



***Imperial Unified
School District***

EMPLOYEE HANDBOOK



Welcome!

Dear Employee:

A sincere and warm welcome to Imperial Unified School District. I hope you find your work experience here to be both engaging and enriching.

This employee handbook is to guide you of Imperial Unified School District procedures and information. It will also familiarize you with policies and practices for all employees.

We have set the highest standard of what we expect from our students and staff. On behalf of our administration, I hope you enjoy being a part of Imperial Unified School District team as we all work together in creating a world class education.

Sincerely,

Gina Hendrix

Associate Superintendent of Administrative Services

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Mission

We are committed to increasing student achievement through a purposeful and effective instructional program that engages all students in academically rigorous learning.

Board Members and Administration

Board of Education

Elvira Hernandez, President

Daniel Yee, Clerk

Geoff Holbrook, Member

Gabby Olguin Nixon, Member

Jill Tucker, Member

District Administration

Bryan Thomason, Superintendent

Gina Hendrix, Associate Superintendent of Administrative Services

Summer Heraz, Associate Superintendent of Educational Services

Telephone Directory

Schools	Phone	Administration
Ben Hulse Elementary 303 S. D St. Imperial, CA 92251	(760)355-3200	Jessica Din, Principal Lucia Macias, Assistant Principal
Cross Elementary 2462 Cross Rd. Imperial, CA 92251	(760)355-3250	Javier Ramos, Principal
TL Waggoner 627 Joshua St. Imperial, CA 92251	(760)355-3266	Queana Jarvis, Principal
Frank Wright Middle School 885 N. Imperial Ave. Imperial, CA 92251	(760)355-3240	Blanca Iniguez, Principal Genaro Sanchez, Assistant Principal
Imperial High School 517 W Barioni Blvd. Imperial, CA 92251	(760)355-3220	Joe Apodaca, Principal Jacqueline Sanchez, Assistant Principal David Shaw, Assistant Principal
Holbrook High School 322 N. Imperial Ave. Imperial, CA 92251	(760)355-3207	Cynthia Herrera, Principal
Special Education	(760)355-3233	Dr. Theresa Fernandez, Director of Special Ed.
Food Services	(760)355-3212	Vanessa Diaz, Director of Food Services
Maintenance and Operations	(760)355-7790	Denise Cuevas, Director of Maintenance & Operations
Technology	(760)355-3200	Ben Esquivel, Director of Technology
Transportation	(760)355-3206	Yissel Silva, Director of Transportation

Section I Policies and Procedures for Employees

All IUSD Board Policies are located on the website: www.do.imperialusd.org. The website is frequently updated as new policies are adopted or revisions are made to current policies.

Attendance and Employee Absences

Attendance is very important for students and all personnel. Employees who miss work because of illness are required to submit their absence by notifying their supervisor and record absences in Frontline. This method is also used by employees who are requesting advance approval for use of their personal leave days or compensatory time off. Administratively approved school business also requires recording in Frontline.

You will be provided with a Frontline account from HR upon hire. You will get an email to your district email from Frontline/Aesop. Follow link to set up your username and password. This is the absence management system that the district uses. If you cannot remember your username or forgot your password, please call or email HR. They will provide you with your username or reset your password.

IUSD utilizes the Frontline Absence system to record all absences. To ensure the continued success, please be sure to follow the district's established procedures when requesting substitute coverage as follows:

1. Notify Principal/Supervisor.
2. Enter Absence in Frontline.
3. Request a substitute if assignment requires a sub.
4. If a sub does not pick up assignment, call supervisor/office so a sub. can be assigned.

*If you need to report an absence, you **must** record it through the Frontline Absence System and inform supervisor.

You can check your sick leave, personal necessity, and/or vacation balances on your paystub, employee portal, or on Frontline. When checking your balances on your paystub or portal, it's important to note that absences for the past month may not be reflected. This is because there is a delay in the processing and updating of absence records and payroll will post absences a month later. This means that any absences taken during a particular month will not be reflected on your paystub or portal until the following month. For example, if you take time off in February, it will not show up in your records until March. As a result, the balance shown might not accurately represent recent time off or absences. To ensure you have the most accurate and up to date information regarding your balances, consider the following: maintain your own records of absences and time off to cross-reference with the portal and paystub balances, regularly check your balances and compare them against your personal records to identify any discrepancies early, and if you have questions reach out to your payroll department.

The absence balances displayed on the Frontline platform are generally the most accurate, reflecting up-to-date information about your absences. The system imports data overnight, which can sometimes lead to temporary discrepancies. This means that recent absences may not be immediately reflected until the import process is complete. Due to the timing of the overnight import, there may be short periods where the balances do not match the actual absences taken. These discrepancies should be resolved once the import is completed and the system updates. To ensure you have the most accurate information, regularly check your balances on Frontline, especially after the overnight import has had time to process and compare to your paystub and/or portal.

You will be able to check your balances on your paystub:

LEAVE BALANCES		
Leave Balances are as of 02/15/2024		
	Sick Leave	Vacation
Bal Fwd:	404.53	16.16
Earned:		13.36
Use/Adj:	10.00-	
Ending:	394.53 (H)	29.52 (H)

You will be able to check your balances through the Employee Portal website by logging on to: <https://ivedportal.org>. As soon as you login, you will find your balances on the right-hand side:

PN (Part of Sick Leave)
56
Hours

Sick Leave
707.18
Hours

Lastly, you can find your balances on the Frontline/ESCAPE website or app.

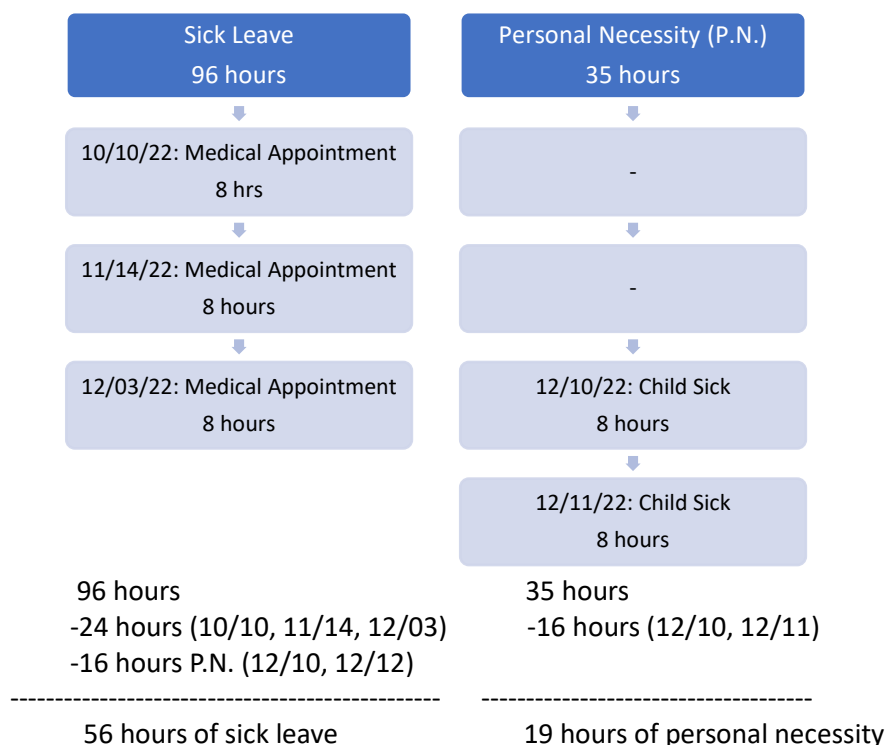
<https://login.frontlineeducation.com/login?signin=b744059a7d47e32e051efbbcef60e29d&productId=ABSMGMT&clientId=ABSMGMT#/login>

From the website; Click on Account from the home screen – Click on Absence Reason Balances-Your balances will pop up.

Absence Management		Absence Reason Balances					Last Calculated: Thursday, August 3, 2023
NAVIGATION		Absence Reason	Initial	Used	Pending	Balance	
Home		Birthday	0.00 Hours as of Friday, June 30, 2023	0.00 Hours	0.00 Hours	0.00 Hours	
Absences		Personal Necessity	0.00 Hours as of Friday, June 30, 2023	0.00 Hours	0.00 Hours	0.00 Hours	
Feedback		Sick Leave	Hours as of Friday, June 30, 2023	0.00 Hours	0.00 Hours	Hours	
Account		Vacation	Hours as of Friday, June 30, 2023	32.00 Hours	0.00 Hours	Hours	
Directory							
Resource Library							

Sick Leave

Employees accrue sick days at the rate of one day per month for each month of full-time employment. Part-time employees earn sick leave on a prorated basis. Eligible employees may carry over an unlimited number of unused sick days from year to year to ensure that such days are available in the event of a long-term illness. However, no employee is paid for accrued unused sick days at the time of termination. Unused sick leave of retiring employees may be applied as service credits as allowed by the applicable retirement plan. Employees also earn personal necessity (This type of leave is not in addition to sick leave, but provides greater flexibility in using sick leave).



*Employees **must** enter their time on Frontline and call their immediate supervisor if they miss work for any reason. This is a way to find substitutes to cover your shift.

Vacation

If you are a **classified** employee, annual vacations provide you with time away from your job. The amount of vacation you are entitled to depends upon your status as the number of hours in your workweek and your length of service with the district. Classified employees accumulate paid vacation at rates established collective bargaining agreements. If you are entitled to take vacation as time off, your vacation must be scheduled and approved by your supervisor in advance of being taken. Although vacation days begin accruing from the date of hire, no vacation may be taken until six months of continuous employment as per the collective bargaining agreement. 10 and 11 month contracts receive their vacation pay as part of their regular monthly salary, rather than taking vacation during the winter and spring breaks during their working months.

Please note that any time off taken during your contract period will be considered a non-pay day. This means, if you take a day off, it will not be paid, as your vacation pay has already been included in your monthly salary.

If you are a **certificated** employee, your time away from work—your vacation—is realized through the scheduling of work and non-workdays. As the activities of certificated employees are typically tied to student attendance, extended periods of non-workdays are generally scheduled during the summer months. Work schedules for certificated employees are determined by collective bargaining agreements and/or individually negotiated employment contracts.

Jury Duty

A regular employee who is summoned for jury duty shall receive full pay for the period of the jury service, provided that they comply with the following:

- The employee **must** present to Human Resources the actual notice to appear for jury duty.
- The employee **must** submit to the District Office any check or warrant in payment for court appearance or jury duty, less reimbursement for travel, unless serving during their own non-work time.
- Employees **must** turn in their verification form after reporting for Jury Duty to their site administrators/managers and to Human Resources.

Comp Time/Overtime *Classified Staff Only

When you are asked by a supervisor to work past your contracted working hours you are to receive overtime. A timesheet must be submitted to payroll to get paid the additional hours worked. Any overtime work must be approved by your supervisor before you work the additional hours. Comp time is only allowed when your supervisor has **pre-approval** from the superintendent or associate superintendent.

Conference/Travel

Mileage Reimbursement Claim

Mileage reimbursement is available in some instances. Please check with your site administrator. If there is more than one employee attending the same conference, the employees are asked to travel together to avoid costly travel fees for the district. A District vehicle may be requested at the same time the conference request is submitted. A district vehicle will be chosen based on the number of employees traveling together. Mileage reimbursement may be requested if no district vehicles are available pending prior approval.

Travel Requests/Reimbursements

All conferences attendance requests **MUST** be submitted at least six (6) weeks in advance of the conference date. If an “early bird” registration is possible, please be sure to submit your requisition and back up materials at least six (6) weeks in advance to secure the least expensive fee. If the conference requires payment by check (i.e., does not accept Purchase Orders), please allow additional days for processing. Plan accordingly to ensure timely payment. Submit your requisition form along with **all** necessary backup materials, including conference details, registration forms, hotel information, and any supporting documentation. An approved copy of the conference request will be sent to your site secretary. Follow up with your site secretary or site administrator within seven (7) days of submitting your request to confirm receipt and processing status.

NOTE: Imperial Unified School District checks are processed by the Imperial County Office of Education. This means extra time must be allowed for checks to be processed. When a conference request comes in late, it is EXTREMELY DIFFICULT to process. Please plan ahead as much as possible.

- **Travel/Conference Reimbursements**

Upon completion of a conference or trip, travel/conference reimbursement form must be completed for REIMBURSEMENT. **All required receipts must be attached** to be reimbursed for overnight parking, uber/lyft to and from hotel from airport.

- **Travel Requests**

All overnight must be approved by District Administrators.

The following items are reimbursable while on school business and attending conferences and workshops. All reimbursement amounts shall be limited to the total amount budgeted for travel expenses for each school or department.

TYPES OF MEETINGS: Conference/Workshop or Business: A business meeting is one required for the purpose of providing or receiving information relevant to District business or for the purpose of completing a District obligation or project. A copy of the meeting notice or agenda must be submitted with the Travel/Conference Request.

OVERNIGHT TRAVEL: Overnight travel will require prior written approval of the District Administrator and Site Administrator.

OUT OF STATE TRAVEL: Out-of-state travel will require prior written approval of the Board of Trustees.

REGISTRATION: Necessary registration fees will be paid. Attach conference agenda, announcement and/or other supporting documentation relative to the trip.

MEALS: Maximum daily allowance for meals is \$64. Itemizing meals is required. When the cost of meal(s) are included in conference fee or the total per diem allowance is reduced for said meal(s). The per-diem amount shall be pro-rated based on the time periods required away from the job site as follows:

Meal	Rate	Time Period
Breakfast	\$16	5:00 a.m. – 11:00 a.m.
Lunch	\$17	11:00 a.m. – 5:00 p.m.
Dinner	\$31	5:00 p.m. – 5:00 a.m.

LODGING: All lodging must be pre-approved by the Superintendent or Associate Superintendent. All lodging arrangements will be made by district personnel unless otherwise approved by the Superintendent or Associate Superintendent.

Detailed hotel registration receipts are required upon return. All employees will be responsible for providing a credit card for incidentals. Personal expenses must be charged on the credit card that was provided for incidentals. Any additional amounts will not be reimbursed. If the room is shared with a non-school related person, the single occupancy rate is used. If prepayment is preferred, employee may secure reservations and submit requisition to Accounts Payable. Requisition must include Hotel name,

address, phone number, length of stay, type of room, cost per night, room tax amount and confirmation number.

Employees are encouraged to share rooms but are not required to do so. Supervisors will determine the number of employees that can attend a conference based on costs and their budget. If employees choose not to share a room, the cost may prohibit the attendance of additional staff.

TRANSPORTATION: Transportation will be approved to provide reimbursement at the lowest possible overall cost based on location, number of persons traveling, time constraints, and convenience. If employee chooses to drive personal vehicle, no reimbursement will be provided unless all district vehicles are in use at the time of travel. Necessary and required air transportation shall be coach fare or lower. **Ticket vouchers or receipts are required.** Before your travel, the district office will inform you of the closest parking garage where you can park the district vehicle if flying is required. For employees flying out of San Diego, Aladdin Parking offers overnight parking for \$19. This facility provides a free shuttle service to and from the airport, making it a convenient option for our staff. This ensures convenience and security for your vehicle during your trip. **Receipts are required.** Use of rental car must be authorized at the time of travel request approval.

TRANSPORTATION FOR STUDENT ACTIVITIES: The district is responsible for providing transportation for students participating in school events away from the campuses. Under no circumstances should a student be allowed to drive their own vehicle or ride with anyone other than a parent for a school-sponsored event. Only the advisor of the school-sponsored event may authorize a parent to transport their child to or from the event. We do not require a signed parent slip or on-the-spot permission from a supervisor. This policy applies exclusively to parents and does not include siblings, grandparents, signatures others, etc.

MISC. EXPENSES: Telephone or fax charges are allowable for the purpose of conducting District business. **Receipts are required.**

REIMBURSEMENT: Submit Travel Reimbursement to Accounts Payable following meeting/conference to claim reimbursement for out-of-pocket expenses within **45 days** from the date the expenses were incurred.

Travel Advances

IUSD rarely will advance for travel accommodations. In the event that a travel advance must occur the procedures are as follows:

- Travel advances are for IUSD employees only.
- If you need a travel advance you must provide as much as one month notice as possible.
- Travel Advances will be paid 2 weeks before the conference/event date.
- Employees must turn in a reconciliation for any travel advances by the end of the month in which travel occurs and all expenditures must be itemized on that claim, with receipts attached. The reconciliation calculates whether the employee owes IUSD a refund or if the employee is owed an additional travel reimbursement. Employees must return original receipts and/or cash totaling the advance.
- Travel Advances must be approved, signed, and dated by the school site/department director or someone with signing authority.

Travel Reimbursements for Other Non-Employees

When departments are reimbursing non-employees (such as parents, etc.) for travel costs, there are several ways this can be done:

1. If the travel was paid for by the district/site of the non-employee, the parent must submit receipts.
2. If the non-employee paid the cost directly, they can be reimbursed directly, and the department would process payment via a PO. Original receipts must be turned in.
3. In lieu of reimbursing, the Administrative Services department could choose to directly pay the cost upfront for certain expenses such as flights, hotel, and registration fees via a PO or district credit card.

Employee Accident/Injury Report

Employee Accident/Injury Report

If you are injured while on the job, please do the following:

1. Injured worker notifies his/her supervisor
2. Supervisor/Employee immediately phones the district nurse at 760-355-3200.
3. District Nurse gathers information over the phone and helps injured worker access the appropriate medical treatment.
4. For immediate emergencies, call 911.

Extra Duty/Coaching

Extra Duty/Coaching Stipends may be available for extra duties and/or coaching. To submit a bid for Extra Duty Assignments such as Tutoring Non-Negotiated or Extra Duty, please use the In-House Google Form. Please be sure to submit your bid by the specified deadline on the appropriate bid form. It is important to note that all bids require board approval. Ensure that your submission is complete and submitted on time to avoid delays in the approval process, which includes staff being able to submit extra hours through their Frontline portal. Payroll will not be processed until a complete bid is submitted.

Facilities Use

Please refer to Board Policy and Administrative Regulation 1330. Facility Use for District policies regarding the use of District facilities. Any group desiring to use our facilities must complete the three forms created by California Risk Management for our District and provide a Certificate of Insurance and additional insured endorsement. Those forms are Application and Permit, Agreement of User to Hold Harmless, Statement of Information. All Facility Use Agreements are to be forwarded to Ms. Sara Ponce at the District Office for final approval after they have been approved at the site level. Facility Use fee information is available at the District Office and our website at www.imperialusd.org.

Please be aware that school equipment and facilities are strictly for school-related purposes and should not be used by staff for personal reasons at any time. This includes items such as tables, chairs, picnic tables, ice from ice machines, tools, vehicles, barbecues, kitchens, athletic fields, and gymnasiums. Facilities and equipment may only be used for school activities when the appropriate forms have been completed, approved by the superintendent, and filed with the district office.

Field Trips

Sports & Classroom Field Trips

Requests for these trips must be received at the District Office four (4) weeks in advance of the trip date. This allows time for District approval and time to arrange for transportation, including charter buses. The Director of Transportation will make **all** transportation arrangements, including charters, and coordinate with District receptionist. We encourage sites to complete all requests for Sports Field Trips when the sports calendar is available. **All** overnight trips must be sent to the district office and transportation six (6) weeks in advance for Board approval.

Van Requests

Due to the popularity of van use, requests to use the vans must be submitted through your site to the District Office four (4) weeks in advance. This gives the district transportation team time to service and prepare the vans.

ALL INFORMATION ON THE FIELD TRIP REQUEST FORM MUST BE COMPLETE INCLUDING BUDGET CODES, DESTINATION ADDRESS, ESTIMATED MILEAGE AND TRIP COST. Due to the volume of requests received, incomplete forms will be returned to the site, and the availability of transportation may be impacted by the delay.

Field Trip Itinerary

Please complete a **Field Trip Itinerary form** for any trips that include stops other than the final destination. Bus Drivers are not permitted to make unscheduled stops. Submit this form at least one week in advance of the field trip.

Student Field Trip Permission Slips

All students must have a completed Field Trip Permission Slip on file with the teacher for each field trip. When a class leaves the school site for a field trip, the certificated staff in charge must have copies of the students' Emergency Card. Please see your site administrator for these forms.

Keys

Keys to all facilities will be issued by the office. Keys are not to be copied or transferred without administrative approval. Guard your keys! In unauthorized hands, keys can cause tremendous losses and other problems for the district.

Uniforms

To ensure the safety of our staff and students all IUSD employees will be required to always wear either a district uniform or nametag while on any of the IUSD campuses.

Mailboxes

Each staff member has a mailbox in the office for mail, bulletins, special notices, and other pertinent information. Mailboxes should be checked when employees arrive in the morning and before leaving in the afternoon. Students should not be asked to get material from mailboxes. Sometimes there is confidential information.

Maintenance Requests

A Maintenance Request must be completed when maintenance repairs are needed in your classroom or workstation. All staff should submit their requests to school dude online for processing, **NOT** to the site

custodian or to utility workers. Once the form is received and recorded, the M&O secretary will forward the request directly to the appropriate staff at M&O.

Technology Resources

Technology resources can enhance employee performance by offering effective tools to assist in providing a quality instructional program, facilitating communications with parents/guardians, students, and community, supporting district and school operations, and improving access to and exchange of information. All employees are expected to learn to use available technological resources that will assist them in the performance of their job responsibilities. As needed, employees shall receive professional development in the appropriate uses of these resources.

Employees are authorized to use technology resources, including, but not limited to, computer hardware, mobile communication devices (such as laptop computers, netbooks, tablets, cellular phones, smart phones, personal digital assistants, cameras, and digital scanners), software, network, Internet, Web-based communication resources (such as email, blogs, podcasts, video conferencing, online collaborations, social media, instant messaging, and other forms of direct electronic communications or “Web 2.0” applications), and other forms of technology services in accordance with Board policy, administrative regulations, and the user obligations and responsibilities specified below. Employees who fail to abide by these regulations shall be subject to disciplinary action, revocation of the user account, and legal action as appropriate.

1. The employee in whose name a district network account is issued is responsible for its proper use at all times. He/she shall use the district’s network only under the account to which he/she has been assigned.
2. Employees shall use technology resources safely, responsibly, and primarily for purposes related to their employment with the district. Incidental personal use of technology resources is acceptable during scheduled work breaks or non-duty time, but employees may not use the network for personal activities that consume significant network bandwidth (e.g., streaming of audio or video) or for activities that violate district policy or local law. The district reserves the right to monitor employee usage of technology resources including, but not limited to, the access of email, stored files, and voice mail for improper use at any time without advance notice or consent.

Technology resources shall not be used to transmit confidential information about students, employees, or district operations without authority.

- Student work may be published on district or school web sites provided that both the student and his/her parent/guardian provide written permission, or the work is part of an existing publication such as a school newspaper.
- Student photos may not be used in district publications and local media without parental permission.

3. Employees shall not access, post, submit, publish, or display harmful or inappropriate matter that is threatening, obscene, disruptive, or sexually explicit, or that could be construed as harassment or disparagement of others based on their race, ethnicity, national origin, sex, gender, sexual orientation, age, disability, religion, or political beliefs.

4. Employees shall not use technology resources to promote unethical practices, or any activity prohibited by law, Board policy, or administrative regulations.
5. Employees shall not use technology resources to engage in commercial or other for-profit activities without the permission of the Superintendent or designee.
6. Employees shall exercise good judgment and maintain professional standards and boundaries when interacting with students via technology resources.
7. Employees who make copies and/or use copyrighted materials in their jobs are expected to be familiar with published provisions regarding fair use and public display and are further expected to be able to provide their supervisor, upon request, the justification for materials that have been used or copied.
 - Employees must observe all publisher licensing agreements between software vendors and the district, including monitoring the number of users permitted by an agreement. Unless the applicable licensing agreement authorizes multiple users of a single program, employees shall not make copies of a computer program or software.
 - All audiovisual materials rented, borrowed, purchased, or accessed via Internet by staff to be shown to students must have prior approval by the site administrator before they can be shown.
8. Employees shall use district email only for work-related purposes. Employees may not use district email to distribute spam, chain letters, advertisements, jokes, or other unsolicited or unauthorized mass mailings. All district-wide email correspondence must be approved by district administration prior to distribution. Employees shall not attempt to interfere with other users' ability to send or receive email, nor shall they attempt to read, delete, copy, modify, or forge other users' email.
9. Employees shall not develop any classroom or work-related web sites, blogs, forums, social media or networking sites, or similar online communications representing the district or using district equipment or resources without permission of the Superintendent or designee.
10. Teachers, administrators, and/or library media specialists shall prescreen technology resources and online sites that will be used for instructional purposes to ensure that they are appropriate for the intended purpose and the age of the students. Staff shall supervise students while they are using technology resources and online sites and may have teacher aides, student aides, and volunteers assist in this supervision.

Users shall report any security problem or misuse of the network to the Superintendent or designee.

Technology Support Requests

All technology purchases and/or movement of existing equipment must be approved by the Technology Department.

To request technology support, go to iusd.freshservice.com. All non-emergency requests must be submitted via email to support@imperialusd.org. If you have an emergency (such as no power, can't connect to the network or Internet, phone is down, etc.), immediately contact your site secretary or administrator. He or she will evaluate whether it is an individual or site issue that needs to be resolved and they will directly contact the appropriate technology personnel on your behalf.

Volunteers

A volunteer is a parent/legal guardian of an Imperial Unified School District student, or any other adult, who assists at a school or district site or within a school-sanctioned program. Generally, volunteers shall be 18 years of age or older.

Volunteers can fall into one of three categories:

- (1) Single Event / Short Term Volunteer
- (2) Chaperone of Overnight Trips/Volunteer Driver
- (3) Long-term/Seasonal Volunteer.

Category 1

A. Single Event/Short-Term Volunteer

Single Event /Short Term Volunteers voluntarily provide a service to the district, without compensation, for a single event or on an occasional basis. These volunteers have no access to confidential information and are generally not left unsupervised with students.

Examples of Single Event /Short Term Volunteers include volunteers helping with student registration, student activities, newsletters, vision/scoliosis screening, dance/prom chaperone, parent advisory committee luncheons, single Booster event, promotion/graduation activities. Volunteers in this category may only work under the direct supervision of a certificated employee.

Clearance Requirements for Single Event / Short-Term Volunteers:

- Must sign an official volunteer sign in sheet in office upon arrival. Must wear site volunteer ID badge when on school grounds.
- Megan's Law will be checked. Notwithstanding the above, a Single Event/Short-Term Volunteer who is not a parent or legal guardian must meet the clearance requirements of a Category 2 volunteer, as described below.

B. Class Observer

Class Observer volunteers are adults who need to observe classes as part of college or university course requirements. Class observers must present a college identification card and a letter from the university or particular professor who requires observation. Class Observers must always be under direct supervision of a certificated employee.

Clearance Requirements:

- Must wear site volunteer ID badge when on school grounds. Must check in the office upon arrival.

Category 2

Chaperones of Overnight Trips / Volunteer Drivers

These volunteers are under the supervision of a certificated employee.

Clearance Requirements (to be cleared by the administrative designee prior to the trip):

- Application/Employment packet required
- Fingerprint clearance required
- Emergency Card filed with site
- Copy of valid California Driver's License required or valid government issued California ID card
- Must wear Imperial Unified School District-issued ID badge when on duty

Additional Requirements for Volunteer Drivers:

- Volunteer Driver Application
- DMV Clearance through Imperial Unified School Transportation Dept
- Proof of Insurance
- Vehicle Verification

Category 3

Long Term or Seasonal Volunteer

A Long-Term Volunteer is a person who voluntarily provides a service to the district, without compensation, from time to time throughout the school year, on a regular and/or ongoing basis. Said service does not necessarily have to be performed on consecutive days. A Seasonal Volunteer is a volunteer who may serve several times within a specific period (such as during athletic seasons), including walk-on coaches, physical trainers, team doctors, coaches of performing arts, choreographers, one-to-one tutors, etc. These volunteers are under the general supervision of a certificated employee.

Clearance Requirements (to be cleared by the site administrative designee prior to participation):

- Attend required Coaches preseason meeting for Fall Sports with Athletic Director
- Attend required Coaches preseason meeting June 30 for Springs Sports with Athletic Director
- Application/Employment packet required
- Fingerprints clearance required
- TB test required (Education Code 45106, 45347, 45349, 49406)
- Copy of valid California Driver's License required or valid government issued
- California ID card
- Emergency Card filed with site
- Must wear Imperial Unified School District-issued ID badge when on duty

Additional requirements for athletic coaches are:

- Certification of Compliance (CIF mandated course work)
- IUSD Coaches' Handbook

Field Trip Drivers

Staff Drivers

Imperial Unified School District participates in the DMV Employer Pull Notice Program. Human Resources completes the necessary paperwork so that all staff driving records are on file at the District Office. Sites will be notified if a staff member is ineligible to drive a District vehicle.

Volunteer (Walk-On) Coach Drivers

If a site anticipates the need for a volunteer (walk-on) coach to drive a vehicle, the District will need the individual's driver's license number to submit to the DMV Pull Notice Program.

Section II: Personnel Policies

Payroll

Payroll and Pay Stub Information

- First Paycheck is a paper warrant.
- Direct Deposit is encouraged; direct deposit forms will be provided by the Human Resources/Payroll department.
- Time sheets are completed for additional assignments. They are due the first day of the month to your immediate supervisor. They must be submitted with authorized signatures for pay warrants to be issued.
- Timesheets will be processed through Frontline. Paper timecards are only used for substitutes.

Extra Duty Positions

To submit a bid for Extra Duty Assignments such as Tutoring Non-Negotiated or Extra Duty, please use the In-House Google Form. Please be sure to submit your bid by the specified deadline on the appropriate bid form. It is important to note that all bids require board approval. Ensure that your submission is complete and submitted on time to avoid delays in the approval process, which includes staff being able to submit extra hours through their Frontline portal. Payroll will not be processed until a complete bid is submitted.

Requirements for Extended Illness

An employee becoming aware of the need for absence due to surgery or other predictable or previously scheduled cause, shall submit a Dr.'s note from their attending physician as far in advance of the initial disability date as possible to Human Resources. The physician's statement should include the nature of illness, how long the employee will be absent, and when he/she will be released to return to work. If you have been directed by your physician to be off from work due to injury, illness, or medical reason, you must secure written authorization from that physician before you may return to work. The authorization must indicate restrictions, if any apply, or no restrictions if there are none. This is for your protection to enable IUSD to make any accommodations, if necessary.

***If a release note is not submitted prior to your return, you will not be allowed to return to work until such note is provided.**

Employee Portal

Imperial Unified School District now has an online employee portal where employees can view items such as contact information, tax statements, pay stubs, leave balances, and information on your health insurance. In addition, you will have the ability to request changes to your tax withholdings.

To access your account:

- Visit the portal at – www.ivedportal.org
 - The portal works on all sized devices.
- Register as a new user:

- Click on “Register as New User” and enter all the requested information. Make sure to use your work email and home or mobile number to complete this request.
- Enter your verification code:
 - After entering all your information, click Submit and you will be sent a verification code to your email to verify your identity. Please wait a minute for the code to arrive. Enter it on the verification screen.
- Log in: Use your email and newly created password to log in.

Personnel Records

All permanent records are held at the district office. All information (except ratings, reports, records obtained records obtained prior to employment or obtained in connection with a promotional examination) may be reviewed by employees. To do so, an appointment must be scheduled in advance with the Associate Superintendent, who must be present during the review of materials. Information in the file may be copied at a cost of 10 cents per page.

Personal Conduct

Employees should always be courteous and helpful to the public and fellow employees. Certain rules and regulations are necessary to help us continue to meet our goal of educating students in a safe, orderly and efficient manner.

The Imperial Unified School District is a public employer, and its employees must maintain the highest standards of ethics in the conduct of their activities. Certain practices are prohibited by employees and include, but are not limited to:

- District owned or leased property
- Soliciting or collecting money for non-approved purposes during working hours
- Borrowing and/or selling school property without written authorization
- Leaving the work site without proper authorization
- Transporting of unauthorized passengers in District vehicles
- Using District property, vehicles, or equipment for personal use

Employee Drug Testing

In compliance with SB 88, all district bus drivers are subject to random drug testing throughout the year.

Additionally, volunteer drivers, including CTE teachers, coaches, and other authorized volunteers who operate district vehicles, will be included in a separate pull notice system to ensure they are also subject to random drug and alcohol testing as required by law.

Regarding any other volunteer drivers, whether employee or parent volunteers, they must complete a DMV “pull notice” for our Transportation Manager, who reviews their DMV driving record annually. If there are traffic violations noted, our Transportation Director can deny the person as a volunteer driver of our students. Currently our human resources has approximately 258 “pull notices” that are reviewed annually by our HR department.

Change of Name or Address

Employees must visit the employee portal at ivedportal.org to change their address, phone number, withholdings, and/or contributions. Employees may change their name through the portal, but employees will still need to provide proof of name change to HR.

Attendance and Employee Absences

Attendance is very important for students and all personnel. Employees who miss work because of illness are required to input absence into Frontline Absence Management System. This website is also used by employees who are requesting advance approval for use of their personal leave days. Please remember that birthday holidays must be used 15 days before and after their birthday and require supervisor approval. School business also requires an absence record.

Classified and Certificated staff members are to call their immediate supervisor and/or leave a voicemail message at their supervisor's extension to report an absence or tardiness prior to the beginning of the workday, even if they are also required to report their absence to Frontline.

Industrial Accident

Employees are eligible for injury and illness leave under the provisions of the California Compensation Insurance Fund. If you receive a job-related injury or illness, you must notify your immediate supervisor by the end of the workday.

To qualify for industrial accident leave, you must be examined and treated, if necessary, by a physician designated by the district or by the district's insurance carrier. Industrial accident leave cannot exceed 60 days per injury during a fiscal year and may be granted only during the period in which you would be performing regular duties for the district. When leave overlaps into the next fiscal year, you are entitled only to the amount of unused leave for the same injury or illness.

If you exhaust your available industrial accident leave, you may then use available sick leave, vacation or other paid leave. Payment while on leave may not exceed your normal wages.

You may return to your job following an industrial accident leave upon presentation of release from an authorized physician. Your medical release must state that you can return to work without restrictions.

Section 125

As a district benefit eligible employee, you are entitled to participate in Section 125, which is provided by American Fidelity Assurance Company. A Section 125 Flexible Benefit Plan allows you, the employee, to select from a list of available benefits that will meet your needs. The benefits that you choose are then paid for by you on a before tax basis. Salary reduction means that you are able to use "pre-tax" dollars to pay for certain benefits that you may have previously paid for with "after-tax" dollars. Implementing this plan helps you reduce your taxes and increase your spendable income. Enrollment opportunities are limited to the plan year dates for Imperial Unified. Please call Business Services for specific enrollment information.

Skin Tests

TB skin tests are required every four years for public school employees. The Payroll/HR Department will advise when you are getting close to your due date.

Dock Days (Absences Without Pay)

Absences without pay may be necessary in emergency or unusual situations. Therefore, days without pay are permitted with prior approval. The employee is required to notify the supervisor at least 24 hours in advance or as soon as practicable if the absence is to be without pay. Dock of pay will occur through the Frontline Absence by selection Leave without pay. HR/Payroll will pull absences for the previous month to dock in the current month they are working on.

Use of Internet and Email

The district's electronic information resources, including network access to the Internet, are primarily for administrative and instructional purposes.

Electronic mail transmission and other uses of electronic communication systems are not confidential and can be monitored at any time to ensure appropriate use.

Cell Phones

Due to the enormous use of cell phones in our society today, guidelines for their use in the workplace must be addressed. Please remember the following:

- The primary purpose for using a personal cell phone during the workday is school safety.
- Personal cell phones should be used for emergencies only when a working telephone isn't available.
- Staff should not make or receive cell calls during work hours (unless there is an emergency).
- Calls should not interfere with classroom instruction or regular work responsibilities.
- Personal cell phones may be used at break time.

Resignations and Retirements

Employee's resigning from a position need to provide a formal written resignation to the HR Department. The resignation letter shall be submitted to the Human Resources Department for board approval.

The employee is required to turn in all District property in his possession: telephones, keys to any facility or vehicle, computer equipment, identification badges and other school or office property before the final salary warrant will be released. If any funds are owed to the district, the total payment owed will be deducted from the final payroll check. Keys must be turned into the appropriate District employee upon checkout.

Prior to retirement or resignation, retirement benefits, insurance coverage, and unemployment insurance benefits may be discussed with the HR Department.

It is recommended that the employee meets with an STRS or PERS counselor for specific retirement information. The district does not provide STRS/PERS counseling information regarding retirement benefits.

Final paychecks due to resignations or retirements are in the form of a paper check.

Section III: SAFETY POLICIES AND PROCEDURES

Air Quality

During declared air pollution episodes, restriction of physical activities will be implemented in accordance with the following:

1. Transmission of information to schools regarding air pollution episode will be as follows:
 - a. Notification from the Air Pollution Control District that an air pollution episode is predicted or has been declared shall be received by the District Office, and the message will be transmitted to the sites as to the level of the episode.
2. Special instructions to principals and supervisors are as follows:
 - a. The Principal shall have the responsibility of alerting site personnel regarding the appropriate actions which must be implemented in order to comply with the directions.
 - b. Each Principal shall establish procedures for modifying programs and for notifying staff and students of predicted and declared air pollution episodes according to AR 3516.4. Each classified supervisor shall follow the guidelines in AR 3516.4 on Unhealthful Air Quality Days or Extreme Heat Days.

The District is also participates in the Real-Time Outdoor Activity Risk (ROAR) Guidelines which are as follows:

Numerical value	Air Quality Index levels of health concern
0 to 50	Good
51 to 100	Moderate
101 to 150	Unhealthy for sensitive groups
151 to 200	Unhealthy
201 to 300	Very Unhealthy
301 to 500	Hazardous   

Level 1 - Green
Level 2 - Yellow
Level 3 - Orange
Level 4 - Red
Level 5 - Purple

Bomb Threat

The majority of bomb threats received in schools are hoaxes, which result in nothing more than a disruption of school routine. In any case, the primary concern of school administration must be the safety of the students and staff.

On receiving a call the following steps should be taken:

1. Do not hang up the phone.
2. Notify administration.
3. Keep the caller on the line as long as possible.
4. Note the exact time.
5. Note as many characteristics of the caller as possible; be friendly; ask questions.

The staff and students will be notified to vacate the building by intercom.

The responsibilities of all staff members include:

1. Teachers will move students immediately to a location stipulated by administration.
2. Teachers are to remain with their class.
3. The maintenance crew will report to their supervisor immediately for directions.
4. Administrators will serve as liaison with faculty, students, and emergency crews.
5. The all clear will be one continuous bell indicating a return to the classroom.

Bullying, Hazing, and Harassment

At the beginning of each school year, students and staff shall receive a copy of the district's policy on bullying behavior. The Education Code prohibits students or other from bullying and engaging in hazing, harassing, or committing any act that intends to injure, degrade, or disgrace any student. Please make it your business to detect bullying, hazing, and harassment and refer the matter to administration (Education Code 212.5).

The Governing Board is committed to maintaining a learning environment that is free from harassment. The Board prohibits the unlawful sexual harassment of any student by any employee, students, or other person at school or any school related activity.

Prohibited sexual harassment includes, but is not limited to, unwelcome sexual advances, requests for sexual favors, and other verbal, visual, or physical conduct of a sexual nature when: (Education Code 212.5)

- Submission to the conduct is explicitly or implicitly made a term or condition of a student's academic status or progress.
- Submission to or rejection of the conduct by an individual is used as a basis for academic decisions affecting the individual.
- The conduct has the purpose or effect of having a negative impact on the individual's academic performance, or creating an intimidating, hostile, or offensive educational environment.
- Submission to or rejection of the conduct by an individual is a basis for any decision affecting the individual regarding benefits and services, honors, programs, or activities available at or through the school.

Examples of conduct which may constitute sexual harassment and would therefore be prohibited include:

- Unwelcome leering, staring, sexual flirtations, or propositions.
- Unwelcome sexual slurs, epithets, threats, verbal abuse, derogatory comments, or sexually degrading descriptions.
- Graphic verbal comments about an individual's body, or overly personal conversation.
- Sexual jokes, stories, drawings, pictures, or gestures.
- Spreading sexual rumors.
- Teasing or sexual remarks about students enrolled in a predominantly single-sex class.
- Cornering or purposefully blocking normal movements.
- Displaying sexually suggestive objects in the educational environment.

Any student who engages in sexual harassment of anyone at school or school related activity shall be subject to disciplinary action which may include suspension and/or expulsion.

Any employee who engages in sexual harassment or who fails to report sexual harassment, shall be subject to disciplinary action up to and including dismissal. In addition, criminal or civil charges may be brought against the alleged harasser. Sexual harassment may also be considered a violation of law relating to child abuse.

Students are informed that they should immediately contact a staff member if they feel they are being sexually harassed. The staff member shall immediately report complaints to the principal or to the district administrator. Staff members shall similarly report any such incidents they may observe, even if the harassed person does not complain.

The principal will immediately investigate any report of the sexual harassment. Upon verifying that sexual harassment occurred, he/she will ensure that appropriate action is promptly taken to address the effects on the person subjected to the harassment and prevent any further instances of the harassment. In addition, the victim may file a formal complaint with the principal in accordance with district policy.

Any retaliatory behavior against the complainant or any participant in the complaint process is prohibited. Information related to a complaint of sexual harassment is confidential and the individuals involved in the investigation shall not discuss related information outside of the investigation process.

Child Abuse Reporting

Pursuant to Penal Code 11164 and District policy, school staff shall report known or suspected child abuse to a child protective agency by telephone immediately or when practically possible and in writing within 36 hours. The reporting duties are individual and cannot be delegated to another individual except under circumstances set forth in Penal Code 11166.

Child abuse includes physical injury inflicted by other than accidental means, sexual abuse, cruelty or unjustifiable punishment of a child, unlawful corporal punishment, and neglect. Failure to safeguard a child from unjustifiable physical pain or mental suffering is also child abuse.

Mandated reporters are those people defined by law as "childcare custodians," "health practitioners," "child visitation monitors," and "employees of a child protective agency." Mandated reporters include virtually all school employees.

To report known or suspected child abuse, any employee shall report by phone to the local child protective agency Phone 1(800)-801-3993; (559) 675-7829; (559) 675-7841. The report must be made immediately and include:

Include the information that led the mandated reporter to suspect child abuse and any other information requested by the child prevention agency. When the verbal report is made, the reporter shall note the name of the official contacted, the date and time contacted, and any instructions or advice received.

Within 36 hours of making the verbal report, the mandated reporter shall complete and mail to the local child protective agency a written report which includes a completed Department of Justice form (DOJ SS 8572). Instructions are included on the form, and reporters may ask the assistance of the site administrator for help in completing and mailing it; however, the mandated reporter is personally responsible for ensuring that the written report is correctly filed.

Employees reporting child abuse to a child protective agency are encouraged, but not required, to notify the site administrator as soon as possible after the initial verbal report by telephone. When notified, the site administrator shall inform the superintendent or designee.

Administrators so notified shall provide the mandated reporter with any assistance necessary to ensure that the reporting procedures are carried out in accordance with law and district regulations. At the mandated reporter's request, the principal may assist in completing and filing these forms.

Mandated reporters have absolute immunity. School employees required to report are not civilly or criminally liable for filing a required or authorized report of known or suspected child abuse. If a mandated reporter fails to report an instance of child abuse that he/she knows to exist or reasonably should have known to exist, he/she is guilty of a misdemeanor punishable by confinement in jail for up to six months, a fine of up to \$1,000 or both.

The duty to report child abuse is an individual duty and no supervisor or administrator may impede or inhibit such reporting duties. Furthermore, no person making such a report shall be subject to any sanction.

Upon request, a child protective agency representative may interview a suspected victim of child abuse during school hours, on school premises, concerning a report of suspected child abuse that occurred in the child's home. The child shall be given the choice of being interviewed in private or in the presence of any adult school employee or volunteer aide selected by the child.

A staff member or volunteer aide selected by the child may decline to be present at the interview. If the selected person accepts, the principal shall inform him/her, before the interview takes place, of the following legal requirements:

- The purpose of the selected person's presence at the interview is to lend support to the child and enable him/her to be as comfortable as possible.
- The selected person shall not participate in the interview.
- The person shall not discuss the facts of the case with the child.

- The selected person is subject to the confidentiality of the Child abuse and Reporting act. (Penal Code 1167.5)

When a child is released to a peace officer or child protective services agent and taken into custody as a victim of suspected child abuse, the principal shall not notify the parent/guardian as required in other instances of removal of a child from school. Rather, the principal shall provide the peace officer or agent with the address and telephone number of the child's parent/guardian. It is the responsibility of the peace officer or agent to notify the parent/guardian of the situation. (Education Code 48096)

Fire Drill

At the sound of an alarm, teachers are to take their class outside and away from buildings in an orderly fashion. The first student to reach the door leading to the outside is to open the door and hold the door open until all students are out of the room. The teacher checks the room to make sure it is vacated. In leaving the teacher is to make certain he/she has the class roll book out of the building. The door to the classroom is to be shut and the lights turned off. Each teacher and his/her class must remain in their safe location until the all-clear signal is sounded to re-enter the building.

SECTION IV: PURCHASING, MONEY, AND FUNDRAISING

Fundraising

All fundraising projects by any club, organization, or class must have the approval of site administration and the School Board before being implemented. A request giving the essential information about the project must be submitted for approval. Money-raising activities are not to be conducted during regular class hours and must be financially sound. The District Student Wellness Policies require that organizations sell nutritional food items only or items other than food. No candy or other types of junk food will be allowed.

ASB

ASB funds are separated by grade level and follow the students. Any money fundraised by the classroom gets deposited into ASB grade level account, at the end of year remaining balances are carried over to the next grade level to follow the students.

Allowable ASB Purchases

The following are some examples of the many types of items generally considered allowable expenses from ASB funds. These examples include frequently questioned items; they do not include obviously appropriate ones, such as supplies for a student store, school photos, or a disc jockey or decorations for a school dance. These and similar expenditures that enhance students' educational experience and are directly linked to the students' benefit are other than what the school entity must provide from its general funding sources. The following are examples of appropriate expenditures using ASB funds:

- Magazines and newspaper subscriptions for student use
- Playground equipment
- Library books
- Supplemental equip for student use that is not normally provided by the school entity, such as telescopes and aquariums
- Field trips/excursions and outdoor education/science camps

- Extracurricular athletic costs, including costs for ticket sales, game officiating and security
- Costs for student social events
- Scholarships (under specific circumstances)
- Awards, if there is a district policy allowing them
- Substitute teacher if the teacher's absence is due to an authorized ASB activity.
- Indirect charges

Examples of Prohibited Purchases

- Expenditure of student funds for the following items is not usually allowable because they do not directly promote the general welfare, morale, or educational experience of the students, or are considered a district responsibility, or do not benefit a group of students (with some exceptions), or are a gift of public funds:
- Salaries or supplies are the responsibility of the district. Some examples are teachers' salaries and negotiated stipends, curriculum supplies, and office supplies and equipment. However, substitute teachers' pay may be allowed if they are substituting because of an ASB-related activity.
- Repair and maintenance of district-owned facilities and equipment. An exception might exist for equipment that the ASB donated to the district and for which the donation agreement includes a provision that the ASB will maintain the donation in the future, including paying for any repair, maintenance, or replacement.
- Permanent buildings
- Articles for the personal use of district employees
- Expenses for staff meetings
- Expenses for faculty meetings
- Expenses for booster clubs, foundations, auxiliary organizations, and other parent-teacher organizations
- Large awards, unless board policy states otherwise
- Gifts of any kind
- Employee appreciation gifts or meals
- Employee clothing/attire
- Donations to other organizations, except in special circumstances
- Donations to families or students in need
- Cash awards to anyone, because internal controls cannot be established and documented, unless a district's board policy allows such awards (FCMAT does not recommend this).

Request ASB Fundraiser Approval

- Complete a ASB Fundraiser Request Form
- Submit completed form along with proper fundraising information to High School ASB Bookkeeper or Elementary/Middle School Administrator
- ASB Bookkeeper will forward form to Administration for approval
- ASB Bookkeeper will notify you once fundraiser was approved

Deposit Money into ASB account

- Completed ASB Deposit Form must be submitted to ASB Bookkeeper or Business Office Fiscal Services Technician by teacher that submitted the fundraiser request form

- Deposit total must be verified by both the ASB Bookkeeper or Business Office Fiscal Services Technician and the teacher submitting deposit to make sure amounts are correct
- ASB Bookkeeper or Business Office Fiscal Services Technician will conduct bank deposit and update ASB account
- ❖ Deposits with Cash/Checks will be counted at the time of drop off. Employees/Advisors/Coaches will need to wait for Accounts Receivable to verify deposits to ensure funds received match deposit form.

Request check from ASB account

- Complete a ASB Request Form (prior to making purchase)
- Submit completed form along with proper invoice/quote to the ASB Bookkeeper or Business Office Fiscal Services Technician
- ASB Bookkeeper or Business Office Fiscal Services Technician will verify your account balance and inform you of fund availability
- If funds were available, check will be processed

Request reimbursement check from ASB account

- Complete a ASB Request Form (prior to making purchase)
- Submit completed form to the ASB Bookkeeper or Business Office Fiscal Services Technician
- ASB Bookkeeper or Business Office Fiscal Services Technician will verify your account balance and inform you of fund availability
- If funds were available, proceed with purchase
- Submit purchase receipt/invoice
- ASB Bookkeeper or Business Office Fiscal Services Technician will process reimbursement

Money and Safety of Funds

No money for field trips or fundraisers should be kept in a classroom. All monies must be deposited with the School Secretary and kept in the site office safe. If these funds were not properly secured, it will be the responsibility of the person who oversaw these funds.

Monies received must be deposited at the districts bank within 14 days of receiving the funds.

Packing Slips

Packing slips serve as the District's Proof of Delivery for an item that was purchased. If you take receipt of any items, please sign, date, and submit the packing slip to the site secretary who will upload the document into ESCAPE.

Purchasing Procedures

***Purchases for Personal Use are Strictly Prohibited**

Requisition forms are your request to the District Office to issue a purchase order. Unauthorized purchases will be the responsibility of the employee, **NOT the District**. A requisition needs to be completed for any purchase you wish to make or conference you wish to attend. These are submitted to your site administrator through the site secretary. All requisitions must include the account budget

number to be charged, and there must be available funds in the budget line item to cover the expenditures. Business Services will return incomplete requisitions.

The district may not subcontract with or award subcontracts to any person or company who is debarred or suspended. For all contracts over \$25,000, the district must verify that the vendor with whom the District intends to do business with is not excluded or disqualified. This can be accomplished by requiring a certification of eligibility from the vendor or using the Federal System of Award Management (SAM) website to determine whether a particular entity has been excluded.

Accounts Payable places orders daily and will send weekly emails regarding open, denied, and submitted purchase orders (POs). Denied POs will have notes in the history tab; please review these notes to prevent future denials. Monthly reminders will be sent for printed POs that require receiving in ESCAPE. Vendors may place accounts on hold if items are not received, as AP cannot process payment until the purchase order status changes to "ready for payment."

To use a District account card from vendors such as Lowes, Smart and Final, Costco, and Walmart, an approved Purchase Order must be presented as proof before a card can be issued. Account cards must be returned the same day along with the receipt.

DO NOT FAX THE REQUISITION DIRECTLY TO THE VENDOR. All orders **MUST** be faxed from the District Office with an authorized purchase order. This allows Business Services to verify the budget and build a paper trail for audit purposes.

When we receive ordered goods, we will

Open the box, and

Verify the contents against the Packing Slip.

If the order is correct and received in good condition,

Receive items in ESCAPE.

Sign and date the Packing Slip.

Most importantly, we promise to

Upload the signed Packing Slips to ESCAPE and email Irene and/or Bea in Accounts Payable.

If Accounts Payable does not have proof that you received your goods, they cannot pay the vendor's invoice. If even one invoice is not paid or past due, the district may be put on Credit Hold by the vendor.

If Accounts Payable staff requests verification of receipt of goods, i.e., your signature on an invoice, don't ignore them! Check that you have received the goods, sign the invoice if you have it, and send it back to

the AP Department in the Inter-District Mail. Don't jeopardize the ability of your site to order and receive products quickly. Turn in your signed Packing Slips and/or Invoices!

- There are several types of purchase requisitions:
 - Blanket PO – Multiple payments to a vendor that you use throughout the year and have a set amount encumbered.
 - PO with Receiving – Payments to vendors for items purchased that are either fixed assets or will be recorded as received (bulk purchases).
 - PO without Receiving – Payments to vendors for services or goods that will not be recorded as fixed assets.
 - Direct Payments – Payments to vendors that do not require a purchase order (e.g. AT&T, Copier Contracts). **A Direct Pay Requisition does not print a Purchase Order.**
 - Reimbursements
- Requisitions/POs for reimbursements should include detailed reimbursement information and must include receipts.
- Fixed Assets are expected to have a useful life of one or more years. Use object code 4400 when a single item (e.g. chair) exceeds \$500, including shipping and tax. iPads, Chromebooks, cameras, and other similar electronic items are recorded and tagged for security purposes, even though the cost may be less than \$500 per item. Items for which the single value or combined value exceeds \$5,000 are charged to object 6xxx.
- Submit a new Purchase Order:
 - If the invoice total has changed more than 10%.
 - If you need to increase, decrease or close a purchase order requisition, call AP for assistance.
- Department Approval – Requisitions are not electronically transmitted to Business Services until the workflow has been completed. After the Department approval has been completed, requisitions are reviewed and approved by the Associate Superintendent of Administrative Services.
- **Tips:**
 - **Whatever you put on the comment line prints on the check!**
 - **"Message Before" and "Message After" on Requisitions** – On the items tab you should add a Message Before/After listing items/services to be purchased, such as, "For questions, contact Susie Smith at 524-1234" or "Do Not Mail Check". The message "Items must be delivered on or before June 30th" should be entered as a "Message After"

PO/Requisition Payments

- **The date of your requisition/PO should be before the date of the invoice.** This practice supports good audit controls and ensures that school site/departments are not purchasing services or goods without appropriate approval.
- Payments are only made from original invoices or receipts. Payments cannot be made from statements or packing slips. If the original invoice is lost, request a duplicate

original or write "Original Invoice Lost-Duplicate Original". Make sure that the original invoice has not already been paid!

- **School site/Departments must verify the following before submitting an invoice for payment:**
 - Correct Item(s) or Services provided
 - Quantity Received or Service Hours
 - Price
 - If a partial order and an invoice for the partial order are received, a partial payment should be made. School site/Departments should specify this on the invoice and email Irene and/or Bea when partial items have been received.
 - **Only current charges are paid on recurring bills.** If there is a past due amount, research previous bills and submit separately.
 - Correct Sales Tax Rate for purchases. Sales tax is based on delivery location.

If the invoice does not match the purchase order or requisition and the department agrees with the invoice, the department should make any minor changes or additions that are necessary on the copies of the purchase order, initial, date and submit to Business Services- Accounts Payable.

Tip: If the sales tax rate for the delivery location is incorrect or the invoice does not match the purchase order or requisition, call the vendor and request a revised invoice.

- **Requisitions must be in "Ready for Payment" status before they can be entered into Accounts Payable (AP).** Requisitions are "Ready for Payment" after receiving all approvals. Purchase Orders with receiving are "Ready for Payment" when the goods are received in ESCAPE.

Submitting Invoices for Payment On A PO/Requisition

Step 1

The School site/department attaches the following documents to the requisition in ESCAPE:

1. Original Invoice, with:
 - Department approval (date/signature).
 - Correct Req or PO Number
 - Amount to pay if different than Invoice. If a partial order and an invoice for the partial order are received, a partial payment should be made. Departments should specify this on the invoice.
- **Use the Invoice number as the Description for the invoice upload.**

2. Packing slip indicating date item(s) were received. **Packing slip must be included.**
Site/Department can file the original packing slip after it is uploaded to Escape.

Step 2

The school site/department should email ap@imperialusd.org. the hard copy of the original Invoice to AP for processing of payment. Sites/Departments may send in hard copies, but email is preferred. Use Purchase Order number in subject line.

- **A snapshot of the Requisition is no longer required.** However, can be used to indicate the breakdown of payment for PO's with multiple budget codes.
- **There is no need to send any hard copy supporting documents, other than the original invoice, to AP as they are now stored in ESCAPE with the Invoice.**
- **When submitting the hard copy of the original invoice, please note the following:**
 - Be sure all information listed in Step 1 is written on the invoice
 - If you have special requests, such as DO NOT MAIL CHECK, highlight your request above the approval signature on the purchase order or requisition. Be sure to provide contact information for check pickup.
 - **Indicate "Rush" with a red tag or post-it if your payment needs to be expedited.**
 - **Please allow 10 business days to process payment from the date submitted to Accounts Payable.** The deadline to submit invoices for payment to ICOE Accounts Payable is Tuesday at noon.
 - Remind vendors that payments can take 30-45 days from the date the invoice is received. **Vendors who have not received payment within 45 days should contact the School site/Department or AP (760-355-3269).**

Stop Payment and Cancellation of Checks / Warrants

To request a stop payment or cancellation of a check / warrant, email the AP/AR Tech (Irene DeLaRosa at idelarosa@imperialusd.org) with the following information:

- Check / Warrant number
- Check / Warrant Date
- Check / Warrant payable to information
- Reason for stopping or canceling check(s) / warrant(s)
- Information on if a reissue of the original check / warrant will be needed

W9 Requirement

A W9 form must be on file for ALL vendors providing services to IUSD. W-9 requests can be sent to Fiscal Services Technician Bea Enriquez at benriquez@imperialusd.org.

Requesting a New Vendor or Vendor Updates

To request a new vendor or a vendor update, department staff must collect a W9 and information from the new vendor to submit to Business Office with Bea Enriquez. Please follow these instructions:

New Vendors

Departments must collect a W9 and any other applicable tax forms from any new vendor that they are contracting with and submit the form(s) to the Business Services department.

Updating Vendors / W9s

If an updated W9 form is needed, departments must collect a new W9 and any other applicable tax form(s) from any vendor that they are contracting with and submit the form(s) to the Business Services department. An updated W9 is required for the following reasons:

- Change in Vendor Name
- Change in Vendor Address
- TIN (Taxpayer Identification Number) Change

Department staff should review the W9 and associated form(s) submitted by vendors to ensure they are fully completed prior to submitting any form(s) to the Business Department. Completed W9s and associated forms can be submitted to the Business Department in **one** of the following ways:

By Inter-Office Mail: Departments can send a hard copy of completed form(s), in a **closed envelope**, via inter-office mail to Bea Enriquez in Business. **IMPORTANT:** Please include your department and contact information (a Post It note on the form is fine) so she can contact you with any questions.

Hand Delivery: Department staff can hand deliver a hard copy of completed form(s) to Bea Enriquez in Business. **IMPORTANT:** Please do not leave any forms in Beas desk inbox unless they are in a **closed envelope**, and please include your department and contact information (a Post It note on the form is fine) so she can contact you with any questions.

Electronic Submission (Document Upload): You may email W-9 forms to Bea Enriquez at benriquez@imperialusd.org.

POs for Out-of-State Vendors Subject to Tax Withholding:

When tax withholding is required for an out-of-state / non-resident vendor, POs must be set up in order to process payment for services to the vendor: one for the vendor, and one for the withholding to the Franchise Tax Board (FTB).

Employee Reimbursement

Employees who need to be reimbursed must receive written permission before making the purchase. No reimbursements **above \$250**. Purchases above that amount should be made on a Purchase Order.

- **Receipts.** Provide the itemized bill, not just the total amount paid at a store or restaurant.
- **Credit Card bill printout.** If you ordered something online, we need the portion of the bill that shows your name and the amount charged to your card for the item. (You can block out the rest for privacy).
- **Signatures.** Make sure that you (Requestor) and your supervisor all sign the reimbursement form before submitting to Accounts Payable.

No reimbursements will be approved for expenditures that may be deemed “gift of public funds”, such as food, gifts, individual scholarships, and field trips.

Employees can seek reimbursement for supplies purchased for meetings, including food from restaurants. The policy allows reimbursement for gratuity up to a maximum of 18% of the food bill. If the gratuity exceeds 18%, the employee seeking reimbursement will be responsible for covering the excess amount. This means that any amount above the 18% limit will not be reimbursed by the district.

Setting Up A New Customer To Invoice

To set up a new customer with a Customer ID in Escape, please email the new Customer’s name, address, and phone number to Irene De La Rosa in Business.

Setting Up an Invoice

- Be sure to reference the contract number, purchase order number or Memorandum of Understanding (MOU) on the invoice.
- Add a Comment – Comments will appear on financial reports and will assist departments in identifying the type and source of funds. For example, use the workshop title.
- Review the account code – is it correct?
- Business Services covers the cost of shipping via UPS and USPS.
- Problems printing the invoice? If you are unable to print an invoice:
 - Make sure that you are in the correct department.
 - Have you included an account code?
 - Check to make sure that the total for the items matches the total for the accounts used.
- Review invoice snapshot before printing.

- Review outstanding invoices monthly by using the AR04 Invoice Aging Report to find outstanding invoices. Contact customers regarding past due balances.

Deposit Request Form

School sites/Departments should prepare a deposit form for:

- All cash transactions.
- Payment by check when the payer was not invoiced.

Make sure the form includes:

- A description for the deposit. For example, instead of “workshop” include the title and date of the workshop.
- The account code(s) for the deposit and signature(s) on the Deposit Form.
- An attached copy of all checks and cash.

Deposit Drop-Off Procedures

When a school site/department receives checks or cash directly for payment for services or an event, deposit must be prepared for submission to Business. **Cash and checks should be delivered to the Business Office within 14 days of receipt by the school site/department, along with any required forms. Cash and checks should NEVER be kept in the school site/department’s possession past the 14 days. Cash and checks should always be secured in the school safe until a deposit can be made.**

To prepare your deposit, please follow these procedures:

1. Complete a deposit form.
2. Place prepared deposit form with checks/cash.
3. Bring the deposit(s) to Administrative Services.

- ❖ Deposits with Cash/Checks will be counted at the time of drop off. Employees/Advisors/Coaches will need to wait for Accounts Receivable to verify deposits to ensure funds received match deposit form.

Deposits: Go To District to make deposit.

NOTE: If AP/AR Tech is unavailable, find another Internal Fiscal Services team member. If NO Internal Fiscal Services team members are available, please ask a staff member for assistance.

Bring deposit directly to AP/AR Tech (or any Internal Fiscal Services staff member if AP/AR tech is not present) for cash count verification and signature.

Once the cash count is verified and signed, leave the cash with the AP/AR Tech and then use Business’s copier to make a copy of the deposit form for your department files or wait to receive a receipt.

Cash Controls

“...Everyone must always be aware of the three components that are required in order for fraud to occur: motive, opportunity, and access. These three components are known as the fraud triangle, and all three must be present for fraud to occur. No program or person is immune to fraud. A person who is honest today can experience change or new circumstances that may make fraud an option for them tomorrow.

The purpose of internal controls is to protect individuals from situations in which all elements of the fraud triangle are present. Strong cash controls can limit the opportunity and access needed to commit fraud and prevent individuals from doing something they may otherwise have never considered.

If fraud does occur, strong cash controls can also help identify the suspect and help exclude from suspicion innocent individuals who may be wrongfully accused by the actual thief. Controls can also provide a documentation trail to quantify the loss and to limit ongoing losses...”.

Cash and Check Control Procedures

- 1. All cash/checks should be turned into the Business Department to be placed in the safe within 14 days of receiving the monies, along with any required forms.**
- 2. All School sites/Departments MUST use receipt books to record receipt of cash, check, or credit card payments.** Receipt books are issued to departments by the Accounting Technicians in Business Services. Each receipt book will be numbered. To maintain numeric control, School site/Departments will use a shared receipt book. Receipt books will be numbered and used sequentially.
3. Business services has a log of all checks and cash received, which includes receipt numbers and the date the deposit request is received when applicable.
4. Voided receipts must be included on the Receipt Log, including the reason for the void.
5. All deposit forms must include the receipt number (if applicable), payer name, and amount received.
6. Cash will be counted by the Department and must be verified by a second Department employee. In addition, cash will be reconciled to receipts. Cash count will be recorded on the currency/coin section of the Deposit Form. Both Department employees will sign and date the Deposit Form.
7. School sites/Departments should keep copies of Deposit Form and receipts for their files.

*****The policies and procedures contained in this handbook are not intended to create a contract. The district reserves the right to modify or change policies and procedures at any time. The Imperial Unified School District is committed to equal employment policies.***