



Human Resources Department

Standard Operating Procedure

Human Resources Department SOP

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Human Resources Analyst

LABOR NEGOTIATIONS:

1. Provide administrative support in negotiations
 - o Research, develop and review MOUs
 - o Participate in CSEA negotiations
2. Compile all signed/completed MOUs and submits to the Executive Assistant to the Chief Human Resources Officer for Board approval and filing
3. Action and implement on all approved MOUs e.g. Article 7

BOARD ITEMS:

1. Submit closed session board items (using template provided) to Executive Assistant to the Chief Human Resources Officer (e.g. settlement authorities, termination)
2. Action and implement approved board items

WORKERS' COMPENSATION:

1. Follow the process from start to finish on a workers' compensation claim
 - a. Provide employee workers' compensation paperwork
 - b. Submit to Keenan (workers' compensation administrator)
 - c. Track and monitor employee's appointment until they are released back to work
2. Meet with payroll once a month to review industrial leaves for accuracy
3. Submit workers' compensation settlement authority to board for approval
4. Action and implement on approved board items

EMPLOYEE RELATIONS:

Investigation

Assists in the investigation and response to grievances, unfair labor practice charges, unlawful discrimination claims, and conflict resolution.

1. General guidelines/steps for conducting an investigation
 - a. Decide whether to investigate: Conduct preliminary inquiries to determine the most appropriate means for addressing the complaint
 - b. Take immediate action, if necessary: Decide if it is necessary to place the accused on administrative leave or allow voluntary leave for the accuser during the investigation. Reinforce the company's no retaliation policy.
 - c. Choose an investigator: Investigator who is experienced and/or trained in investigations, is impartial and perceived as impartial.
 - d. Plan the investigation: Take some time up front to organize your thoughts. Gather any information you already have about the problem
 - e. Conduct interviews: The goal of every investigation is to gather information- elicit as much information as possible by asking open-ended questions.

- f. Gather documents and other evidence: Personnel files, email messages, company policies, correspondence, and so on.
- g. Evaluate the evidence: You'll want to consider, for example, whose story makes the most sense, whose demeanor was more convincing, and who (if anyone) has a motive to deceive you.
- h. Document the investigation: Create a summary report of the investigation and confirm with senior management and legal counsel the final course of action. Keep good notes of interviews, responses, dates/times, efforts, results, actions and refusals. Assume all documents will be seen by a judge or jury. Avoid gratuitous conclusions and speculations. Only write what you were told and what you saw.
- i. Follow up: Follow up as needed on the effectiveness of the corrective action. Be alert to retaliation claims and follow up on them.

Discipline

In order for discipline to be effective and correct employee behavior, it must have certain fundamental characteristics. Discipline must: 1) be progressive 2) consider past practice and equitable treatment, and 3) meet the test of just cause. The principle of "progressive" discipline involves informing the employee of the problem and the need to correct it, and then using increasingly stronger disciplinary measures if the employee fails to correct the problem.

1. General guidelines/steps for implementing progressive discipline
 - a. Manager/supervisor reaches out to the Office of Human Resources for implementing and determining the level of discipline, if any, which may be required.
 - b. Investigate the issue as needed. Thoroughly investigate all issues that require investigation prior to implementing any step(s) of progressive discipline. This may include interviewing other employees or witnesses who may know about an issue/incident.
 - c. Document in writing. When documenting each step of progressive discipline, include key information about the issue, dates on which issues/incidents occurred, and any corrective action that has been previously taken.
 - d. Implement the discipline promptly. Once an issue has been discovered or an incident has occurred, promptly implement any necessary progressive discipline. Be consistent and fair. When deciding on the level of discipline that is appropriate to the issue(s), be consistent and fair (e.g., implement the same step(s) of progressive discipline for the same violation). The goal is to guide the employee to correct performance or behavior the problems, causes and solutions, not to punish the employee.
 - e. Monitor for improvement. Once progressive discipline has been implemented, continuously monitor an employee's performance and/or behavior for improvement.
 - f. Maintain records. Any documentation relating to progressive discipline that has been implemented should be kept in a confidential location.

BENEFITS & LEAVE ADMINISTRATION

Health Benefits Administration (e.g. enrollments, terminations, life events)

1. Process all changes to employee benefits in the benefits eligibility system such as new eligible employees, terminations, qualifying life events.

- a. Run monthly reports to identify any covered individuals who lose eligibility due to age guidelines.
2. Enter employees/dependents who have lost coverage into the COBRA administration system for required notices to be sent to individuals.
3. Conduct the annual open enrollment
 - a. Prepare and distribute communication for any benefit plan changes for the upcoming plan year
4. Contact carriers for escalated cases needing immediate attention regarding employees' coverage.
5. Create and maintain benefits files for all benefits eligible employees.
6. Assist Early Retirees with Medicare process upon losing group plan coverage when reaching age 65.
7. Maintain ACA reporting spreadsheet for month's employees were covered under medical group plans.
8. Prepare annual 1095-C notices per IRS regulations.
9. Participate in Health Benefits Committee. Prepare agenda and minutes for meetings.
10. Plan and coordinate the annual Employee Health Fair.

Group Life Benefits Administration

1. Process all changes to group life insurance such as new eligible employees, terminations, qualifying life events.
2. Collect beneficiary designation forms for employees with group life coverage.
3. Provide direction for employees enrolling in any Voluntary life plans required to submit Evidence of Insurability.
4. Pull reports monthly to verify any employees who have been approved/denied supplemental coverage. Update coverage amounts in tracking spreadsheet and benefits eligibility system.
5. Submit life claims for qualifying events for covered individuals.

Health Benefits and Group Life Benefits Billing

1. Run all monthly reports for invoice reconciliation process.
2. Reconcile all benefit carrier invoices to current benefits systems for billing.
3. Contact benefit carriers to resolve any discrepancies or errors in the invoices.
4. Complete and submit invoice for payment to Accounts Payable.
5. Download and reconcile remittance check received for COBRA and Direct Bill participants.

Leave of Absence Administration

1. Receive and process all leave of absence requests.
 - a. Responsible for determining annual for entitlement for leaves under Federal, State, Education Code, and bargaining agreements.
 - b. Provide notice of eligibility for federal/state leaves to employees requesting a leave of absence.
 - c. Gather and review supporting documentation and/or physician certification forms to make a determination of granting the leave request.
 - d. Record and track all approved leave of absences in tracking systems. Monitor leave balances.

- e. Enter leave codes into LeavTrak and notify payroll of any salary adjustments based on leave usage.
 - f. Communicate with employees' supervisors of leave status and updates.
 - g. Follow up with employees for return to work certifications to permit employees to return to work.
2. Follow up with employees who fail to return to work after leave. Send out job abandonment letters to employees who have failed to return and communicate with HR.
 3. Submit employees to be included in board agenda to be placed on 39-month list upon exhaustion of all available leaves.

ADA Interactive Process

1. Receive and process request for reasonable accommodations in the workplace.
2. Collect and review supporting documentation to make a determination of whether the disability is within ADA/DFEH guidelines.
 - a. If documentation is insufficient or needs further clarification, contact physician and provide supplemental questionnaire.
3. Conduct a thorough review of the employee's essential functions and make a recommendation.
4. Consult with employee's supervisor to gather relevant information necessary to make a recommendation.
5. Schedule and facilitate interactive meetings with employee, employee's supervisor, and employee representative (if requested).
6. Provide notice to appropriate parties of determination of request and whether an accommodation is needed.
7. Track and monitor any temporary modified/light duty (TMLD) accommodations.
8. Coordinate transition to a leave of absence if TMLD accommodations extend past 60 days.

YEAR-END PROCEDURES

Calendar Roll

1. Starting in February, go to Fiscal Year Rollover tab then to Personnel Roll tab to set the Holidays and Workdays for the new fiscal year

The screenshot shows a web application interface with a navigation bar at the top containing tabs: Home, Personnel, Position Control, Work Calendar, Salary Schedule, PAF, Fiscal Year Rollover, Reports, and Configuration. Below the navigation bar, the 'Personnel Roll' tab is selected and circled in red. The main content area is titled 'Personnel Roll' and contains several sections:

- From FY: 2021 To FY: 2022 Final Roll Final Roll Performed On:
- Roll Holiday Master (circled in red)
- Holiday Master Roll History
- Roll Work Calendar (circled in red)
- Work Calendar Roll History
- Roll Salary Schedule
- Salary Schedule Roll History
- Roll Position and Position Accounts

2. Set Holidays

- a. Enter the new dates of observance (refer to approved/posted [Academic Calendar](#)). Holidays are already set as Unpaid for Academic and Paid for Classified.
- b. Enter dates both Holiday Masters – Academic and Classified. If there are new holidays that need to be added, go to Configuration → District Tables → Holiday.

Holiday Master Code	Current FY	Rolled FY	Description	Holiday Code	Current FY...	Rolled FY A...	Fill Series	Current FY...	Rolled FY
ACADEMIC	2021	2022	INDEPENDENCE DAY	01	7/3/2020	07/03/2021	<input type="checkbox"/>	U - Unpaid	U - Unpa
ACADEMIC	2021	2022	LABOR DAY	02	9/7/2020	09/07/2021	<input type="checkbox"/>	U - Unpaid	U - Unpa
CLASSIFIED	2021	2022	INDEPENDENCE DAY	01	7/3/2020	07/03/2021	<input type="checkbox"/>	H - Paid	H - Paid
CLASSIFIED	2021	2022	LABOR DAY	02	9/7/2020	09/07/2021	<input type="checkbox"/>	H - Paid	H - Paid

3. Set Workdays as July 1st through June 30th. The specific dates can be entered within the calendars once they roll.

Work Calendar Code	Current FY	Next FY	Current FY First Wo...	Next FY First Work...	Current FY Last Wo...	Next FY Last Work...	Fill Series
10MCL1	2021	2022	9/3/2020	09/03/2021	6/30/2021	06/30/2022	<input type="checkbox"/>
10MCL2	2021	2022	8/3/2020	08/03/2021	5/31/2021	05/31/2022	<input type="checkbox"/>
10MOCL	2021	2022	7/6/2020	07/06/2021	6/30/2021	06/30/2022	<input type="checkbox"/>
11MCL2	2021	2022	8/3/2020	08/03/2021	6/30/2021	06/30/2022	<input type="checkbox"/>


4. Roll the calendars into the new fiscal year

From FY: 2021 To FY: 2022 Final Roll Final Roll Performed On:

Roll Holiday Master
[Holiday Master Roll History](#)

Roll Work Calendar
[Work Calendar Roll History](#)

The roll will generate an email with a list of calendars that rolled and any errors that occurred.

<p>EPICS Roll Report - WorkCalendar - District 72 WorkCalendar- Rolled By ktrujillo On 06/22/2020 14:37:01 From Fiscal Year 2020 To</p>	 Mon 2:37 PM
<p>EPICS Roll Report - HolidayMaster - District 72 HolidayMaster- Rolled By ktrujillo On 06/22/2020 14:37:00 From Fiscal Year 2020 To</p>	 Mon 2:37 PM

Holiday Master Roll Status
All the holiday master/date records were rolled without error.



5. To balance Individual Work Calendars, see section regarding Entering & Updating Work Calendars.
6. To balance Master Calendars:
 - a. Add or Remove days toward the beginning or end of the year
 - b. Update Spring Break dates where appropriate
 - c. Ensure 9 or 10 month calendars do not have work days in 'off' months
 - d. Change the "H" on July 4th to an "X" for calendars that have no workdays in July
 - e. When the 12 month Classified Master Calendar totals more than 260 days, coordinate with managers to assign non-service days to bring down to 260.
 - f. If management decided to pay the extra day(s), change paid days to the appropriate number.

Fiscal Year Roll

Preparation for the fiscal year roll begins around May

1. Skip Step
 - a. Run shared report in EPICS #3035 – Year End Skip Year Checkbox in Position Attachment
 - b. Ensure Executive Managers, Interims, and any employees with unique circumstances that should not step have this box marked.
2. Terminations
 - a. Ensure termination date for all employees terminating 6/30 or before have a term date entered.

Final Roll

Final Roll begins around Mid-June. Payroll will receive a Year-End Checklist from SBCSS. Complete and verify HR related items. Final Roll date must be coordinated with Payroll. Budget must be tentative to perform Final Roll. "Set Assign Reason" is pre-populated. This will update the Assignment Reason in Position Attachment to "Continuing". Unless there are changes, leave as is.

1. Perform Final Roll

https://f2kmt.prod.sbcss.k12.ca.us/ - EPICS - Personnel Roll - Internet Explorer

File Edit View Favorites Tools Help

Home Personnel Position Control Work Calendar Salary Schedule PAF Fiscal Year Rollover Reports Con

Budget Roll Personnel Roll

Personnel Roll

Print Page

From FY: 2021 To FY: 2022 Final Roll Final Roll Performed On:

Roll Holiday Master Set Holidays

Holiday Master Roll History

Roll Work Calendar Set Workdays

Work Calendar Roll History

Roll Salary Schedule

Salary Schedule Roll History

Roll Position and Position Accounts

From Budget(2022) to Personnel(2022)

From Personnel(2021) to Personnel(2022)

Position and Accounts Roll History

Roll Position Attachment Set Assign Reason

Step Advance

No Step Advance

Clear Budget Hours

Do Not Clear Budget Hours

Attachment Roll History

Roll

Reconciliations After the Roll

1. Check Epics emails and reports for success and errors.
2. Calendars
 - a. Calendars will re-roll but will not overwrite calendars that were manually updated to balance in the new fiscal year.
 - b. Delete calendars that will not be used in the new fiscal year such as those for terminated employees.

3. Salary Schedules
 - a. Enter changes to the salary schedules if applicable

EDITING THE SALARY SCHEDULE/MATRIX

1. There are several ways to access the Salary Schedule for maintenance in the Edit Salary Schedule programs: Select the Edit Salary Schedule tab, select Edit, double-click the Salary Schedule record in the Search results grid or press the "Enter" key on the keyboard.
2. On access of the Edit Salary Schedule tab, both the Schedule Attribute and the Schedule Matrix programs reside on the same page and both sections are expanded by default. The sections can be collapsed or expanded by selecting the '-' to collapse and '+' to expand. The Schedule Attribute and Schedule Matrix labels at the top of the page as well as the left side of the page can also be used as hyperlinks to navigate to the section selected.

Home | Personnel | Position Control | Work Calendar | Salary Schedule | PAF | Fiscal Year Rollover | Reports | Configuration | Close

Salary Schedule Search | Add Salary Schedule | Edit Salary Schedule

Edit Salary Schedule - AIDEJH

Print Page

Effective Date History

- 07/01/09
- 07/01/08
- 07/01/06

Beginning Unit: 00 ASST/SUP ADRO/LEGISLATIVE SPEC. Effective Date: 07/01/2009

Schedule: AIDEJH Description: JUV HALLIS HR AIDES HRLY STEPS

Schedule Type: HOURLY

Base: FTE: Hours/Day: 25 Hours/Day: 8.000 Days/Year: 182.500 Months Paid: 12

Position Defaults and Components

Default from Calendar: [Select]

Major Object Range From: 2100 To: 2000

Tax Type: SCHOOL EMPLOYEE

Longevity

Unit	Y	%	Step
Column	Years Completed	Percent	
	15	3.000	
	20	6.000	
	25	9.000	
	30	12.000	

Add | Update | Export

Longevity Methods/Rules

Longevity on Schedule: Annual Use FTE:

Longevity Calculation: Monthly/Daily - Calculate daily rate if mid month, then use full monthly # Multiple Positions: Primary Position

Longevity Rule: [Select] Calculate Both

Step

Code	Description	Percent

Add | Update | Export

Education and Bonus Steps

Code	Description	Unit	Amount
ED	10 YEAR STEP(ED)	Amount	300.00
ED	EDUCATION STP	Amount	300.00

Add | Update | Export

Rules

Budget Monthly Calc: [Select]

Pay Method: [Select]

Recreate Pay: Annual Monthly

Salary Schedule Matrix

Print Page

Effective Date History

- 07/01/09
- 07/01/08
- 07/01/06

Rounding: M TO DOLLAR, SAL-3 DEC Browse

Schedule Type: HOURLY Effective Date: 07/01/2009

Vertical Display: Range Default Range: [Select]

Step Default Step: [Select]

Schedule Matrix

Step	Range
1	14.10
2	14.50
3	15.04
4	15.44
5	16.02
6	16.38
7	16.80
8	17.25
9	17.59
10	18.13
11	18.57

Matrix Row/Column

Step: Range: Add | Update

Notes | Security Matrix | Export to File | Copy

Logon: wlvaweb03 District: 01 San Bernardino County Superintendent of Schools Fiscal Year: 2010 Financial 2000 Version: 2510.03.0005

Salary Schedule Attribute Fields

The Salary Schedule Code will be displayed at the top of the page in the header section. The Salary Schedule effective date record will default to the effective date closed to the logon date without going into the future unless the Salary Schedule only has a future effective date. All effective dates for the Salary Schedule will display in the Effective Date History grid on the right side of the section which includes effective dates for prior Fiscal Years.

Home | Personnel | Position Control | Work Calendar | Salary Schedule | PAF | Fiscal Year Rollover | Reports | Configuration | Close

Salary Schedule Search | Add Salary Schedule | Edit Salary Schedule

Edit Salary Schedule - AIDEJH

Salary Schedule Attribute

Beginning Unit: ED ADST/DIP ASSOC/ERALLE SPEC
 Schedule: AIDEJH
 Schedule Type: HOURLY
 Effective Date: 07/01/2009
 Description: A/JV HALL'S HR AIDES HRLY STEPS

Effective Date History

07/01/2011
07/01/2010
07/01/2009
07/01/2008

The Effective Date displayed in this field corresponds to the highlighted date in the Effective Date History grid

Base: FTE: Hours/Day: Hours/Day: 8.000 Days/Year: 181.000 Months Paid: 12

Position Defaults and Components: Default Work Calendar: Major Object Range From: 2108 To: 2999 Tax Type: NORMAL EARNINGS

Longevity

Column	Years Completed	Percent
	15	3.000
	20	6.000
	25	9.000
	30	12.000

Longevity Methods/Rules: Longevity on Schedule: Annual Longevity Calculation: Monthly/Daily - Calculate daily rate if mid month, then use full months Longevity Rule: (Select)

Use FTE: Multiple Positions: Primary Position Calculate Both:

Shift: Education and Bonus Stipends

Code	Description	Stip	Amount
10	10 YEAR STIPEND	Amount	300.00
ED	EDUCATION STIP	Amount	300.00

Rules: Budget Month Calc: (Select) Pay Method: (Select) Retroactive Pay: Annual Monthly

Salary Schedule Matrix

Rounding: M-TO DOLLAR, SAL, 2 DEC
 Schedule Type: HOURLY
 Effective Date: 07/01/2009
 Vertical Display: Range Step
 Default Range: (Select) Default Step: (Select)

Effective Date History

07/01/2011
07/01/2010
07/01/2009
07/01/2008

Schedule Matrix

Step	Range
1	14.16
2	14.80
3	15.04
4	15.48
5	15.92
6	16.36
7	16.80
8	17.24
9	17.68
10	18.12
11	18.57

Matrix Row/Column: Step: Range: Add Remove

Notes | Create Matrix | Export to File | Copy

Logon: wswarobis District: 88 San Bernardino County Superintendent of Schools Fiscal Year: 2010 Financial: 2000 Version: 2010.03.0005

Effective Date Grid

Effective dates are used to mark a point in time when change occurs in the Salary Schedule record. Some of the most common changes include adding or modifying Longevity amounts, adding or modifying Shift Factors as well as adding or modifying Education and Bonus Amounts. The Effective Date record closest to, but not greater than the login date will be the default selected record. The Effective Date Grid shows all Salary Schedules/Matrices and all the available effective dates across all fiscal years. To select another effective date, click on the desired date in the grid. Prior fiscal year records may only be edited by changing the logon fiscal year. Any attempt to modify a prior year record will produce the following error message: "The salary schedule attribute record Effective Date is prior to the login fiscal year and may not be edited."

The salary schedule attribute record Effective Date is prior to the login fiscal year and may not be edited.

Note that prior year effective dates can be accessed from the Effective Date History Grid, though the Effective Date field is grayed out to disallow modifications to an effective date record in a prior fiscal year. The user must change the logon fiscal year to allow a modification to a prior year effective date record.

Column	Years Completed	Percent
	15	3,000
	20	6,000
	25	9,000
	30	12,000

Inserting a New Effective Date Record

1. Click on the Effective Date field located in the middle of the Salary Schedule page next to the Bargaining Unit field.
2. Overwrite any existing date value and replace with a new effective date in any of the following date formats: MMDDYY, MM/DD/YY, MMDDYYYY, or MM/DD/YYYY or select a date from the Calendar Control. This Effective Date should be the first day that the desired change to the record will occur.
3. After entering the new Effective Date, use the mouse to click on the area of the section to make a change. The tab key on the keyboard can also be used to navigate to the particular field on the section to change.
4. After making the desired changes click [Save] located at the bottom right side of the section.

In the example below, a new effective date record of 01/01/2010 is being inserted with a change to the existing Longevity amount and additional Longevity amounts are also added.

Home | Personnel | Position Control | Work Calendar | Salary Schedule | PAF | Fiscal Year Rollover | Reports | Configuration | Close

Salary Schedule Search | Add Salary Schedule | Edit Salary Schedule

Edit Salary Schedule - AIDEJH

Schedule Attribute | Schedule Menu

Salary Schedule Attribute

Bargaining Unit: ED ASSTS/SP ASSOCERAILLE SPEC
 Schedule: AIDEJH
 Schedule Type: HOURLY

Effective Date: 01/01/2010
 Description: JUV HALL/8 HR AIDES HRLY STEPS

Effective Date History
 07/01/2011
 07/01/2010
 07/01/2009
 07/01/2008

Base
 FTE: Hours/Day
 Hours/Day: 8.000
 Days/Year: 181.000
 Months Paid: 12

Position Defaults and Components
 Default Work Calendar:
 Major Object Range From: 2100 To: 2999
 Tax Type: NORMAL EARNINGS

Longevity

Column	Years Completed	Percent
	15	3.000
	20	6.000
	25	9.000
	30	12.000
	35	14.000

Notes | Create Matrix | Export to File | Copy | Save | Cancel

Logon: wnavarobss District: 85 San Bernardino County Superintendent of Schools Fiscal Year: 2010 Financial 2000 Version: 2010.03.0005

Propagate Changes

When editing a Salary Schedule/Matrix record and future Effective Date records exist, a message will appear upon saving. The user can choose to only make the change on the newly added Effective Date record by selecting [Cancel] or to make the same to all future Effective Date records by selecting [OK].

Human Resources Coordinator

CAMPUS ID BADGES

1. Badges are provided on a requested basis
2. Once a request has been made, HR Coordinator schedules an appointment with the employee
3. Take i.d. badge picture using camera, and upload picture to laptop
4. Open Badge Program, select appropriate template, and edit all applicable information (name, title, etc.)
5. Print Badge and give to employee

PROVIDING INTAKE FOR INTERVIEWS

1. HR Generalists will reach out to HR Coordinators when assistance is needed; booking dates as far as a month out in advance.
2. The day before or on the day of interviews (prior to the first interviewee), HR Generalist will instruct, if Coordinators are to collect presentation/materials from candidates and/or give items for intake such as:
 - a. List of scheduled interviewees
 - b. Questions for review (reminder on minutes candidates have to review/ make notes)
 - c. Written exercise (if applicable)
3. Treat all candidates in the same manner, such as instructions given to candidate and ensuring that all candidates have the same amount of time allotted to complete their tasks.
 - a. Please note:
 - Candidates are not allowed use the internet to answer any of the tasks presented to them (unless it applies)
 - Candidates can use notes they bring with them during interview

VERIFICATION OF EMPLOYMENT

1. Complete all verification of employment requests except for those requesting historical wage (historical wage requests are forwarded to the Payroll department)
2. When filling out a form, a signed authorization by the employee whose information we are providing must be emailed or faxed.
3. When providing information over the phone, a signed authorization must still be received unless we are only confirming information that caller already was provided by employee

DATA ENTRY IN EPICS

New Hourly Hires

1. Enter information from "Personnel System Info" sheet, "Warrant Recipient/Emergency Contact Form", make sure that name entered is based off social security card.

Evaluations

1. Enter evaluation completion dates and next evaluation due date
2. Follow evaluation guidelines (See Evaluations)
3. Any evaluation that received a 2 or below for classified employees, or anything less than a satisfactory for academic employees, are given to HR Analyst and/or Associate Director of HR for review.

Address Updates

1. Employee submits address change form request via email to HR Coordinator.
2. Once address change has been entered in all systems (EPICS/Colleague/ Benefits), email Purchasing Technician informing them of the change.
3. If employee is a CalPERS member, collect proof of address change such as a utility bill, forward it with AESD1 to SB County.

Name Changes

1. Only make name changes when a new social security card is provided
2. Email TESS informing them of the name change
 - a. Take screenshot of updated record in EPICS showing new name
 - b. Drop into the folder for name changes in the drive shared TESS/HR
3. If employee is a CalPERS member, complete AESD-1 form, include copy of social security card, send to SB County.

Work Calendar Changes of Non-Service Days

1. When form is received, make sure the date the form was signed precedes any of the dates for which a change is being requested.
2. If this is the case, approve form and make changes in epics; if not, send back to supervisor and employee and inform them why it cannot be approved.
 - a. Work Calendar is found under position attachment.
 - b. Follow guidelines on work calendar in system when making changes

APPLICANT TESTING

1. When HR Generalist opens a new posting that requires testing, they will reach out to confirm if there is a current test on file within 2 years in CODESP.
 - a. If not, HR Coordinator will request new test materials through the CODESP website.
 - Fill out CODESP's online form, copy/paste the job description into form and submit request
 - CODESP will send back test materials. HR Coordinator will work with HR Generalist for a Subject Matter Expert (SME) to look at test and select the questions.
 - b. SME and/or HR Coordinator will narrow down test questions to approximately 100; keeping questions proportionate to how many questions were represented in each category before questions were deleted.
2. Testing date is scheduled in advance in NEOGOV for HR Generalist to assign to candidates that meet Minimum Qualifications (MQ's) for the position.
 - a. Follow guidelines for NEOGOV previously provided on how to schedule candidates for testing
3. Once testing is completed, download score report from CODESP and save in the shared drive
 - a. Notify applicants of test results via NEOGOV
 - b. Email HR Generalist's that candidates have completed testing and NEOGOV was updated.

UPDATE TESS/HR FOLDER

1. TESS will request employment status, live scan clearance, and Colleague/Datatel employee ID number.
2. Update the appropriate spreadsheet with information requested:
 - a. Colleague Spreadsheet
 - b. Termination Spreadsheet (a report run monthly and added to shared drive folder)

EMPLOYEE BUSINESS CARD APPROVALS

1. Printshop sends emails requesting approval for employee business cards to be printed
2. Confirm information on business card request is accurate (i.e. job title on business card matches job title in EPICS)
3. Send approval to printshop. If job title does not match, deny request.

Posting Hourly Positions

- a. See NEOGOV Guidelines in [OneNote](#)

Processing of Hourly Employees

(Adjunct, Professional Experts, Short-Terms and Student Workers)

Adjuncts

1. Receive DNOE, Statement of Qualifications and Personnel System Information form from the Office of Instruction.
2. All Adjunct must have completed online application
3. Refer to the State Chancellor's MQ's to determine if an Adjunct is qualified to teach a course.
 - a. If Adjunct is not qualified, reach out to adjunct and inform them of the equivalency request process.
 - b. Send equivalency request form to Adjunct. Request any information and documents for committee to consider.
 - c. Send Adjunct through equivalency request process.
 - d. If granted equivalency, continue with hire; if not, inform hiring Dean and Adjunct he or she will not be hired.
4. Adjunct must
 - a. Clear DOJ
 - b. Have a negative TB results dated within 60 days of hire
 - c. Have sent in official transcripts and/or have sealed official transcripts on hand before an appointment is scheduled.
5. Once they have clearances, schedule an appointment to meet with Adjunct
6. Adjunct will be given a choice of electing either CalSTRS or APPLE as their retirement benefit, if Adjunct is already a CalSTRS member, they must elect CalSTRS
7. Enter new hire into EPICS and Colleague/Datatel
 - a. Must enter Adjunct's education level in Colleague so an employment contract can be generated by the college.
 - Route all appropriate forms
 - To Payroll department: 2 copies of NOE, EFT, W-4 and DE-4
 - a. To SB County: original NOE, and STRS elections (if employee elect APPLE, then county will receive original NOE and MidAmerica will receive APPLE election form

- b. Keep copy of NOE and any retirement forms for file

Professional Experts/Short-Terms

1. New Hire Packets are received from campus departments.
2. They must include Employment Authorization form and Justification form.
3. Before processing packet confirm that:
 - a. A complete packet was received (new hire paperwork is collected by department/administrative secretary)
 - b. Professional Expert/Short-Term have cleared DOJ and have negative TB results dated within 60 days of hire
 - c. Job title and pay rate are accurate on the Employment Authorization
 - d. Appropriate signatures are on the Employment Authorization
 - e. Look up employee in CalPERS database to make sure that employee is not a CalPERS member
 - If employee is a CalPERS member, reach out to employee and request they fill out the EAMD-801 and CalPERS Reciprocity Form
 - f. If employee is not a CalPERS member, they are enrolled in APPLE
 - Once all the above actions are met, add their name and appropriate information to the corresponding "hourly" board items spreadsheet.
 - Route Employment Authorization to the Fiscal Department for budget approval
 - g. If the Fiscal Department does not approve budget, reach out to campus department to get a new budget and/or they perform a budget transfer.
4. After the Fiscal Department approves, give Employment Authorization with Justification to Associate Director of HR for final approval.
5. After final approval from Associate Director of HR, route appropriate forms:
 - a. Payroll Department receives 2 copies of NOE, EFT, W-4, DE-4 and a copy of the Employment Authorization
 - b. SB County receives original NOE
 - c. Apple form is sent to MidAmerica; if employee is a CalPERS member, then EAMD801 and AESD1 are sent to SB County.
6. If Professional Expert/Short-Term employee is currently employed and is only renewing for the upcoming semester the above will not apply.
 - a. Only a copy of approved Employment Authorization is sent to Payroll.
 - b. Hiring department will receive scanned copy of signed Authorization indicating what dates Professional Expert/Short-Term employee is cleared to work
7. Create new hire file; if it is a renewal, Authorization with Justification are filed in employee's file.

Student Workers

1. New Hire Packets are received from campus departments.
2. If Student Workers are being authorized to work under Federal Work Study, new hire packets are sent to the Financial Aid Office to process packets and then forwarded to HR.
 - a. It must include the Financial Aid representative authorized signature
3. Before processing the packet, confirm that:
 - a. A complete packet was received (all new hire paperwork is collected by department/administrative secretary)
 - b. All student workers have negative TB results dated within 60 days of hire (certain departments, such as CDC, require that student workers also clear DOJ)
 - c. Pay rate is accurate

- d. Appropriate signatures
4. Route Employment Authorization to Fiscal Department for budget approval
 - a. If, the Fiscal Department does not approve budget, reach out to campus department to get a new budget and/or perform a budget transfer
5. After the Fiscal Department approves, give Employment Authorization to Associate Director of HR for approval
6. After final approval from Associate Director of HR, route appropriate forms:
 - a. Payroll Department receives 2 copies of NOE, EFT, W-4, DE-4 and a copy of the Employment Authorization.
 - b. SB County receives original NOE
7. If Student worker is currently employed and only renewed for the upcoming fiscal year, above will not apply.
 - a. Only a copy of approved Employment Authorization is sent to Payroll.
 - b. Hiring department will receive scanned copy of signed Authorization indicating dates Student Worker is cleared to work.
 - c. If student was approved under Federal Work Study, the federal work study student spreadsheet must be updated and sent to Financial Aid with a copy of the authorization.
8. Create new hire file; if it a renewal, Authorization is filed in employee's file.

DAILY

1. Monitors and responds to emails in hureinfo@sbccd.edu inbox
 - a. If, not able to respond forwarded to HR staff to assist.
2. File personnel documents in corresponding files in File Room following guide
 - a. If brand new personnel, create appropriate file based on color code system -
 - Adjunct: Green
 - Professional Experts, Short-Term Workers, Substitutes: Blue
 - Student Workers: Yellow
 - Classified Perm: Grayish-Green with Blue Striped Label
 - Academic Perm: Grayish-Green with Green Striped Label

WEEKLY

1. MidAmerica Authorization Approvals
 - a. Follow directives on form in order to approve or disapprove distributions
 - b. Approve terminated employees
 - c. Approve employees who will no longer contribute to plan (i.e. they are enrolled CalPERS)
 - d. If employee shows active, but has not been paid for a few months, reach out to employee and verify if they are still active with SBCCD.
 - If not active, terminate employee and approve distribution.
 - If active, explain to employee that they cannot withdraw funds and deny request.

MONTHLY

New Hire Orientation

1. Prepping for New Hire Orientation

- a. Email HR Generalists two weeks before orientation requesting names of those who will be attending orientation, and to include what documents will need to be collected from employees.
- b. Work with HR Generalists to ensure that immediate supervisor of new employee is aware that employee will be reporting to HR for orientation and safety training for several days before reporting to work as scheduled.
- c. Email orientation presenters 10 days prior to orientation reminding them of upcoming orientation and inform them of how many people will be attending.

Prior to Orientation:

1. Prepare folders for new employees with the following forms:
 - a. Orientation PowerPoint Printout
 - b. Temporary Parking Permit
 - c. Best Net Quick Reference Guide
 - d. Work Report
 - e. Maps
 - f. Orientation Itinerary
 - g. "How to access leave balance" sheet
 - h. Appropriate CTA/CSEA Handbooks
 - i. Print out any documents that HR Generalists need to be collected from employees.
2. Prep Safety Training for each new employee
 - a. Input employee's information in Keenan Management and Academic employees can finish safety training on their own time.
3. Write down login credentials on sticky note and include on inside of folder
 - a. Print out "Day of Checklist" and "Orientation Itinerary" to use during orientation

During Orientation:

1. Go through itinerary.
2. Give orientation presentation
3. Collect new hire paperwork
4. Give paperwork to HR Generalists for data entry
5. Route all appropriate forms
 - a. To Payroll department: 2 copies of NOE, EFT, W-4, DE-4, copy of employment contract when necessary
 - b. To SB County: original copy of NOE, AESD1, EAMD-801, STRS elections form (whatever is appropriate)
 - c. Keep copy of NOE and any retirement forms for file
6. New hires meet with American Fidelity and (HR) Benefits (if applicable),
7. New hire must stay to complete their safety training unless:
 - a. Management (complete training on their own time)
 - b. Faculty (do not complete training).

Birthday Report

1. Run employee birthday report for CHC, SBVC and DIST
2. Send to appropriate Executive Administrative Assistant.

Term Report

1. Run term report in EPICS on the first of the month to see who was terminated the previous month
 - a. Add term report to appropriate folder in HR/TESS shared drive and email TESS letting them know that this action has taken place.

Hourly Board Items

1. Submit Hourly Board information on the appropriate tab of the HR spreadsheet (professional expert, short-term and substitute). S:\HOURLY\BOARD ITEMS
2. Copy all three spreadsheets into one workbook to be sent to Associate Director of HR for a final review before it is sent to Executive Assistant of the CHRO.

Human Resources Generalist

EVALUATIONS

Probationary Evaluations

1. Probationary period consists of 6 months for classified employees. Confidential employees and Police Department Classified employees consists of 12 months probationary period.
2. For 6-month probationary periods, an evaluation should be conducted at approximately the 2nd and 4th month of employment. For 12-month probationary periods, evaluations should be conducted at the 2nd, 4th and 6th months of employment. Additional evaluations can be conducted during probationary periods if deemed necessary by manager to address employee deficiencies.
3. Once evaluation is received, update EPICS Events, Evaluation Date Completed, and Class Probation Evaluation Due sections.

CLASS PROBATION EVALUATION DUE	Per Article 13.2: Only put the first date, i.e. 1st probationary evaluation = 2 mos. after hire date. If the evaluation is completed, replace with the next probationary date.
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4. Sign and date Office of Human Resources designation on last page of evaluation
5. Initial and date bottom of last page of evaluation when you have input into EPICS.
6. File into employees personnel file (3rd flap)

Annual Management Evaluations

1. 1st year managers need to be evaluated at least once during the first year (preferably 6 months for goal setting, and 12 months) with *only* their direct supervisors, and includes the District survey (due by January 31, 20XX)
2. 2nd year managers will need to be evaluated during this cycle and if they are a Director and above, a committee will be formed to provide a summary to the manager (committee formation and roles are included in the referenced AP 7150)

Some additional things to consider

1. Some 1st year managers may be given the full committee experience so they will not be required to have another committee for their 2nd year (just formal evaluation with direct supervisor with the exception of the College President)
2. Beginning December 2019, the Chancellor will receive the list of evaluations and ensure compliance for January 31, XXXX
3. Managers who will be considered for non-renewal should have an evaluation done in the fall, regardless of their length of contract

Email notifications for Annual Management evaluations

1. E-mail notifications will consist of the following sample:

Hello,

The following Managers on your team are due for evaluations on or by January 31, 20XX.

LAST AND FIRST NAME	POSITION DESC	EVAL DUE	EVALUATOR NAME	NOTES

The most recent AP has been attached for your reference. Below are a few guidelines to consider for evaluations per AP 7150:

- Interim managers will need to be evaluated during the sixth month of their appointment (if they become permanent in the role they move to 1st year manager)
- 1st year managers will need to be evaluated at least once during the first year (preferably 6 months for goal setting, and 12 months) with *only* their direct supervisors, and includes the District survey (due by January 31, 20XX)
- 2nd year managers will need to be evaluated during this cycle and if they are Director and above, a committee will be formed to provide a summary to the manager (committee formation and roles are included in the referenced AP)

Some additional things to consider:

- Some 1st year managers were given the full committee experience so they will not be required to have another committee for their 2nd year (just formal evaluation with direct supervisor with the exception of the College President)
- Beginning December 2019, we will be sending the Chancellor the list of evaluations and ensure compliance for January 31, 20XX
- Managers who will be considered for non-renewal should have an evaluation done in the fall, regardless of their length of contract

Schedule (On or by the following dates):	October 1st	Manager meets with employee to initiate process
	November 1 st	Committee formed
	December 31 st	Committee Due
	January 31 st	DUE DATE

2. Once evaluation is received update EPICS Events, Evaluation Date Completed, and Class Probation Evaluation Due sections.

MANAGEMENT EVALUATION DUE	Per AP 7150: 01/30 of current or next FY depending on hire date
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3. Sign and date Office of Human Resources designation on last page of evaluation
4. Initial and date bottom of last page of evaluation once entered into EPICS.
5. File into employees personnel file (3rd flap)

Annual Classified Evaluations

1. Permanent classified employees will be evaluated every two (2) years in the month of April
2. List of employees that need evaluations completed will be e-mailed to each respective HR Generalist by HR manager prior to the first week of March
3. The first week of March the HR Generalist will send out e-mail notifications to the classified employees respective manager identifying the employees that need evaluations to be completed in April of that current year.
4. E-mail notifications will consist of the following sample:

Hello,

This e-mail is a reminder in regard to the evaluation below that is **due no later than April 30th** (No sooner than April 1st, no later than April 30th).

LAST AND FIRST NAME	POSITION DESC	LOCATION	EVAL DUE	EVALUATOR NAME

5. Once evaluation is received update EPICS Events, Evaluation Date Completed, and Classified Probation Evaluation Due sections.

CLASSIFIED EVALUATION DUE	Per Article 13.2: Regular 4/30 eval date. If probation complete before 1/1=4/30 of current FY; if after 1/1=4/30 of next FY. i.e. probation complete 2/15/20=4/30/21. If permanent update to 2 years i.e. eval complete 4/20/20=4/30/22
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6. Sign and date Office of Human Resources designation on last page of evaluation
7. Initial and date bottom of last page of evaluation into EPICS.
8. File into employees personnel file (3rd flap)

Additional Information: Evaluations with low ratings

- Evaluations with 2 or lower rating will be sent to respective HR Analyst and returned to the HR Generalist once reviewed. (Update EPICS prior to sending to HR Analyst)

Classified Reclassifications

1. Reclassification is defined as upgrading of a position to a higher classification as a result of gradual increase of duties performed by the incumbent in that position (Article 16.3.1)

2. Reclassification requests are submitted to Human Resources from November 1st to December 1st, anything after December 1st will not be accepted. Early submissions prior to November are permitted.
3. Once reclassification is received, stamp date and review if there is an Immediate Supervisor Statement. If not, send form to respective manager in which they must provide comments within fifteen (15) working days.
4. Scan and e-mail the Reclassification and Immediate Supervisor Statement to self and save in *S:\Reclassification Committee\Committee Date for 2-20XX*
5. E-mail Classified member Reclass Receipt (Template located in *S:\Reclassification Committee*)
6. E-mail a copy of the Reclassification to the Classified member's manager and CSEA President.
7. Start preparing a Reclassification Analysis (Template located in *S:\Reclassification Committee*), save current and requested job description to folder as well. It is recommended for HR Generalist to have conversations with classified member and respective manager to obtain further information and analyze if the classified member is conducting out of class duties.
8. Reclassification committee meeting will occur during the month of February. Classified member may request an interview with committee. Generally, the HR Analyst will schedule the interview.
9. HR Analyst will notify the unit member of the committee's decision within ten (10) working days at the conclusion of the committee.

Appeal Process

1. Classified member is permitted to appeal to the Chancellor within fifteen (15) working days after they are informed of the committee's decision.
2. The Chancellor will then notify the member within thirty (30) working days of their final decision.
3. Generally, HR Analyst will receive appeals and send over to Chancellor for review.

Approval Process

1. Approved reclassifications will be submitted for Board approval no later than the June Board meeting.
2. Generally, HR Analyst will input Board items and notify the HR Generalist of approvals and MOU's.

EPICS Process

1. Once Payroll notifies that the classified members new position has been updated in EPICS, HR Generalist will go into EPICS and update Step and Range accordingly.
2. File Reclassification packet, new job description and MOU into classified member's personnel file (2nd flap)

WORKERS COMPENSATION

Initial Contact

1. Inform employee of the Worker's Compensation (WC) claim process at one of the District's WC providers. Advise the employee of the several steps in the WC claim process. The employee must call the Company Nurse Injury Hotline (*emphasize they must call this number first*)
2. Information and forms can be located on our District website at:
http://www.sbccd.org/District_Faculty_-a-,_Staff_Information-Forms/Human_Resources_Forms
3. E-mail HR Analyst of employee and claim so they are made aware prior.

Follow up with Employee

1. E-mail and include the following forms:
 - a. Company Nurse Injury Hotline Form (*emphasize they must call this number first if they have not already done so*)
 - b. Instructions for Injured Worker
 - c. Covered Employee Notification of Rights and Materials
 - d. Authorization for Medical Treatment
 - e. DWC-1 Form
2. E-mail notifications will consist of the following sample:

Hello,

This email is to inform you on the Workers Compensation (WC) claim process and how to seek medical treatment at one of the district's WC providers. There are several steps in the WC claim process. Below are the steps in numerical order:

1. Call the district's Company Nurse hotline at 877-518-6702. Provide search code "QS369"
 - The nurse hotline will take down some initial information regarding your injury/condition you are stating is a result of your working conditions. If medical treatment is advised, they will provide you with the address and name of our two WC medical clinics/providers.
2. You have the option to seek treatment at either of the providers:
3. Once you have visited one of our clinics, please follow up with HR and inform us of any updates

COMP – CENTRAL OCCUPATIONAL MEDICINE PROVIDERS	295 E. CAROLINE ST., STE D1 SAN BERNARDINO, CA 92408 **OTHER LOCATIONS AVAILABLE**	909-723-1161	9:00 AM TO 6 PM MON-FRI ON-CALLSAT-SUN
REDLANDS INDUSTRIAL MEDICINE CLINIC	255 TERRACINA BLVD. SUITE 101-A REDLANDS, CA 92373	909-748-6569	9:00 AM TO 6:45 PM MON-FRI 10:00 AM TO 4:45 PM SAT
HEALTHPOINTE	290 N. 10TH ST., #100 COLTON, CA 92324	909-264-2500	24 HOURS / 7 DAYS A WEEK

that affect your employment status/conditions (e.g. work restrictions or being placed off of work for specified duration). We will also need any documentation from the clinic that supports a change to your employment status/conditions.

4. The attached forms (listed below) are for your information and reading.
 - Covered Employee Notification of Rights and Materials
 - Instructions for Injured Worker
5. Complete the attached (listed below) WC documents and return to me/Human Resources as soon as possible
 - Employee Statement
 - Authorization for Medical Treatment
 - Top section of DWC-1 form on page 4

If at any point you have any questions, please give me a call at (XXX) XXX-XXXX or reply to this email. We will know more on the next steps once you are evaluated by a doctor at one of our clinics. There is no guarantee that your WC claim will be approved by the WC insurance carrier. In the event it is denied, any time missed from work related to this injury/condition will be deducted from your personal accrued sick leave days.

Supervisor/Manager Communication

1. Provide employee's supervisor with Supervisor Instructions for Manger Injured Worker's & Supervisor Statement Form

http://www.sbccd.org/District_Faculty_-a-,_Staff_Information-Forms/Human_Resources_Forms

2. E-mail completed forms to HR Analyst which will include the following:
3. Employee Statement
4. Authorization for Medical Treatment
5. DWC-1 Form
6. Supervisor Statement

PERSONNEL ACTION FORMS (PAFS)

PAF's may be used for the following reasons:

<input type="checkbox"/> Reassignment	<input type="checkbox"/> Position Change	<input type="checkbox"/> Resignation	<input type="checkbox"/> Transfer
<input type="checkbox"/> Promotion	<input type="checkbox"/> Program Change	<input type="checkbox"/> Retirement	<input type="checkbox"/> Other
<input type="checkbox"/> Demotion	<input type="checkbox"/> Salary Increment	<input type="checkbox"/> Termination	
<input type="checkbox"/> Increase in Hours	<input type="checkbox"/> Salary Adjustment	<input type="checkbox"/> Lay Off	
<input type="checkbox"/> Decrease in Hours	<input type="checkbox"/> Leave of Absence	<input type="checkbox"/> Out of Class	
<input type="checkbox"/> Correction	<input type="checkbox"/> Leave Extension	<input type="checkbox"/> Shift Differential	
<input type="checkbox"/> Reassigned Time	<input type="checkbox"/> Return from Leave	<input type="checkbox"/> Stipend	

1. The most common reason to use a PAF would be for Out of Class, because it is not an available action to change in EPICS
2. Personnel Action Form can be found S:\FORMS\Personnel Action Form.pdf
3. Fill out necessary fields
4. Request signature from Vice Chancellor, Human Resources or Director, Human Resources
5. Once received, make a copy to give to Payroll
6. File original document in employee's personnel file (2nd flap)

DMV PROCESSING

1. All new employees, who intend to drive for any purpose related to District job requirements, events, function, or attendance at conferences/workshops, must submit a Driver Record Info Authorization Form, copy of a valid California Driver's License, and proof of automobile insurance to the Human Resources Department.
2. Driver Record Info Authorization forms is available through the District's Wiki: <https://wiki.sbccd.org/HR/Employment%20Processing%20Forms/Driver%20Record%20Info%20Authorization.pdf>

3. Once received, ensure all documents are valid and send the driver's information to the DMV for processing. DMV will need the following information:
 - Last name
 - First Name
 - Driver's License Number
4. Send DMV file
 - a. Go to *Transaction Menu>DL Inquiries/EPN*
 - i. Fill in the following fields: Driver's License, Drivers Last Name, and First Name
 - ii. Select EPN Add, Delete or Change and choose 'ADD' from 'Select EPN transaction type'
5. Create employee DMV file
 - a. Create new employee folder in S:\District Approved Driver's List\Employee DMV Files\IN APPROVAL PROCESS
 - b. Place Driver Record Info Authorization Form, Copy of a valid California Driver's License, and proof of automobile insurance into employee folder
6. Download employee DMV file
 - a. An e-mail will be sent when a DMV File is ready to view.
 - b. In DMV File Generation System go to *Transaction Menu>Receive files from DMV* to download the files.
7. View employee DMV file
 - a. In DMV File Generation System go to *Transaction Menu>DL Inquiries/View Files* (this will convert .txt file in .pdf)
 - b. Open file and place DMV record in respective DMV File
 - c. If DMV record indicates Suspended, the employee cannot be added to the District Approved Driver's List and will be notified accordingly. If their job description consists of driving a vehicle, advise the HR Analyst for further steps.
8. Add employee to District Approved Driver's List
 - a. Go to S:\District Approved Driver's List\2019-2020\Drivers Lists
 - b. Type In last name, first name and location (SBVC, CHC, District) and filter by last name and save
 - c. Move employee file from IN APPROVAL PROCESS to ACTIVE EMPLOYEES ON DL
 - d. At the end of each month the District Approved Driver's List will be sent to Accounts Payable for their records and processing of mileage.
 - e. At the end of each month also check for terminations and check in S:\TERM REPORTS to check employees who have been terminated and delete record from the following locations:
 - i. DMV System
 - ii. District Approved Driver's List
 - iii. Employee file in S:\District Approved Driver's List\Employee DMV Files\Active Employees on DL

EXPORT SEXUAL HARASSMENT COMPLIANCE TRAINING COMPLETIONS VIA KEENEN SAFE COLLEGES

1. At the first of each month export completions of Sexual Harassment Compliance Training
2. Log in to Keenan Safe Colleges:
 - a. Click on Admin>Reports>Compliance By Person
 - b. Input 'From Date:' and ensure To Date: is current date you are running the report

- c. In drop down *Assignment Category*: select *Mandatory Training*
 - d. In drop down *Course*: select *Sexual Harassment Prevention for Non-Managers (SB 1343)*
 - e. In drop down *Completions*: select *Completions*
 - f. Click *Generate* to generate report
3. To generate manager report, repeat the following steps above and in drop down *Course*: select *Sexual Harassment: Policy and Prevention*
4. Once you have generated (2) two reports, open the spreadsheet *Sexual Harassment Training Tracker (S:\COMPLIANCE TRAINING\SEXUAL HARASSMENT PREVENTION TRAINING\Sexual Harassment Training Tracker.xls)*
5. Manager completion dates will be input into *Sexual Harassment: Policy and Prevention* column and all other employee completion dates will be input into *Sexual Harassment Prevention for Non-Managers (SB 1343)* column
6. Input date when report was generated in *In last reports: (date)* at the top of spreadsheet and save file.

VACANCY RECONCILIATION

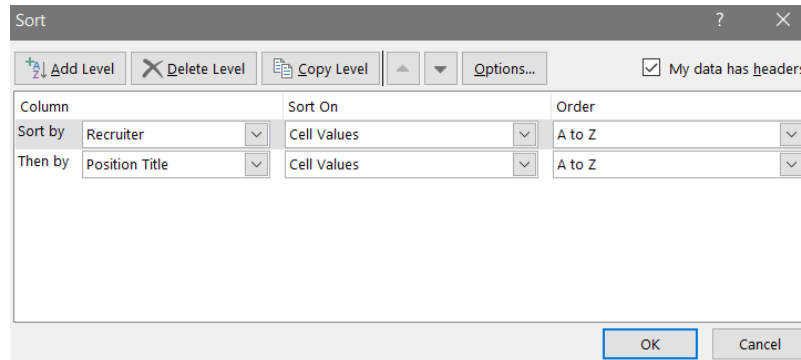
Vacancy Reconciliation Excel Workbook:

1. The vacancy reconciliation workbook is used within the HR department to track vacancies, position control, filled, canceled, and failed recruitments throughout the district. This workbook is updated by the HR Generalist and referenced by the HR Analyst and management within the HR department.
2. The file can be located at: S:\RECRUITMENT STATUS\Vacancy Reconciliation.xlsx
3. At the start of a new fiscal year, HR Generalists will download open vacancies from Epics/position control into the Vacancy Reconciliation Workbook. See Epic Reports for download and instructions.
4. Each fiscal year the report should be reconciled and compared to position control in Epics for accuracy by HR Generalists.
5. HR Generalist will update the Vacancy Reconciliation Spreadsheet with direction from the HR Manager
 - a. Add row to the spreadsheet if the following occurs:
 - New position created (PRF received by HR)
 - Position has been or will be vacated by a probation release, resignation, retirement and/or termination (PRF will need to be received by HR)
 - b. Update each column (A-AB) either using the drop down key or adding specific information/notes. See example: Status: Anticipated, External, Internal, etc.

A	B	C	D
Status	Recruiter	EPICS PCN Questica Job Code	Position Title

- c. Anytime the HR Generalist has movement within the recruitment they will update the row and add any new notes, committee dates, test dates, interview dates, job offer date, board date, etc.
 - Sort Workbook- See example of sort below
 - Save workbook

- d. Send updates on open recruitments weekly to hiring manager, campus presidents, Associate Director of HR or any other manager that it pertains to.
- e. Once a position is filled, failed or canceled remove row and move to designated tab within the workbook.
 - Sort Workbook- *See example of sort below*
 - Save workbook



- Stats Tab:
 - This tab is automatically formulated based off of the vacancies tab. **Do not change formulas in this workbook.** Send stats monthly to Chancellor and Campus President's by email.

TUITION COURSE APPROVAL & REIMBURSEMENT REQUEST

CSEA Bargaining Unit Member Course Approval-Outside of District (Article 7.13):

Classified employees on the classified employee salary schedule shall be eligible for 80% tuition cost reimbursement for courses completed outside of the DISTRICT with a grade of "C" or better which pertain to their classified position.

Course Approval Procedure:

1. HR Generalist will receive the CSEA Course Approval and Tuition Reimbursement form directly from the employee via email or inter office mail with approved Supervisors signature. The form can be found directly at: <https://wiki.sbccd.org/HR/Pages/Human%20Resources.aspx>
2. Verify employee has completed the probationary period. Only full-time classified employees who have completed their probationary period as a classified employee shall be eligible for this benefit.
3. Verify college, course, unit, term/dates and tuition cost is filled out.
4. Verify the courses have not started. All courses for which a classified employee seeks tuition reimbursement must have prior approval by their immediate supervisor.
5. Verify employee listed the reason the courses will pertain to the classified position they hold.
6. Verify supervisor and employee signed form
7. Submit for approval to Associate Director of HR.
8. If approved:
 - a. Send copy via email to employee to retain for their records.
 - b. File approved copies in employee personnel file.

9. If denied:
 - a. If course approval is denied, send course approval form (with denied box checked and Associate Director of HR signature) back to employee via email for their records.
 - b. If the request by the immediate supervisor or HR is denied, it may be appealed to the Vice Chancellor of Human Resources & Police Services.

CSEA Bargaining Unit Member Course Reimbursement

1. HR will receive via email or interoffice mail the original Course Approval form with ALL approved signatures, receipt with tuition fees, and passing grades of "C" or better.
2. Once received, verify against original in employee personnel file.
3. Submit all documents to Accounts Payable for payment via email and carbon copy employee.
4. File final copy of tuition reimbursement form along with employee's documentation in employee personnel file.

CSEA Bargaining Unit Member Enrollment Fee Reimbursement-CHC/Valley:

1. HR will receive the CSEA Enrollment Fee Reimbursement form directly from the employee via email or inter office mail with approved Supervisors signature. The form can be found directly at: <https://wiki.sbccd.org/HR/Pages/Human%20Resources.aspx>
2. Verify employee is a permanent employee and works at least 20 hours per week.
3. Verify courses taken were within the district campuses.
4. Verify the courses have a passing grade of "C" or better. Employee will attach documentation.
5. Verify employee has attached receipts for tuition and fees.
6. Verify all boxes are filled out with course #, term dates, enrollment fees, etc.
7. Verify supervisor and employee signed form
8. Submit for approval to Associate Director of HR.
9. If approved:
 - a. Submit all documents to Accounts Payable for payment via email and carbon copy employee.
 - b. File approval paperwork in employee personnel file.

CTA Bargaining Unit Member Course and Reimbursement Approval (Article 19.C):

Faculty members on the academic salary schedule shall be eligible for 80% tuition cost reimbursement for courses completed which pertain to their academic position. Faculty may not seek both reimbursement for a course and salary advancement.

Course Approval Procedure:

1. HR will receive the CTA Course Approval and Tuition Reimbursement form directly from the employee via email or inter office mail with approved Supervisors signature.
2. Verify faculty is full time. Only full-time faculty employees are eligible for this benefit.
3. Verify college, course, unit, term/dates and tuition cost is filled out.
4. Verify the courses have not started: All courses for which a faculty member seeks tuition reimbursement must have prior approval by their manager and the Chancellor of the District.
5. Verify employee listed the reasons the courses will pertain to the position they hold.
6. Verify supervisor and employee signed form
7. Submit for approval to Associate Director of HR.
8. If approved:
 - a. Send copy via email to employee to retain for their records.

- b. File approved copies in employee personnel file.
9. If denied:
 - a. If course approval is denied, send course approval form (with denied box checked and Associate Director of HR signature) back to employee via email for their records.

CTA Bargaining Unit Member Course Reimbursement

1. HR will receive via email or interoffice mail the original Course Approval form with ALL approved signatures along with receipt with tuition fees and passing grades of "C" or better.
2. Once received, verify against original in employee personnel file.
3. Submit all documents to Accounts Payable for payment via email and carbon copy employee.
4. File final copy of tuition reimbursement form along with employee's documentation in employee personnel file.

SUBSTITUTE PROCESSING

Substitute Employees are used for the following within the district:

- Fill a vacancy
- Leave of Absence
- Substitute for a CSEA employee that is on sick or vacation leave

CSEA Bargaining Agreement (15.6):

The District may employ a substitute employee pursuant to Education Code 88003 to replace any classified employee who is temporarily absent from duty.

*If the DISTRICT is engaged in recruiting a permanent employee to fill a vacancy in any classified position, the Governing Board may fill the vacancy through such employment for not more than **sixty (60) calendar days**.*

1. HR Generalist will receive a memo or email from hiring manager requesting substitute.
2. If a substitute is needed, post the job in Neo Gov (if not already posted). *See Neo Gov SOP for posting instructions.*
3. Screen substitute applications for minimum qualifications. *See Neo Gov SOP for screening instructions.*
4. Hiring Manager Responsibility:
 - a. Hiring manager will have access to screen and interview applicants through Neo Gov.
 - b. Hiring manager will interview selected candidates.
 - c. Hiring manager will notify HR of the selected candidate to hire. Hiring manager will have direct communication with potential new hire (i.e. recommending position).
 - d. The hiring manager or designated employee will send recommended candidate for a LiveScan and TB test (tests dated 60 calendar days before the hire date are acceptable).
 - e. The hiring manager will submit the New Hire Substitute Hiring Packet to HR. Forms can be found here:
<https://wiki.sbccd.org/HR/Employment%20Processing%20Forms/Substitutes/Substitute%20Packet%20-%20New%20Hire.pdf>
5. HR Generalist needs to make sure the packet is completed with all documents attached (i.e. I-9 form completed by hiring manager, copies of acceptable identification, TB results, etc.)
6. HR will verify candidate has been approved through DOJ.
S:\DOJ\DOJ LiveScan RESULTS\DOJ LiveScan RESULTS.xlsx

7. Once LiveScan results have been received, send substitute name to next board date for employment approval. Substitutes do not need to wait to start work until board approval.
S:\HOURLY\BOARD ITEMS
8. Notify department by email that the new hire substitute is able to start work
9. Enter new hire substitute in EPICS. See new hire EPICS entry for instructions.

EPICS ENTRIES

EPICS is an integrated Human Resource system for maintaining all types of employee/position data.

Employee Search

The EPICS Employee Search tab provides search capabilities for finding an individual employee or groups of employees. An employee must first be identified using Employee Search prior to accessing any of the Personnel sections including Employee Attributes. Each search returns an employee record(s) with columns of basic employee information within the search grid.

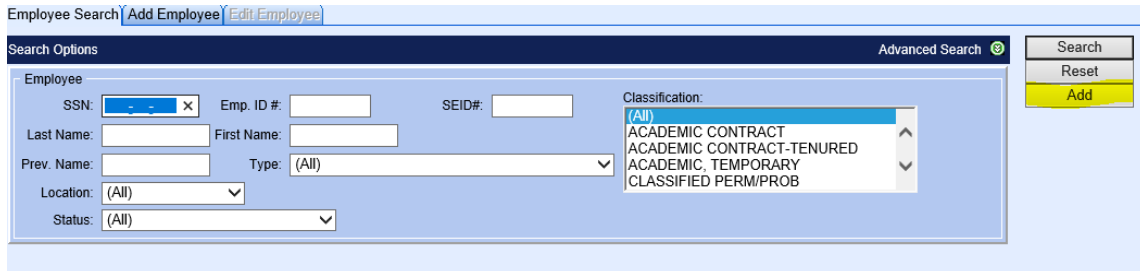
1. The initial search tab will be blank upon the first time entering the Employee Search and the cursor will default into the SSN search field. Upon subsequent returns to the search tab, the last search criteria and results will always display. The cursor will default in the first defined field of the previous search criteria. This field may be modified for a new search or click the [Reset] to refresh the search tab. If any of the advanced search criteria were selected, the advanced search section would remain displayed.

2. Last Name: Last Name is a Free Text field that uses the 'begins with' logic. Only the first or the first few characters are required.
3. First Name: First Name is a Free Text field that uses the 'begins with' logic. Only the first or the first few characters are required.
 - a. [Edit] - Will open the selected employee record in the Edit Employee page. You can also double click on employee's name in results field to open record to edit.
 - b. [Notes] - Once search results are displayed, selecting the Notes will open the Notes dialog for the employee that has been selected from the search results. If Notes exist for an employee, [Notes] will be displayed in blue.
4. If EPICS has record of the employee, it will be displayed. If not, it will state "no record found"

Adding a New Employee:

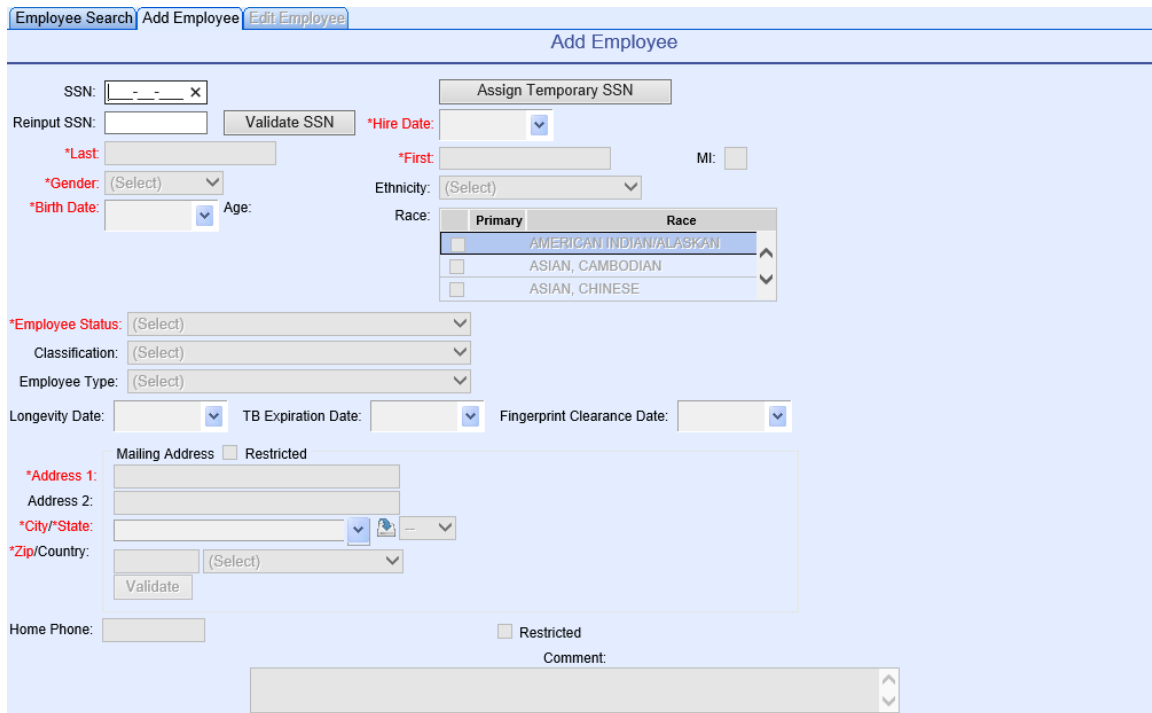
The employee section which contains fields in Employee Attribute/Events, and the position section that includes Position Attachment information. The information entered using this process will populate the Attributes, Events and Position Attachment sections.

1. Add



The screenshot shows the 'Employee Search' interface. At the top, there are links for 'Employee Search', 'Add Employee', and 'Edit Employee'. Below this is a 'Search Options' section with a search bar and an 'Advanced Search' icon. The search criteria include: SSN (with a mask and clear button), Emp. ID #, SEID#, Last Name, First Name, Prev. Name, Type (dropdown), Location (dropdown), and Status (dropdown). A 'Classification' dropdown menu is open, showing options: (All), ACADEMIC CONTRACT, ACADEMIC CONTRACT-TENURED, ACADEMIC, TEMPORARY, and CLASSIFIED PERM/PROB. On the right side, there are buttons for 'Search', 'Reset', and 'Add'.

2. Enter all required information that can be found on the new hire paperwork.



The screenshot shows the 'Add Employee' form. At the top, there are links for 'Employee Search', 'Add Employee', and 'Edit Employee'. The form is titled 'Add Employee'. It contains several sections of fields: SSN (with a mask and clear button), Reinput SSN, Assign Temporary SSN, Validate SSN, Hire Date (dropdown), *Last (text), *First (text), MI (text), *Gender (dropdown), Ethnicity (dropdown), *Birth Date (calendar), Age (text), Race (dropdown with options: AMERICAN INDIAN/ALASKAN, ASIAN, CAMBODIAN, ASIAN, CHINESE), *Employee Status (dropdown), Classification (dropdown), Employee Type (dropdown), Longevity Date (dropdown), TB Expiration Date (dropdown), Fingerprint Clearance Date (dropdown), Mailing Address (checkbox Restricted), *Address 1 (text), Address 2 (text), *City/*State (dropdown), *Zip/Country (dropdown), Home Phone (text), and Comment (text area). There are also 'Validate' buttons for SSN and Zip/Country.

- Social Security Number/Validate SSN
- Hire Date
- Last Name, First Name, Middle Initial
 - Last and first name is a Free Text field. The entered First Name in Attributes is used to update the employee's warrant or EFT information as well as used in W-2 reporting.
- Gender
- Ethnicity
- Birth Date
 - Birth Date is a Calendar control field.

- Race
- Employee Status
 - Select employee status from drop down- EMPLOYEE

(Select)
 PRE-HIRE
 39 MONTH REHIRE LIST
 CONTRACT - NON-EMPLOYEE
 DECEASED
EMPLOYEE
 LAYOFF
 LEAVE-FAMILY MEDICAL
 LEAVE-MILITARY
 LEAVE-PAID
 LEAVE-UNPAID
 NON-ACTIVE
 RESIGNED
 RETIRED ACTIVE
 RETIRED INACTIVE
 TERMINATED-INVOLUNTARY
 TERMINATED-VOLUNTARY
 VOLUNTEER

- Employee Type
 - Select Employee type from drop down

(Select)
 CONTINUING - ACADEMIC CONTRACT
 CONTINUING - ACADEMIC HOURLY
 CONTINUING - CLASSIFIED CONT
 DEP OF ACADEMIC RETIREE
 DEP OF CLASSIFIED RETIREE
 FACILITATOR
 NEW HIRE - ACADEMIC CONTRACT
 NEW HIRE - ACADEMIC HOURLY
NEW HIRE - CLASSIFIED CONTRACT
 NEW HIRE - PROFESSIONAL EXPERT HRLY
 NEW HIRE - SHORT-TERM HOURLY
 NEW HIRE - STUDENT HOURLY
 NEW HIRE - SUBSTITUTE HOURLY
 NON-EMPLOYEE (CONTRACT)
 PROMOTED - MANAGEMENT CONTRACT
 RETIRED ANNUITANT - CONTINUING
 RETIRED ANNUITANT - NEW
 RETIREE NOT ELIGIBLE FOR BENEFITS
 RETIREE ON BENEFITS
 SHORT-TERM HOURLY
 STUDENT / NA
 SUBSTITUTE HOURLY
 WRONG SOCIAL SECURITY NUMBER

- Enter longevity date for CSEA members, TB test date and Fingerprint Clearance date
 - This is a Calendar control field. The Longevity, TB and Fingerprint Clearance date will create the entry in the Events program.
 - Enter home address- Validate
 - Enter phone number
 - Add comments- for example: Hired employee eff. 1/1/2020 (12/16/2019 bd).
3. Access the following spreadsheet for better understanding of longevity, tb expiration, etc.:
 S:\FORMS\Employee Events.xlsx

4. Attach position control code to new employee record- Attach

No position has been attached to this employee. Please click Attach to attach a position.

Position Code: _____

Location: _____ Primary Job Position

Start Date: End Date:

Salary Schedule Detail

Schedule Code: _____

Range: Step:

Shift:

Work Calendar:

Earn Type:

Group Rule:

Fiscal Year Roll Detail

Increment Date: Skip Year

Assignment

Type:

Reason:

Subject:

Health & Welfare:

5. Enter position code from new hire paperwork/recruitment paperwork- select

- Start Date
- Range/Step
- Shift- If working 5 days (if not, leave blank and enter information in additional information)
- Work Calendar
- Earn Type
- Group Rule
- Increment Date
- Assignment Type, Reason and Subject if applicable
- Health and Welfare
- Retirement Options/Retirement
- EEO
- Contract Duration
- Campus No.

6. SAVE Record and click update record

7. Enter the following information in Attributes Section:

- Cellular phone number
- Enter Email Addresses available
- Select from drop down disability, disability type and citizen status

8. Enter the following information in Position Control Section:

- Board date
- Position hire date
- Enter any other information that pertains to the employee

9. Events- enter the following information that pertains to record

Event
ACADEMIC CONTRACT HIRE DATE ●
ACADEMIC EVALUATION DUE ●
ASSOCIATE PROFESSOR
ASSISTANT PROFESSOR
PROFESSOR
TENURED DATE
ACADEMIC HOURLY HIRE DATE
CONTRACT START DATE ●
CONTRACT END DATE
MANAGEMENT HIRE DATE ●
MANAGEMENT EVALUATION DUE ●
CLASS CONTRACT HIRE DATE ●
CLASS PROBATION EVALUATION DUE ●
CLASS EVALUATION DUE ●
EVALUATION DATE COMPLETED
CLASS SENIORITY DATE
SHORT-TERM/SUB HIRE DATE
PROFESSIONAL EXPERT HIRE DATE
HW ELIGIBILITY DATE ●
HW TERMINATION DATE
ORIGINAL HIRE DATE
HEPATITIS B
CPR CERTIFICATION
FIRST AID CERTIFICATION
I-9 WORK AUTHORIZATION EXPIRATION
APPROVED DRIVER'S LIST DATE
39 MONTH RE-HIRE DATE
RE-EMPLOYMENT HIRE DATE
39 MONTH LIST START DATE
DISTRICT EXPERIENCE DATE
CTA PART-TIME SENIORITY DATE

10. Enter information under Additional Information:

Additional Information

Hide Unassigned Items

*** ITEMS ISSUED *** ●

Item
CELL PHONE
CREDIT CARDS
KEYS
LAPTOPS (COMPUTERS)
UNIFORMS
WEAPONS
TERMINATION REASON
DATATEL ID NUMBER

WORK SCHEDULE DETAIL

Item
VARIABLE SHIFT (TW,SW,GS) ●
WORK SCHEDULE ●
SCHEDULE EFF. DATE/NOTES ●
OF DAYS PER WEEK ELIGIBLE FOR SHIFT DIFFERENTIAL ●

a. Work schedule detail: CSEA, Article 7.2

- If variable shift is working less than five days enter information for reporting:
 - Variable Shift: TW, SS, GS, SR
 - Work Schedule Days/Times
 - Schedule Eff. Date/Notes
 - # of Days per week eligible for shift

11. Enter emergency record information which can be found on new hire paperwork.

12. SAVE RECORD with all Updates

13. Print NOE (Notice of Employment), AESD1 form (if CalPERS) and email payroll, fiscal and benefits- see additional procedures for these processes.

Terminating an Employee:

The termination section contains fields in Employee Attribute/Events, and the position section that includes Position Attachment information. The information entered using this process will populate the Attributes, Events and Position Attachment sections.

Reasons to terminate employee:

- Deceased
 - End of Assignment
 - Exhausted leaves
 - Retirement
 - Resignation (voluntary or involuntary)
 - Resignation in lieu of termination or probationary release
 - Termination (voluntary or involuntary)
1. Select termination in employee record
 - a. Enter termination effective date (last day worked)- load data
 - b. Select termination reason
 - c. Select Status
 - d. Assignment Reason
 2. Save Record
 3. Enter board date in position attachment- Save
 4. Saving the record will create a new effective date in Attributes and automatically update the employee to termination status.
 5. Saving the record will also update the event section with a termination date.
 - a. Enter other event dates, i.e. H/W term date
 6. Save record in Epics
 7. Print AESD1 form (if applicable) and email payroll, fiscal and benefits- *see additional procedures for these processes.*

Additional areas to reference:

S:\FORMS\Employee Events.xlsx

<https://f2kmt.prod.sbcss.k12.ca.us/Financial2000/MainMenu/MainMenuUI/default.aspx>

OUT OF CLASSIFICATION

CSEA Bargaining Unit Member Working out of Class (7.9):

Any unit member required to work out of classification for five (5) or more working days within a fifteen (15) calendar day period shall have his/her salary adjusted upward beginning with the first working day in the higher classification.

A unit member required to work out of class shall receive five percent (5%) salary increase unless the increase exceeds the highest step of the higher classification, in which case the unit member shall be paid at the highest step.

Working out of class assignments shall be limited to six (6) months unless the period is extended by mutual agreement by the DISTRICT and the ASSOCIATION.

1. HR to receive memo from department requesting employee to work out of class.
 - a. Memo should state the following: employee name, dates and reason to work out of class and title of higher classified position
2. Verify unit member meets CSEA guidelines above.
3. Enter date on Out of Class working spreadsheet: S:\RECRUITMENT STATUS\District Wide List of Out of Class Assignments.xlsx
4. Create Personnel Action Form (PAF) for Out of Class
 - a. Access PAF template: S:\FORMS\Personnel Action Form.pdf
 - b. Submit PAF to Associate Director of HR for approval.
 - c. Once approved submit copy to payroll.
 - d. File PAF in employees personnel file.
 - e. Email department informing the Out of Class is approved.
5. Update Epics (see section 1.1 below)

CSEA Bargaining Unit Member Working Out of Class OUTSIDE of unit (7.9.1):

Unit members required to work out of classification not within the bargaining unit shall have his/her salary adjusted to the rate of pay of the position that is not within the bargaining unit if it exceeds their current salary range. The District and Association shall meet and negotiate the effects.

1. HR to receive memo from department requesting employee to work out of class.
 - a. Memo should state the following: employee name, dates and reason to work out of class and title of higher classified position
2. Verify unit member meets CSEA guidelines above.
3. Enter date on Out of Class working spreadsheet: S:\RECRUITMENT STATUS\District Wide List of Out of Class Assignments.xlsx
4. Create Personnel Action Form (PAF) for Out of Class
 - a. Access PAF template: S:\FORMS\Personnel Action Form.pdf
 - b. Submit PAF to Associate Director of HR for approval.
5. After PAF is approved send copy to HR Analyst.
 - a. HR Analyst will create a memo for the association and district to agree at negotiations.
 - b. HR Analyst will prepare MOU for board approval.
6. After Out of Class has been approved in negotiations, notify department informing the Out of Class was approved pending board approval.
7. Send copy of PAF to payroll for records. Payroll will pay employee based off of MOU pending board approval.

8. File MOU and PAF together in employee personnel file.
9. Update Epics (see section 1.1 below)

Section 1.1

Update Epics record:

1. Update position attachment record with new effective date with out of class start date.
 - a. Change subject line to: CSEA Out of Class
 - b. Enter board date
 - c. If there is a shift differential and it needs to be removed, make sure to remove it within the out of class record.
 - d. Enter notes in position attachment with effective date and title.
 - e. Save new record.

Position Attachment

Eff Date: 04/01/2020 Primary Job Position

Position Code: C123204 LEAD CUSTODIAN Board Date: 04/09/2020

Location: SBVC
Department: CUSTODIAL - SBVC
Start Date: 09/13/2019 End Date:

Salary Detail

Schedule Code: CLACOH Salary: \$22.56 Salary Rate as of: 07/01/2019

Range: 31 Step: B

Shift: (Select)

Work Calendar: 12 MONTH CLASSIFIED (12MOCL) Flex Edit Flex Calendar

Earn Type: NORMAL PAY

Group Rule: (Select)

Generate Earnings Indicator Overlap Override FTE

Schedule	Hours/Day	Days/Year	Paid Days/Year	Hours/Year	FTE	Budget Hours/Day	Avg. Weekly Hours
8					1		
Position	8						
Employee	8.0000	206	206	1648	1.0000	8.0000	40.00

Earnings:

Hourly	Daily	Monthly	Normal Annual	Actual Annual
\$22.56	\$180.48	\$3,910.40	\$46,924.80	\$35,971.92

Position Hire Date: 09/13/2019 Years Of Service: 0 Months: 7

Comment: APPROVED TO WORK OOC 3/25/20-4/5/20 AS CUSTODIAL SUPERVISOR. MOU AND PAF CREATED 3/25/2020, REVISED PAF 4/6/2020. DOES NOT RECEIVE SHIFT DIFFERENTIAL WHILE OOC DUE TO HIGHT POSITION.

Fiscal Year Roll Detail

Increment Date: 04/01

Step Future Fiscal Year: Future

Assignment Type: OPER/SUPP ACTIVITES - NORMAL

Reason: CONTINUING

Subject: CSEA OUT OF CLASS

Health & Welfare: YES

Retirement: NEW MEMBER PERS

Retirement Option: PICK-UP HIRED AFTER 01/01/2013

EEO: SERVICE/MAINTENANCE

Contract Duration: 11 - 12 MONTHS

Leave Status: NOT APPLICABLE

Campus No: 2 SAN BERNARDINO

Work Phone #:

- f. Enter new effective date for the out of class to be terminated.
 - i. Make sure to add shift differential back into record if needed.
- g. Save new record.

Position Attachment

Eff Date: 04/09/2020 Primary Job Position

Position Code: C123204 LEAD CUSTODIAN Board Date: 04/09/2020

Location: SBVC
Department: CUSTODIAL - SBVC
Start Date: 09/13/2019 End Date:

Salary Detail

Schedule Code: CLACOH Salary: \$22.56 Salary Rate as of: 07/01/2019

Range: 31 Step: B

Shift: SWING SHIFT

Work Calendar: 12 MONTH CLASSIFIED (12MOCL) Flex Edit Flex Calendar

Earn Type: NORMAL PAY

Group Rule: (Select)

Generate Earnings Indicator Overlap Override FTE

Schedule	Hours/Day	Days/Year	Paid Days/Year	Hours/Year	FTE	Budget Hours/Day	Avg. Weekly Hours
8					1		
Position	8						
Employee	8.0000	206	206	1648	1.0000	8.0000	40.00

Earnings:

Hourly	Daily	Monthly	Normal Annual	Actual Annual
\$22.56	\$180.48	\$3,910.40	\$46,924.80	\$35,971.92

Position Hire Date: 09/13/2019 Years Of Service: 0 Months: 7

Comment: APPROVED TO WORK OOC 3/25/20-4/5/20 AS CUSTODIAL SUPERVISOR. MOU AND PAF CREATED 3/25/2020, REVISED PAF 4/6/2020. DOES NOT RECEIVE SHIFT DIFFERENTIAL WHILE OOC DUE TO HIGHT POSITION.

Fiscal Year Roll Detail

Increment Date: 04/01

Step Future Fiscal Year: Future

Assignment Type: OPER/SUPP ACTIVITES - NORMAL

Reason: CONTINUING

Subject: CSEA OUT OF CLASS

Health & Welfare: YES

Retirement: NEW MEMBER PERS

Retirement Option: PICK-UP HIRED AFTER 01/01/2013

EEO: SERVICE/MAINTENANCE

Contract Duration: 11 - 12 MONTHS

Leave Status: NOT APPLICABLE

Campus No: 2 SAN BERNARDINO

Work Phone #:

21-DAY NOTICE SCHEDULE CHANGES (CSEA)

The District may change a unit member's permanent shift, beginning and end times, provided that it gives the unit member 21-calendar day notice. (See CSEA BA Article 6.2)

1. The manager completes the Form_21 Day Schedule Change located here: T:\FORMS
2. When form is received, forward to CSEA Negotiations HR Analyst to present to CSEA.
 - a. CSEA will create an MOU to be sent to Board and list an effective date.
 - b. The 21 days **does not begin until** CSEA has been notified of proposed change.
3. The HR Analyst will advise HR Generalist when schedule change is approved.
4. Enter updated schedule in EPICS under Additional Information.

WORK SCHEDULE DETAIL	
Item	Data
VARIABLE SHIFT (TW,SW,GS)	TW
WORK SCHEDULE	M-TH 1:00PM-9:30PM, F 7:00AM-4:00PM

5. If necessary, modify shift under Position Attachment:

[Attributes](#)

[Position Attachment](#)

Eff Date: 04/01/2020

Range: 46 Step: D

Shift: SWING SHIFT

Comment:
SCHEDULE CHANGE TO TWILIGHT EFF. 5/1/20

6. Save entry
7. After saving, send the EPICS notification email to:
 - a. Payroll Manager
 - b. Associate Director, Fiscal Services
 - c. District Budget Analyst
 - d. Payroll Accountant
 - e. Payroll Accountant
 - f. Benefits HR Analyst
 - g. HR Coordinators

FACULTY CONTRACT RENEWALS

Each campus President's office will create an annual Board item to be sent to March Board detailing the list of faculty advancing to their next year contract. The HR Generalist should collaborate with the President's office in January to audit the Board item to ensure the information is correct.

1. After March Board meeting, create faculty contracts referencing CTA Bargaining Agreement, Article 16. Templates found here: T:/CONTRACTS
 - a. 1st year
 - b. 2nd year
 - c. 3rd & 4th year (combined contract)
 - d. Tenure contract
2. Email PDF contract to faculty and copy their manager. Request the faculty member sign and return the contract to HR.
3. Obtain signature from Vice Chancellor of Human Resources & Police Services.
4. Scan and email a copy of the fully executed contract to faculty for their records and save a copy here: T:\CONTRACTS
5. For faculty receiving their tenure contract, update EPICS to reflect their tenure status.

Attributes:

Attributes	
Effective Date:	07/01/2020
Class:	ACADEMIC CONTRACT
Contract Status:	TENURED

Events:

Events		
<input checked="" type="checkbox"/> Hide Unassigned Events		
* SYSTEM DEFINED DATES *		
Event		
HIRE DATE		01/25/1999
TB EXPIRATION DATE		08/11/2020
*** DISTRICT DEFINED ***		
Event		
ACADEMIC CONTRACT HIRE DATE		08/12/2016
ACADEMIC EVALUATION DUE		12/15/2020
TENURED DATE		07/01/2020

6. Make a copy of the contract for Payroll and file original copy in employee's file.

FACULTY SALARY RECLASSIFICATION

Contract faculty employees are eligible to apply for Salary Reclassification following their initial placement on the salary schedule. Reclassification is based on academic units gained subsequent to employment by the District. If approved, the employee advances to the next Range on the Faculty Salary Schedule.

Appendix B of CTA BA describes when Salary Reclassification can be initiated by the faculty member.

Course Approvals

1. Prior to enrolling in courses, employees must submit:
 - a. A Request for Approval of Coursework for Salary Reclassification, including their VP's approval signature. (This must have all approvals **prior** to the start date of the class.)
 - b. Copy of course descriptions for each course
2. Review all completed paperwork and ensure it is complete and correct.
3. Ensure the educational institution is accredited.
4. Ensure no more than 15 semester (or 22.5 quarter units) are approved for each year.
5. Obtain HR Associate Director's approval.
6. Scan a copy back to employee for their records.
7. File a copy in the employee's file.

Request for Salary Reclassification

Once faculty members have completed 15 semester units (or 22.5 quarter units) of approved coursework with a grade "C" or better, employee may file the Request for Salary Reclassification form with HR. This must be submitted prior to the last day of Spring semester. If approved, the effective date of the Salary Reclassification will be July 1st.

1. Employee must submit:
 - a. Request for Salary Reclassification form
 - b. Copies of all course approvals for each class listed on the Salary Reclassification form.
 - c. Proof of successful completion of class (Initially, a copy can be accepted; however, official transcripts must be provided to HR prior to July 1st.)
2. Review all submitted paperwork ensuring everything is complete and correct. Review the below information:
 - a. Audit employee's file. Look to see if they had leftover units from their initial Salary Placement
 - b. Copies of all previously approved course approvals must be attached.
 - c. Copy of transcripts reflecting successful completion are attached (Official transcripts must be provided to HR prior to July 1st.)
 - d. Referencing the Salary Schedule Placement Guidelines in Appendix B of the CTA BA, ensure their requested salary placement is correct.
3. Complete bottom of form:

Approved <input type="checkbox"/>	Not Approved <input type="checkbox"/>	New Classification: <input type="text"/>	Effective: <input type="text"/>
Reviewed by: _____ Human Resources Technician	Date: <input type="text"/>		
_____ Vice Chancellor, Human Resources & Employee Relations	Date: <input type="text"/>		
Board Approval Date: <input type="text"/>			

4. Give paperwork to HR Associate Director for signature.

5. Scan a copy of the form back to employee for their records.
6. If approved, complete create Board Agenda Item with effective date of July 1st here: T:\Board Items. Be sure to advance the range on the Board Item, along with their new step (Faculty normally step annually on July 1st so will need to include their new step on the Board item.)
7. After Payroll has closed in June, add the new Range advancement in Epics. In Position attachment:
 - a. Select the July 1st record in Position Attachment. (The existing record will already reflect the annual one-step increase, which was created by the annual roll.)
 - b. Select new Range
 - c. Add comments
 - d. Save entry

EPICS System Interface Screenshot:

Position Code: A250402 INSTRUCTOR, BUSINESS Board Date: 06/09/2016

Location: CHC Department: BUSINESS ADMINISTRATION - CHC

Start Date: 07/01/2019 End Date: Additional Earnings

Salary Detail: Schedule Code: ACA177 Salary: \$508.75 Salary Rate as of: 07/01/2016

Range: I Step: 11

Work Calendar: 177 DAYS (AC177) Earn Type: NORMAL PAY Group Role: ACADEMIC

Hours/Day	Days/Year	Paid Days/Year	Hours/Year	FTE	Budget Hours/Day	Avg. Weekly Hours
Schedule 8				1		
Position 8						
Employee \$ 0.0000	177	177	1416	1.0000	\$ 0.0000	40.00

Earnings:

Hourly	Daily	Monthly	Normal Annual	Actual Annual
\$376.09	\$508.75	\$10,774.88	\$107,748.75	\$107,748.75

Position Hire Date: 08/12/2016 Years Of Service: 3 Months: 8

Comment: SALARY RECLASS FROM R TO I EFF 7/1/19

8. After saving, send the EPICS notification email to:
 - a. Payroll Manager
 - b. Associate Director, Fiscal Services
 - c. District Budget Analyst
 - d. Payroll Accountant
 - e. Payroll Accountant
 - f. Benefits HR Analyst
 - g. HR Coordinators
9. Create a NOE reflecting the new range and give to Vice Chancellor of Human Resources & Police Services for approval.
10. Provide Payroll a copy of NOE.
11. File all paperwork in employee file.

MANAGEMENT CONTRACT RENEWALS

Non-renewals:

Each year around early November, leadership determines if they will renew their managers contracts. They will provide a list of contract non-renewals to HR.

Managers with multi-year contracts not being renewed must be notified by December 15th of the year preceding contract expiration.

Managers with one-year contracts must be notified by March 15th of the year of contract expiration.

1. HR Director sends out the employee notifications.
2. HR Director creates the non-renewal Board item that is sent to December or March Board identifying non-renewals.
3. The manager may continue to work through the end of their contract (June 30th, or they may be placed on paid Administrative Leave through end of contract.
4. HR Generalist reaches out to the hiring manager of the non-renewed employee and discuss the plan for the position. If the position will be filled, initiate recruitment. After the exiting employee's contract expires (June 30th), an interim manager may be used.
5. After Payroll runs in June, enter termination into EPICS (see Separation of Employment process)

Renewals:

HR Director will obtain a list of management contract renewals and the duration of the new contract in spring. HR Director will create the Contract Renewal Board item to be sent to June Board.

1. HR Generalist creates contract using templates located: T:\CONTRACTS. There are several manager contract templates on the shared drive. Templates are specific for interim positions, categorical positions, one or two year contracts as well as managers hired before 7/1/2018. Make sure to use the appropriate manager contract template for each manager.
2. Email PDF contract to manager and copy the employee's manager. Request the employee sign and return the contract to HR.
3. Obtain signature on contract from Vice Chancellor of Human Resources & Police Services.
4. Scan and email a fully executed contract to manager for their records and save a copy here: T:\CONTRACTS.
5. Make a copy of the contract for Payroll and file original copy in employee's file.

RECRUITMENT PROCESS

Initiation of Recruitment

- a. Recruitment is initiated when a Manager expresses a need to either fill an existing position or establish a new position by completing a Personnel Requisition Form (PRF) and submitting it for approval. The Manager will obtain signatures of approval from area VP, VPAS, Fiscal Services, and Human Resources has final approval.
- b. Approved PRFs are saved in the Human Resources shared drive.
- c. A PRF can also be used to:
 - a. Place a position on administrative hold (AH)
 - b. Abolish position
 - c. Transfer position
 - d. Change funding
- d. HR Generalist will discuss recruitment strategies with hiring manager that would create a diverse, qualified applicant pool.
- e. HR Generalist will gather recruitment details from hiring Manager. Details will include:
 - a. Names of those appointed to serve on the committee
 - b. Desired qualifications
 - c. Work schedule

- d. Job description (faculty)
- e. Date of 2nd level interviews
- f. Funding details e.g. tenure track, categorically funded etc.
- f. HR Generalist will evaluate membership of committee to ensure diversity and verify committee membership follows AP 7210.
- g. HR Generalist will review job description and desired qualifications removing any access barriers
- h. HR Generalist will determine whether an assessment test is required and initiate the assessment by communicating the details with HR Coordinator. HR Coordinator will coordinate date, time and place of testing session(s).

39-Month List

1. Classified unit members who are laid-off are placed on a reemployment list. This list is referred to as the 39-month list.
2. Unit members placed on the 39-month list are required to maintain current address on file with Human Resources.
3. HR Generalist will review 39-month list identifying any unit member(s) who may have a return privilege to the position being recruited for.
4. If such member is identified, HR Generalist will follow Reemployment Procedures as outlined in the CSEA collective bargaining agreement prior to moving forward with recruitment.

Internal Announcement

1. HR Generalist will send CSEA or CTA Employment Opportunity email to all corresponding unit members announcing the intent to recruit.
2. Formatting of all Employment Opportunity announcement emails will remain consistent in appearance and will include:
 - a. Position title
 - b. Department
 - c. Location
 - d. Supervisor
 - e. Work schedule
 - f. Salary Range
 - g. Number of vacancies
 - h. Contract language outlined in collective bargaining agreement for Vacancies, Transfers, Voluntary Demotions, In House or Promotional only Recruitment procedures
3. Internal unit members have 10-days to express interest in the position by responding to the announcement.
4. If interest is received, HR Generalist will follow Vacancies, Transfers, Voluntary Demotions, In House or Promotional only Recruitment procedures as outlined in collective bargaining agreement prior to moving forward with recruitment.

External Announcement

1. HR Generalist will create external job posting through NEOGOV to be posted on SBCCD careers site and follow guidelines per classification set forth in District Administrative Procedures (AP).
2. Formatting of external postings will remain consistent in appearance and will include:
 - a. Job description
 - b. Duties of the position

- c. Minimum qualifications
 - d. Desired qualifications
 - e. Work schedule
 - f. Location and department
 - g. Application deadline
 - h. Salary and benefits
 - i. Application process
 - j. Contain the statement “An Equal Employment Employer”
 - k. Details specific to the position, e.g. tenure, or categorically funded
3. HR Generalist will utilize third party vendor such as Job Elephant to expand the dissemination of job posting. Job Elephant posts on third party sites such as ccregistry.org, indeed.com, higheredjobs.com, and edjoin.org at no additional cost.

Recruitment File

1. HR Generalist will develop and maintain a digital recruitment file for each position being recruited for.
2. Recruitment files are saved in the Human Resources shared drive.
3. Recruitment files will include all documents and details directly related to the recruitment including, but not limited to:
 - a. Recruitment Cover Sheet
 - b. Recruitment Checklist
 - c. Copy of the external posting
 - d. Job description
 - e. Detailed screening notes
 - f. Interview questions
 - g. Testing Results
 - h. Interview results
 - i. Committee screening sheets & notes
 - j. Committee meeting agenda
 - k. Interview schedule
 - l. EEO Report
 - m. Signed Confidentiality Statement for each committee member
 - n. Applications of all candidates invited to interview
4. At the completion of the recruitment, the digital recruitment file will be printed, and a physical file will be created.

Screening Applicants

1. Once external posting has closed, HR Generalist can begin reviewing applications.
2. HR Generalist will thoroughly review all online application materials identifying applications that display the minimum qualifications (MQs) for the position.
3. HR Generalist will disposition each applicant according to whether MQs were displayed or not.
4. For classified positions, HR Generalist will disposition candidates who meet MQs to their corresponding assessment test date and time. Assessment date/time was created by HR Coordinator.
5. All screening results are notated in recruitment file and dispositioned accordingly in NEOGOV.

6. Applicants that do not meet MQs will need to be notified. HR Generalist will prompt NEOGOV to send the Does Not Meet Minimum Qualifications email template to applicant notifying them that their application materials did not meet the minimum qualifications stated in the posting, and therefore, they will not move forward in the recruitment process.
7. When screening for faculty positions, review applications for possible equivalency requests. (Follow equivalency process outlined below)
8. Applicants that do meet MQs will need to be notified. For classified positions, HR Generalist will prompt NEOGOV to send Notification to Self-Schedule Test email template to applicant notifying them they have met MQs for the position and will need to take an assessment test to remain in the qualified applicant pool. Once test is completed, HR Coordinator will prompt NEOGOV to send Pass/Fail notification.
9. For non-tested positions, applicants that do meet MQs will need to be notified. HR Generalist will prompt NEOGOV to send email template aligned with the next step in the hiring process for the recruitment.

Equivalency

1. Equivalency is the process by which a person can meet the MQs of a discipline. It is the responsibility of the candidate to apply for equivalency and provide conclusive evidence of equivalency for the State-approved requirements through the use of transcripts, publications, statements validating related work experience, and other products that show a command of the discipline or occupation in question.
2. Faculty applicants can and should submit their request for equivalency through their online application.
3. For faculty positions, HR Generalist will consider possible equivalency when reviewing application materials. Applications that do not display the minimum educational requirements but do contain transcripts with conferral date of a related degree can be evaluated for equivalency upon request.
4. If such application is identified, HR Generalist will send email notifying applicant that their application materials did not meet the minimum qualifications stated in the posting and give instructions on how to apply for equivalency if they so choose. Email notification will include clear instructions on how to apply for equivalency, a deadline to respond and equivalency form attached.
5. If interest is received, HR Generalist will time stamp equivalency packet from applicant and scan the packet to the HR designee who will submit packet to equivalency committee to be reviewed.
6. Equivalency committee will either grant or deny equivalency.
7. HR Generalist will notate determination in recruitment file and NEOGOV, then proceed with recruitment accordingly.

Assessment Testing

1. Classified applicants will respond to the Notification to Self-Schedule Test email by following a link contained in the email to self-schedule their assessment.
2. HR Coordinator will proctor assessment tests, disposition candidates according to results and prompt NEOGOV to send Pass/Fail notification.

Convening Hiring Committee

1. HR Generalist will create an email to notify those employees appointed to serve on the committee of the recruitment details and projected timeline and gather the availability of each to schedule a 1st committee meeting.
2. Each committee member must complete Human Resource's EEO training prior to the 1st committee meeting.
3. HR Generalist will proctor EEO training with any committee members who have not completed the training within the past twelve months.
4. Confirm 2nd level interview date, time and participants with hiring manager.
5. In preparation for 1st committee meeting, HR Generalist will prepare the following documents for each committee member to review during meeting.
 - a. Job description
 - b. Job posting
 - c. Sample interview questions
 - d. Confidentiality statement
6. 1st committee meeting agenda
 - a. Review and sign Confidentiality Statement
 - b. Discuss EEO requirements, concerns and encourage questions
 - c. Discuss recruitment process, timeline and expectations
 - d. Elect chairperson to help facilitate discussions and process
 - e. Develop interview questions based on job description/posting while eliminating any access barriers
 - f. A minimum of 1 interview question must be focused on gauging the candidates understanding and sensitivity to diversity
 - g. Identify desirable responses to questions, presentation and/or writing exercise
 - h. Determine whether candidates will or will not complete a written exercise and/or presentation as part of their interview and develop it.
 - i. Determine whether committee will be screening on desired qualifications stated in posting and select which desired qualifications to utilize.
 - j. Determine time given for writing exercise, question review, presentation, and interview.
 - k. Determine date and time of 2nd committee meeting if needed.
 - l. Determine date and times of 1st level interviews. Discuss 30/60 minute lunch break for all-day interviews.
7. HR Generalist will confirm room availability for interviews and check-in area.
8. Send interview calendar item invite to each committee member and HR designee who will assist with applicant check-in.

Desired Qualifications

1. Desired qualifications (DQs) are developed by the hiring manager and stated in the external posting.
2. DQs are job related and support the responsibilities of the position.
3. If committee decides to screen on desired qualifications stated in posting, HR Generalist will email all application material along with screening instructions to the committee members for this additional layer of screening.

4. Every committee member must screen each application and keep detailed notes supporting their decision to either invite them to interview or screen them out.
5. All screening materials and results including notes must be brought to 2nd level committee meeting and collected by HR Generalist.
6. 2nd committee meeting agenda
 - a. Review criteria utilized for screening
 - b. Discuss and review screening results of each member
 - c. Identify and eliminate any bias in the decision-making
 - d. Select candidates for interview
 - e. Discuss interview process and expectations of committee members during interviews
 - f. Discuss EEO requirements again, discuss any concerns and answer questions

Scheduling Interviews

1. HR Generalist will develop an interview schedule with time slots for each applicant based on the date(s) and time frame agreed upon during 1st committee meeting.
2. HR Generalist will send email notification to candidates being invited to interview.
3. Email will contain:
 - a. Position
 - b. Date
 - c. Time
 - d. Address
 - e. Parking pass (if applicable)
 - f. Campus map (if applicable)
 - g. Approximate duration of interview
 - h. Details of written exercise being given up-front if needed
 - i. Special instructions such as check-in on 1st floor, room 100, arrive 15 minutes early to find parking, utilize attached parking permit etc.
 - j. Reimbursement of travel and meal expense language as outlined in Employee Travel Policy
 - k. Respond by date and time
 - l. Instructions on how to request accommodations
4. Once deadline to respond has passed, HR Generalist will revise interview schedule, removing names of candidates who did not respond. Final interview schedule will be saved within the recruitment file.
5. In preparation of interviews, HR Generalist will prepare the following documents to be utilized on the day of interviews:
 - a. Application materials of all applicants scheduled to interview
 - b. Interview schedule for each committee member
 - c. Interview questions for each committee member
 - d. Applicant copy of questions for review
 - e. Applicant scoring sheet for each interview to be completed by each committee member
 - f. Writing exercise for each candidate

Interviews

1. HR designee conducting interview check-in will greet applicant and proctor writing exercise and question review.
2. Every applicant will be provided the same consistent, fair and equitable interview experience.
3. Interview will follow check-in process. Committee will evaluate writing exercise and assign a rating based on agreed upon desirable responses.
4. Committee will utilize applicant scoring sheet prepared by HR Generalist to evaluate the responses of each applicant while keeping notes and assign a rating based on agreed upon desirable responses.
5. Committee will identify the most qualified candidates to recommend forwarding to next level.
6. All interview steps are timed.

Candidate Travel Reimbursements

1. Finalists who are invited for a 2nd level interview and live more than 200 miles away will be reimbursed for actual travel and meal expenses incurred as set forth in the Employee Travel Policy.
2. Eligible finalists will complete district Travel Claim Form and submit to HR Generalist with expense receipts for each item.
3. HR Generalist will review and forward to HR designee for processing.

Job Offer

1. Once 2nd level interviews conclude, HR Generalist will discuss recommended applicant with hiring manager.
2. HR Generalist will call recommended applicant and extend offer of employment contingent upon Board of Trustees approval, successful clearance of live scan, agreeable reference checks, and negative tuberculosis test.
3. Other details to be discussed include; position, salary, workschedule, health and welfare benefits, retirement, union, date of employment, new hire orientation date, and reference checks.
4. HR Generalist will obtain an acceptance or denial of job offer from applicant.
5. HR Generalist will notify remaining candidates of non-selection.
6. HR Generalist will create email containing all details of job offer including form for live scan and offer of employment letter.

Employment Reference Checks

1. HR Generalist will contact three most recent employers to verify employment information such as: employment dates, job title, and job duties.
2. HR Generalist will utilize pre-approved questions and form when conducting employment reference checks.
3. Completed reference check forms are saved for later reference.

Professional Reference Checks

1. Hiring manager at their discretion, can elect to contact professional references listed on finalist's application material. HR will provide hiring manager a list of approved reference check questions.

Board of Trustees Approval

1. HR Generalist will create board item to be submitted for Board approval.
2. Board approval must be obtained prior to date of hire.
3. Board item will include candidate name, site of position, department, position, date of hire, salary schedule and range, salary, live scan clearance date, funding source and whether they are replacing an employee or the position is new.

Onboarding

1. New Hire Orientation
 - a. HR Generalist will notify HR Coordinator of new employee scheduled to attend upcoming orientation.
2. EPICS Entry (See EPICS Entry)
3. HR Generalist will prepare personnel file and new hire documents for orientation.
4. HR Generalist will prepare Notice of Employment (NOE) for each new hire and gain approval.
 - a. Copies of the NOE will go to county, payroll and personnel file
5. HR Generalist will prepare a PERS-AESD-1 form for each CalPERS eligible new employee.
 - a. Copies of PERS-AESD-1 form will go to county and personnel file.
6. HR Generalist will configure salary placement of Faculty employees by applying education and relevant experience as outlined in Placement Guidelines of CTA bargaining agreement.
7. HR Generalist will create an Employment Contract for all management and faculty employees.
 - a. Utilize approved contract templates according to assignment when creating employment contracts, e.g. Interim, Faculty, Manger, Temp Full-Time.
 - b. Interim management employment contracts will be used when someone is assigned to serve as Interim in a management position until position can be filled on a permanent basis.
 - c. Temp Full-Time contracts will be used when someone is assigned to serve in a faculty position on a temporary, full-time basis.
 - d. Employees may work Temp Full-Time assignments no more than (2) years.
 - e. Upon board approval, HR Generalist will gain employee and HR signatures.
 - f. Fully executed employment contracts will be filed in personnel file, saved electronically in Human Resources shared drive and a copy given to payroll.
8. HR Generalist will complete a Classified Assignment Sheet for every new classified employee.
9. Classified Assignment Sheet documents all details regarding the employee and position including, start date, supervisor name, work schedule, range/step, hourly rate, employment status, evaluation and step dates.
10. Employee will review and sign his/her Classified Assignment Sheet during orientation and a copy will be filed in personnel file and a copy will be sent to the hiring manager.

SEPERATION OF EMPLOYMENT

(Retirements, Resignations, Terminations, Non-Renewal)

Retirement

Employees may send their notice of intent to retire directly to HR or to their manager, who would then forward to HR.

1. If employee directly notifies HR, forward notice to manager for their information. As soon as we have received notice of intent to retire, reach out to the hiring manager to initiate Personnel Requisition Form.
2. Reach out to employee to ensure they have been in contact with PERS/STRS and are coordinating their retirement date.
3. Create Board Agenda item for retirement located here: T:\Board Items
4. Enter termination in EPICS, following Payroll deadlines (Be sure not to enter too soon to avoid premature payroll disruption.)
 - a. At bottom right of screen, select "Termination"



- b. Enter term Date and select "Load Data"

The screenshot shows the termination form with the following fields: 'Termination Date' set to 06/30/2020, 'Status' set to RETIRED INACTIVE, 'Termination Reason' set to RETIREMENT, and 'Assignment Reason' set to RETIRED. The 'Load Data' button is highlighted in yellow.

- c. Enter Termination Reason as Retirement
- d. Change Status to Retired Inactive
- e. Enter comments
- f. Save entry

The screenshot shows the 'Terminate Process -- Webpage Dialog' window. The 'Termination Date' is 06/30/2020, 'Status' is RETIRED INACTIVE, 'Termination Reason' is RETIREMENT, and 'Assignment Reason' is RETIRED. The 'Position Information' table is as follows:

Effective Date	Position	Description	Location	Start Date	*End Date
07/01/2019	C21001	ADMINISTRATIVE SECRETARY	CHC	07/01/2019	06/30/2020

The 'Notes' field contains the text: 'RETIREMENT LETTER RECEIVED 5/15/20. LAST DAY WORKED 6/20/2020'. The 'Save' button is highlighted in yellow.

5. After saving, send the EPICS notification email to:
 - a. Payroll Manager
 - b. Associate Director, Fiscal Services
 - c. District Budget Analyst
 - d. Payroll Accountant
 - e. Payroll Accountant
 - f. Benefits HR Analyst
 - g. HR Coordinators
6. Complete AESD1, if a PERS member (See procedure at the end of this SOP)
7. Pull employment file and provide both the AESD1 and file to HR Coordinator.

Resignations

Employees may send their notice of intent to resign directly to HR or to their manager, who would then forward to HR.

1. If employee directly notifies HR, forward notice to manager for their information. As soon as we have received notice of intent to resign, reach out to the hiring manager to initiate Personnel Requisition Form.
2. Create Board Agenda item for retirement located here: T:\Board Items
3. Enter termination in EPICS, following Payroll deadlines (Be sure not to enter too soon to avoid premature payroll disruption.)
 - a. At bottom right of screen, select Termination



- b. Enter term Date and select Load Data

- c. Enter Termination Reason as Resignation - Voluntary
 - d. Change Status to Resigned
 - e. Enter comments
 - f. Save entry.

Terminate Process -- Webpage Dialog

Termination Date: 06/30/2020 Status: RESIGNED

Termination Reason: RESIGNATION - VOLUNTARY Assignment Reason: RESIGNED

Position Information:

Effective Date	Position	Description	Location	Start Date	*End Date
07/01/2019	C210901	ADMINISTRATIVE SECRETARY	CHC	07/01/2019	06/30/2020

Notes:
NOTICE OF RESIGNATION RCVD 5/15/20

Contract Duration: | 11 - 12 MONTHS

4. After saving, send the notification email to
 - a. Payroll Manager
 - b. Associate Director, Fiscal Services
 - c. District Budget Analyst
 - d. Payroll Accountant
 - e. Payroll Accountant
 - f. Benefits HR Analyst
 - g. HR Coordinators
5. Complete AESD1, if a PERS member (See procedure at the end of this SOP)
6. Pull employment file and provide both the AESD1 and file to HR Coordinator.

Involuntary Termination

Employees may be involuntarily terminated for a variety of reasons. Notification of involuntary terminations will come directly from within HR.

1. An HR Analyst will create the Board Agenda item.
2. After Board has approved termination at their meeting, reach out to the hiring manager to initiate Personnel Requisition Form.
3. Enter termination in EPICS, following Payroll deadlines (Be sure not to enter too soon to avoid premature payroll disruption.)
 - a. At bottom right of screen, select Termination

Notes Forms LOA Termination Re-Hire Attach Transfer

Financial 2000 Version: 2020.03.0058

- b. Enter term Date and select Load Data

Termination Date: 06/30/2020 Status:

*Termination Reason: Assignment Reason:

- c. Enter Termination Reason as Termination - Involuntary
- d. Change Status to Terminated - Involuntary
- e. Enter comments
- f. Save entry.

Terminate Process -- Webpage Dialog

Termination Date: 06/30/2020 Status:

Termination Reason: Assignment Reason:

Position Information:

Effective Date	Position	Description	Location	Start Date	*End Date
07/01/2019	C210901	ADMINISTRATIVE SECRETARY	CHC	07/01/2019	06/30/2020

Notes:

INVOLUNTARY TERMINATION (SEE FILE)

4. After saving, send the notification email to
 - a. Payroll Manager
 - b. Associate Director, Fiscal Services
 - c. District Budget Analyst
 - d. Payroll Accountant
 - e. Payroll Accountant
 - f. Benefits HR Analyst
 - g. HR Coordinators
5. Complete AESD1, if a PERS member (See procedure at the end of this SOP)
6. Pull employment file and provide both the AESD1 and file to HR Coordinator.

Non-Renewal of Management Contract

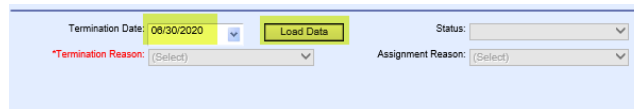
Managers may receive their notice of non-renewal. These must be sent from the HR Director directly to non-renewing manager. Notification of involuntary terminations will come directly from within HR.

1. Director of HR will create the Board Agenda item.
2. After Board meeting, reach out to the hiring manager to initiate Personnel Requisition Form.
3. Enter termination in EPICS, following Payroll deadlines (Be sure not to enter too soon to avoid premature payroll disruption.)

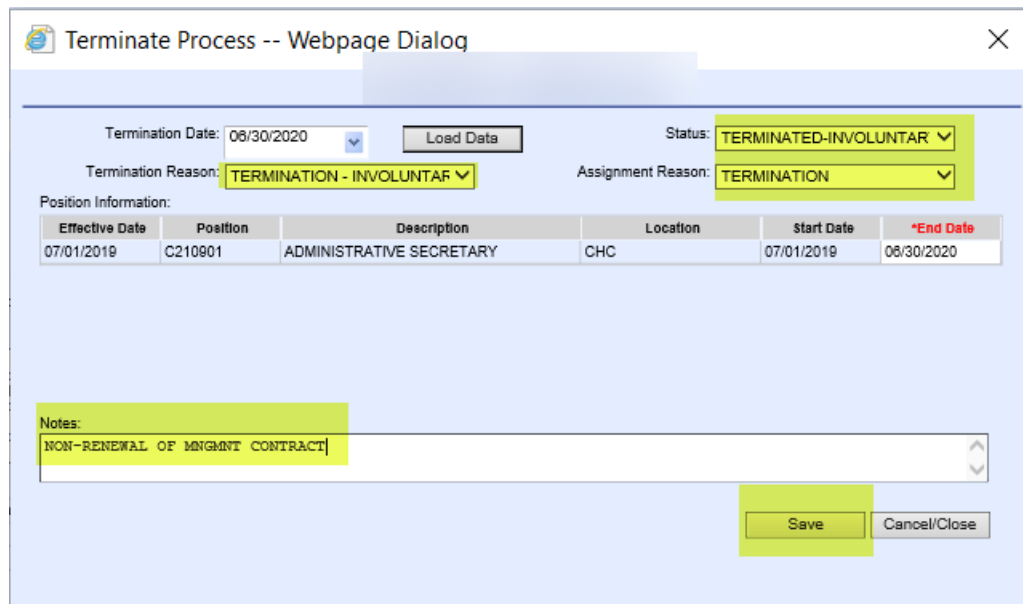
- a. At bottom right of screen, select Termination



- b. Enter term Date and select Load Data



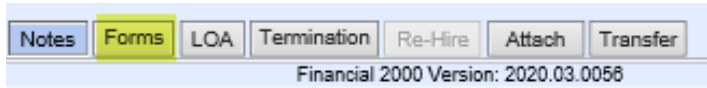
- c. Enter Termination Reason as Termination - Involuntary
- d. Change Status to Terminated - Involuntary
- e. Enter comments
- f. Save entry.



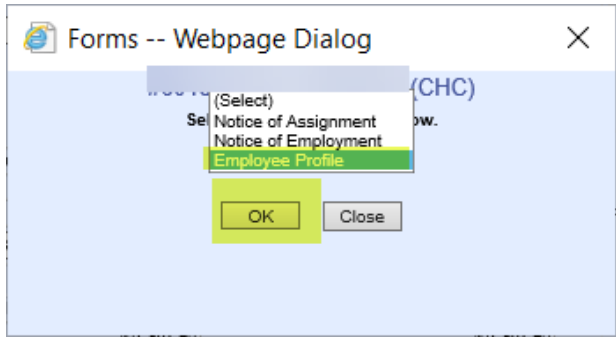
4. After saving, send the notification email to
 - a. Payroll Manager
 - b. Associate Director, Fiscal Services
 - c. District Budget Analyst
 - d. Payroll Accountant
 - e. Payroll Accountant
 - f. Benefits HR Analyst
 - g. HR Coordinators
5. Complete AESD1, if a PERS member (See procedure at the end of this SOP)
6. Pull employment file and provide both the AESD1 and file to HR Coordinator.

CREATING AESD1:

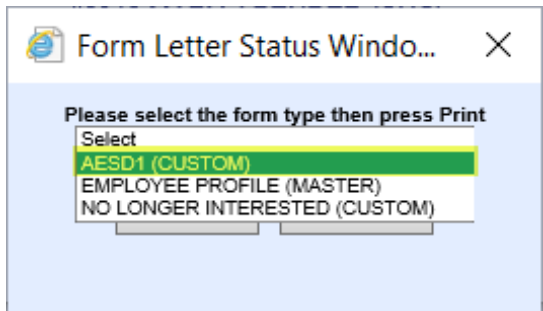
1. Select Forms on lower bottom right of screen:



2. Select Employee Profile



3. Select AESD1(Custom):



4. Select Print
5. On the AESD1 form enter SBCCD for Employer Name:

9 Employer Name

6. Enter:
 - a. Effective Date
 - b. Employer Code (0247)
 - c. District Code (272)

10 Effective Date of Action:	11 Subject to Section 20306: YES ___ NO ___	12 Employer Code:	13 District Code (Schools only):	14 Hire Date: 01/12/2001
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7. Select Separation, Permanent

8. Enter Coverage Group number (60005)

15 Type of Action (check all boxes that apply for this Effective Date; if non apply, indicate action needed in "Remarks" [#8] above):

- | | | |
|--|---|---|
| A. <input type="checkbox"/> Appointment/Membership | F. <input type="checkbox"/> Worker's Comp Leave | K. <input type="checkbox"/> Address Change |
| B. <input type="checkbox"/> Return from Leave | G. <input type="checkbox"/> Sabbatical | L. <input type="checkbox"/> Coverage Group Change |
| C. <input checked="" type="checkbox"/> Separation, Permanent | H. <input type="checkbox"/> Maternity/Paternity Leave | M. <input type="checkbox"/> Layoff or Placed on 39 Month Re-hire List |
| D. <input type="checkbox"/> Separation, Temp (>= 2 months) | I. <input type="checkbox"/> Alternate Retirement Plan(G.C. 20306) | |
| E. <input type="checkbox"/> Military Leave | J. <input type="checkbox"/> Name Change | |

16 Coverage Group:	17 Job/Position Title: ADMINISTRATIVE SECRETARY	18 1/2 @ 55 Formula Cont. Rate: ___%
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9. Complete bottom portion of form:

21 Form Completed By:

(Name & Title)		
(Telephone Number)	(Fax Number)	(Date)
(Signature of Certifying Officer)		(Date)

10. Print form.

WORK CALENDARS

At the time of hire and each academic year, some Faculty and Classified employees will need to submit a work calendar detailing what days they will be working throughout the school year.

Faculty:

Faculty members who work more than 175 days per year must complete a work calendar.

Classified:







Some full-time Classified employees also have work calendars (i.e. 222, 240,218,239 days) depending on their department's needs.

Annual Submission of Work Calendars

1. In March of each year, the HR Director provides a report detailing all employees requiring work calendars. This spreadsheet can be found here: T:\WORK CALENDARS
2. HR Generalists email each of their managers the list of employees requiring a work calendar. Managers are given the deadline of April 30th to have all work calendars returned to HR.
3. As calendars are received, log the date they are received on the master work calendar list found here: T:\WORK CALENDARS (add a column for this if one doesn't already exist)
4. On April 15th, send a reminder email to managers who have not yet returned calendars.
5. As calendars come in, briefly review them to identify issues such as:
 - a. Correct amount of total days
 - b. Correct holidays are indicated
 - c. Ensure that employees on the summer 4/10 schedule have listed 1.25 for the summer days. (Be sure you have the correct begin and end dates of the 4/10 schedule, as they change every year. These can be found on annual CSEA MOU.)

- Faculty have the option to participate in the 4/10 schedule.
- CSEA – Most all departments participate in the 4/10 schedule. However, some departments request to not participate. In or around February every year, this is negotiated. The departments can change every year. Always refer to the negotiated MOU.
- d. Return any incorrect work calendars to the employee for revision (copy manager).
- e. Legend on employee work calendar:

Please place the numeral 1 in each day worked. For half-day indicate .5 and for 4/10 summer schedule indicate 1.25

Legend:  = Unpaid Holiday  = Weekend  = Non-Work Day  = Work Day  = Half-Day  = Summer 4/10 Day

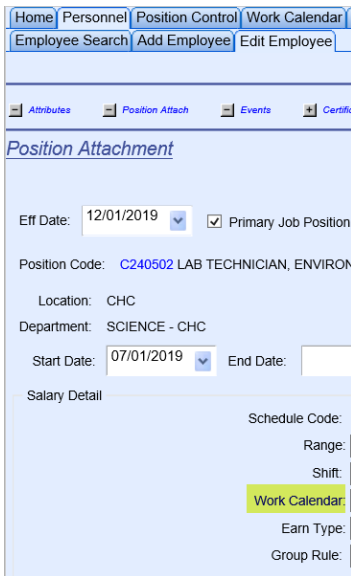
- .25 = 2 hours
- .5 = 4 hours
- 1 = 8 hours
- 1.25 = 10 hours

6. Enter newly submitted Work Calendars into EPICS after the annual EPICS roll.

VERY IMPORTANT - ALWAYS ENSURE YOU ARE ENTERING IN THE CORRECT FISCAL YEAR

Position Attachment:

1. Select Work Calendar to access the employees work calendar.



2. On the Edit Work Calendar page ensure the correct dates for the upcoming Academic Year are reflected; First Workday should reflect July 1st and the Last Word Day should reflect June 30th.
3. Ensure the Total Paid Days listed in EPICS match the number of days indicated on the physical Work Report

Total Work Days

219.00

4. Proceed to enter the physical work calendar information into the Work Calendar in EPICS.

Calendar Details:

Fiscal Year: 2020
 Code: 222HH
 Description: HADSOCK, HARRISON
 Holiday Master: CLASSIFIED HOLIDAY MASTER
 First Work Date: 7/1/2019
 Last Work Date: 6/30/2020
 Contract Days: 222
 Total Paid Days: 222
 Vacation Days: 0
 Flex Calendar
 Year Round

Month	Days	Extra	Total	%	Dy Rt
July	15.5	7	22.5	100	N
August	12	6	18	100	N
September	12	8.75	20.75	100	N
October	11.5	10.25	21.75	100	N
November	11	6	17	100	N
December	11	4.5	15.5	100	N
January	13.5	8.25	21.75	100	N
February	12	7	19	100	N
March	9.5	8.75	18.25	100	N
April	10.5	9.25	19.75	100	N
May	8	6.5	14.5	100	N
June	12.5	0.75	13.25	100	N
Total	139	83	222		

X = Non-work day

H = Paid holiday (classified)

U = Unpaid holiday (faculty)

/ = Half day (Will reflect as .50 on physical work calendar form)

If the employee indicated a 1.25 day on their work calendar, leave the EPICS calendar day blank (indicating it is a work day) and enter a .25 under the “extra” column. After entering the entire month, manually calculate the total in “extra” column.

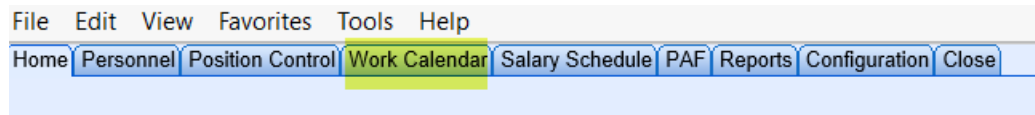
5. After all work calendar entries have been made, be sure that the “Total Paid Days” listed in EPICS matches the Total listed at the bottom of the below section.

Month	Days	Extra	Total	%	Dy Rt
July	15.5	7	22.5	100	N
August	12	6	18	100	N
September	12	8.75	20.75	100	N
October	11.5	10.25	21.75	100	N
November	11	6	17	100	N
December	11	4.5	15.5	100	N
January	13.5	8.25	21.75	100	N
February	12	7	19	100	N
March	9.5	8.75	18.25	100	N
April	10.5	9.25	19.75	100	N
May	8	6.5	14.5	100	N
June	12.5	0.75	13.25	100	N
Total	139	83	222		

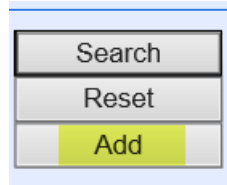
6. Save entry

Creating Initial Work Calendar for Employee

1. In EPICS, navigate to the Work Calendar tab:



2. Select "Add" to add to create Calendar



3. Enter all highlighted fields below:

- Calendar Details -

Fiscal Year:	2020		
Code:	221LG		
Description:	GREEN, LAURIE		
Holiday Master:	ACADEMIC HOLIDAY MASTER		
First Work Date:	7/1/2019	Last Work Date:	6/30/2020
Contract Days:	221		
Total Paid Days:	221		
Vacation Days:	0		
	<input type="checkbox"/> Flex Calendar		<input type="checkbox"/> Year Round
Comment:			

- a. Code should be number of days + first letter of first name and then first letter of last name. (see above example)
 - b. Enter the actual first working day on the calendar and use June 30th as the end date.
 - c. Enter number of contract days per year.
 - d. Save calendar
4. Navigate back to Position Attachment in EPICS. Click on "Work Calendar" and find the calendar that you just created. Select it. Proceed to complete entry.

Range:	E	Step:	10
Shift:	(Select)		
Work Calendar:	GREEN, LAURIE (221LG)		
Earn Type:	NORMAL PAY		
Group Rule:	ACADEMIC		

Requests for changing work calendar

1. If an employee would like to change their work calendar throughout the year, they must complete and obtain their manager's approval on a Non-Service Change Form located here:
T:\WORK CALENDARS\Instructions & Template
2. Do not accept retroactive changes. Follow up with manager to discuss.
3. HR Coordinators complete the EPICS entry for these changes.

Executive Assistant to the Chief Human Resources Officer

BOARD ITEM SUBMISSION

Regular & Closed Session Items

1. Campus Administrative Assistants and HR Staff submit agenda items to the Executive Assistant to CHRO through HR Board Item Spreadsheet templates
2. Items not included in the spreadsheet templates such as MOU's, TA's, Resolutions, and closed session items are submitted via email to the Executive Assistant to the CHRO.
3. Compile all submissions into formal items for review by the Vice Chancellor of Human Resources & Police Services, Director of HR, and Associate Director of HR.
4. Submit items to Chancellor via Box
 - a. Revisions are recommended and revised items are resubmitted via Box for a second review
5. Submit items to the Administrative Officer to the Chancellor via share drive
6. Print and compile the closed session red binders and give to the Administrative Officer to the Chancellor to distribute the Board of Trustees.

Post Board Meeting Tasks

1. Email HR staff letting them know if items were approved or pulled
2. Distribute signed documents to appropriate staff

CONFERENCE AND TRAVEL ARRANGEMENTS

1. Complete Travel/Conference Request and Claim Form and gets all required approval signatures (Conference materials and preferred travel options are forwarded to the Executive Assistant to the CHRO)
2. Submit a Purchase Requisition (PR) in Oracle for all conference/travel related items. Conference materials are required as back-up for purchases. (See Wiki for Oracle Manual)
3. Once PR is generated into a Purchase Order (PO), complete all registration and travel arrangements associated with the conference
4. Following a conference/travel, the Executive Assistant to the CHRO collects all receipts and completes expense reports and reimbursements as necessary. (See Wiki for Oracle Manual)

CONFIDENTIAL CLAIMS REPORT

1. As claims come in, they are assigned a contact and investigator.
2. Follow up with lead contact for status updates of claims.
3. Update the confidential claims report with pertinent information related to each claim. Emails and files are uploaded to the Employee Relations SharePoint as needed.

CONTRACT SUBMISSIONS

1. Send vendor the Supplier Information Form and W-9 to be completed and returned.
 - a. Send to Business Services to set-up vendor in Oracle
2. Create PR in Oracle (See Wiki for Oracle Manual)

3. Compile contract packet with the cover sheet and 2 copies of the contract (signed by vendor)
 - a. Send email to contracts@sbccd.edu email to let them know the packet is in route
4. Business Services will get appropriate District signatures and send to Board for approval
5. Once approved, email applicable invoice(s) to purchasing for processing, sbccdapd@sbccd.cc.ca.us

EEO COMMITTEE

1. Attends committee meeting and records minutes
2. Assists with Request of EEO Funds form submission approvals
 - a. Corresponds with requestor on the status of their form
 - b. Provides budget and PR information for purchases pertaining to EEO funds usage
3. Assists with overseeing budget (i.e. budget transfers, fiscal year budget review)

FORM 700 FILINGS

1. Review current managers covered under AP2712 Conflict of Interest Code who are required to submit a Form 700 filing for the previous year.
2. Update the NetFile database to reflect those managers
3. Coordinate with NetFile representative to send an email blast to the Servalist (email includes an explanation of filing requirement, how to file, and deadline for filing)
4. Maintain the filing list, following up with managers who have not completed their filing.
5. Work with the Administrative Officer to the Chancellor on Board of Trustee forms. These forms are typically uploaded and filed by the Executive Assistant on their behalf.

ORACLE (PR, INVOICES, REIMBURSEMENTS, BUDGETARY CONTROL, EXPENSE REPORTS)

1. Responsible for processing PR's pertaining to the operations of the Human Resources department. This includes but is not limited to supply orders, travel, candidate reimbursements, vendor invoices, contracts, dues, and memberships. (See Wiki for Oracle Manual)
2. Oversees Cal Card purchases and enters expense report to balance the statements.
3. Provides budget reports and balances when requested
4. Coordinates with A/P at end of year to close out any open PO's no longer needed

QUESTICA (BUDGET TRANSFERS, BUDGET PLANNING)

1. Supports the Vice Chancellor of Human Resources in yearly budget planning, expense tracking, and budget transfers through Questica. (See Wiki for Questica Manual)

WEBSITE UPDATES

1. Maintains and updates all information on the Human Resources & Careers tab of the District website through Site Core.
2. Maintains and updates all information on the Human Resources Wiki pages