



# Information Technology Support Services **HANDBOOK**



# Mission Statement

Our mission in the IT Support Services Branch is to provide the tools and resources to all staff in order to maintain leading-edge application support systems and technical infrastructure. Our focus is to augment and support the educational goals which include proficiency for all and 100% graduation rate. This will be driven by excellent customer service to meet the targets.

## Information Technology Support Services

We provide support to all areas of the division in terms of finance, contracts/purchasing, human resources, communications, and other areas; set administrative policies; and ensure that ITD business practices are aligned with District policies and comply with local, state, and federal regulations.

Explore the list below for a description of the service provided by IT Support Services.

- IT Asset and Software Compliance
- IT Budget and Finance
- Cellular Unit
- IT Contracts
- IT Human Resources
- IT Warehouse

This handbook includes policies, procedures and guidelines to promote sound business decisions and best practices in securing necessary products and services for various IT departments.

This handbook does not eliminate or override any requirements as defined in the District's Procurement Manual, Personnel Commission Rules or established District policies.

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# ITD Central Office Administration

## How to Request an Access Badge

Any individual requesting access to LAUSD Headquarters requires a badge. Based on the reason for access and duration, the type of badge may vary. Individuals may be issued a permanent badge, temporary badge or visitor badge. An access badge request form must be completed and submitted to IT Support Services for processing. The forms are available at <http://mo.laschools.org/fis/existing-facilities/m-and-o/maintenance/admin-offices/online-forms>

## Headquarter Badge

This badge is for individuals located at LAUSD Headquarters. The "Access and Parking Request" form shall be completed to request a badge for District employees. The "Consultant Access and Parking Request" form shall be completed for Contract Professionals.

## Non Headquarter Badge

This badge is for District employees that are NOT permanently located at LAUSD Headquarters, but are requesting an access badge. Complete the "Access Badge Request for Non-HQ Based Staff" form.

## How to Request Lighting, Heating and Air Conditioning After Hours

It is customary that Building Management turn off the air conditioning every weekend and lighting, heating and air conditioning on holidays. In the event a department requires employees to work on the weekend or holiday, an "After-Hours HVAC" form must be submitted to and approved by LAUSD HQ - Office of the Building. A funding line is also required as a cost is associated with this request. The form is available at <http://mo.laschools.org/fis/existing-facilities/m-and-o/maintenance/admin-offices/online-forms>

## How to Update Contact Information in the Email Directory

All ITD employee contact information is listed in the global address email directory. It is important that employees update their contact information as they change locations, or if their contact information changes.

1. Go to <https://mylogin.lausd.net>
2. Select your role.
3. Select "Change your current password, or review and update information about yourself."

4. Check the box that indicates "I agree to the terms and condition of LAUSD (Responsible Use Policy for District Computer and Network Systems).
5. Enter your Single Sign On (SSO) username and password.
6. Select "Edit Personal Information."

## How to Update Emergency Contact Information in the Employee Self Service (ESS)

The safety of all employees is a District priority. Natural disasters as well as a medical emergency necessitates the ability to quickly connect with an employee's "in case of emergency" contact. Therefore, it is critical that we have updated emergency contact information for all employees.

Your personal and emergency contact information is as follows:

- **Personal telephone number(s), e.g., home, cell, and/or office**
  - Depending on the nature of the emergency, we may have to notify employees that a school or office is inaccessible. Please provide a mobile number where messages can be delivered when you are not at your work site. Per REF-5483.1, Superintendent's Emergency Notification System, during a disaster, text messaging is expected to be the first successful method of communication. The District expects to only send a text message during an emergency. By providing your cell phone number, you authorize receiving emergency text messages from the District and understand that you are responsible for all text-related charges.
- **Home address** is part of the complete information needed by LAUSD.
- **Emergency contact information** contains the name, address and phone number(s) of the person(s) you would like the District to contact in the event of a personal emergency.

Please review your personal and emergency contact information on an annual basis and update your information whenever there is a change. Your information can be accessed and updated 24 hours per day / 7 days a week by logging into the Employee Self Service (ESS) system at <http://selfservice.lausd.net>. Please note that ESS cannot be accessed via the Chrome and Safari internet browsers. Apple users can access ESS via Citrix. You will need your Single Sign-On (SSO) to access the ESS system. A job aide on updating your information may be accessed at <https://achieve.lausd.net/ithr> for your reference.

Should you have any questions regarding ESS, please contact the ITD Help Desk at (213) 241-5200.

## Conference Call Requests

ITD schedules conference calls for all customers. Conference calls are for District related business only and not for personal use. When requesting a conference call, the below information is required:

1. Requester's name, phone number, department name and email address
2. Date of conference call
3. Conference call start time and end time
4. Number of conference call participants

Please call (213) 241-4906 to request a conference call. The requester will be provided with confirmation of the reservation along with the dial in phone number and conference code.

## Conference Room Reservations

ITD has conference rooms available for use by ITD Staff. To reserve a conference room, send an email calendar invite directly to the conference room with the date, start time and end time. The requester will receive an email indicating either approval of request or denial due to unavailability.

## Training Room Reservations

The IT Training Room (Room 10-102) is equipped with necessary training equipment and computing devices to accommodate training needs. To reserve the training room send an email calendar invite directly to the training room. The requester will receive an email indicating either approval of request or denial due to unavailability.

## Keys

All division keys are maintained by IT Support Services. If you require a key for a conference room or office, please contact IT Support Services at (213) 241-4906. For cubicle keys, please email [ITD-SpacePlanning@lausd.net](mailto:ITD-SpacePlanning@lausd.net). Use "Key Request" in the subject line. Provide the key number being requested (e.g., FR 381) and the name of the department.

## Cubicles

All cubicles are equipped with overhead cabinets and file drawers that may be locked to protect valuable items or sensitive/confidential information. The keys to the cubicle cabinets and drawers shall remain with the occupant of the cubicle for the duration of occupancy. Upon vacating, the occupant shall leave the keys in the cubicle.

## Conference Rooms

Division conference rooms are for the use of division employees and primarily remain unlocked and available for use during normal business hours. In the event a conference room is locked, contact (213) 241-4906. Keys must be signed for upon receipt and return.

## Dongles

Dongles are for the use of the division's state of the art technology equipped conference rooms and are available for use. Please contact (213) 241-4906 for sign out procedures.

## Parking

The District provides parking adjacent to LAUSD Headquarters. Employees and contract professionals require a parking badge to gain access to parking facilities. See "How to Request an Access Badge" Section for information. For additional questions regarding parking contact LAUSD HQ - Office of the Building at (213) 241-1320 or visit their office at LAUSD Headquarters, 333 South Beaudry, 2nd Floor, Room 209

## District Parking Policy

District employees working full time at LAUSD Administrative Headquarters are assigned parking by LAUSD HQ - Office of Building at an authorized location or may choose to participate in the LAUSD subsidy program (See Transportation Subsidy Program Section). Adherence to the Parking Policy, parking rules and regulations is critical to the safety of all District personnel. Failure to follow policy may result in the termination of parking privileges or subsidy privileges and other disciplinary action. Inactivity for 30 consecutive calendar days without notice will result in removal of parking access.

## Contractor Parking

Per District policy, all consultants and contract professionals shall pay for parking. Subject to availability, contract professionals may be given the opportunity to park in District lots. The current charge for contract professionals is \$165 per month regardless of the location. This amount is subject to change. Contact LAUSD HQ - Office of the Building at (213) 241-1320 for payment options.

## Disabled Persons Parking

Parking for disabled persons is available at each location currently used by LAUSD. If special accommodations are required for individuals with permanent or temporary disabilities, parking may be assigned to LAUSD Headquarters (B1) or Pacific Stock Exchange Building Garage (B2) subject to vehicle height requirements and availability. Completion of the LAUSD Access Badge Request form is required. Additionally, written approval of the reasonable accommodation is required. Contact Risk Management or your HR Representative for assistance.

Visitors with disabilities may park in the Headquarters garage located at 333 S. Beaudry Avenue (Beaudry Building 1 only). They will need to present evidence of current placards from the DMV to Security upon entrance and exit.

## Electric Vehicle Charging

The District allows employees to charge their own electric vehicles (EV) at designated District sites on a structured fee basis. Employees that wish to participate in the EV charging program shall follow the procedures outlined in District Bulletin - 6430.

## Damaged, Lost or Misplaced Parking Badge

District employees assigned to LAUSD Headquarters are required to park at assigned locations only and are specifically not authorized to park at the visitor lot. In the case of damaged, lost, misplaced, or disabled badges, the employee should continue to park in his or her assigned parking facility. Do not elect to park in another location unless instructed to do so by parking facility staff.

District staff having problems with badges should contact LAUSD HQ - Office of the Building immediately after arrival. **Note: Replacement badges are the sole responsibility of the employee. There is a \$10 replacement fee.**

## Beaudry 1 and 2 Parking Occupants

If you are assigned to park in these locations use the call box at the parking entrance to contact building security. Provide your first and last name and upon verification, you will be granted access to the parking facility.

## Visconti Parking Occupants

Employees assigned to Visconti have a separate key card to access Visconti Parking Garage. If the key card is lost or damaged, pull a ticket from the machine and get validation from LAUSD HQ - Office of the Building.

## District Parking Facilities

The parking locations and uses below are subject to change. District personnel may be asked to relocate their parking location at any time.

### LAUSD Headquarters (B1)

333 S. Beaudry Avenue, Los Angeles, CA 90017

Parking Lot Hours: 24 hours

Card Access required: Yes

Height: 6'3"

## Pacific Stock Exchange Building Garage (B2)

233 S. Beaudry Avenue, Los Angeles, CA 90012

Parking Lot Hours: Entry is allowed from 7:00am – 3:30pm Monday-Friday.

Cashier is available from 6:00am – 7:00pm

Card Access required: Yes. Key card access is available 24 hours

**Note: LAUSD parking is prohibited on the north end of Level 5 (adjacent to 3rd Street/Miramar) and on Level 6**

## Visconti: The Visconti Apartments (Visitor and Monthly)

1221 W. 3rd Street, Los Angeles, CA 90017

Located immediately northwest of the LAUSD Headquarters building (3rd & Boylston)

Card Access required: No

Parking Lot Hours: 6:00am – 6:00pm, Monday through Friday

Height: 7'2"

## Huntley Parking Lot

**(For Pre-Approved Oversized vehicles and Overflow Visitor Parking Only)**

1159 Huntley Drive, Los Angeles, CA 90026 (N/E Corner of Miramar and Boylston)

Card Access Required: No (Surface Lot)

Height: N/A

**Note: Validation is accepted**

## Visitor Parking Facilities

### Visconti: The Visconti Apartments

1221 W. 3rd Street, Los Angeles, CA 90017

Located immediately northwest of the LAUSD Headquarters building (3rd & Boylston)

### Huntley Parking Lot

**(For Pre-Approved Oversized vehicles and Overflow Visitor Parking Only)**

**Do not park here unless directed. Your validation may not be honored.**

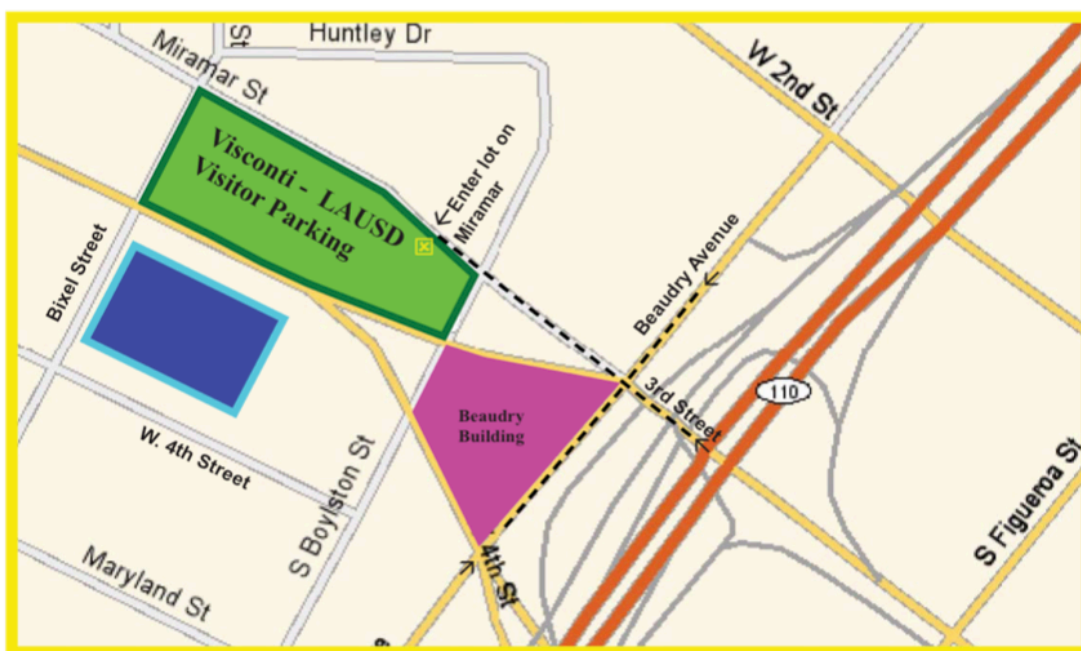
1159 Huntley Drive, Los Angeles, CA 90026 (N/E Corner of Miramar and Boylston)

Card Access Required: No (Surface Lot)

## Parking Map

### Los Angeles Unified School District Beaudry Headquarters, 333 South Beaudry, Los Angeles 90017 Visitor Parking Information

Please note the location of the LAUSD Headquarters visitor parking lot has moved to the Visconti Apartment building garage at 1221 W. 3rd Street, immediately northwest of the Headquarters building. Visitors should enter through the eastern-most entrance on Miramar Street just west of S. Boylston Street.



1221 West Third Street – Visconti Apartments Parking Lot  
Hours: 6AM – 6PM, Monday through Friday

**Handicapped Parking:** Visitors with disabilities may park in the Headquarters garage located at 333 S. Beaudry Avenue (Beaudry building I only). They will need to present evidence of current placards from the DMV to Security upon entrance and exit.

**Validation:** Parking validation for LAUSD visitors is available only from the District department being visited. Visitors parking at the Visconti lot will be directed to nearby overflow sites if the lot is full. Validation stickers are not valid at other lots unless and until visitors are directed to those lots by Visconti Parking personnel.

## Directions to Visitor Parking (Visconti Apartments)

Visitor Parking is located at 1221 W. 3rd Street, Los Angeles, CA 90017 (immediately northwest of the Headquarters building). Enter through the eastern-most entrance on Miramar just west of Boylston ("X" on Parking Map). When you access the parking lot, please take a parking ticket. Take the parking ticket with you to the department visited to have it validated.

### From the 110 North

Take the 110 North towards Downtown Los Angeles

Take the 4th St./3rd St. exit

Pass the 4th St. exit and take the 3rd St. WEST exit onto W 3rd St.

Continue across Beaudry Avenue onto Miramar St. by staying in the right lane

Continue across Huntley Dr. and turn left into the parking lot

### From the 110 South

Take the 3rd St. exit which places you on Beaudry Ave.

Turn left onto Beaudry Ave.

Turn right on Miramar St. Continue across Huntley Dr. and turn left into the parking lot

### From the 101 South

Take the 101 South towards Downtown Los Angeles

Take the exit towards 110 Harbor Fwy/San Pedro

Merge onto 110 South, and stay in the right lane

Take the 3rd St. exit which places you on Beaudry Ave.

Turn left onto Beaudry Ave.

Turn right on Miramar St and continue across Huntley Dr. and turn left into the parking lot

## Transportation Subsidy Program

When an employee uses public transportation, carpooling or ride sharing as a regular means of getting to work the District saves money on parking passes. To encourage employees to use alternate transportation, the District offers incentives in the form of transit subsidies. Eligible employees must apply and qualify for a subsidy. Contact LAUSD HQ - Office of the Building for the required form. The current subsidy rate is \$55.00 per month and is subject to change.

For carpoolers, only the designated carpool driver may receive a parking assignment. Carpool drivers will be assigned parking in B1, B2 or Visconti. All others receiving a subsidy will not receive a parking assignment.



Subsidy program participants who are not designated carpool drivers are authorized to receive validation for the Visconti Parking Lot up to a maximum of 12 times per calendar year. Validation shall be obtained from LAUSD HQ - Office of the Building. After a subsidized person has used the maximum allowances, he or she must find alternate parking locations and pay for parking. Departments shall not validate employees who participate in the subsidy program. Departments shall notify LAUSD HQ - Office of the Building of status changes in subsidy program participants.

**NOTE:** Effective May 31, 2020, The Transportation Subsidy Program is suspended until further notice due to limited business operations at LAUSD Headquarters Building. The Office of The Building will notify employees if and when the Subsidy Program is offered in the future. Email [officeofthebuilding@lausd.net](mailto:officeofthebuilding@lausd.net) for further information.

## Validation

Parking validation for LAUSD visitors is available only from the District department being visited. Visitors parking at the Visconti lot will be directed to nearby overflow sites if the lot is full. Validation stickers are not valid at other lots unless and until visitors are directed to those lots by Visconti Parking personnel.

District Employees shall not be given validation by the department. See Damaged, Lost or Misplaced Parking Badge Section for procedures to gain access to parking facilities.

### Visitors shall:

Sign validation sheet indicating floor visited and reason for visit.

### IT Staff shall:

Give visitors a validation sticker corresponding to the number on the validation sheet. Stickers shall be placed on parking ticket given by parking staff.

## Vehicles

### Fleet

ITD has a fleet of vehicles that are used by IT Staff to service District schools and offices. District vehicles are housed at the B2 Parking Facility (Floor 9), ITD Soto Street location and various other District locations based on IT staff assignments.

## Use and Responsibility

Pursuant to District Bulletin (DB) BUL-6401.1, employees may use District-owned vehicles only for official business and work related activities. The location Site Administrator is to ensure that District vehicles are used in accordance with the District policies and procedures.

### Employees shall:

- Obtain Administrator approval prior to use of a District vehicle.
- Sign out District vehicle prior to use.
- Physically possess and provide proof of a valid California Driver's License prior to use.
- Visually inspect the vehicle prior to its use to ensure that the vehicle is in a safe and clean operating condition.
- Ensure proof of financial responsibility and documentation is in vehicle.
- Ensure the vehicle is clean and maintains proper fuel (at least a ½ tank) and fluid levels at all times.
- Ensure vehicle is fueled with regular (87-octane) unleaded gasoline unless vehicle notes otherwise.
- Know and comply with all State of California Vehicle Codes, local traffic rules and ordinances, traffic control signs, posted speed limits, parking restrictions, and other applicable rules and regulations governing vehicle operation.

### Employees shall not:

- Operate a District vehicle with an invalid, suspended or revoked Driver's License.
- Operate a District vehicle with only a California Identification Card.
- Transport family member or friends in District vehicles.

## Beyond Economic Repair (BER)

Vehicles requiring repairs in excess of the vehicle's "Blue Book" value will be removed from service and require the operating department to identify replacement options. The Director of Transportation or designee has the sole authority to determine if a vehicle will ultimately be repaired.

Listed below are the District Maintenance locations. Any questions or concerns regarding vehicle maintenance should be referred to the assigned garage supervisor or the Transportation Branch Fleet Maintenance Office at (323) 342-1430.

## Maintenance

All regular maintenance of District owned vehicles is the responsibility of the Fleet Maintenance Section of the Transportation Branch. New vehicles must be taken for maintenance at 3,500 miles. Thereafter, Transportation will place a sticker on the driver side doorpost noting the date and mileage when service is due.

## Maintenance Locations

### Downtown (Business Division)

604 E. 15th St. Los Angeles, CA 90015  
(213) 743-3593

### Sepulveda Garage

8920 Sepulveda Blvd. North Hills, CA 91343  
(818) 997-2643

### Gardena Garage

18421 S. Hoover St. Gardena, CA 90248  
(310) 515-3165

### Sun Valley Garage

11247 Sherman Way, Sun Valley, CA 91352  
(818) 982-1459

### San Julian Garage

1425 S. San Pedro Street Los Angeles, CA 90015  
(213) 743-3679

## Check Out Procedures

The following procedures shall be followed when checking out a District vehicle in ITD.

### The person requesting to use the District vehicle shall:

1. Show IT Support Services Administrative Staff proof of valid California Drivers License.
2. Sign ITD Vehicle Log.
3. Document Pre-Trip Vehicle Mileage

### IT Central Office Staff shall:

1. Validate proof of California Driver's License.
2. Provide requesting driver with the vehicle keys.

## Check In Procedures

The following procedures shall be followed when returning a District vehicle in ITD.

**The person returning District vehicle shall:**

1. Complete Vehicle Badge Log to identify parking location.
2. Sign ITD Vehicle Log
3. Document Post-Trip Vehicle Mileage

**Take Home Procedures**

Although District policy does allow employees to take home District vehicles, it is not division practice to allow employees to do so at this time.

**Visitors****Visitor Management System (VMS)**

The Employee Service Center is responsible for registering visitors to the LAUSD Administrative Offices for access into the LAUSD Headquarters Building. Visitors may enter the building between 6:00 am to 6:00 pm, Monday through Friday. All visitors will be given a temporary badge upon check in.

Before visiting the LAUSD Headquarters

**Visitors should:**

- Know the name, time and location (floor and room number) of your meeting.
- Know the name and telephone number of the person(s) you are meeting.
- Have a Government issued identification (state driver's license, state identification card, passport) to present when registering at the Visitor Desk.

**IT Central Office Staff should:**

- Ensure that visitor(s) are pre-registered with the Visitor Management System.
- Ensure parking validation is provided.

**VMS Registration**

IT Central Office Staff is authorized to pre-register visitors into VMS. LAUSD HQ - Office of the Building grants this authorization subsequent to receipt of the required form indicating administrator approval.

**Parking**

All visitors shall park in Visconti unless directed otherwise by facility parking staff. See Parking Section for additional information. Visitors will receive parking validation for visit.

# IT Asset Management

IT Asset Management assists District schools and offices with managing assets at each stage of the life cycle from purchase to salvage. We support LAUSD employees by providing tracking tools and maintaining the systems of record. We are responsible for creating policies, procedures, and guidelines on best practices for managing IT devices. For additional asset management support, visit our webpage at <http://achieve.lausd.net/itam>, contact the unit at (213) 241-3023 or email [ITAssetMgmt@lausd.net](mailto:ITAssetMgmt@lausd.net).

## Requesting IT Equipment

### The requesting department shall:

1. Request approval from the department head for a computing device or peripheral. Provide the following on the request:
  - (a) Specifications of the device or peripheral
    - Type (Laptop, Desktop)
    - Make (Manufacturer)
    - Product Name (MacBook Pro, ThinkPad)
  - (b) Employee's name and classification who will be assigned the device or peripheral
  - (c) Reason for request
2. Email approved request to IT Asset Management (ITAM)

### IT Asset Management shall:

1. Confirm receipt of request (via email) to requesting department. ITAM may ask for more information in order to fulfill the request.
2. Notify the requesting department/IDM when the computing device or peripheral is available for pick up. If the inventory is not in stock, ITAM will provide estimated date of availability.
3. Forward approved request with signed Inventory Control Form (ICF), Purchase Order (PO), and Journal Voucher of requisition to IT Budget & Finance Unit for processing.

### The Site Instructional Device Manager (IDM) shall:

1. Distribute loaned equipment/peripheral to employee
2. Complete the "Employee Checkout" form in Remedy & have employee sign ICF
3. Obtain employee acceptance of the terms of the loaned equipment at time of distribution. (Upon acceptance, employee will receive a copy of the ICF along with a Remedy confirmation email to retain for his/her records).
4. Notify IT Asset Management of any change to the employee's department

## Returning IT Equipment

### The requesting department shall:

1. Notify ITAM via email that the computing device or peripheral will be returned.
2. Print ICF signed by employee.
3. Submit computing device or peripheral and signed ICF to ITAM.

### IT Asset Management/Site IDM shall:

1. Check-in device into inventory using Remedy to confirm receipt of returned equipment. A confirmation email notification will be sent to the employee upon device check-in.
2. Update ICF accordingly.

## Lost or Stolen IT Equipment

All lost or stolen equipment must be reported immediately.

### The employee shall:

1. Gather the information on the lost or stolen computing device. Refer to signed copy of ICF.
2. Call the ITD Help Desk (213) 241-5200 to request for an immediate search for the missing device.
3. Call Los Angeles School Police Department (LASPD) at (213) 625-6631 to report incident and obtain a police report number.
4. Notify the department head that the computing device is lost or stolen. If stolen, the department head must complete an iSTAR report.
5. Notify ITAM that the computing device is lost or stolen. Follow guidelines in Section 7 of the ITAM handbook located at <https://achieve.lausd.net/itam>.

### IT Asset Management shall:

1. Confirm receipt of the reported lost or stolen computing device (via email) to the reporting department and employee.
2. Update the ICF.

## Damaged IT Equipment

### The employee shall:

1. Gather the information on the damaged computing device. Refer to signed copy of ICF.
2. Submit a self-service ticket (Remedy) at <https://lausd-myit.onbmc.com>.
  - Select "School/District Office Technology."
  - Select the first option - "I need something fixed" under Provide request details
  - Complete all fields and click on "Submit Request."
3. If a loaner device is needed, then work with your site administrator
  - If device is determined Beyond Economic Repair, follow the process outlined in "Salvage IT Equipment"

## Salvage IT Equipment

A computing device that is damaged and determined Beyond Economic Repair (BER) must be processed for salvage.

### The requesting department shall:

1. Follow section 10 of the IT Asset Management Handbook
2. Print ICF signed by employee.
3. The device or peripheral will be scheduled for pick up by the designated vendor.

### IT Asset Management shall:

1. Update device status in Remedy to salvage.
2. Update the ICF accordingly.

## Removal of IT Equipment from Beaudry Building

### The requesting department shall:

1. Complete the Property Removal Form (PRF) available at <http://mo.laschools.org/fis/existing-facilities/m-and-o/maintenance/admin-offices/online-forms>
2. Submit the PRF and ICF (if new device is assigned) to ITAM

### IT Asset Management shall:

1. Confirm receipt of the request to remove IT equipment (via email) to the requesting department. Additional information may be required to approve the request.
2. Notify the requester when the approved Property Removal Form is approved and ready for pick up.
3. Update the ICF as needed.

## Change of Employee Work Location

### The supervisor shall:

1. Notify ITAM of the change of work location.
2. Collect assigned equipment from employee.
3. Return computing device or peripheral to ITAM.

**Note: Departments must obtain approval from ITAM prior to the reassignment of a computing device or peripheral to an employee.**

### IT Asset Management/Site IDM shall:

1. Check-in device into inventory using Remedy to confirm receipt of returned equipment. A confirmation email notification will be sent to the employee upon device check-in.
2. Update the ICF.



# IT Budget & Finance

We are responsible for managing the ITD budget. This includes the reporting and financial operations of the Division. Our unit provides quality (timely and useful) financial assistance to help align financial decision-making with the Division's goals.

For additional budget or finance support, visit our webpage at <http://achieve.lausd.net/itbudget> or contact the budget analyst assigned to your location.

## IT Budget & Finance: Purchases

It is recommended that the requesting department contact their assigned budget analyst to confirm funding availability prior to making a purchase, including purchases using a P-Card or T-Card regardless of amount.

## Purchases Utilizing the P-Card/T-Card

### P-Card/T-Card purchases under \$500:

1. Review the P-Card Restricted Items List published by the Procurement Services Division to ensure the items are eligible for P-Card purchases. The link is: <https://achieve.lausd.net/cms/lib/CA01000043/Centricity/Domain/97/P-Card%20Restricted%20Items%20List-8-17-18.pdf>
2. Prior approval by IT Support Services (ITSS) is not required.
3. May be processed directly by the department
4. Obtain a funding line from ITSS using the pre-approval form required for purchases over \$500. The form is available at <http://achieve.lausd.net/itbudget>.

### P-Card/T-Card purchases over \$500

#### The Requesting Department shall:

1. Review the P-Card Restricted Items List published by the Procurement Services Division to ensure the items are eligible for P-Card purchases. The link is: <https://achieve.lausd.net/cms/lib/CA01000043/Centricity/Domain/97/P-Card%20Restricted%20Items%20List-8-17-18.pdf>
2. Complete the pre-approval form available for download at <http://achieve.lausd.net/itbudget>
3. Identify the item(s) to be purchased and provide justification
4. Submit the form including supporting documentation (e.g. justification, quotes) to your budget analyst for processing

**IT Support Services will:**

1. Identify funding and route for approval
2. Return the approved request to the Requester, who may then make the purchase

**P-Card/T-Card Reconciliation****The Responsible Department shall:**

1. Reconcile all purchases in SAP before the 18th of each month
2. Adhere to the policies set forth by Procurement and outlined in the Procurement Manual. For additional information, visit the Procurement website at <https://achieve.lausd.net/Page/905>
3. Attach proof of purchase (receipts) to the monthly bank statement for reconciliation and auditing purposes
4. Submit the original monthly bank statement, receipts, and any supporting documentation to IT Support Services
5. Retain a copy for your department records

**Purchases Utilizing Requisition/Purchase Order****The Requesting Department shall:**

1. Refer to IT Contracts Section "Type of Procurement" for requirements based on your purchase order value and type.
2. Complete the requisition (RX) form available for download at <http://achieve.lausd.net/itbudget>
3. Provide a memo stating why the purchase is necessary and for whom the purchase is intended.
4. For project-based purchases, complete the project expenditure control sheet available for download at <http://achieve.lausd.net/itbudget>
5. Obtain signatures from your Project Manager/Director and Sr. Director
6. Time stamp and submit the requisition form and supporting documentation to the budget analyst supporting your location or project
7. Retain a copy of the requisition form and supporting documentation for your records

**IT Support Services will:**

1. Identify the funding line to be used
2. Route the documents for approval
3. Create the Shopping Cart in SAP
4. Notify the requesting department once the purchase order has been issued

Our commitment to you: If your requisition is incomplete or inaccurate, we will return it to you with guidance on how to correct it.

**IT Budget & Finance: Invoice Payments**

When you receive an invoice, follow these steps:

1. Complete and follow the steps on the invoice checklist available for download at <https://achieve.lausd.net/itbudget>
2. Sign the checklist and have the Project Manager/Director and Sr. Director sign the invoice
3. Retain a copy of the checklist and invoice for your records
4. Submit the completed invoice checklist, original invoice and any pertinent supporting documentation to the budget analyst supporting your location or project for processing

Our commitment to you: If your invoice payment checklist is incomplete or inaccurate, we will return it to you with guidance on how to correct it.

**IT Budget & Finance Responsibilities:**

1. Time stamp the invoice upon receipt
2. Verify the Purchase Order number
3. Verify funding availability on the Purchase Order
4. Upon completion of a thorough review, enter the Goods Receipt into SAP and record the SAP document number on the invoice. The analyst will initial, date and stamp the invoice to indicate the invoice has been reviewed

For professional services invoices:

- Verify the statement of work, hourly rate, other relative information and ensure the service period is within the contract term.

- Verify all supportive documents such as: time sheets, deliverable sign-offs, vendor/sponsor agreements, etc.

For goods invoices:

- Verify the item descriptions and quantity match the purchase order.
  - Verify all supportive documents such as: packing slip, installation verification, etc.
5. Submit the invoice to IT Support Services authorized signer for approval
  6. Submit the invoice to Accounts Payable for payment processing.
  7. Retain a copy of the invoice and all supportive documents for record retention and auditing purposes
  8. Monitor payment status in SAP
  9. Contact Accounts Payable to investigate the payment status of the invoice, if necessary

# Cellular Unit

We provide support to LAUSD employees with district-issued mobile devices. For ordering or billing assistance, visit our webpage at <http://achieve.lausd.net/cellular>, call the Cellular Unit at (213) 241-0505 or the Billing Unit at (213) 241-1124, or email [cellularunit@lausd.net](mailto:cellularunit@lausd.net).

## Placing an Order

To place an order, follow these steps:

1. Complete the cellular order form available for download at <http://achieve.lausd.net/cellular> Select "Order a Phone or Device."
2. Include justification – why this is necessary and for whom it is intended
3. Print a copy of the "Request for Exception" form. **Note: This is required for all employees that are not director level or above.**
4. Obtain the signatures from your department head
  - If applicable, submit the "Request for Exception" form to IT Support Services who will obtain the signature from the CIO and the Chief of Staff - Office of the Superintendent
5. Obtain funding line and funding approval from IT Support Services
6. Please visit the Online Service Request System at <https://lausd.onbmc.com> and open a Cellular Unit – General Request
7. Upload your completed cellular order form and the signed "Request for Exception" form to your online service request as an attachment
8. Submit your order and you will receive a system generated email confirming that your order is in process
9. To check on your order status, please visit the Online Service Request System at <https://lausd.onbmc.com> or call the Cellular Unit at (213) 241-0505
10. You will be contacted when your order is ready for pick up at LAUSD Headquarters, 10th floor

Our commitment to you: You will receive a status update within three (3) business days. Most orders for cellular equipment will be processed within five (5) to seven (7) business days (unless item is on backorder). You will be notified if your order will be delayed for any reason. If your order is incomplete or inaccurate, we will return it to you with guidance on how to correct it.

## Billing Process

You can check your billing statement online at any time by visiting <http://achieve.lausd.net/cellular>. Locations are strongly advised to examine their billing statements each month.

All charges on cellular accounts assigned to a location are the responsibility of the authorizing location. The authorizing location must conduct internal reviews to identify personal usage and obtain reimbursement for unauthorized charges. This includes non-business related personal calls, features, services, downloads, 4-1-1 calls, and premium text messaging deemed as non-business related by the authorizing location. For further information, please see *BUL-1612.10 Acquisition and Usage of Wireless Voice and Data Devices*.

Our commitment to you: We strive to help minimize your cellular expenses and will notify you if we notice anything unusual about your usage or believe there are better plans available. We are happy to assist you with any of your questions about the billing process.

# IT Communications

IT Communications handles a variety of tasks supporting all areas of the division with communication strategies and implementation, principally the following:

**Office of the Chief Information Officer** – providing editing and polishing for clarity, tone, and style for any documents distributed under the name of the Chief Information Officer (CIO) and messages used to articulate the vision and mission of ITD to the public.

**Employee Communications** – Assisting in delivering messages to our ITD employees, which may include division-wide email blasts, bulletins, flyers, or other vehicles. Whenever the message is not coming from the CIO, the sponsoring office should generate the content and receive approval to distribute from the responsible IT Senior Leadership. IT Communications will assist with any editing needs and dispatching to the correct audiences.

**End User Communications** – providing guidance on the most appropriate strategies for the goals and implementation scopes and schedules for projects and initiatives affecting our end users (schools, offices, families and students). This may include recommendations on materials to develop and channels to use (e.g., Spotlight message on ITD website, ITD news items, email blasts to users, Principal's Connection, the streamlined communication vehicle for principals – distributed twice monthly).

**Website Solutions** – The ITD Website Services team provides schools and offices with authorized tools needed to establish a web presence and the ability to connect all web content to a centrally managed system, ensuring consistent presentation of information. IT Communications serves as a resource for departments or initiatives under the IT Division.

## Requesting Services

As an essential resource for the District, we want to ensure our team communicates within ITD and to those we serve – effectively and efficiently. By focusing our efforts around communication, we will be creating deliverables that help transform the complexity that sometimes surrounds our technological support into simplicity for our users. To help make your communication strategy successful, think through each of the following before contacting IT Communications:

**Who** Who are your target audiences? Who needs to know what it is you need to tell them?

**What** What is the message? What is it that people need to know?

**When** What is your timeline? How soon do people need to know?

**Why** Why is your message important? How does it affect members of your target audiences?

In planning your communication strategy for a project or initiative, it is best to plan at least one (1) month in advance to provide adequate timing for proactive communications to your audience. Once you have thought through these essential questions, you can contact IT Communications by email at [itsupportservices@lausd.net](mailto:itsupportservices@lausd.net) for assistance in strategizing about HOW – What are the best vehicles to get your message to the right audiences at the right time with the right degree of information about why it is important? For ITD Website Service requests, please visit <http://achieve.lausd.net/WebsiteServices> to submit a request.



# IT Contracts

The mission of IT Support Services – Contracts Team (hereinafter referred to as “IT Contracts Team”) is to implement and ensure sound procurement practices in accordance with policies and procedures as defined by the District’s Procurement Services Division.

In keeping with this mission, we are providing this handbook which includes basic information to assist in preparing and processing various types of procurement actions.

Acting as the liaison between ITD and the Procurement Services Division, we support the division with processing contracts, vendor negotiations, board reports, board briefings, ensuring board items pass, and creating reference guides on IT contracts as needed. For contracts support, visit our webpage at <http://achieve.lausd.net/itcontracts>.

## Contract Resources

### Procurement Manual

[https://achieve.lausd.net/cms/lib/CA01000043/Centricity/Domain/98/Procurement\\_Manual\\_8th\\_Edition.pdf](https://achieve.lausd.net/cms/lib/CA01000043/Centricity/Domain/98/Procurement_Manual_8th_Edition.pdf)

### Professional Services Contract User Guide

[https://psd.lausd.net/doc/pca/irfp\\_process/process\\_over\\_bid\\_limit/user\\_guide.pdf](https://psd.lausd.net/doc/pca/irfp_process/process_over_bid_limit/user_guide.pdf)

### P-Card

<http://achieve.lausd.net/Page/905>

## Buy and Use LAUSD First Resolution

The Buy and Use LAUSD First Resolution was adopted by the Board of Education on November 13, 2012. This Resolution requires all schools and offices to purchase daily supplies and materials from the District Warehouse Catalog so school and office budgets can be better utilized for other resources.

## Delegated Authority

The Board of Education approved delegation of authority to the Superintendent. This authority has been designated or sub-delegated to an official(s) in the Procurement Services Division. **IT department heads, managers and/or other IT staff do not have delegated authority to sign contracts.**

## Formal Competitive Bid Limit

The California Department of Education annually adjusts the dollar thresholds triggering procurements that shall be competitively bid. The threshold is applicable to supplies, equipment and general services. The Board has adopted a similar competitive process for the negotiation and execution of professional services. Please check with IT Contract Staff for the current applicable bid limit.

## Types of Procurement

### Supplies, Equipment and General Services

Supplies, equipment and general services are tangible items. Examples include, but are not limited to, network equipment, computers, printers, and software maintenance renewals.

### Supplies, Equipment and General Services: \$1 Up to \$25,000

Dollar Thresholds	Approval and Requirement
\$1 - \$1,500 or \$1 - \$3,000 (subject to authorized limits)	ITD may use a P-Card to purchase supplies, equipment and general services.  If a vendor does not accept P-Card, submit a requisition (RX) to issue a Purchase Order.

*Supplies, Equipment and General Services (Continued)*

Dollar Thresholds	Approval and Requirement
Up to \$25,000	<p>IT Contracts Team recommends competition regardless of the dollar threshold.</p> <p>For this dollar threshold, ITD has the ability to select the vendor and utilize SAP to auto-generate a Purchase Order.</p> <p><b>Required documents</b></p> <ul style="list-style-type: none"> <li>• Shopping Cart (Requisition)</li> <li>• Price quotes</li> </ul> <p>A memo explaining the request to purchase is recommended to be included as part of the submittal (e.g., Informatives, Single Source, etc.)</p> <p><b>How to Process an Order</b></p> <p>The Requester shall:</p> <ol style="list-style-type: none"> <li>1. Informally solicit a minimum of three (3) price quotes</li> <li>2. Select the lowest price from a qualified vendor</li> <li>3. Prepare the required documents for signatures</li> <li>4. Acquire department head signatures from authorized individual(s) such as:             <ol style="list-style-type: none"> <li>(a) Supervisor/Manager/Director</li> <li>(b) Senior-level Director</li> </ol> </li> <li>5. Submit all signed documents to IT Support Services</li> </ol> <p>IT Support Services will finalize the process by:</p> <ol style="list-style-type: none"> <li>1. Providing the funding line</li> <li>2. Issuing the SAP Shopping Cart</li> <li>3. Issuing the District Purchase Order</li> </ol>

## Supplies, Equipment and General Services: \$25,000 Up to State Competitive Bid Limit

### Supplies, Equipment and General Services (Continued)

Dollar Thresholds	Approval and Requirement
\$25,000 up to below State Competitive Bid Limit	<p>IT Contracts Team recommends competition regardless of the dollar threshold. For this dollar threshold, Procurement Services Division will procure your request upon receiving all required documents from the IT Contracts Team.</p> <p><b>Required documents</b></p> <ul style="list-style-type: none"> <li>• Requisition (RX)</li> <li>• Price quote(s) including product descriptions, technical specifications, etc.</li> </ul> <p>A memo explaining the request to purchase is recommended to be included as part of the submittal (e.g. Informative, Single Source, etc.)</p> <p><b>How to Process an Order</b></p> <p>The Requester shall:</p> <ol style="list-style-type: none"> <li>1. Informally solicit a quote (A minimum of three (3) quotes is recommended)</li> <li>2. Select the lowest price from a qualified vendor</li> <li>3. Prepare the required documents for signatures</li> <li>4. Acquire department head signatures from authorized individual(s) such as:               <ol style="list-style-type: none"> <li>(a) Supervisor/Manager/Director</li> <li>(b) Senior-level Director</li> </ol> </li> <li>5. Submit all signed documents to IT Support Services</li> </ol> <p>IT Contracts Team will facilitate the process by:</p> <ol style="list-style-type: none"> <li>1. Requesting the funding line</li> <li>2. Requesting the SAP Shopping Cart</li> </ol> <p>A District Purchase Order will be issued by Procurement Services Division upon completion of its due diligence process.</p>

## Supplies, Equipment and General Services: State Competitive Bid Limit to \$250,000

### Supplies, Equipment and General Services (Continued)

Dollar Thresholds	Approval and Requirement
<p>At or above State Competitive Bid Limit to \$250,000</p>	<p>IT Contracts Team recommends competition regardless of the dollar threshold.</p> <p>For this dollar threshold, Procurement Services Division will procure your request upon receiving all required documents from the IT Contracts Team.</p> <p><b>Required documents</b></p> <ul style="list-style-type: none"> <li>• Requisition (RX)</li> <li>• Price quote(s) including product descriptions, technical specifications, etc.</li> <li>• Memo (Informative, Single Source, etc.)</li> <li>• Request for Procurement Action (RFPA)</li> </ul> <p><b>How to Process an Order</b></p> <p>The Requester shall:</p> <ol style="list-style-type: none"> <li>1. Informally solicit a budgetary quote</li> <li>2. Prepare the required documents for signatures</li> <li>3. Acquire department head signatures from authorized individual(s) such as:               <ol style="list-style-type: none"> <li>(a) Supervisor/Manager/Director</li> <li>(b) Senior-level Director</li> </ol> </li> <li>4. Submit all signed documents to IT Support Services</li> </ol> <p>IT Contracts Team will facilitate the process by:</p> <ol style="list-style-type: none"> <li>1. Requesting the funding line</li> <li>2. Requesting the SAP Shopping Cart</li> <li>3. Requesting final signature approvals from ITSS department head and Chief Information Officer (CIO)</li> </ol> <p>Procurement Services Division will conduct an Invitation for Bid (IFB) solicitation. The resulting agreement will be presented to the Board of Education for Ratification. District Purchase Order(s) will be issued once the IFB process is completed.</p>

## Supplies, Equipment and General Services: Over \$250,000

### *Supplies, Equipment and General Services (Continued)*

Dollar Thresholds	Approval and Requirement
Over \$250,000	<p>IT Contracts Team recommends competition regardless of the dollar threshold. For this dollar threshold, Procurement Services Division will procure your request upon receiving all required documents from the IT Contracts Team.</p> <p><b>Required document</b></p> <ul style="list-style-type: none"> <li>• Requisition (RX)</li> <li>• Memo (Informative, Single Source, etc.)</li> <li>• Request for Procurement Action (RFPA)</li> <li>• Transmittal form</li> <li>• Product descriptions, technical specifications, etc.</li> </ul> <p><b>How to Process an Order</b></p> <p>The requester shall:</p> <ol style="list-style-type: none"> <li>1. Provide estimated cost</li> <li>2. Prepare the required documents for signatures</li> <li>3. Acquire department head signatures from authorized individual(s) such as:               <ol style="list-style-type: none"> <li>(a) Supervisor/Manager/Director</li> <li>(b) Senior-level Director</li> </ol> </li> <li>4. Submit all signed documents to IT Contracts Team</li> </ol> <p>IT Contracts Team will facilitate the process by:</p> <ol style="list-style-type: none"> <li>1. Requesting the funding line</li> <li>2. Requesting the SAP Shopping Cart</li> <li>3. Requesting final signature approvals from ITSS department head, Chief Information Officer (CIO) and other required signatures.</li> </ol> <p>Procurement Services Division will conduct an Invitation For Bid (IFB) solicitation. The resulting agreement will be presented to the Board of Education for approval. District Purchase Order(s) will be issued after Board approval.</p>

## Professional Services

Professional service contracts can be used to engage qualified individuals or firms to provide temporary special services in areas such as finance, economics, accounting, engineering, architecture, technical, design-build, legal, or administrative matters.

Professional service contracts may not be used to hire persons who should be classified as employees rather than as contractors under Internal Revenue Service (IRS) guidelines, or to perform work that could be assigned to certificated, classified, or unclassified District employees.

### Professional Services: \$1 Up to \$25,000

Dollar Thresholds	Approval and Requirement
\$1 - \$1,500 or \$1 - \$3,000 (subject to authorized limits)	ITD may use a P-Card to procure professional services.  If a vendor does not accept P-Card, submit a requisition (RX) to issue a Purchase Order.

*Professional Services (continued)*

Dollar Thresholds	Approval and Requirement
Up to \$25,000	<p>IT Contracts Team recommends competition regardless of the dollar threshold. For this dollar threshold, ITD has the ability to select the vendor and utilize SAP to auto-generate a Purchase Order.</p> <p><b>Required documents</b></p> <ul style="list-style-type: none"> <li>• Requisition (RX)</li> <li>• Price proposal(s)</li> </ul> <p>A memo explaining the request to purchase is recommended to be included as part of the submittal (e.g. Informatives, Single Source, etc.)</p> <p><b>How to Process an Order</b></p> <p>The Requester shall:</p> <ol style="list-style-type: none"> <li>1. Informally solicit a minimum of three (3) written price proposals</li> <li>2. Evaluate and provide an award recommendation</li> <li>3. Prepare the required documents for signatures</li> <li>4. Acquire department head signatures from authorized individual(s) such as:             <ol style="list-style-type: none"> <li>(a) Supervisor/Manager/Director</li> <li>(b) Senior-level Director</li> </ol> </li> <li>5. Submit all signed documents to IT Support Services</li> </ol> <p>IT Support Services will finalize the process by:</p> <ol style="list-style-type: none"> <li>1. Providing the funding line</li> <li>2. Issuing the SAP Shopping Cart</li> <li>3. Issuing the District Purchase Order</li> </ol>



## PROFESSIONAL SERVICES CONTRACTS \$1.00 UP TO \$25,000

(Processing time - approximately 10 working days)



\*Based on Professional Services Contracts User Guide

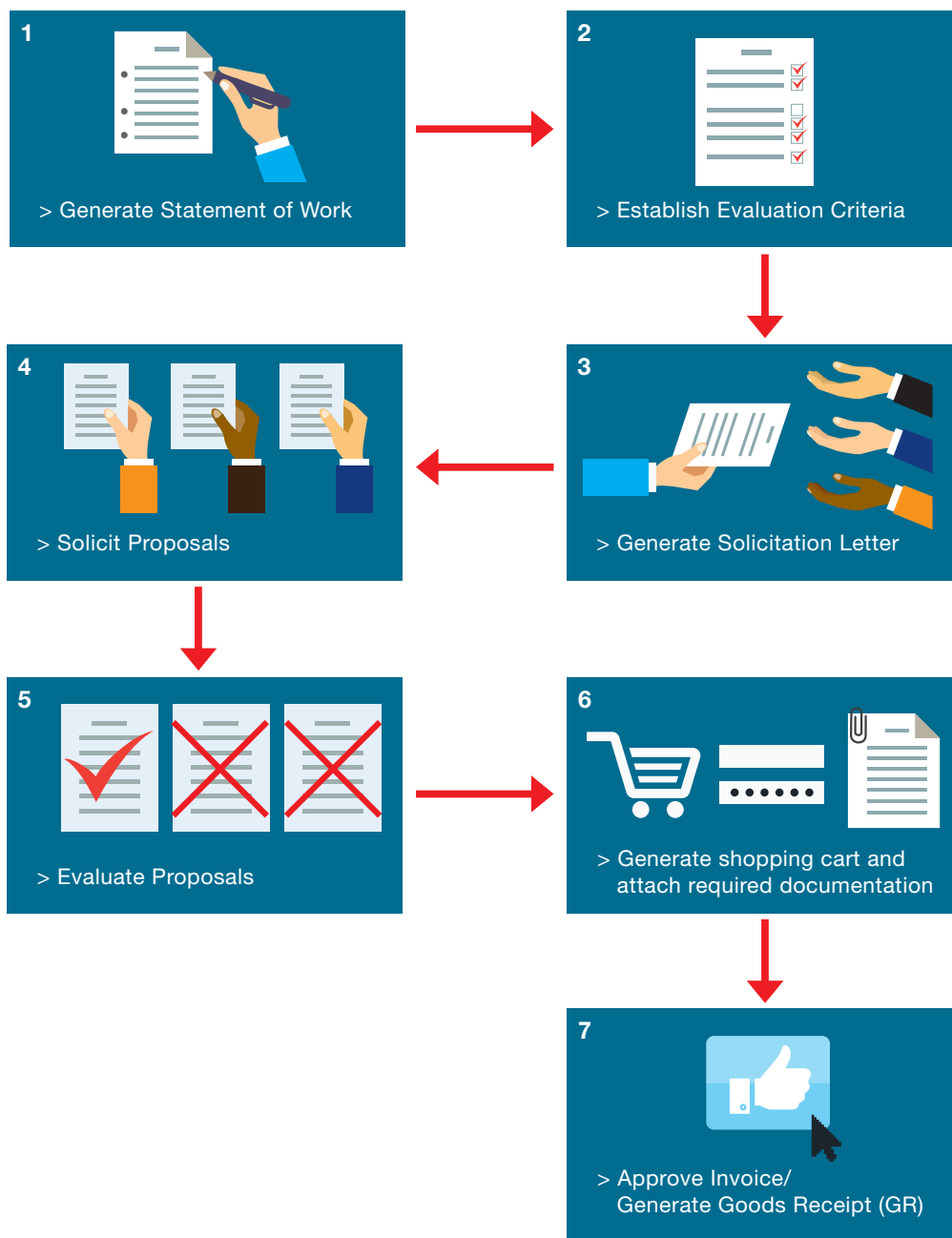
## Professional Services: \$25,001 Up to \$250,000

### Professional Services (continued)

Dollar Thresholds	Approvals and Requirement
\$25,001 - \$250,000	<p>ITD will conduct an Informal Request for Procurement (IRFP) solicitation and submit all necessary documentation to Procurement Services Division for processing.</p> <p><b>Required Documents:</b></p> <ul style="list-style-type: none"> <li>• Request for Procurement Action (RFPA)</li> <li>• Statement of Work, Minimum Qualification and Evaluation Criteria</li> <li>• Informative Memo</li> <li>• Requisition (RX)</li> <li>• SB 1419 Compliance Checklist (if applicable)</li> </ul> <p><b>How to Process an Order</b></p> <p>The Requester shall:</p> <ol style="list-style-type: none"> <li>1. Generate the required documents such as: statement of work, establish minimum qualifications and evaluation criteria drafts</li> <li>2. Provide a list of three (3) Source Selection Committee members</li> <li>3. Submit RFPA once evaluation and award recommendation is completed</li> </ol> <p>IT Contracts Team will:</p> <ol style="list-style-type: none"> <li>1. Work with requester to finalize the solicitation documents</li> <li>2. Generate the solicitation letter and issue the IRFP solicitation at a pre-determined date</li> <li>3. Will work with the SSC members to evaluate the proposals and finalize award recommendations</li> <li>4. Generate IRFP Checklist and request SSC member signatures</li> <li>5. Facilitate the process by:             <ul style="list-style-type: none"> <li>• Requesting the funding line</li> <li>• Requesting the SAP Shopping Cart</li> <li>• Requesting final signature approval from the department head, Chief Information Officer and other required signatures as applicable</li> <li>• Submit proposed agreement to Procurement Services Division</li> </ul> </li> </ol> <p>Procurement Services Division will:</p> <ol style="list-style-type: none"> <li>1. Perform due diligence on the ITD's IRFP process</li> <li>2. Request signatures between LAUSD and selected vendor</li> </ol> <p>The Contractor may commence services once both parties (Vendor and LAUSD) have signed the agreement. The resulting agreement will be presented to the Board of Education for ratification. An updated Board Informative will be requested from the sponsor once the item is scheduled on the Board agenda.</p>

## PROFESSIONAL SERVICES CONTRACTS \$25,001 UP TO \$250,000

(Processing time - minimum 30 working days)



\*Based on Professional Services Contracts User Guide

## Professional Services: Over \$250,000

### Professional Services (continued)

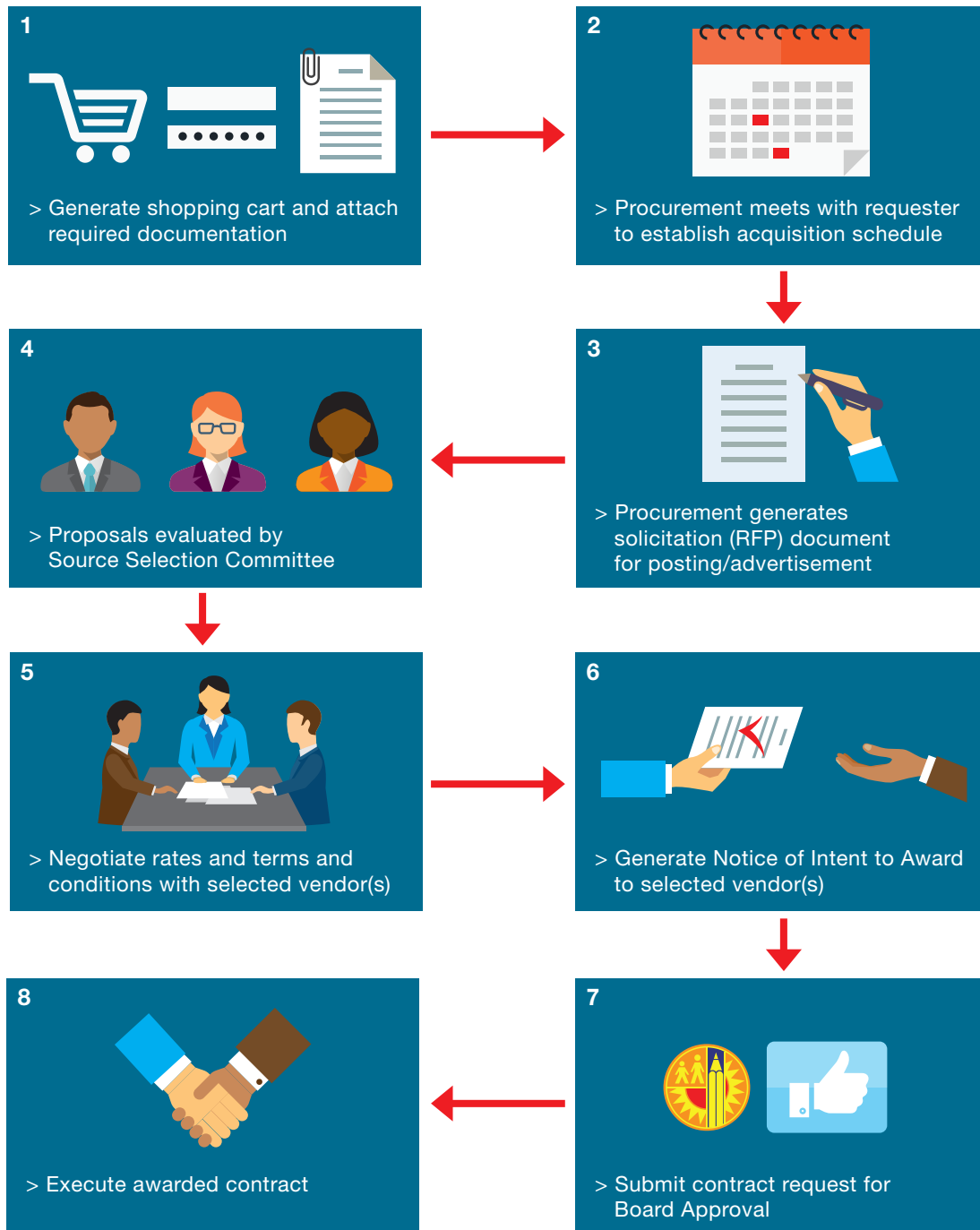
Dollar Thresholds	Approvals and Requirement
Over \$250,000	<p>For this dollar threshold, Procurement Services Division will procure your request upon receiving all required documents from IT Contracts Team.</p> <p><b>Required Documents:</b></p> <ul style="list-style-type: none"> <li>• Request for Procurement Action (RFP)</li> <li>• Statement of Work, Minimum Qualification and Evaluation Criteria</li> <li>• Transmittal Form</li> <li>• Informative Memo</li> <li>• Requisition (RX)</li> <li>• SB 1419 Compliance Checklist (if applicable)</li> </ul> <p><b>How to Process an Order</b></p> <p>The Requester shall:</p> <ol style="list-style-type: none"> <li>1. Generate the RFP document</li> <li>2. Generate the required documents (e.g., statement of work, establish minimum qualifications and evaluation criteria drafts).</li> <li>3. Provide a list of three (3) Source Selection Committee members</li> </ol> <p>IT Contracts Team will:</p> <ol style="list-style-type: none"> <li>1. Facilitate the process by:             <ul style="list-style-type: none"> <li>• Requesting the funding line and the SAP Shopping Cart</li> <li>• Requesting final signature approval from ITSS department head, Chief Information Officer and other required signatures, as applicable</li> <li>• Review and submit the documents to Procurement Services Division</li> </ul> </li> </ol>

*Professional Services (continued)*

Dollar Thresholds	Approvals and Requirement
Over \$250,000	<p>Procurement Services Division will:</p> <ol style="list-style-type: none"> <li>1. Meet with IT Contracts Team and Requester to establish an acquisition plan</li> <li>2. Conduct the Request for Procurement (RFP) process at a pre-determined date</li> <li>3. Evaluate the proposal and recommend potential awardee(s) along with SSC members</li> <li>4. Negotiate rates, terms and conditions. IT Contracts Team will facilitate as needed.</li> <li>5. Generate a Notice of Intent to Award upon agreement of rates, terms and conditions</li> <li>6. Along with IT Contracts Team, prepare necessary documentation (e.g. Board Report and Informative) and submit request for Board approval</li> <li>7. Request signatures between LAUSD and selected vendor upon board approval</li> </ol> <p>Contractor may commence services once both parties (Vendor and LAUSD) have signed the agreement. The resulting agreement will be presented to the Board of Education for Approval. An updated Board Informative will be requested from the sponsor once the item is scheduled on the Board Agenda.</p>

## PROFESSIONAL SERVICES CONTRACTS OVER \$250,000

(Processing time - minimum 4 months)



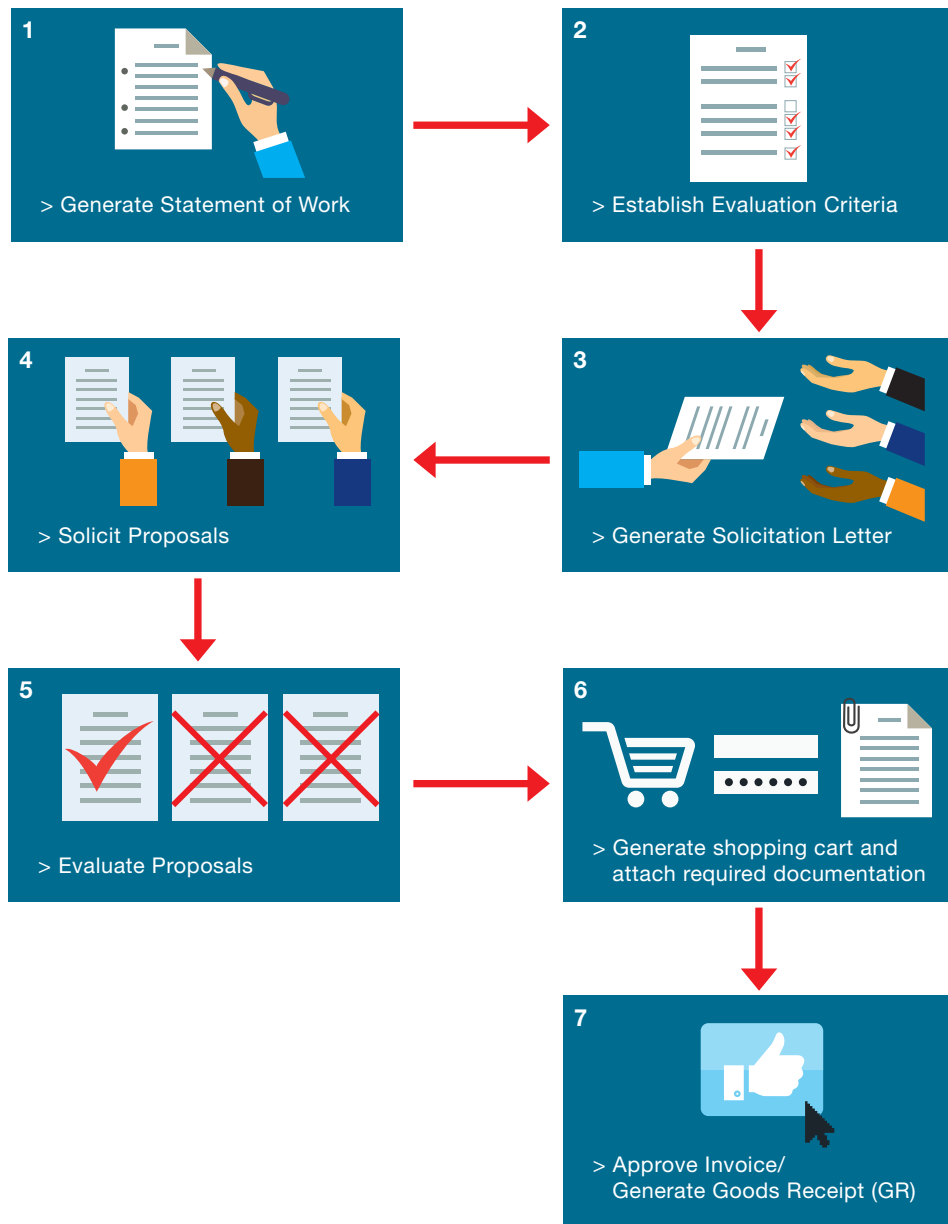
\*Based on Professional Services Contracts User Guide

## Master Services Agreement (MSA) also known as “Bench Contracts”

Dollar Thresholds	Approvals and Requirement
N/A	<p>Regardless of dollar threshold, IT Contracts will conduct the informal solicitation process and Procurement Services Division will execute the agreement (Work Order) upon receiving all required documents from requesting department.</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p><b>Required Documents</b></p> <ul style="list-style-type: none"> <li>• Statement of Work</li> <li>• Minimum Qualifications</li> <li>• Evaluation Criteria</li> </ul> </div> <div style="width: 48%;"> <p><b>Work Order Documents</b></p> <ul style="list-style-type: none"> <li>• Requisition (RX)</li> <li>• Work Order Submission Checklist</li> <li>• Schedule D (Work Order)</li> <li>• Change Order form memo &amp; Summary (if applicable)</li> <li>• SB 1419 Compliance Checklist (if applicable)</li> <li>• Bench Service Proposal Summary Report</li> <li>• Project Expenditure Control Sheet (if applicable)</li> </ul> </div> </div> <p>A memo explaining the request to purchase is recommended to be included as part of the submittal (e.g. Informative, Single Source, etc.)</p> <p><b>How to Process an Order</b></p> <p>The Requester shall:</p> <ol style="list-style-type: none"> <li>1. Generate the required documents such as: statement of work, establish minimum qualifications and evaluation criteria drafts</li> <li>2. Provide a list of three (3) Source Selection Committee members</li> <li>3. Submit signed Work Order and other related documents to IT Contracts</li> </ol> <p><b>IT Contracts Team will:</b></p> <ol style="list-style-type: none"> <li>1. Work with requester to finalize the documents</li> <li>2. Generate the solicitation letter and issue the MSA solicitation at a pre-determined date</li> <li>3. Will work with the SSC members to evaluate the proposals and finalize award recommendations</li> <li>4. Facilitate the process by:             <ol style="list-style-type: none"> <li>(a) Requesting the funding line</li> <li>(b) Requesting the SAP Shopping Cart</li> <li>(c) Requesting final signature approval from ITSS department head, Chief Information Officer and other required signatures, as applicable</li> <li>(d) Submit proposed agreement to Procurement Services Division</li> </ol> </li> </ol> <p><b>Procurement Services Division will:</b></p> <ol style="list-style-type: none"> <li>1. Perform due diligence on the MSA solicitation process</li> <li>2. Request signatures from authorized Procurement official</li> </ol> <p>The Contractor may commence services once both parties (Vendor and LAUSD) have signed the agreement.</p>

## Master Services Agreements Workflow Process

### MASTER SERVICES AGREEMENTS / BENCH CONTRACTS (for Work Orders)



\*Based on Professional Services Contracts User Guide



## Single Source Request

A single source contract may be approved for items that fit the following exceptions:

- Service issue
- Location
- Availability
- Capacity
- District or school emergency
- State or Grant Mandated Provider

A request for Single Source memo must be submitted with your contract request. Please include the following information:

1. Why is this necessary? Explain why this service is required.
2. Why is this firm selected? Do we have prior experience with the vendor that this procurement will build upon? Is the service to be provided unique or proprietary in nature? Please include whether the firm is a small business and indicate if their employees belong to a union. Also indicate if it is a grant-named vendor.
3. Explain why this contract could not be competitively bid. Describe why this contract request could not undergo the normal competitive bid process required by the Board.
4. How was the fair price established? Provide details about the firm's competitors and pricing; State how this is the best value for the District.
5. What would happen if this were not approved? Clarify ramifications of taking action versus not taking action; including delay for competitive procurement.
6. What are the terms of the proposed agreement? Identify terms of any proposed agreement, including the funding sources. Identify any savings over the previous year, "green" initiatives.

Required approvals:

Principal/Head of Organization and ESC Instructional Area Superintendent/Senior Staff (as applicable)

If the Single Source request does not qualify as a justification to contract without competition, it will be returned to the school/office to conduct an informal request for proposal process. This will cause a delay in the processing of your contract request and may impact the requested start date of services.

## After the Fact Request

After the fact requests occur when a contractor was allowed to start services prior to an authorized purchase order or contract being in place. **After-the-Fact contracts are prohibited by District policy.**

Please ensure you plan your request for professional services with ample time to:

- Gather required documentation
- Obtain required approvals, and
- Conduct an IRFP if needed

**Note: The District will not process invoices that do not have a valid contract or purchase order executed by authorized District personnel.**

All vendors are required to have a valid contract or purchase order prior to providing services or delivering goods to a school or office within the District. If the vendor provides services or delivers goods in advance of a valid executed contract or purchase order, the vendor does so at its own risk and invoices received will not be processed for payment.

## Onboarding and Exiting Guidelines for Contract Professionals

### Purpose

This document provides guidelines for onboarding and exiting ITD Contract Professionals. Throughout this document, the Contract Professional that is onboarding or exiting is referred to as "Resources." Onboarding is the process of integrating Resources into their new work environment, beginning on their first day of service. The goal of onboarding is to ensure that Resources understand the mission of the District, the responsibilities of their assignment(s), and management's expectations.

### Sponsor's Role

As a Sponsor, your role in onboarding and exiting Resources is a critical one. Effective onboarding ensures that the Resources feel welcome, comfortable, prepared, and supported. It also introduces Resources to the culture and values of the District, sets clear expectations, and provides applicable rules, policies and procedures. Resources who are exiting the District must be managed professionally and comprehensively.

**Onboarding**

For each agreement, the Sponsor or Sponsor's Designee must provide onboarding for all new Resources by following the ITD Onboarding Checklist. It is the Sponsor's responsibility to ensure that all these items are discussed with the new Resource. Once onboarding has been completed, the Sponsor or Sponsor's Designee must submit all necessary documentation to the appropriate IT Support Services staff.

**Exiting**

At the end of each assignment, the Sponsor or Sponsor's Designee must complete an exit checklist. It is the Sponsor's responsibility to ensure that all of the items included in Reference Guide REF-1939.2 are discussed with the Resource. Once the exit checklist is completed, the Sponsor or Sponsor's Designee must submit all necessary documentation to the appropriate IT Support Services staff.

**Attachments & Links**

Onboarding and Exiting Guidelines are available at <http://achieve.lausd.net/itcontracts>.

# IT Human Resources

## Hiring

### Filling a Vacant Position - Regular Appointment

Existing vacancies may be filled on a permanent basis. **Note: The vacancy cannot exist because the employee is on leave in another position, or on a leave of absence.** See Section "Filling a Vacant Position - Temporary Assignment."

Unit E classifications require that hiring departments interview all available transfers prior to candidates from the eligibility list. In accordance with the Collective Bargaining Agreement, the hiring department must inform IT HR and the employee in writing of the reason the eligible transfer is not selected.

#### Requesting Department shall:

1. Submit Personnel Request Form (available at <http://achieve.lausd.net/ithr/forms>) to IT HR Secretary.
2. Request Eligibility List
3. If the list is expired, IT HR will request a new exam. In the interim, departments may request a provisional placement ("Leave to Higher"). See Section "Filling a Vacant Position - Provisional Appointment."
4. Interview Candidates (the department may request additional candidates, if candidates are unavailable).
5. Select a candidate within the first three (3) ranks and notify IT HR via email of their selection.

#### IT HR Unit shall:

1. Notify the Personnel Commission (PC) and request that an offer be made.
2. Coordinate with the PC regarding the selection, processing and start date of employee.
3. Notify the requesting department of the candidate's acceptance/rejection, processing status and employment start date.

For current LAUSD employees, the employee start date is generally two (2) weeks after the candidate accepts the position offered by the PC.

If the candidate selected is not an LAUSD employee, the candidate:

1. Will require processing and background clearance (administered by the PC).
2. May request to start at a designated salary step, other than Step 1.

**The department shall:**

- Inform IT HR and complete a [Step Placement for an Outside Eligible form](#) or visit the Personnel Commission website at <https://achieve.lausd.net/Page/2534> to access the form.

**IT HR will:**

- Obtain from the candidate available documents supporting the request for a higher step placement. (Effective January 1, 2017, considerations for step placement are primarily based on a candidate's earning, education, training and experience.)
- Forward necessary documents to the PC for review and processing.

### **Candidate Processing**

Candidates must complete processing through the PC, which includes:

1. Completion of required District forms. First and Last Name must match on all documents.
2. Proof of original Social Security Card.
3. Proof of a recent TB test clearance, administered no more than 60 days prior to the processing date.
4. Proof of valid certification and/or license if required as per the class description. **Note: required certifications and/or licenses listed on the class description must remain valid while in the applicable job classification.**
5. Background and fingerprint clearance by the Department of Justice and FBI prior to start date. Time needed for clearance varies by employee and cannot be estimated.

Upon candidate's background clearance, IT HR Unit will notify the department of the employee's start date.

**Note: Subsequent to hire, and on an annual basis, the supervisor shall submit to IT HR Unit a copy of the employee's proof of valid drivers license and insurance if applicable.**

### **Filling a Vacant Position - Provisional Appointment**

In the absence of an eligibility list for a requested classification, the requesting department may place an individual in the position on a provisional basis until the examination process is complete and a new eligibility list is produced. If fewer than three (3) ranks exist on an eligibility list, the department may also place a person on a provisional basis.

Provisional employees are current LAUSD employees who are placed on "Leave to Higher." In order to be placed in the position on a permanent basis, the provisional employee must compete in the examination and be reachable within the first three (3) ranks. In the event the provisional employee is neither reachable nor successful on the examination, the provisional employee must return to his/her former position within 30 working days from the date of the eligibility list. The department will then have the option to (1) fill the vacancy with a candidate who is reachable on the eligibility list, (2) keep the position open and vacant, or (3) close the position.

**To fill a position provisionally, the requesting department must:**

1. Submit Personnel Request Form to IT HR Secretary (available at <http://achieve.lausd.net/ithr/forms>).
2. Inform IT HR Unit of candidate.
3. Have candidate complete Temporary Application Form and Leave of Absence form (Classified Leave Package) available at <https://achieve.lausd.net/Page/2534>.
4. Have the employee submit proof of required degrees, transcripts, certifications and/or license.
5. Submit above referenced documents to IT HR Unit.
7. Upon approval of Temporary Application Form from the PC, the employee is given a start date.
8. IT HR Unit will notify the department of the employee's start date.

Please be advised that conditional assignments are not permissible. The candidate must meet all entrance requirements for the position in order to be assigned.

**Note: Provisional assignments are valid for 90 days. Upon placement of a candidate it is recommended that the department request an examination for permanent placement.**

### Filling a Vacant Position - Temporary Assignment

A department that has a "vacancy" due to an incumbent on a "Leave to Higher" or a leave of absence (illness leave longer than 20 working days) has the option to temporarily fill the vacated position. In such cases, the department must interview the first three (3) ranking candidates on the classifications' eligibility list that identifies candidates accepting "temporary" positions. If no eligibility list exists, departments may request to place someone provisionally ("Leave to Higher"). If the person on the leave of absence returns to his/her position, s/he will displace the temporary employee.

**Requesting department must:**

1. Submit Personnel Request Form to IT HR Secretary
2. Obtain eligibility list and interview candidates
3. Select candidate and notify IT HR Unit

4. Have the candidate submit proof of required certification and/or license, if applicable.

### Filling a Vacant Position – Substitute

If a department has an employee that will be absent for a period of time, the department may request a substitute to meet the needs of the department for the duration of the absence. This process is commonly used for IT Interns or clerical classifications (e.g., Clerk or Office Technician). Substitutes may be requested for days or weeks at any given time. Their assignments are open ended and may be terminated at any time.

#### Requesting department must:

1. Submit a Personnel Request Form (available at <http://achieve.lausd.net/ithr/forms>) and inform IT HR Unit which employee the substitute is replacing and the duration the substitute is needed.

#### IT HR Unit shall:

1. Coordinate process with the PC. Candidates that are not current District employees will require processing (See "Candidate Processing" in Section "Filling a Vacant Position - Regular Appointment).
2. Inform department of substitute employee's start date

**Note: Substitute employees that are not LAUSD employees do not receive benefits while in temporary status and are separated from the district if not successful on the examination.**

### Filling A Vacant Position – IT Intern / Administrative Intern

#### IT Interns and Administrative Interns are limited and have a lifetime limit of 799 hours

To fill a position, the requesting department must:

1. Submit Personnel Request Form to IT HR Secretary.
2. Inform IT HR Unit of Candidate.
3. Have candidate complete Temporary Application Form (available at <https://achieve.lausd.net/Page/2534>).
4. Have the employee submit proof of required degrees and/or transcripts
5. Submit above referenced documents to IT HR Unit.
6. Upon approval of Temporary Application Form from the PC and completion of processing, the candidate is given a start date.
7. IT HR Unit will notify the department of the candidate's start date.

## Requesting an Examination

If a department has a vacancy to fill and there is no eligibility list for the classification, the department may request an examination for the classification. Examinations may either be (1) promotional only or (2) dual, open to the public and promotional for current permanent LAUSD employees.

### Requesting department shall:

1. Email IT HR Administrator to request an examination
2. Obtain and submit completed Start Up Questionnaire to IT HR Administrator
3. Identify a Subject Matter Expert (SME) for the exam. The SME is responsible for conveying to the PC the needs of the department and defining the ideal candidate. Identify a list of qualified employees that can serve as raters for the exam (Raters must be in a position that earns more than the classification that is being recruited for).

### IT HR Unit shall:

1. Coordinate with the PC to request an examination
2. Provide the PC with a contact for the requesting department

Please be advised that if a District employee is reachable within the first three (3) ranks on the eligibility list and has Tucker rights, then he/she must be selected before a candidate outside of the District. Tucker rights apply to all District employees who have been laid off from a District position and are on a re-employment list. Tucker rights only apply when an exam is dual (open to internal/external candidates).

## Establishing New Positions

Requesting Department must submit the following to IT HR Unit (Sr. HR Representative):

1. Personnel Request Form with Director's and Senior Director's signature and funding line from IT Budget & Finance
2. Completed Freeze Exemption Form
3. Duty Statement (a minimum of 10 duties are required)
4. Organizational Chart reflecting the requested position

### IT HR Unit shall:

1. Submit completed Freeze Exemption Form (available at <https://achieve.lausd.net/Page/2534>), Duty Statement, and Organizational Chart to the PC.



2. Inform the Department that the PC either (1) approved the establishment of the position or (2) requested additional information prior to approval. The PC will issue a tracking number that is provided to IT Budget & Finance to indicate the position may be created in SAP.
3. Monitor the status of the position, and when the Position Control Number (PCN) is available, notify the requesting department the position can be filled.

**IT Budget & Finance Unit shall:**

1. Create the position in SAP.
2. Provide the Position Control Number (PCN) to the IT HR Unit.

Giving consideration to the freeze approval process there is an anticipated 30 to 45 day processing period, which may impact the timeline. Contact IT HR if freeze approval expires. Freeze approvals are valid for 45 days.

## Establishing a New Classification

If a department feels that it has a need for work that is not met with an existing classification, it can request that the PC establish a new class.

**The requesting department must:**

1. Review the request with the responsible Senior Director and obtain funding line from IT Budget & Finance.
2. Complete one of the following:
  - (a) If an individual is currently performing the duties of the proposed classification (a minimum of 10 duties), submit a Position Information Form (80.4) available at <https://achieve.lausd.net/Page/2534>.
  - (b) If the job duties are not currently performed by an employee (a minimum of 10 duties), submit a proposed classification description.
3. Submit an organizational chart depicting the new classification and identifying the level (e.g., managerial, supervisory, or front-line).
4. Provide justification and rationale for the new classification.

**IT HR Unit shall:**

1. Submit the required documents to the PC who will then perform a duty and salary study to determine whether the duties and responsibilities warrant a new classification.

All proposed new classifications are submitted for approval by the PC, which meets bi-monthly (refer to LAUSD website for meeting dates and times <https://achieve.lausd.net/Page/2135>). If the PC determines that a new class is warranted, then:

- A class code is assigned to the new class and the requesting department may create the new position.
- The examination process may begin in order to quickly establish an eligibility list for regular hire.
- The department may place a person provisionally in the position or wait for the eligibility list to place a person permanently.

**Bond Funded Positions**

The duties for bond funded positions must be approved by the Bond Oversight Committee (BOC) prior to using bond funding for the position. Please contact IT HR for assistance in the bond approval process.

**Reclassifications**

If an employee believes that s/he is performing duties that aren't within their current classification, s/he may request to have their position studied by the PC.

**The requesting employee must:**

1. Complete a Position Information Form (80.4) and submit to the IT HR Unit who will submit to the PC for review. The form is available at <https://achieve.lausd.net/Page/2534>.
2. Be available for a possible interview with a representative from the PC.

Potential Findings of Position Study	
PC Findings	Department Actions
Employee is working <b>within</b> the confines of his/her classification	No Action Required
Employee is working at a level <b>below current classification</b>	Reassess duties and ensure employee is assigned appropriate level duties
Employee is working at a level <b>higher than his/her classification</b>	Remove higher level duties or Reclassify the position, in which employee will receive a temporary pay increase for performing higher level duties for up to six (6) months or until the exam is given.

## Crosswalks

When a department wants to move a position to a new location code within the division, it is called a crosswalk.

**Requesting department shall:**

1. Obtain approval from CIO/Director of IT Finance & Administration to crosswalk position.
2. Notify IT Budget & Finance of involved employee, position, location and provide justification for crosswalk.
3. Notify IT HR Administrator that they want to crosswalk a position.
4. Submit to the IT Budget & Finance Unit an organization chart reflecting the existing location of the position and an organization chart reflecting the new location of the position.

**The IT Budget & Finance Unit will:**

1. Prepare the crosswalk form and forward to IT HR Unit, along with the organization chart and justification.
2. Process the crosswalk request subsequent to the receipt of the tracking number from the PC.
3. Notify IT HR when the position crosswalk has been completed.

**The IT HR Unit will:**

1. Review documents and forward to the PC for review/approval.
2. Obtain a tracking number from the PC.
3. Notify IT Budget & Finance of PC approval and provide IT Budget & Finance the tracking number.
4. Notify the requesting department when the crosswalk has been completed.

## Employee Requested Transfers

If an employee requests to transfer to another location (intra division or intra District), the employee shall:

1. Complete Transfer Request form (PC form 5005 available at <http://achieve.lausd.net/ithr/forms>).
2. Obtain his/her department head's signature.
3. Submit completed form to IT HR Secretary for division approval.

**The IT HR Unit will:**

1. Provide the employee with an acknowledgment letter confirming receipt of the transfer request form. If transfer is delayed, the duration of the delay will be noted in the acknowledgment letter.
2. Provide the employee with a copy of the time-stamped, approved Transfer Request form.
3. Hand deliver the original completed Transfer Request form to the PC, who will then place the employee on a Transfer list. A copy will be sent via certified and regular US mail.

## Administrative Transfers (Initiated by District administrator)

A District director or manager may request to transfer an employee to another location for the good of the District service. The requesting department shall email the request to the IT HR Unit Sr. HR Representative and copy the IT HR Administrator and include the following information:

1. Name of employee, employee number, classification
2. Rationale for the administrative transfer (e.g. specialized skillset that no one else has)
3. Location that the employee is transferring from and to
4. Effective date of transfer
5. Assigned Working Shift

Pursuant to the applicable collective bargaining agreements (CBA), all employees shall receive written notification of the scheduled transfer prior to the effective date. The Sr. HR representative will work closely with the department to create the appropriate notification to the employee (with copy to supervisor, IT HR Administrator, and applicable union) in compliance with the CBA.

## Human Resources: Leaves of Absence

Processing leave of absence requests is subject to PC rules, collective bargaining agreement provisions, and various employment laws. Direct all leave of absence questions to the IT HR Unit.

### Illness Leaves

#### Definitions

- Short-Term – any illness that is fewer than 20 working days
- Long-Term – any illness that exceeds 20 working days

Supervisor's Guide to Illness Leaves and Required Documentation			
Illness Leave Duration	Certification of Illness Absence Form Required	Formal Leave Documents Required	Physician clearance to return to work required
Fewer than 5 days	Yes	No	May be requested by supervisor if it is a part of a performance improvement agreement
5 – 19 days	Yes	No	Yes
20+ days	Yes	Yes	Yes

## Short-Term Illness

Employees may use their illness benefit for illness related absences, medical appointments, etc. Permanent employees are allocated illness days at the beginning of each fiscal year. There is no cap on the amount of days a permanent employee may accrue. Probationary employees (New Hires) without underlying District permanency are only allocated six (6) illness days. Substitute employees are allocated three (3) paid sick days in a 12-month period. To request illness leave, all employees shall complete the "Certification/Request of Absence for Illness, Family Illness, New Child" available at <https://achieve.lausd.net/Page/440>

## Long-Term Illness

The following procedures are required for any illness that exceeds 20 working days:

1. As soon as the employee has knowledge of a long term leave or as soon as possible, the employee must accurately complete a Leave of Absence Request for Classified Employees or Certificated Request for Leave of Absence. If the form is incorrect or incomplete, processing may be delayed.
2. The employee's physician must accurately complete the Attending Physician Statement.
3. The employee's supervisor must sign the form under the "Acknowledgement of Mandatory Leave Request" section on the Leave of Absence form.
4. The original documents shall be submitted to the ITD HR Unit for processing.
5. If a leave of absence needs to be extended, the procedures shall be repeated.

**Note:** Employees who take long-term illness leaves are protected by law. Refer to <http://achieve.lausd.net/Page/2206> for information on the Family Medical Leave Act/California Family Rights Act. Reprisals against employees for taking these types of leaves of absence are prohibited.

## FMLA Leaves of Absence

When an employee is absent three (3) or more consecutive days, please notify IT HR who will prepare and provide an FMLA advisory notice to the employee. Notices are sent via certified mail and hand delivery if possible.

## Return to Work after Illness or Injury

The following is required for an employee returning to work after an illness that exceeds five (5) days

1. Obtain clearance to return to work by his/her own physician (Clearance by the District physician may be required).

2. Have treating physician complete a Notice of Intent to Return to Work Form indicating the employee's anticipated date of return.
3. Submit the Notice of Return to Work form to the IT HR Administrator 24 hours prior to the employee's date of return.

**Note: An employee might be allowed to return to work by his/her physician, but only with work restrictions. In this case, reasonable accommodations will need to be considered.**

## Families First Coronavirus Response Act (FFCRA)

The Families First Coronavirus Response Act (FFCRA) requires the District to provide employees with paid sick leave or expanded family and medical leave for specified reasons related to COVID-19. The Emergency Paid Sick Leave (EPSL) and Emergency Family Medical Leave Expansion Action (FMLA+) provisions under FFCRA are applicable beginning **April 1, 2020 through December 31, 2020**.

### Emergency Paid Sick Leave (EPSL)

All District Employees are eligible for EPSL benefits, limited to 80 hours for an EPSL qualifying event.

Qualifying events include:

1. Employee is subject to a government (federal, state, local) quarantine or isolation order
2. Employee has been advised by a health care provider to self-quarantine
3. Employee is experiencing symptoms of COVID-19 and seeking medical diagnosis
4. Employee has a bona fide need to care for an individual who is subject to quarantine (pursuant to Federal, State, or local government order or advice of a health care provider)
5. Employee is caring for their son or daughter whose elementary/secondary school or place of care has been closed, or the childcare provider of the son or daughter is unavailable due to COVID-19

If an employee is requesting use of EPSL, contact IT HR for assessment to determine if employee qualifies.

### Emergency Family Medical Leave Expansion Act (FMLA+)

FMLA+ is utilized when an employee is caring for his/her son or daughter whose elementary/secondary school or place of care has been closed, or the childcare provider of the son or daughter is unavailable due to COVID-19.

If an employee is requesting to use FMLA+, contact IT HR to review the request.

## Permissive Leaves

Under rare circumstances, permissive leaves (typically unpaid) may be granted by Division operating departments. Permissive leaves are granted at the discretion of the department. The following is required for an employee to apply for a permissive leave of absence:

1. Complete a Leave of Absence Request for Classified Employees or Certificated Request for Leave of Absence.
2. Obtain the signature of your supervisor and department director.
3. Submit completed forms to the IT HR Administrator.

## Fitness for Duty and Involuntary Leaves

Under certain circumstances, management can compel an employee to be evaluated for his/her general fitness for the job performed. If the employee is found to be unfit for his/her job, management can compel the employee to take a leave of absence until s/he is again found to be physically/mentally fit for the job. Contact the IT HR Administrator if there is a question about an employee's physical or psychological fitness for duty.

An Employee may be referred to the District's Employee Health Services Unit for a fitness for duty examination under the following circumstances:

1. The employee demonstrates any physical inability to perform the basic job tasks.
2. The employee exhibits any bizarre or delusional behavior that makes him/her a threat to him/herself or others, or any other severe psychological behavior that prevents the employee from performing the basic job tasks.
3. Prior to a return to work from an extended medical leave or mandated leave of absence.

## Absence Without Leave (AWOL)

If an employee is absent from work for more than five (5) working days without authorization, s/he can be considered absent without leave (AWOL) and subject to termination from employment with the District. This includes not only failing to show up to work, but also failing to provide documents for long-term illness leaves or leave extension documents. If you have a problem with an employee being AWOL, contact the IT HR Administrator immediately.

## Catastrophic Illness Donation Program

This program offers qualifying employees who have experienced a catastrophic illness or injury an opportunity to receive donations of full-pay illness days from other co-workers. Contact IT HR Unit for more information.

## Human Resources: Employee Management

### Orientation

The supervisor should always set clear expectations for conduct and work performance for new employees. Supervisors should regularly review expectations, objectively evaluate employees and give honest feedback. Every new or transferring employee must receive a Division orientation. IT HR provides orientation for new employees, but should not replace the employee orientation provided by the supervisor.

### Exit

At the end of each employee's work assignment, the supervisor shall complete an Employee/Contractor Exit Checklist form located on the Personnel Commission website at <https://achieve.lausd.net/Page/14476>. The supervisor shall ensure that all equipment, keys, etc. issued to the employee is returned. Please coordinate with IT Asset Management regarding the return of equipment (e.g. computers, docking stations, etc.). Upon completion of the exit checklist, submit to IT HR.

### Progressive Counseling

If an employee needs to improve his/her work performance or conduct, it is the role of the supervisor to provide assistance and guidance in the form of verbal or written counseling.

What is Progressive Counseling?

1. Address the Problem

In a private meeting, discuss work performance and behavior standards. Give the employee an opportunity to clarify the standards and explain why there's difficulty meeting the standards.

2. Discuss Previous Counseling

Review the information provided in orientation.

3. Provide Assistance and Guidance

Provide tools (e.g., training, policies) that will help the employee meet the expected level of work performance or standard of behavior.

4. Inform of Consequences

Inform the employee of the consequences of failure to improve.



5. Memorialize Counseling in Writing

Provide a written memorandum to document verbal counseling about work performance behavior concerns utilizing the ITD Incident Form available at <http://achieve.lausd.net/ithr/forms>

6. Provide Written Counseling

Written counseling succeeds verbal counseling and may be provided in the form of a Conference Memorandum or Letter of Reprimand. Please contact IT HR Administrator for assistance.

**Supervisors should:**

1. Provide coaching and mentoring in areas employees need to improve.
2. Offer training or recommend employee assistance program.
3. Consider each situation on an individual basis.
4. Ensure employees sign off for the receipt of any documents that you provide. If the employee will not sign, have a witness sign off that the employee received the documents.

**Supervisors shall:**

1. Allow employees to have representation in any meeting scheduled to discuss concerns that may lead to disciplinary action. This employee right does not extend to routine meetings, training sessions, or when issuing documents to employees.
2. Base corrective action or proposed discipline on facts, not opinions.
3. Allow employees to review and respond to all negative material that will be put into their personnel file. **Note: the Personnel Commission maintains all employee's personnel files.**

**Supervisors shall adhere to:**

1. Personnel Commission Rules
2. Applicable Collective Bargaining Agreement provisions
3. Applicable Federal and State laws
4. Applicable tenets of progressive discipline

## Discipline

The Division *cannot* impose formal discipline (demotion, suspension or dismissal) on an employee; it can only make a recommendation to the Board of Education to do so. All formal discipline is ratified by the Board of Education.

1. Demotion – assigned to a lower classification
2. Suspension – removal from service without pay for a period not to exceed 30 days
3. Dismissal – permanent removal from District service for cause

Any disciplinary action recommended for an employee shall be held in the strictest confidence and shall not be discussed with the alleged victim or anyone else. A recommendation to impose disciplinary action shall adhere to the concepts of "Fair Play," "Just Cause" and "Due Process" as mandated.

### Fair Play

Disciplinary action should never be a surprise to the employee. In most circumstances, the employee should have the opportunity to improve and experience progressive counseling prior to the recommendation of discipline. However, if the employee commits an egregious act, which is a violation of District or Division policy and a cause for discipline, a recommendation for disciplinary action may be made.

### Just Cause

Discipline should be recommended for work related reasons and should not be discriminatory or subjective.

### Due Process

When a decision is made to proceed with the recommendation of disciplinary action (demotion, suspension, or dismissal), all mandated procedures shall be followed. The required procedures include, but are not limited to, providing the employee with a copy of the charges against him/her and the policies that were violated and allowing the employee to have representation. It is understood that as a supervisor, you may not be familiar with the disciplinary process or mandated procedures, so you should contact the IT HR Administrator prior to taking any action against an employee.

### Discipline should always:

- Be recommended for cause based on Personnel Commission rules
- Be imposed soon after the offense occurs
- Be void of subjective feelings or thoughts
- Be based on factual information

- Be handled in private
- Remain confidential

## iStar – Incident System Tracking Accountability Report

iStar is the District's incident electronic tool to report and document incidents involving students, employees, or the school community which occur on or near District schools and sites. iStar can be accessed at <http://istar.lausd.net>

When an employee is injured or involved in an incident, the supervisor shall:

1. Notify the IT HR Administrator.
2. Complete and submit an iStar report the same day the incident occurred.
3. Retain a copy of the iStar incident number.

Accurate reporting enables responders to effectively coordinate and allocate the appropriate resources required to address the incident and provide necessary support to the affected site. For additional information and guidance on completion of the iSTAR report refer to District BUL-5269.2.

## Human Resources: Evaluations

### Purpose

To provide a written record to the employee to serve as a point of reference for improved work performance.

Formal performance reviews or "Evaluations" should:

1. Accurately and objectively reflect the performance strengths and weaknesses of each employee.
2. Not be a surprise to the employee. Supervisors should give employees on-going honest feedback.
3. Be completed:
  - (a) Annually for permanent employees
  - (b) At least twice during the probationary period for new hires and newly promoted employees.

### Instructions

1. Complete evaluations where other staff cannot hear (e.g., conference room or office).
2. Comment on each area or unit of competency being addressed. Simply indicating satisfactory does not give the employee insight into their work performance.
3. Make sure comments are specific and detailed. Vague and ambiguous statements do not benefit the employee. If comments speak to substandard performance, vague statements do not support the

supervisor's concerns.

**Vague statement:** "You work very slowly."

**Specific and detailed statement:** "Work standards indicated that invoices coming into the unit should be processed by individuals in your position within 48 hours. During the months of January through March, your invoice processing averaged 70 hours."

4. Do not mark an employee "Below Standards" on any part of their evaluation if the employee has not received counseling about the concern at least once during the performance review period.

**Note: The counseling should not have occurred during the month prior to the issuance of the evaluation to prevent the appearance of punitive action.**

If marking an employee "Below Standards" on any part of their evaluation, management shall include the following:

1. A statement of the problem or concern
2. The desired improvement
3. Suggestions on how to improve
4. Any provisions for assisting the employee
5. If the issue was previously discussed with the employee, what was done and if it was not previously discussed with the employee, why not

Please submit a completed copy of employee evaluation to IT HR for placement into the employee's Division folder.

### Human Resources: Telecommuting (Emergency Purposes)

The District does not engage in the practice of allowing employees to work from home in lieu of reporting to a District work site. However, in the event of an emergency, the District may make temporary provisions.

### Human Resources: Training

The District's Organizational Excellence Branch unit provides high quality training programs designed to foster professional and personal development for classified employees at all levels of the organization.

Generally, standard programs are offered, but customized training may be arranged and developed through the Unit. Organizations that are efficient and competitive tend to value continuous training of their employees. Contact the IT HR Unit for more details regarding this program and other training options.

## Human Resources: HR Related Laws

### List of Employment Issues and Relating Statutes

1. Amendments to California's Fair Employment and Housing Act make it illegal to discriminate against someone based on their marital status or sexual orientation.
2. California Labor Code, Section 233 (Kin Care) allows employees to use one half of the illness time that they accrue in a year to care for an ill child, spouse, or parent.
3. Charles Joseph Tucker, Jr., vs. Grossmont Union High School (2008) gives preferential employment rights to laid off District employees over any new applications to available positions for which he/she is qualified.
4. The Age Discrimination Act of 1975 prohibits discrimination in all aspects of employment based on age.
5. Parental Leave Act, based on California law and Education Code Sections 44977.5 and 45196.1, mandates that eligible school employees be paid a portion of their salary for parental leave taken under the California Family Rights Act (CFRA). Eligible employees are permitted to use illness time.
6. The Fair Labor Standards Act of 1938 and various California wage statutes define minimum wage provisions, normal hours of work, under what circumstances overtime is to be paid, and the minimum age of workers.
7. The Family Medical Leave Act of 1993 and the California Family Rights Act of 1993 compel employers to allow employees to take leaves of absences to care for themselves or certain family members.
8. The Healthy Workplaces, Healthy Families Act of 2014 (Commencing with Section 245 of the Labor Code), provides mandatory paid sick days for specific eligible employees who currently do not have paid sick days.
9. The Pregnancy Discrimination Act is an amendment to the Civil Rights Act of 1964 and prohibits discrimination against pregnant women in all aspects of employment.
10. The Rehabilitation Act of 1973 and the subsequent passage of the Americans with Disabilities Acts of 1990 prohibit discrimination in employment based upon disability.
11. Title VII of the Civil Rights Act of 1964 prohibits discrimination in all aspects of employment based on race, color, gender, religion, and national origin.
12. Weingarten Rights (NLRB v. J. Weingarten, Inc. 420 U.S. 251) state that employees have a right to union representation at investigatory interviews. 1). The employee must make a clear request for union representation before or during the interview and cannot be punished for this request. 2). After the employee makes the request the employer must (a.) grant the request and delay questioning until the union representative arrives and allow the representative to privately consult with the employee prior to the continuance of the meeting, (b.) deny the request and end the interview immediately or (c.) give the employee the clear choice to have the interview without representation or end the interview. **If the employer denies the request and continues questioning, it commits an unfair labor practice. The employee has the right to refuse to answer and cannot be disciplined for his/her refusal to answer.**

# Space Planning

## Moves, Adds or Changes

### Procedures for Requesting Moves, Adds or Changes (MACs)

For Moves, Adds, or Changes, follow these steps:

1. Departments requesting to move staff, add additional space or change/modify existing space must complete the MAC form available at <http://mo.laschools.org/fis/existing-facilities/m-and-o/maintenance/admin-offices/online-forms>. All forms must be filled out completely for consideration.
2. The requester must acquire the department's Senior Director's signature to signify acknowledgement and approval of request.
3. The form shall be submitted via email to [ITD-SpacePlanning@lausd.net](mailto:ITD-SpacePlanning@lausd.net). Use MAC Request and department name in the subject line.
4. The ITD Space Planning will review the request and meet with the appropriate department personnel to discuss the request, if necessary.

### Prohibited Actions

1. Departments shall not move staff or equipment without submission and approval of a MAC Form.
2. Departments and/or Staff shall not occupy space that is not assigned to them either at LAUSD Headquarters or other authorized District locations.
3. Space additions and reconfigurations shall not violate LAUSD HQ - Office of the Building policies, Fire Code policy or Emergency Safety regulations.
4. For Safety reasons, The Space Utilization Department shall be notified of all intra-division moves.

### Related Resources and Assistance

1. Space Reallocation Process Memorandum, dated April 17, 2012
2. LAUSD Administrative Headquarters Fire Life Safety Guidelines for a Safe Working Environment

For assistance regarding space assessments, or requests for moves, additions, or changes you may send an email to [ITD-SpacePlanning@lausd.net](mailto:ITD-SpacePlanning@lausd.net).

# Time Reporting

ITD wants to ensure all employees are aware of the expectations concerning payroll documents and sign-in and out procedures. The documents provide the framework for executing payroll reporting procedures to ensure accuracy and compliance with relative rules and regulations.

## Absence Certification Forms

Complete and approved absence Certification forms for Illness and Non-Illness are required prior to reporting of absence time. The required forms are available at <https://achieve.lausd.net/Page/440>.

## Positive Time (TMS=1) vs. Negative Time (TMS=9)

Positive Time Reporting is the recording of actual time. Time Reporters must report all attendance and absence codes and wage types for all hours.

Negative Time Reporting means that employees "planned working times from their personal work schedules are used to populate their regular time through the process of time evaluation." Only deviations from their work schedule are required to be reported (e.g., absences, additional time, etc).

## Sign In/Out Procedures

All employees shall sign in and out each day that they report to work. On days when an employee is absent, the benefit time used will be noted on the time card. Please refer to the [Payroll Concepts Manual](#) found on the Payroll Administration website (<https://achieve.lausd.net/Page/440>) regarding specific instructions related to Hourly, Salaried, Classified and Certificated employees sign in procedures.

Due to COVID-19 related pandemic resulting in school/office closures, the following guidelines are being provided when documenting an employee's time reporting:

1. Employees must document their work time.
2. The documentation process can be done on paper, electronically, or a combination of both.
3. The documentation and process for time documentation must be approved by the supervisor/administrator and discussed with employees.
4. Regardless of the methodology for time documentation - paper or electronic, please refer to "Instructions for Completing Time Cards" in the Payroll Concepts Manual on sign-in/out requirements.

5. Time documentation must be stored by the location for retrieval or traceable (if electronic) for audit purposes and in accordance with District Records Retention policies.

## Time Cards

A time card is the District's official document of employee's attendance and absence for time reporting purposes. All employees shall review and sign their time card on the signature line provided at the end of each month to confirm accuracy. The use of the time card is mandated in the Board rules and is subject to the District designated auditors.

## Work Schedule

Employees are expected to work their assigned work hours daily. Any modification to the assigned work hours requires supervisor approval in advance. The time card shall reflect the employees work schedule for the day. The appropriate form shall be submitted to pay for time worked outside of employee's assigned schedule (e.g., Overtime).

## Overtime

Overtime must be approved in advance. Employees may not exceed 44 hours of overtime per pay period or 528 hours per year without approval from the Superintendent.

## Working After Hours

Employees must have prior authorization to work before or after assigned hours or on weekends. Registration in the Visitor Management System (VMS) is required unless authorized badge access has been granted. See "Visitors - VMS Registration" for additional information.



# IT Training Academy

## What We Do

The IT Training Academy supports projects and initiatives through the coordination of professional development activities. We assist ITD employees achieve their professional goals, thereby increasing their opportunities to advance and contribute to the ITD mission. Contact us via email at [ITD-Training@lausd.net](mailto:ITD-Training@lausd.net).

## What We Provide

### Online Training Resources

Online learning resources are available to ITD staff, which include Microsoft Imagine Academy, O'Reilly Books Online and Skillsets Online. These resources are self-paced and help employees prepare for the attainment of IT industry recognized certifications.

### Microsoft Imagine Academy

The Microsoft Imagine Academy program prepares individuals for industry-recognized certifications and provides appropriate business software and technology skills essential to everyday life, whether it is basic computer skills or advanced technical skills.

Learning paths available:

- Productivity - Exposes staff to Microsoft Office and other software productivity tools for a myriad of jobs.
- Computer Science - Prepares staff for roles in software and application development
- IT Infrastructure - Provides the core technical skills required to build a sustainable technology career managing infrastructure for cloud, clients, devices databases and Office 365
- Data Science - Builds on core Excel and database fundamental skills by providing staff with advanced skills for querying, analyzing and visualizing data.

## O'Reilly Books

An online digital library containing over 24,000 videos, interactive tutorials and books from top publishers and the world's foremost innovators technology and business. An O'Reilly Books Online license is assigned to a user in which the user has the ability to bookmark literature, read and save it onto a "bookshelf." The bookmarks allow the user to refer back to items of interest. O'Reilly is accessible via mobile devices with the free app "O'Reilly." It can be viewed anytime, any place with internet access.

## Skillsets Online

Skillsets is virtual training, offering technical and business courses. Business courses include Project Management, Agile PM Essentials, Scrum Master and ITIL. Trainings are self paced and average 25 hours in length. All courses include chapter quizzes and a test. All course modules must be completed within 14 days of the start date to ensure receipt of Certificate of Completion. Skillsets may be accessed 24/7 from work or home given the PC used for training passes the systems check.

## ShopTalk Lounge

ShopTalk Lounge is a pre-recorded discussion forum collected into a video album. The 10-minute videos consist of panel-based unscripted, unfiltered discussions by experts on technical issues from varied viewpoints. The videos provide "real world" understanding of IT topics, which include VMWare, Server 2012, SQL 2012, Windows 8, SharePoint, etc. It is available online 24/7 via Safari, Internet Explorer, Firefox, Google Chrome and is also mobile compatible.

## Internal Training

The IT Training Academy can assist with coordinating training for your department (e.g., securing location). Visit the IT Training Academy website <https://achieve.lausd.net/itpd> and download a PDF fillable form "Training Information Sheet." Complete and submit to [ITD-Training@lausd.net](mailto:ITD-Training@lausd.net). You will be contacted for further information.

## Self-Enrolled Training

If you self enroll in training, notify the IT Training Academy via email at [ITD-Training@lausd.net](mailto:ITD-Training@lausd.net) and provide the following information:

- Training title
- Training duration (start and end dates)
- Training location
- Name(s) of participant(s)

## Tuition Reimbursement

Tuition reimbursement for approved IT related certificates is available by submitting an online tuition reimbursement application. Follow these steps to complete an online application.

1. Visit <https://tuitionrequest.lausd.net/Login?ReturnUrl=%2f>
2. Log in with your Single Sign On (SSO)
3. Select "Create New Tuition Reimbursement Request"
4. Complete the "Personal Information" section

### For IT Certification Exam

- Complete "Course Information" and select ITD certification in the "Select Program" drop down menu
- In the "Vacation Approval Document(s)" section, upload your approved Non-Illness Absence Certification form if your exam is scheduled during your assigned work shift
- Upload course documents in the "Pre-Course Document(s)" section. **Note: The Division Head/Administrator's information will be populated.**
- Click "Pre-Course Submit" to submit tuition reimbursement application and finish
- Log out to exit tuition reimbursement system

Note: The Tuition Reimbursement program for IT Certifications is currently unavailable.

### For College Courses

- Enter your Division Head/Administrator's email
- Click "Pre-Course Submit" to complete and finish, or click "Save (submit later)" to complete and submit at a later time.
- Log out to exit tuition reimbursement system

## Vendor Based Training

The IT Training Academy serves as a liaison to IT industry recognized training vendors and works with external organizations and schools to provide quality in-person/online instructor led training. Submit an IT Training Request form and justification via email to [ITD-Training@lausd.net](mailto:ITD-Training@lausd.net). The IT Training Academy will contact you to coordinate and finalize your training request.

# IT Travel

## Approval and Reimbursement

For travel to a conference, training, or meeting, follow these steps:

1. Complete a Request for Travel and Attendance at Conference, Convention or Meeting form (10.12) and obtain your Senior Director's signature. A fillable copy of the form may be found at <http://achieve.lausd.net/Page/862>. Please include the following:

Justification memo with a brief summary of conference/meeting

Provide answers to the following questions:

- Why do we need this?
- Why do we need to do this now?
- What would happen if this were not approved?
- What are the terms?
- What is the cost? Provide a detail cost estimate

2. Provide an agenda of the conference or convention

3. Provide the following estimates:

(a) Air & Hotel

- A print out of your search is required. It is preferable that the estimated hotel rate is below \$200 per night.
- Also include estimated expenses on form 10.12 that may be incurred (e.g. shuttle/taxi, baggage, parking)

(b) Mileage

- Include a Google map showing the mileage. You may only claim the closest distance from either "home" or "work" to conference destination

4. Submit the conference package to the IT Training Academy Unit in LAUSD Headquarters on the 10th floor

## Per Diem

Per Diem applies to In-State and Out-of-State travel and must be more than 45 miles one way. The reimbursable rate is \$49 per day. However if the traveler departs after 12 noon, or meals are provided at the conference, the per diem is reimbursable at a rate of \$24.50. To determine if meals are included at the conference, refer to the conference agenda.

## Travel Expenses

Indicate the conference fee in the appropriate line on the travel request form and state how it will be paid for. After an Approved Travel Request Notification (ATRN) is received for each traveler, conference registration fees may be paid with a P-Card, Purchase Order or self-paid using personal funds. Air travel/hotel charges may be paid using the T-Card or self-paid using personal funds.

## Purchase Order

If the conference organization accepts Purchase Orders, the IT Training Academy Unit will prepare the requisition and request all required signatures for processing.

## Self-Paid

Conference fees paid by the traveler are reimbursable with the supporting documentation (e.g., paid receipt from the venue, a copy of the credit card statement, or cancelled check reflecting the charges) and pre approval from the requester's Senior Director.

Our commitment to you: You will receive a status update within 2 weeks of submitting your travel request. We recommend that you submit your travel request as soon as possible. If your request is incomplete or inaccurate, we will return it to you with guidance on how to correct it.

## Ethical Considerations

### Why Does Ethics Matter?

It is the goal of ITD to make certain that all actions are executed in an ethical manner, in compliance with governing rules and does not give the appearance of unethical, illegal, or immoral behavior. As noted in the District's Employee Code of Ethics, our success depends on our teamwork, trust and commitment. Our division's adherence to the ethical guidelines helps to create an environment of trust with our colleagues as well as the communities we serve. The below guidelines will assist you in making the appropriate ethical decision relative to your business with and outside of the District.

### Conference Attendance

The division follows the advice and guidance of the Ethics Office regarding conferences that may be paid for by third parties. If you have a question or concern about what is allowed, contact the Ethics Office for guidance.

### Gifts

A gift is a benefit we receive that we did not pay for and can include merchandise, food, tickets, use of facilities, discounts that are not offered to the public, etc. A District employee shall not accept a gift or gratuity that exceeds \$100 from a "single source" in a "single year," or give the appearance that the gift improperly influenced our decisions regardless of the amount.

### Gift to Agency

There are allowances to receiving a gift. If a third party wishes to provide a gift to the District, the Superintendent may choose the person(s) who will benefit from the gift. In this event, the receiving person shall complete Form 801 – Gift to Agency. The gift may be payment for a conference and/or conference travel.

For additional information you may contact the Ethics Office at  
333 S. Beaudry Avenue, 20th Floor  
Los Angeles CA 90017  
Ask Ethics at (866) 322-5788  
<https://achieve.lausd.net/Page/3048>

# IT Warehouse

## Placing an Order (Requisition (RX))

### Materials in Stock

#### The requesting department shall:

1. Check SAP to verify whether the item is in the warehouse inventory.
2. Create a Shopping Cart with proper funding in SAP. (Instructions on how to create a Shopping Cart can be found at <http://www.lausd.net/ol/basetraining/shoppingCartCourses.html>)
3. Obtain the supervisor's approval for the Shopping Cart in SAP. The Shopping Cart shall include funding line, ticket number and all information pertaining to the area responsible for the cost.
4. Include their contact information in the comment section of the Shopping Cart for notification purposes.
5. Return any unused materials / items to the IT Warehouse. (Please see "Returns Process" section)

**Note: The IT Warehouse will not send unused materials to salvage! Departments are accountable for all items issued to them.**

The IT Warehouse will process the Shopping Cart, prepare items for pick up (Please allow at least one (1) hour for processing time) and notify requesting department when items are available for pick up.

### Materials Out of Stock

#### The requesting department shall:

1. Complete the "Material Request Form" (available at <http://achieve.lausd.net/itwarehouse>) and submit it to the IT Warehouse Staff for processing.
  - (a) Include justification – why you need this and who it is for?

#### IT Warehouse Staff will:

1. Request to add new materials to the IT Warehouse catalog in SAP
2. Create a Requisition (RX) for purchase with Procurement through SAP per the District's Procurement Manual.

3. Create a Goods Receipt in SAP after verifying accuracy of items subsequent to receipt of shipment.
4. Confirm goods received by comparing it to the signed packing slip upon receipt of invoice from Vendor and assign items to a location within the warehouse.
5. Notify the Requester of the availability of item(s) in SAP.

## Non-Stock Material Items

Non-Stock Material Items are not normally stocked in the IT Warehouse (e.g., item is not ordered frequently). The Non-Stock Material Items process is the same as the Materials Not In Stock process described above. The IT Warehouse Staff will monitor ordering trends and collaborate with District departments to determine which non-stock items should be added to the IT Warehouse's stock.

**Our commitment to you:** IT Warehouse will process the order and prepare items for pick up (Please allow at least one (1) hour for processing time) after funding and supervisor approval is obtained. You will be notified if your order will be delayed for any reason. If your order is incomplete or inaccurate, we will return it to you with guidance on how to correct it.

## Escalation Process

The IT Warehouse Staff will do its best to ensure that (1) critical materials are housed, (2) sufficient quantity levels are available, and (3) prompt service is provided to minimize disruption of District School and Office operations. However, in the case of an emergency, or if an order is delayed for any reason and you are unable to resolve your concerns with the IT Warehouse, please perform the following steps to escalate the issue:

1. The Requester or Requester's department shall complete a service request in Remedy.  
**Note: The request must provide justification for the escalation, as this process will be used only in appropriate situations.** A lack of planning is not considered an appropriate situation. Please plan accordingly.
2. The Requester's Supervisor and Director shall review the service request prior to submitting for final approval.
3. Director of ITFA shall review the service request in Remedy and approve for immediate action.
4. Upon final approval, the IT Warehouse Staff, with the support of ITSS and potentially other departments, will escalate the order to a top priority.
5. IT Warehouse Staff will file the Escalation service request for recording purposes.



## Return Process

ALL returns must include the following:

1. Unopened/unused material(s)
2. A copy of the signed packing list
3. A valid reason for the return
4. An authorization signature from the director approving and acknowledging the return

## Customer Procedure

After identifying a valid need to return a stock material to the IT Warehouse, the customer shall:

1. Bring the unopened/unused material(s) to the IT Warehouse.
2. Provide a copy of the signed packing slip on which the parts were issued, which shall include:
  - (a) the part(s) that need to be returned
  - (b) a statement by the approving supervisor indicating the reason for return and
  - (c) the director's signature indicating approval and acknowledgement of return.

### **The IT Warehouse staff member shall:**

1. Update SAP where the part(s) will be transferred back to stock.
2. Modify the original Requisition (RX) and credit the proper funding line(s) for the amount of the return.
3. Reprint a packing slip showing the updated materials as proof of the return for customer verification of return and credit.

### **Note:**

- All returns will be processed within 24 hours of receipt.
- Materials cannot be returned after 30 days from the signed date of the packing slip.

Our commitment to you: IT Warehouse will process the order and prepare items for pick up (Please allow at least one (1) hour for processing time) after funding and supervisor approval is obtained. You will be notified if your order will be delayed for any reason. If your order is incomplete or inaccurate, we will return it to you with guidance on how to correct it.