagros Vargas	M Vargas
15.	Rochelle Betteff	Rochelle Betteff
16.	Patricia Smith	P Smith
17.	Pat Mincey	Pat Mincey
18.	Ruth Ahlers	R Ahlers
19.	Connie Bellantoni	Connie Bellantoni
20.	SANDRO SANSOTTA	S Sansotta
21.	Therelle Adamak	Therelle Adamak
22.	Johana Mendez	Johana Mendez
23.	Eric Beldoch	E Beldoch
24.	Marcia A. Denais	Marcia A Denais
25.	Ron Valez	Ron Valez
26.	Debbie J Hand	D Hand
27.	Jackie Manning Campbell	J Campbell
28.	Maggie D'Acroppe	M D'Acroppe
29.	Angelina Garbutt	A Garbutt
30.	Mercedes F. Ruiz	M Ruiz
31.	Kathy Marte	Kathy Marte
32.	Jody TORO	J Toro

Brian Cordelle

B. Blum

Laura Leon Zagaya  
Linda Z...

## **TOPICS OF DISCUSSION:**

Purchasing: Toni Russo

### New forms and updated policies:

All the forms on my webpage have been updated to include the new school year information or any changes. Please update your desktop or hand out forms accordingly. We are still receiving the outdated forms. All new/updated policies will be posted on my webpage upon acceptance by the Board of Education.

Some changes to be noted:

- Purchase order increase/decrease forms. Increases/decreases have a total limit of \$5,000.00 per purchase order for the year. If you need to increase a purchase order above this limit you will be required to enter a new purchase order.
- Meals & Refreshments Documentation Form. All meal and refreshment expenses must be appropriately documented, including the date, purpose of the meeting and the group in attendance and submitted with the requisition prior to the event/meeting. Please refer to policy #9170 Meals & Refreshments for examples of authorized expenditures.
- Procedure Manual Updates are posted on my webpage under Business Office Procedures Manual. All insertable updates can be printed out and inserted in your manual. Each new updated page notes a tab and page number.
- Templates for Bids, RFPs, RFQ's and Contracts have been lawyer approved and updated for 2019.

### Hit the pause button...

When you are entering a requisition, prior to you hitting submit take a minute to look over your requisition making sure you have a complete entry. If you submit a requisition without the proper backup, missing contract numbers or quotes, your requisition will be disapproved, therefore delaying the order. If the amount of your requisition and quotes do not equal or if the total aggregate amount is over \$20,000.00, your requisition will be disapproved. This is a reminder to follow your purchasing policy and guidelines.

You know what is needed to have a complete requisition, if you have a question, call us, we are here to help. Don't place a requisition without the proper paperwork needed to support it. It only takes a couple of seconds to proof your requisition. It may take up to two weeks, depending on approvals, for the corrected requisition to be converted.

So, remember to hit pause before you hit submit.

**WHITE PLAINS CITY SCHOOL DISTRICT**  
**PURCHASE ORDER INCREASE/DECREASE FORM**

**THIS FORM MUST BE USED FOR ALL INCREASES/DECREASES AND SHOULD ONLY BE USED FOR UNANTICIPATED CHANGES IN SHIPPING CHARGES, UNIT PRICE, ETC. Depending on the circumstance, \$5,000.00 will be the limit before a new purchase order will be required.**

Instructions: This is a fillable form. Fill out the form completely; print out the form and have Principal/Administrator sign it using any other color ink but black. Email signed form to Paula Christensen using your email account. Do not use the Xerox copier. Allow time to process. You will receive an email when the increase/decrease is completed. Please note that the payment process may be delayed due to the purchase order needing additional funding. If you will require additional funding, please process a budget modification prior to the purchase order increase.

P.O. # \_\_\_\_\_

VENDOR NAME: \_\_\_\_\_

INCREASE: \$ \_\_\_\_\_

\_\_\_\_\_

DECREASE: \$ \_\_\_\_\_

Account Code: \_\_\_\_\_

Please verify that there are funds available in your account code. Yes \_\_\_\_\_ No \_\_\_\_\_

Detailed explanation required:

Change in Unit Cost \_\_\_\_\_ Shipping Charges \_\_\_\_\_

Other:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Requested By: \_\_\_\_\_ Date: \_\_\_\_\_

Approved By: \_\_\_\_\_ Date: \_\_\_\_\_

Purchasing Agent Authorization: \_\_\_\_\_ Date: \_\_\_\_\_

## 9170 MEALS AND REFRESHMENTS

The Board of Education recognizes that, occasionally, it may be appropriate to provide refreshments and/or meals at district meetings or events, which are being held for a district or educational purpose. Any expenditure on such refreshments and/or meals must be approved in advance by the appropriate Administrator. Meal requests may be approved when:

- officers and/or employees of the district will be prevented from taking time off for food consumption due to a pressing need to complete the business at hand;
- the district is faced with business of an immediate nature and meetings of district employees are essential at mealtime;
- the district wishes to recognize the services provided by volunteers or other unsalaried members of the district (in such cases, however, only the meals of those being recognized may be reimbursed and the cost of the meals must be reasonable).

An example of an authorized expenditure would be refreshments and/or meals for staff assigned to participate in assessment day grading of standardized tests.

Purchase orders must be used for the purchase of all meals and refreshments and must be placed prior to the meeting or event. All expenses must be appropriately documented, including the date, purpose of the meeting and the group in attendance, and submitted to the district's Business office for the purposes of audit and possible reimbursement.

Ref: NY Constitution, Art. VIII, §1 (constitutional prohibition against gifts)  
Education Law §2118  
Ops. St. Compt. 77-667; 79-522; 82-66; 82-213 82-298; 83-57; 98-2

Adoption date: September 17, 2018





# White Plains City School District

## MEALS AND REFRESHMENTS DOCUMENTATION FORM

All meal and refreshment expenses must be appropriately documented, including the date, purpose of the meeting and the group in attendance, and submitted to the District's Business Office for the purposes of audit and possible reimbursement. Any expenditure on refreshments and/or meals must be approved in advance by the appropriate Administrator. Please fill out all information on the below form, have your Administrator sign the form and submit with your requisition. Purchase orders must be used for the purchase of all meals and refreshments and must be placed prior to the meeting or event. Please refer to policy #9170 Meals and Refreshments for examples of authorized expenditures.

DATE: \_\_\_\_\_

TIME: \_\_\_\_\_

LOCATION: \_\_\_\_\_

DEPARTMENT: \_\_\_\_\_ CONTACT PERSON: \_\_\_\_\_

PURPOSE: \_\_\_\_\_  
\_\_\_\_\_

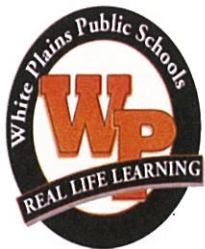
LIST OF ATTENDEES:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

ADMINISTRATORS SIGNATURE: \_\_\_\_\_

ADMINISTRATORS NAME: \_\_\_\_\_ DATE: \_\_\_\_\_

\*\*\*This form must be signed and submitted with your requisition.



## White Plains City School District

### Employee Transfer Form

Date: \_\_\_\_\_

Employee Name: \_\_\_\_\_ Employee #: \_\_\_\_\_

Current Position: \_\_\_\_\_ Current Location: \_\_\_\_\_

Current Grade/Subject: \_\_\_\_\_

Certification Area: \_\_\_\_\_

Transfer: Current Employee Changing (Position, Department and/or Location)

New Position: \_\_\_\_\_ New Department: \_\_\_\_\_

New Location: \_\_\_\_\_ Person Being Replaced: \_\_\_\_\_

Status: (Check one)

\_\_\_\_\_ Full time \_\_\_\_\_ Part Time

Effective Date \_\_\_\_\_

Notes: \_\_\_\_\_

Submitted by: \_\_\_\_\_ Title: \_\_\_\_\_

#### *Human Resources Internal Notes*

Step/Level: \_\_\_\_\_ Salary: \_\_\_\_\_ Hourly Rate: \_\_\_\_\_ Budget Code: \_\_\_\_\_

Notes: \_\_\_\_\_

Approved by \_\_\_\_\_ Date \_\_\_\_\_

*Submit this completed form to Scott Pepper, Assistant Superintendent of Human Resources via email and/or the Human Resources at the Education House prior to an employee transfer being made. Once approved by Assistant Superintendent for HR, payroll will receive this form.*

User Requires: (Check all that apply)

\_\_\_\_ Email Account \_\_\_\_ nVision Access \_\_\_\_ Aesop \_\_\_\_ MLP \_\_\_\_ GNC

Completed By: \_\_\_\_\_ Title: \_\_\_\_\_

July 10, 2019

## 2019-2020 Calendar of Dates for Claims Auditor

Accounts Payable check runs & Audit dates	Send claims by	Notes
7/11/19 & 7/12/19		July 4th Thursday
7/23/19 & 7/24/19	7/19/2019	
8/6/19 & 8/7/19	8/2/2019	
8/20/19 & 8/21/19	8/16/2019	
9/4/19 & 9/5/19	8/30/2019	Labor Day 9/2
9/17/19 & 9/18/19	9/13/2019	
10/3/19 & 10/4/19	9/27/2019	Rosh Hashanah, 9/30, 10/1 Monday and Tuesday
10/15/19 & 10/16/19	10/11/2019	Yom Kippur, 10/9 Wednesday Columbus Day, 10/11
10/29/19 & 10/30/19	10/25/2019	Veterans Day 11/11
11/13/19 & 11/14/19	11/8/2019	
11/26/19 & 11/27/19	11/22/2019	Thanksgiving 11/28 & 11/29
12/18/19 & 12/19/19	12/13/2019	
1/2/20 & 1/3/20	12/31/2019	
1/14/20 & 1/15/20	1/10/2020	
1/28/20 & 1/29/20	1/24/2020	Martin Luther King, 1/20
2/11/20 & 2/13/20	2/7/2020	Presidents Day, 2/17
2/26/20 & 2/27/20	2/19/2020	
3/11/20 & 3/12/20	3/6/2020	
3/26/20 & 3/27/20	3/24/2020	
4/14/20 & 4/15/20	4/9/2020	Good Friday 4/10
4/28/20 & 4/29/20	4/24/2020	
5/13/20 & 5/14/20	5/8/2020	
5/27/20 & 5/28/20	5/22/2020	Memorial Day 5/25
6/11/20 & 6/12/20	6/8/2020	
6/24/20 & 6/26/20	6/19/2020	



# WHITE PLAINS CITY SCHOOL DISTRICT INFORMATION ON BOCES PRINT CENTER USAGE & PROCEDURES SEPTEMBER 2019

**BOCES print center** has requested that we remind staff of the following:

- If you do not have an electronic file of your document, please use the scanners in your buildings to create a pdf to attach to your request.
- **NO DROP-INS TO THE BOCES PRINT CENTER**
- **All requests should be in Black & White and 2-sided, when possible. Color prints and binding should be the rare exception.**
- The administrator in the building is responsible for **approving color print jobs** sent to the BOCES print shop. Forms will be used to support payment of the monthly charges from BOCES. \*
- If it is determined that copies must be made, **THE FOLLOWING CRITERIA SHOULD BE USED WHEN SENDING JOBS TO THE BOCES PRINT CENTER:**
  - Multi-page documents greater than **300 copies**
  - Multi-page documents greater than **50 pages**
- Jobs that require folding, such as playbills, program guides, etc.
- Jobs that require documents to be bound, such as math workbooks, handwriting workbooks, budget books, etc.

## **THE FOLLOWING CRITERIA SHOULD BE USED WHEN DETERMINING IF A JOB SHOULD BE SENT TO THE BOCES PRINT CENTER:**

- Turnaround time – **BOCES PRINT CENTER REQUIRES 4 DAYS TO COMPLETE SIMPLE JOBS AND 5-7 DAYS FOR COMPLEX PRINT JOBS.**
- Requester must complete the LHRIC Copy Service Print Request form found on the district website under Business Office; Copy Center.
- **COPYRIGHT LAW Board Policy 6160:** please see attached Board of Education policy to ensure compliance.

\* Requests from the PTA should be routed to the Purchasing Director for approval.

WHITE PLAINS CITY SCHOOL DISTRICT

OBJECT CODES

2019-2020

**SALARIES - 100**

**INSTRUCTIONAL SALARIES**

120 Salaries Elementary, K-3  
121 Salaries Elementary, 4-6  
130 Salaries 7-12  
131 Noon Duty Pay Grades 7-12  
140 Substitute Teachers  
141 Substitutes - Teacher covering for teacher  
142 Substitutes - Teaching Assts.  
150 Other certified positions  
152 Teaching Assistants  
153 Teacher Salaries  
154 Per Diem/Stipends

155 Teaching Assistant Overtime

158 Teaching Assistant, hourly

**NON-INSTRUCTIONAL SALARIES**

160 Non-Instructional Salaries  
163 Teacher Aides, hourly  
164 Security Guards  
165 C.S. Overtime  
166 Night Differential  
168 Substitutes/Temporary Staffing  
169 Teaching Assistant - Contingency

**EQUIPMENT - 200**

200 Equipment Value > \$10,000

**PRINCIPAL ON INDEBTEDNESS - 600**

600 Payment

**INTEREST ON INDEBTEDNESS**

700 Interest Payment on Debt  
710 Tax Anticipation Note  
719 Bond Anticipation Note

**INTERFUND TRANSFERS - 900**

950 Transfers to other Funds

**CAPITAL PROJECTS - H FUND**

201 Const. Mgr.	246 Engineering
240 Admin Expense	293 General Const.
242 Reimbursables	294 Heat/Ventilation
243 Insurance	295 Plumbing
244 Legal Architect	296 Electrical
245 Architect	298 Mechanical

**CONTRACTUAL - 400**

401 Telephone  
402 Electric  
403 Water  
404 Fuel Oil  
405 Security Contracts  
406 Recycling  
407 Natural Gas  
408 Chemical Disposal  
415 Equip/Building Repair  
416 Inspection & Maintenance  
418 Grounds  
421 Fire/Liability Insurance  
432 Equipment Rental/Lease  
440 Contract, Professional & Technical Services  
450 Supplies and Materials  
455 Transportation Co-Curricular  
456 Transportation - Departmental Programs  
457 Transportation - Field Trips  
458 Contract Transportation  
460 Software  
461 Library Books/Materials  
462 Advertising  
463 Postage  
464 Travel and Conferences  
467 Tax and Assessment  
469 Miscellaneous Contractual  
471 Tuition  
472 Payment to City of W.P.  
476 Fees and Dues  
478 Printing  
480 Textbooks  
490 BOCES  
491 BOCES-Capital  
492 BOCES-Administrative  
492 HVAC Service Contract  
493 General Construction  
494 Heating and Ventilating  
495 Plumbing  
496 Electrical  
497 Site Improvement

## Furniture & Rugs

Upholstered furniture in classrooms is not recommended. Flammability and sanitation are the major issues. Let's consider sanitation first. Upholstered furniture can harbor a multitude of problems such as molds, mildews, allergens, bacteria, biological contaminants, lice, insects, and bedbugs. This can easily lead to the transfer from student to student. It's impossible to eliminate these contaminants with cleaning methods. Professional cleaning and decontamination on a regular basis is required in order to eliminate and control these contaminants. Second, there is the fire issue. Residential upholstered furniture was never intended to serve in an educational occupancy.

The standards for educational occupancy are much higher than residential use. For residential upholstered furniture to be used in an educational occupancy, it must be professionally treated with an UL/FM approved fire retardant. To achieve these requirements can be time consuming and costly. In addition, with or without proper documentation, local fire officials may still require its removal.

- Newly introduced upholstered furniture shall be reviewed to meet the requirements and standards set forth by NYS Fire Code, Building Code, NFPA, ASTM, and other standards adopted.
- The components of the upholstered furniture shall meet the requirements for Class I when tested in accordance with NFPA 260.
- Heat release rate: Newly introduced upholstered furniture shall have limited rates of heat release when tested in accordance with ASTM E 1537 or California Technical Bulletin 133, as follows:
  - The peak rate of heat release for the single upholstered furniture item shall not exceed 80KW.
    - Exception: Upholstered furniture in rooms or spaces protected by an approved automatic sprinkler system installed in accordance with Section 903.3.1.1.
- The total energy release by the single upholstered furniture item during the first 10 minutes of the test shall not exceed 25 megajoules (MJ).
  - Exception: Upholstered furniture in rooms or spaces protected by an approved automatic sprinkler system installation.
- Identification: Upholstered furniture shall bear the label of an approved agency, confirming compliance with the requirements

Since it is technically unfeasible and costly to upgrade certain items to those stringent standards, they cannot be allowed. Before a rug or carpet is purchased or donated for use in school space, proof of its fire resistance rating must be presented with the purchase documentation. The same procedure must be followed for upholstered furniture such as chairs, sofas, etc.

If you have any doubts about what defines rugs or furniture, please call (914) 422-2050 before you purchase an item.



# Work Order and Work Request

- Requesting Work
- Equipment (New / Replacement)
- Does it need assembly?
- Utilities
- Type of utility-services
- Total cost estimate
- Maintenance of equipment
- <https://help.dudesolutions.com/Content/Documentation/Maintenance/MaintenanceDirect/User%20Roles/Requester/MaintenanceDirect%20Requester.htm>





# Work Order Videos

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The screenshot shows a web browser window with the Dude Solutions website. The browser's address bar displays the URL: <http://www.dudesolutions.com/MaintenanceDirect/Requester.aspx>. The website has a navigation menu with links for Clubs, Education, Government, Healthcare, Senior Living, and Manufacturing. A red banner at the top of the page reads "STILL OPEN". Below the navigation menu, the page title is "MaintenanceDirect Requester". A paragraph of text explains that requesters are only able to enter new work orders into the system once they have entered a request, and that they can view it but will not be able to change it. It also states that requesters use the MySchoolBuilding.com page to enter requests and are the only role able to register themselves into the system when given the correct information by Administrators. A "Table of Contents" section lists three links: "How to Register", "How to Submit a Work Request", and "My Requests List". A "Back to Top" link is located at the bottom of the page. The footer contains the Dude Solutions logo, contact information for Client Services (Phone: 1-877-455-DUDE (3333), Email: [support@dudesolutions.com](mailto:support@dudesolutions.com)), and a copyright notice for 2015 by Dude Solutions, Inc. | Terms Of Use | Privacy Statement.

**MaintenanceDirect Requester**

Requesters are only able to enter new work orders into the system. Once they have entered a request, they can view it but will not be able to change it. Requesters use the MySchoolBuilding.com page to enter requests and are the only role able to register themselves into the system when given the correct information by Administrators.

**Table of Contents**

- [How to Register](#)
- [How to Submit a Work Request](#)
- [My Requests List](#)

[Back to Top](#)

**Dude Solutions**

**Questions? Contact Client Services**  
Phone: 1-877-455-DUDE (3333)  
Email: [support@dudesolutions.com](mailto:support@dudesolutions.com)

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# MaintenanceDirect Requester Guide

## How to Register/Log in

- Open your Internet Browser (Internet Explorer, Firefox, etc). Click on the following link, or copy and paste it into the web browser:  
<https://www.myschoolbuilding.com/myschoolbuilding/mygateway.asp?acctnum=184842242>
- **If you are a returning user**, enter your **Email Address** and **Password**. Click **Sign In**.
- **If you have forgotten your password**, click the **Forgot Password?** Link and enter your email address. We'll send you instructions for resetting your password.

Email: requester@schooldistrict.e... Password: ..... Sign In  
[Forgot Password?](#)

- **If you are submitting your first request**, you must enter registration information first. Click on the down arrow (∨) next to Never Submitted a Request? Register Here! to expand the registration form.  
*\*Note: Your registration will be complete after you submit your first work request.*
  - Enter the **Account Number** provided by your Administrator. If needed 184842242
  - Enter your **First and Last Name**, as well as your **Phone Number** and **Email Address**.
  - Type the **Password** you would like to use to log into your SchoolDude account and confirm it. The password you choose must be 6 characters long.
  - Click **Register** to go to the work order request form.

Never Submitted a Request? Register Here! ^

Account Number: [text box]

First Name: [text box] Last Name: [text box]

Phone Number: [text box]

Email: [text box]

New Password: [text box]

Passwords are case sensitive and must be at least six characters long.

Confirm Password: [text box]

Register

## The Dude Says:

To create a shortcut to your desktop, find a blank area on this screen and right click on your mouse. You will have the option to create a shortcut or add to your favorites. Creating a shortcut will add an icon to your desktop. You can double click it the next time you want to sign in.

## How to Submit a Request

- Make sure you are on the **Maint Request tab** at the top of the screen.



*\*Note: Any field marked with a red checkmark is a required field.*

- Step 1:** These fields will already be filled in with your contact information according to how it was entered upon registration.
- Step 2:** Click on the drop down arrow and highlight the **Location** where the work needs to be done. Do the same for **Building** (if available) and **Area**. Also, be sure to type in the area description or room number in the **Area/Room Number** field.

- Step 3:** Select the **Problem Type** that best describes the request/issue you are reporting.

- Step 4:** Type in a **Description** of the problem. Please provide as much detail as possible.

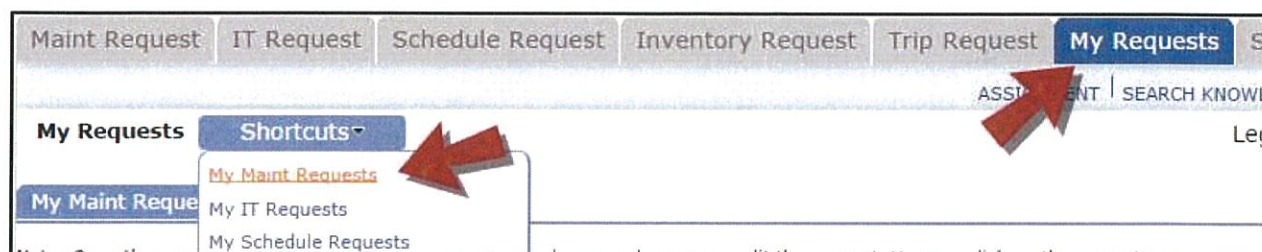
- Step 5:** Enter a **Time Available**, such as a planning period, when workers can come by.
- Step 6:** Select a **Purpose** for the work if necessary.
- Step 7:** Enter the date you would like to have the work completed by.
- Step 8:** Attach a file to your request if necessary (i.e. a picture of damage or setup diagram).
- Step 9:** Type in the **Submittal Password**. – “Password”



- **Step 10:** Click the **Submit** button.

## My Request Tab

You can view any requests that you have entered into the system by clicking on the **My Requests** tab. Hover your mouse over the **Shortcuts** link and click on **My Maint Requests**. You will see a listing of any requests that you have entered into the system. You are also able to print out a listing of your requests by clicking on the printer icon.



On the **My Requests** page you will see up-to-date information on your requests including the current status, work order ID number, and Action Taken notes. You can click on the number next to the status description in the **Request Totals** section to see all of your requests marked with that status. You can also search for any work order request by typing a key word into the **Search** box and clicking **Go**.

### My Maint Requests

Note: Once the request is assigned to someone for approval, you no longer can edit the request. You can click on the current assigned person name to send email and request changes on your request.

Search for

Search this results for:

1 - 2 of total 2 listed

#### Request Totals

- 1 New Request
- 1 Work In Progress

Status	WOID	Area	Area Number	Purpose	Location	Building	Description	Action Taken	Assigned To	Request Date	Type	Complete Date
New Request	157	Classroom	Room 125		ABC High School		The printer in the classroom isn't working.	No Action Note		5/17/2012		
Work In Progress	149	Classroom	Room 123		ABC High School		The heat is not working in this room. It is very cold!	No Action Note		2/12/2010	Heating/Ventilation /Air Conditioning	