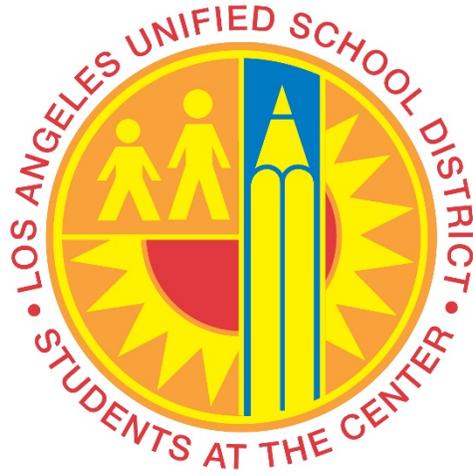


Los Angeles Unified School District



Payroll Concepts Manual

February

2021

LOS ANGELES UNIFIED SCHOOL DISTRICT

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Mission Statement

“Our mission is to support the educational community by providing quality customer service to ensure reliable, accurate and timely compensation. We take pride in our continuous focus on the ever-changing needs of our customers to improve processes and accountability while fostering trust among the people we serve.”

Foreword

The Payroll Concepts Manual is a reference guide for administrators, office technicians, school administrative assistants, time reporters, and all District employees. The manual is a compilation of payroll information, documents, forms, sections of personnel policies and Collective Bargaining Unit Agreements.

The manual is not intended to replace Collective Bargaining Unit Agreements, Board Rules or Personnel Commission Rules, but rather to serve as a guide. This manual is divided into major payroll subjects that administrators and time reporting personnel commonly refer to.

Payroll Administration

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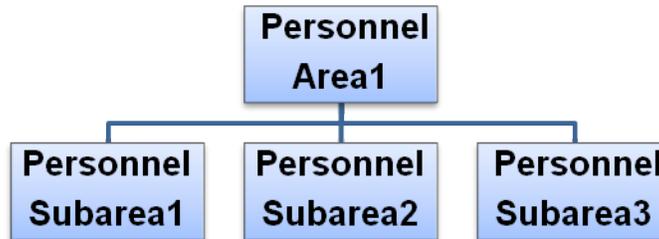
Enterprise and Personnel Structure

The Enterprise and Personnel Structure are critical components of the overall design of the SAP Human Resources system. It drives many of the business rules, processes, authorizations, benefits, timekeeping, payroll, and reporting activities. SAP defines the groupings of LAUSD employees in the Enterprise and Personnel Structure.

The structure typically divides an organization into functional and if applicable geographical groupings as well as employment classifications and groupings. It is comprised of the following elements:

- Personnel Area
- Personnel Subarea
- Employee Group
- Employee Subgroup

Enterprise Structure



Personnel Area

For LAUSD, the Personnel Area (PA) defines whether an employee is certificated, classified or unclassified and the appropriate bargaining unit. Within SAP, Personnel Area is used by HR, Benefits, Payroll, & Time modules. The Personnel Area is assigned to a single Company Code, which determines the country and currency of the Personnel Area. Personnel Area will be attached to a Position in Organizational Management, which will default to the employee record when a person is assigned to a position.

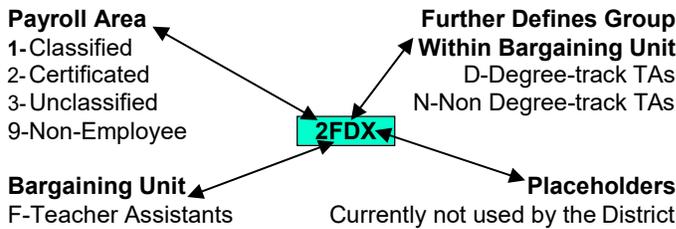
Enterprise structure			
CoCode	1000	LAUSD	Leg.person
Pers.area	2FDX	FF-Teacher Assistants (Degr Subarea	XXXX X Basis
Cost Ctr	1680801	61st St EL	Bus. Area
Fund	010-0000	GF-Unrestricted	
Grant	NOT_RELEVANT	NOT_RELEVANT	
Func. Area	0000-0000-00000	Not Applicable	

CoCode – Company code. This field will always be 1000 LAUSD, and is used for Financials and Controlling.

Leg.person – Legal Person. This field is not used by LAUSD.

Enterprise structure			
CoCode	1000	LAUSD	Leg.person
Pers.area	2FDX	FF-Teacher Assistants (Degr Subarea	XXXX X Basis
Cost Ctr	1680801	61st St EL	Bus. Area
Fund	010-0000	GF-Unrestricted	
Grant	NOT_RELEVANT	NOT_RELEVANT	
Func. Area	0000-0000-00000	Not Applicable	

Key Term - Personnel Area



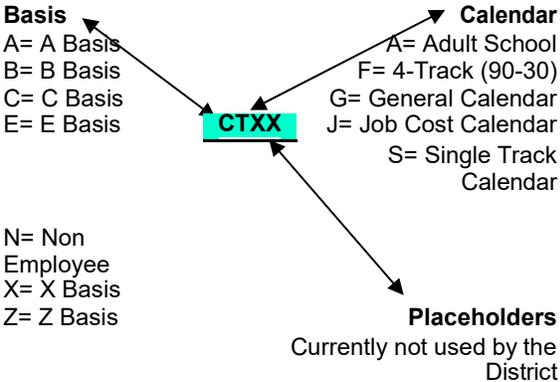
Bargaining Unit	Description	SAP Personnel Area	Description
FF	Teacher Assistants	2FDX	Teacher Assistant, Degree-Track

Personnel Subarea

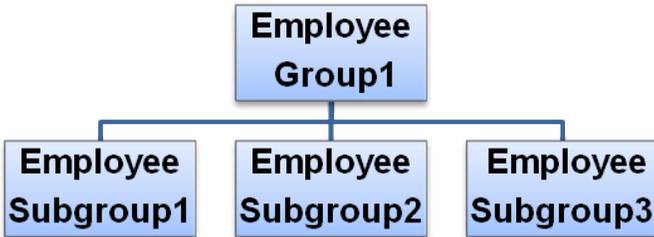
For LAUSD, the Personnel Sub Area (PSA) defines the Pay Basis (number of days worked per year) and track. In addition, it defines the holiday calendar and work schedule. Within SAP, the Personnel Subarea groupings are used by Time and Payroll. Personnel Subarea is a subdivision of the Personnel Area. A personnel area can be associated with more than one personnel subareas. Personnel Subarea will be assigned on IT0001, Organizational Assignment.

Enterprise structure				
CoCode	1000	LAUSD	Leg.person	<input type="checkbox"/>
Pers.area	20TK	UU-Teachers (K-12/Sp Ed)	Subarea	CTXX C Basis 3 track
Cost Ctr	1809401	Carver MS	Bus. Area	<input type="checkbox"/>
Fund	010-0000	GF-Unrestricted		
Grant	NOT_RELEVANT	NOT_RELEVANT		
Func. Area	0000-0000-00000	Not Applicable		

Key Term - Personnel Sub Area



Personnel Structure



Employee Group

For LAUSD, the Employee Group (EG) is used to map the employee subgroup grouping (Salaried and Hourly) in the pay scale structure. Within SAP, the employee group is used by payroll and benefits. The Employee Group is a logical grouping of persons in SAP based on certain common characteristics. Employee Groups are based on the nature of employment.

Personnel structure			
EE group	A	FT Salaried mthly	Payr.area CE Monthly Certificated
EE subgroup	R1	Regular/Permanent	Contract <input type="text"/>

- A Full time Salaried Monthly
- B Full-time Hourly Monthly
- D Full-time Hourly Semi-Monthly
- E Part-time Salaried Monthly
- G Part-time Hourly Monthly
- H Part-time Hourly Semi-Monthly
- N Non-Employee
- P Benefits (no pay)

Employee Subgroup

In LAUSD, Employee Subgroup (ESG) identifies the status of employee’s assignment, i.e. probationary, regular, and temporary, intern, retiree, and substitute. In SAP, Employee Sub-Group groupings are used by Payroll, Time, and HR. For example, in Payroll it is used to determine certain wage type eligibility.

Personnel structure			
EE group	A	FT Salaried mthly	Payr.area CE Monthly Certificated
EE subgroup	R1	Regular/Permanent	Contract <input type="text"/>

(Employee Subgroup Partial List)

- | | |
|------------------------|----------------------|
| B1 Probationary 1 | Q2 Qualifying 2 |
| E1 Extra Adult | R1 Regular Permanent |
| F2 University Intern 2 | S1 Substitute |
| G1 District Intern 1 | T1 Temporary |
| K1 Temporary Contract | V1 Provisional |
| L1 Limited Contract | |

Enterprise Structure Functions in Payroll

Personal Subarea Groupings

- **Permissibility** – The personal subarea grouping for primary wage types defines which wage types are valid for which personal subareas.

Employee Subgroup Groupings

- **Personnel Calculation Rules** - The employee subgroup grouping for the *personnel calculation rule* controls how an employee's payroll is processed, for example, whether an employee is to be paid on an hourly or salaried basis.
- **Assignment to Pay scale** - The employee subgroup grouping for the collective agreement provisions specifies which pay scale groups are valid for which employee groups.
- **Permissibility** - The employee subgroup grouping for primary wage types defines which wage types are valid for which employee subgroups.

Enterprise and Personnel Structure Design

	Personnel Area	Personnel Subarea	Employee Group	Employee Subgroup
Naming Convention	<p><u>1st position represents the service</u> 1= Classified 2= Certificated 3= Unclassified 9 = Non employee</p> <p><u>2nd position represents the Bargaining unit</u></p> <p><u>3rd and 4th (if not an XX) represent the detail within bargaining unit (e.g. 2UTE = Teachers Early Ed)</u></p> <p><u>If 4th position is not needed for BU detail, then it is a Place holder (marked as an X) - can be used in future for new personnel areas</u></p>	<p><u>1st position represents the Basis</u></p> <p><u>2nd position represents the Site/School Calendar</u></p> <p><u>3rd and 4th positions are Place holders - can be used in future for new Personnel Subareas</u></p>	Employee group indicates full time, part time, hourly, salaried, and non employees	Formerly Assignment Status Code

Enterprise Structure – LAUSD (Overview)

Personnel Area	Personnel Area Description
1APX	AA-Plant Security Aides
1APW	AA-Plant Security Aide Weekends
1AOX	AA-Detectives & Officers
1ASX	AA-School Safety Officers
1BXX	BB-Instructional Aides
1CXX	CC-Operations Support Svcs
1DXX	DD-Office, Technical and Bus Svcs
1DPX	DD-Student Integration Helper
1DTX	DD-TV Studio Assistant
1EXX	EE-Skilled Crafts
1SAX	HH-Lieutenants & Sergeants
1SAS	HH-Supervising School Safety Officer
1LMX	LL-Classified Management
1LAX	LL-Captain
1LJX	JJ-Classified Mgmt (AALA) Lowr
1LVX	VE-Executive Officer, Board of Ed
1NAX	NN-Classified Non-rep Safety-Security Offr
1NXX	NN-Classified Non-represented
1SXX	SS-Classified Supervisory
1SLL	SS-Classified Supervisory O/T Exempt
1SLX	SS-Classified Supervisory SDI Exempt
1VVX	VV-Classified Exec Management
1VEX	VE-Classified Exec Management-JR
1VJX	JJ-Classified Mgmt (AALA) High
1VSX	VS-Classified Exec Management-SR
1VAC	VS-Classified Exec Mgmt Chief of Police
1VAD	VV- Classified Exec Mgmt Deputy Chief
1YLX	YY-Program Analyst IAU, Director of Budget & Financial Policy and Director of
1ZXX	ZZ-Classified Confidential
1ZLX	ZZ- Classified Confidential O/T Exempt
1ZDX	ZZ-Classified Confidential Off/Tech/Bus Svcs
1ZSX	ZZ-Classified Confidential Supervisory
2FDX	FF-Teacher Assistants (Degree)
2FNX	FF-Teacher Assistants (Non-Degree)
2MZX	MM-Certificated Confidential
2MCX	MM-Certificated Contract Management
2MEX	Certificated Exec Management
2MSX	MS-Certificated Supervisory
2PXX	PP-Physician
2USX	UU-Support Services
2UTA	UU-Teachers (Adult)
2UTE	UU-Teachers (ECE)
2UTH	UU-Teachers (Home School)
2UTK	UU-Teachers (K12/Sp Ed)
3GXX	GG-Playground Aides/Community Reps
3NBX	NB-Community Representatives
3NMX	NN-Medical Experts
3NBP	NN-Playground Supervisors
3NPX	NN-Professional Experts
3NSX	NN-Student Workers
3NXX	NN-Unclassified
3YYX	YY-Board of Education Member
3YPX	YY-Personnel Commission Member
9NEC	Non-Employee-Charter School
9NEX	Non-Employee
9REC	Retired Employee Conversion

Personnel Subarea	Personnel Subarea Description
AAXX	A-Basis/ Adult
AFXX	A-Basis/ Four-Track
AGXX	A-Basis/ General Calendar
AJXX	A-Basis/ Job Cost Calendar
AXSX	A-Basis/ Day-to-Day Sub
BAXX	B-Basis/ Adult
BFXX	B-Basis/ Four-Track
BGXX	B-Basis/ General Calendar
BJXX	B-Basis/ Job Cost Calendar
BSXX	B-Basis/ Single-Track
CAXX	C-Basis/ Adult
CFXX	C-Basis/ Four-Track
CGXX	C-Basis/ General Calendar
CJXX	C-Basis/ Job Cost Calendar
CSXX	C-Basis/ Single-Track
CX SX	C-Basis/ Day-to-Day Sub
EAXX	E-Basis/ Adult
EGXX	E-Basis/ General Calendar
EJXX	E-Basis/ Job Cost Calendar
ESXX	E-Basis/ Single-Track
NONE	Non-Employee
RXXX	Retiree
XJXX	X-Basis/ Job Cost Calendar
XXSX	X-Basis/ Day-to-Day Sub
XXXX	X-Basis
ZJXX	Z-Basis/ Job Cost Calendar
ZXXX	Z-Basis

Enterprise Structure – LAUSD (Overview) continued

EE Group	Employee Group Description
A	Full Time Salaried(monthly)
C	Full Time Hourly(monthly)
D	Full Time Hourly(Semi-monthly)
E	Part Time Salaried(monthly)
G	Part Time Hourly(monthly)
H	Part Time Hourly(Semi-monthly)
N	Non Employee
P	Benefits (no pay)

EE Subgroup	Employee Subgroup Description
A2	Student Body
B1	Probationary1
B2	Probationary2
D1	Detached Service
E1	Extra-Adult
F1	University Intern1
F2	University Intern2
G1	District Intern 1
G2	District Intern2
K1	Temporary Contract
L1	Limited
N1	Non-Employee - Classified
N2	Non -Employee Contractor
N3	Non -Employee Certificated
Q1	Qualifying1
Q2	Qualifying2
R1	Regular/Perm Employee
S1	Substitutes
T1	Temporary
V1	Provisional
W1	Restricted
X1	Exchange - With Pay
X2	Exchange - Without Pay
Z1	Return Retiree
Z2	Return Retiree (Exempt)

Employee Subgroup Definitions

Employee Subgroup Definitions (Legacy to SAP Relationships)			Employee Subgroup Definitions (Legacy to SAP Relationships)		
SAP Code	Employee Subgroup	Description	SAP Code	Employee Subgroup	Description
A1	Surviving Dependent/Spouse	Non employee spouse/dependent of a deceased employee who will receive decedent's benefits	A2	Student Body	Hired by Student Store at a school site; benefits paid with Student Body Funds
B1, B2	Probationary	Certificated: employee serving in probationary period; tenure earning	D1	Detached Service	Certificated: employee on leave to perform assignment with an approved organization/contract. Vacation accruals earned while on leave must be used before
E1	Extra-Adult	Certificated: Extra Assignment in Adult Ed while holding a regular assignment; non benefit earning; counts for step advance.	F1, F2	University Intern	Certificated: employee working on a University Intern certificate, any year of service
G1, G2	District Intern	Certificated: employee working on a District Intern certificate, any year of service	K1	Temporary Contract	Certificated: a temporary contract to serve in place of an employee on leave or offered to candidates in shortage fields who do not
L1	Limited	1) Nonsubstitute temporary assignment with no other basic assignment in the District; limited as to time and/or dates and/or benefits according to class/job and service - (formerly LT - adult ed) 2) Employee with a limited contract to serve in a certificated management position (usually assistant superintendent level and above) or as member of Board or Commission, or as a staff assistant or field representative serving under EC Section 45112 - (formerly CL, CLN)	N1, N2, N3	Non-Employee	N1 - Classified N2 - Contractor N3 - Certificated Person not employed by the District; for benefits or tracking purposes only
Q1, Q2	Qualifying	Certificated: 1) probationary or permanent employee who is serving a conditional period in another non-management class - (formerly J1, J2) 2) employee serving the equivalent of a prob period in a class/job other than the one in which regular/perm status was or would have been attained; from eligible list or by direct appt - (formerly Q1, Q2) 3) employee who is qualified for conversion to perm status should a vacant position occur; allows for open-ended assignments until the employee is reached for conversion to perm status - (formerly SQ)	R1	Regular/Perm Employee	Classified: probationary or permanent unlimited assignment, including apprentice assignments - (formerly RG) Certificated: An unlimited assignment, after completion of probationary or qualifying period - (formerly CN)
S1	Substitutes	Employee serving in place of an absent employee or vacant position with no other basic assignment in the District - (formerly TS, SV, SX)	T1	Temporary	1) Classified: employee serving in a non-substitute limited assignment; may earn limited benefits - (formerly TM, TA) 2) Certificated: employee on leave to a temporary assignment in a management
V1	Provisional	Certificated: 1) employee serving under an emergency-type permit; service does not count toward permanent status with the District - (formerly VY, V1...) 2) Administrators serving under Board Rule 4213 (non-exam)- (formerly LA) Classified: non-sub assignment to a budgeted vacant position which cannot be filled by an employee for prob or reg/perm status; may earn benefits on the basis of a status in another class/job - (formerly TR)	W1	Restricted	Employee in class/job by appt only (not by exam) pending qualifying for unrestricted status. - (formerly RW, Administrators under Board Rule 4214)
X1	Exchange - With Pay	Certificated: an exchange assignment paid by the District	X2	Exchange - Without Pay	Certificated: an exchange assignment not paid by the District
Z1	Return Retiree	Employee receiving a retirement allowance; restricted to salary and/or hours- (formerly SZ, LZ, TZ)	Z2	Return Retiree (Exempt)	Employee receiving a retirement allowance; exempt from STRS earnings limitations- (formerly KZ, ZK)

Employee Subgroup Definitions continued

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Z1	Return Retiree	Employee receiving a retirement allowance; restricted to salary and/or hours- (formerly SZ, LZ, TZ)	Z2	Return Retiree (Exempt)	Employee receiving a retirement allowance; exempt from STRS earnings limitations- (formerly KZ, ZK)

Personnel Area/Personnel Subarea/Employee Group Relationships

Code	Personnel Area	Code	Personnel Sub Area	Code	Employee Group	Employee Subgroup
1AOX	AA-Safety (Detectives & Officers)	AGXX	A-Basis/ General Calendar	C	Full Time Hourly (monthly)	R1, S1, V1, T1, W 1, Z1
		XXSX	X-Basis/Day-to-Day Sub	G	Part Time Hourly (monthly)	
		RXXX	Retiree			
1APX	AA-Misc (Plant Security Aides)	AGXX	A-Basis/ General Calendar	C	Full Time Hourly (monthly)	R1, S1, V1, T1, W 1, Z1
		XXXX	X-Basis	G	Part Time Hourly (monthly)	
		XXSX	X-Basis/Day-to-Day Sub			
		RXXX	Retiree			
1APW	AA-Plant Security Aide Weekends	AGXX	A-Basis/ General Calendar	C	Full Time Hourly (monthly)	R1, S1, V1, T1, W 1, Z1
		XXXX	X-Basis	G	Part Time Hourly (monthly)	
		XXSX	X-Basis/Day-to-Day Sub			
		RXXX	Retiree			
1ASX	AA-School Safety Officers	AGXX	A-Basis/ General Calendar	C	Full Time Hourly (monthly)	R1, S1, V1, T1, W 1, Z1
		BGXX	B-Basis/ General Calendar	G	Part Time Hourly (monthly)	
		CGXX	C-Basis/ General Calendar			
		XXXX	X-Basis			
		ZXXX	Z-Basis			
		XXSX	X-Basis/Day-to-Day Sub			
		RXXX	Retiree			
1BXX	BB-Instructional Support Aides	AAXX	A-Basis/ Adult	C	Full Time Hourly (monthly)	R1, S1, V1, T1, W 1, Z1
		AFXX	A-Basis/ Four-Track	G	Part Time Hourly (monthly)	
		AGXX	A-Basis/ General Calendar			
		BFXX	B-Basis/ Four-Track			
		BGXX	B-Basis/ General Calendar			
		BSXX	B-Basis/ Single-Track			
		CAXX	C-Basis/ Adult			
		CFXX	C-Basis/ Four-Track			
		CGXX	C-Basis/ General Calendar			
		CSXX	C-Basis/ Single-Track			
		XXXX	X-Basis			
		ZXXX	Z-Basis			
		XXSX	X-Basis/Day-to-Day Sub			
		RXXX	Retiree			
1CXX	CC-Operations Support Svcs	AAXX	A-Basis/ Adult	D	Full Time Hourly (semi-monthly)	R1, S1, V1, W 1, Z1
		AFXX	A-Basis/ Four-Track	H	Part Time Hourly (semi-monthly)	
		AGXX	A-Basis/ General Calendar			
		AJXX	A-Basis/ Job Cost Calendar			
		BAXX	B-Basis/ Adult			
		BGXX	B-Basis/ General Calendar			
		BJXX	B-Basis/ Job Cost Calendar			
		BSXX	B-Basis/ Single-Track			
		CAXX	C-Basis/ Adult			
		CFXX	C-Basis/ Four-Track			
		CGXX	C-Basis/ General Calendar			
		CJXX	C-Basis/ Job Cost Calendar			
		CSXX	C-Basis/ Single-Track			
		EJXX	E-Basis/ Job Cost Calendar			
		FFXX	F-Basis/Four-Track			
		XJXX	X-Basis/ Job Cost Calendar			
		XXXX	X-Basis			

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Code	Personnel Area	Code	Personnel Sub Area	Code	Employee Group	Employee Subgroup
		ZJXX	Z-Basis/ Job Cost Calendar			
		ZXXX	Z-Basis			
		XXSX	X-Basis/Day-to-Day Sub			
		RXXX	Retiree			
1DPX	DD-Student Integration Helper	AAXX	A-Basis/ Adult	C	Full Time Hourly (monthly)	R1, S1, V1, T1, W 1, Z1
		AFXX	A-Basis/ Four-Track	G	Part Time Hourly (monthly)	
		AGXX	A-Basis/ General Calendar			
		AJXX	A-Basis/ Job Cost Calendar			
		BAXX	B-Basis/ Adult			
		BGXX	B-Basis/ General Calendar			
		BJXX	B-Basis/ Job Cost Calendar			
		BSXX	B-Basis/ Single-Track			
		CAXX	C-Basis/ Adult			
		CFXX	C-Basis/ Four-Track			
		CGXX	C-Basis/ General Calendar			
		CJXX	C-Basis/ Job Cost Calendar			
		CSXX	C-Basis/ Single-Track			
		EGXX	E-Basis/ General Calendar			
		EJXX	E-Basis/ Job Cost Calendar			
		ESXX	E-Basis/ Single-Track			
		XJXX	X-Basis/ Job Cost Calendar			
		XXXX	X-Basis			
		ZJXX	Z-Basis/ Job Cost Calendar			
		ZXXX	Z-Basis			
		XXSX	X-Basis/Day-to-Day Sub			
		RXXX	Retiree			
1DXX	DD-Office, Technical and Bus Svcs	AAXX	A-Basis/ Adult	C	Full Time Hourly (monthly)	R1, S1, V1, T1, W 1, Z1
		AFXX	A-Basis/ Four-Track	G	Part Time Hourly (monthly)	
		AGXX	A-Basis/ General Calendar			
		ATXX	A-Basis/ Three-Track			
		BAXX	B-Basis/ Adult			
		BGXX	B-Basis/ General Calendar			
		BJXX	B-Basis/ Job Cost Calendar			
		BSXX	B-Basis/ Single-Track			
		CAXX	C-Basis/ Adult			
		CFXX	C-Basis/ Four-Track			
		CGXX	C-Basis/ General Calendar			
		CJXX	C-Basis/ Job Cost Calendar			
		CSXX	C-Basis/ Single-Track			
		EGXX	E-Basis/ General Calendar			
		EJXX	E-Basis/ Job Cost Calendar			
		ESXX	E-Basis/ Single-Track			
		XJXX	X-Basis/ Job Cost Calendar			
		XXXX	X-Basis			
		ZJXX	Z-Basis/ Job Cost Calendar			
		ZXXX	Z-Basis			
		XXSX	X-Basis/Day-to-Day Sub			
		RXXX	Retiree			
1DTX	DD-TV Studio Assistant	XXXX	X-Basis	C	Full Time Hourly (monthly)	R1, S1, V1, T1, W 1, Z1
		XXSX	X-Basis/Day-to-Day Sub	G	Part Time Hourly (monthly)	
		RXXX	Retiree			

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Code	Personnel Area	Code	Personnel Sub Area	Code	Employee Group	Employee Subgroup
1EXX	EE-Skilled Crafts	AGXX	A-Basis/ General Calendar	D	Full Time Hourly (semi-monthly)	R1, S1, V1, W 1, Z1
		AJXX	A-Basis/ Job Cost Calendar	H	Part Time Hourly (semi-monthly)	
		BJXX	B-Basis/ Job Cost Calendar			
		CGXX	C-Basis/ General Calendar			
		CJXX	C-Basis/ Job Cost Calendar			
		EJXX	E-Basis/ Job Cost Calendar			
		XJXX	X-Basis/ Job Cost Calendar			
		XXXX	X-Basis			
		ZJXX	Z-Basis/ Job Cost Calendar			
		XXSX	X-Basis/Day-to-Day Sub			
		RXXX	Retiree			
1LAX	LL-Safety(Captain)	AGXX	A-Basis/ General Calendar	A	Full Time Salaried (monthly)	R1, S1, V1, Z1
		XXXX	X-Basis	E	Part Time Salaried (monthly)	
		XXSX	X-Basis/Day-to-Day Sub			
		RXXX	Retiree			
1LJX	JJ-Classified Mgmt (AALA) Lowr	AGXX	A-Basis/ General Calendar	A	Full Time Salaried (monthly)	R1, S1, T1, V1, Z1
		AJXX	A-Basis/ Job Cost Calendar	E	Part Time Salaried (monthly)	
		BGXX	B-Basis/ General Calendar			
		BJXX	B-Basis/ Job Cost Calendar			
		EGXX	E-Basis/ General Calendar			
		EJXX	E-Basis/ Job Cost Calendar			
		RXXX	Retiree			
		XJXX	X-Basis/ Job Cost Calendar			
		XXSX	X-Basis/Day-to-Day Sub			
				XXXX	X-Basis	
1LMX	LL-Classified Management	AGXX	A-Basis/ General Calendar	A	Full Time Salaried (monthly)	R1, S1, V1, Z1
		AJXX	A-Basis/ Job Cost Calendar	E	Part Time Salaried (monthly)	
		BJXX	B-Basis/ Job Cost Calendar			
		CJXX	C-Basis/ Job Cost Calendar			
		EJXX	E-Basis/ Job Cost Calendar			
		XJXX	X-Basis/ Job Cost Calendar			
		XXXX	X-Basis			
		ZJXX	Z-Basis/ Job Cost Calendar			
		XXSX	X-Basis/Day-to-Day Sub			
				RXXX	Retiree	
1LVX	VE- Executive Officer, Board of Ed	AGXX	A-Basis/ General Calendar	A	Full Time Salaried (monthly)	R1, S1, V1, Z1
		XXSX	X-Basis/Day-to-Day Sub	E	Part Time Salaried (monthly)	
		RXXX	Retiree			
1NAX	NN-Safety (Security Officer)	XXXX	X-Basis	G	Part Time Hourly (monthly)	T1, Z1
		RXXX	Retiree			
1NXX	NN-Classified Non-represented	XXXX	X-Basis	C	Full Time Hourly (monthly)	T1, Z1
		RXXX	Retiree	G	Part Time Hourly (monthly)	
1SAX	HH-Safety (Lieutenants & Sergeants); promotional only positions	AGXX	A-Basis/ General Calendar	C	Full Time Hourly (monthly)	R1, V1, Z1
		XXXX	X-Basis	G	Part Time Hourly (monthly)	
		XXSX	X-Basis/Day-to-Day Sub			
		RXXX	Retiree			
1SAS	HH-Supervising School Safety Officer	AGXX	A-Basis/ General Calendar	C	Full Time Hourly (monthly)	R1, S1, V1, Z1
		XXXX	X-Basis	G	Part Time Hourly (monthly)	
		XXSX	X-Basis/Day-to-Day Sub			
		RXXX	Retiree			
1SLL	SS-Classified Supervisory O/T Exempt	AAXX	A-Basis/ Adult	A	Full Time Salaried (monthly)	R1, S1, V1, Z1
		AFXX	A-Basis/ Four-Track	E	Part Time Salaried (monthly)	
		AGXX	A-Basis/ General Calendar			
		AJXX	A-Basis/ Job Cost Calendar			
		BAXX	B-Basis/ Adult			
		BFXX	B-Basis/ Four-Track			
		BGXX	B-Basis/ General Calendar			

Code	Personnel Area	Code	Personnel Sub Area	Code	Employee Group	Employee Subgroup
		BJXX	B-Basis/ Job Cost Calendar			
		BSXX	B-Basis/ Single-Track			
		CFXX	C-Basis/ Four-Track			
		CGXX	C-Basis/ General Calendar			
		CJXX	C-Basis/ Job Cost Calendar			
		CSXX	C-Basis/ Single-Track			
		EAXX	E-Basis/ Adult			
		EGXX	E-Basis/ General Calendar			
		EJXX	E-Basis/ Job Cost Calendar			
		XJXX	X-Basis/ Job Cost Calendar			
		XXXX	X-Basis			
		ZJXX	Z-Basis/ Job Cost Calendar			
		ZXXX	Z-Basis			
		XXSX	X-Basis/Day-to-Day Sub			
		RXXX	Retiree			
1SLX	SL-Classified Supervisory - SDI Exempt	AAXX	A-Basis/ Adult	C	Full Time Hourly (monthly)	R1, S1, V1, Z1
		AFXX	A-Basis/ Four-Track	D	Full Time Hourly (semi-monthly)	
		AGXX	A-Basis/ General Calendar	G	Part Time Hourly (monthly)	
		AJXX	A-Basis/ Job Cost Calendar	H	Part Time Hourly (semi-monthly)	
		BAXX	B-Basis/ Adult			
		BFXX	B-Basis/ Four-Track			
		BGXX	B-Basis/ General Calendar			
		BJXX	B-Basis/ Job Cost Calendar			
		BSXX	B-Basis/ Single-Track			
		CFXX	C-Basis/ Four-Track			
		CGXX	C-Basis/ General Calendar			
		CJXX	C-Basis/ Job Cost Calendar			
		CSXX	C-Basis/ Single-Track			
		EAXX	E-Basis/ Adult			
		EGXX	E-Basis/ General Calendar			
		EJXX	E-Basis/ Job Cost Calendar			
		XJXX	X-Basis/ Job Cost Calendar			
		XXXX	X-Basis			
		ZJXX	Z-Basis/ Job Cost Calendar			
		ZXXX	Z-Basis			
		XXSX	X-Basis/Day-to-Day Sub			
		RXXX	Retiree			
1SXX	SS-Classified Supervisory	AAXX	A-Basis/ Adult	C	Full Time Hourly (monthly)	R1, S1, V1, Z1
		AFXX	A-Basis/ Four-Track	D	Full Time Hourly (semi-monthly)	
		AGXX	A-Basis/ General Calendar	G	Part Time Hourly (monthly)	
		AJXX	A-Basis/ Job Cost Calendar	H	Part Time Hourly (semi-monthly)	
		BAXX	B-Basis/ Adult			
		BFXX	B-Basis/ Four-Track			
		BGXX	B-Basis/ General Calendar			
		BJXX	B-Basis/ Job Cost Calendar			
		BSXX	B-Basis/ Single-Track			
		CFXX	C-Basis/ Four-Track			
		CGXX	C-Basis/ General Calendar			
		CJXX	C-Basis/ Job Cost Calendar			
		CSXX	C-Basis/ Single-Track			
		EAXX	E-Basis/ Adult			
		EGXX	E-Basis/ General Calendar			

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Code	Personnel Area	Code	Personnel Sub Area	Code	Employee Group	Employee Subgroup
		EJXX	E-Basis/ Job Cost Calendar			
		FFXX	F-Basis/Four-Track			
		XJXX	X-Basis/ Job Cost Calendar			
		XXXX	X-Basis			
		ZJXX	Z-Basis/ Job Cost Calendar			
		ZXXX	Z-Basis			
		XXSX	X-Basis/Day-to-Day Sub			
		RXXX	Retiree			
1VAC	VS-Safety (Chief of Police)	AGXX	A-Basis/ General Calendar	A	Full Time Salaried (monthly)	R1, S1, V1, Z1
		XXSX	X-Basis/Day-to-Day Sub	E	Part Time Salaried (monthly)	
		RXXX	Retiree			
1VAD	VV-Safety (Deputy Chief)	AGXX	A-Basis/ General Calendar	A	Full Time Salaried (monthly)	R1, S1, V1, Z1
		XXXX	X-Basis	E	Part Time Salaried (monthly)	
		XXSX	X-Basis/Day-to-Day Sub			
		RXXX	Retiree			
1VEX	VE-Classified Exec Management	AGXX	A-Basis/ General Calendar	A	Full Time Salaried (monthly)	R1, S1, V1, Z1
		XXXX	X-Basis	E	Part Time Salaried (monthly)	
		XXSX	X-Basis/Day-to-Day Sub			
		RXXX	Retiree			
1VJX	JJ-Classified Mgmt (AALA) High	AGXX	A-Basis/ General Calendar	A	Full Time Salaried (monthly)	R1, S1, T1, V1, Z1
		AJXX	A-Basis/ Job Cost Calendar	E	Part Time Salaried (monthly)	
		BGXX	B-Basis/ General Calendar			
		BJXX	B-Basis/ Job Cost Calendar			
		EGXX	E-Basis/ General Calendar			
		EJXX	E-Basis/ Job Cost Calendar			
		RXXX	Retiree			
		XXXX	X-Basis			
1V SX	VS-Classified Exec Management-SR	AGXX	A-Basis/ General Calendar	A	Full Time Salaried (monthly)	R1, S1, V1, Z1
		XXXX	X-Basis	E	Part Time Salaried (monthly)	
		XXSX	X-Basis/Day-to-Day Sub			
		RXXX	Retiree			
1V VX	VV-Classified Exec Management	AGXX	A-Basis/ General Calendar	A	Full Time Salaried (monthly)	R1, S1, V1, Z1
		XXXX	X-Basis	E	Part Time Salaried (monthly)	
		XXSX	X-Basis/Day-to-Day Sub			
		RXXX	Retiree			
1Y LX	YL- Program Analyst IAU, Dir of Budget & Financial Policy, Dir of Ed. Policy	AGXX	A-Basis/ General Calendar	A	Full Time Salaried (monthly)	R1, S1, Z1
		XXXX	X-Basis	E	Part Time Salaried (monthly)	
		XXSX	X-Basis/Day-to-Day Sub			
		RXXX	Retiree			
1ZDX	ZD-Bargaining Unit D Confidential	AGXX	A-Basis/ General Calendar	C	Full Time Hourly (monthly)	R1, S1, V1, T1, W 1, Z1
		AJXX	A-Basis/ Job Cost Calendar	G	Part Time Hourly (monthly)	
		BJXX	B-Basis/ Job Cost Calendar			
		CJXX	C-Basis/ Job Cost Calendar			
		EJXX	E-Basis/ Job Cost Calendar			
		XJXX	X-Basis/ Job Cost Calendar			
		XXXX	X-Basis			
		ZJXX	A-Basis/ Job Cost Calendar			
		XXSX	X-Basis/Day-to-Day Sub			
		RXXX	Retiree			
1Z LX	ZZ-Classified Confidential O/T Exempt	AGXX	A-Basis/ General Calendar	A	Full Time Salaried (monthly)	R1, V1, S1, Z1
		AJXX	A-Basis/ Job Cost Calendar	E	Part Time Salaried (monthly)	
		BJXX	B-Basis/ Job Cost Calendar			
		CJXX	C-Basis/ Job Cost Calendar			
		EJXX	E-Basis/ Job Cost Calendar			
		XJXX	X-Basis/ Job Cost Calendar			
		ZJXX	Z-Basis/ Job Cost Calendar			
		XXSX	X-Basis/Day-to-Day Sub			

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Code	Personnel Area	Code	Personnel Sub Area	Code	Employee Group	Employee Subgroup
		RXXX	Retiree			
1ZSX	ZS-Classified Confidential Supervisory	AGXX	A-Basis/ General Calendar	C	Full Time Hourly (monthly)	R1, V1, Z1
		XXSX	X-Basis/Day-to-Day Sub	G	Part Time Hourly (monthly)	
		RXXX	Retiree			
1ZXX	ZZ-Classified Confidential	AGXX	A-Basis/ General Calendar	C	Full Time Hourly (monthly)	R1, S1, V1, T1, W 1, Z1
		AJXX	A-Basis/ Job Cost Calendar	G	Part Time Hourly (monthly)	
		BJXX	B-Basis/ Job Cost Calendar			
		CJXX	C-Basis/ Job Cost Calendar			
		EJXX	E-Basis/ Job Cost Calendar			
		XJXX	X-Basis/ Job Cost Calendar			
		ZJXX	Z-Basis/ Job Cost Calendar			
		XXSX	X-Basis/Day-to-Day Sub			
		RXXX	Retiree			
2FDX	FF-Teacher Assistants (Degree)	XXXX	X-Basis	C	Full Time Hourly (monthly)	T1
		RXXX	Retiree	G	Part Time Hourly (monthly)	
2FNX	FF-Teacher Assistants (Non-Degree)	XXXX	X-Basis	C	Full Time Hourly (monthly)	T1
		RXXX	Retiree	G	Part Time Hourly (monthly)	
2MCX	MM-Certificated Contract Management	AGXX	A-Basis/ General Calendar	A	Full Time Salaried (monthly)	D1, Q1/2, B1/2, R1
		EGXX	E-Basis/ General Calendar			S1, Z1/2
		BGXX	B-Basis/ General Calendar			
		CGXX	C-Basis/ General Calendar			
		CXSX	C-Basis/Day-to-Day Sub			
		RXXX	Retiree			
2MEX	MM-Certificated Exec Management	AGXX	A-Basis/ General Calendar	A	Full Time Salaried (monthly)	D1, Q1/2, B1/2, R1
		EGXX	E-Basis/ General Calendar			
		BGXX	B-Basis/ General Calendar			
		CGXX	C-Basis/ General Calendar			
		CXSX	C-Basis/Day-to-Day Sub			S1, Z1/2
		RXXX	Retiree			
2MSX	MS-Administrators	AAXX	A-Basis/ Adult	A	Full Time Salaried (monthly)	D1, Q1/2, B1/2, R1
		AFXX	A-Basis/ Four-Track			S1, Z1/2
		AGXX	A-Basis/ General Calendar			
		BAXX	B-Basis/ Adult			
		BGXX	B-Basis/ General Calendar			
		BSXX	B-Basis/ Single-Track			
		EAXX	E-Basis/ Adult			
		EGXX	E-Basis/ General Calendar			
		ESXX	E-Basis/ Single-Track			
		CGXX	C-Basis/ General Calendar			
		XXXX	X-Basis			
		ZXXX	Z-Basis			
		CXSX	C-Basis/Day-to-Day Sub			
		RXXX	Retiree			
2MZX	MZ- Management Confidential	AGXX	A-Basis/ General Calendar	A	Full Time Salaried (monthly)	D1, Q1/2, B1/2, R1
		EGXX	E-Basis/ General Calendar			
		BGXX	B-Basis/ General Calendar			
		CGXX	C-Basis/ General Calendar			
		XXXX	X-Basis			S1, Z1/2
		CXSX	C-Basis/Day-to-Day Sub			
		RXXX	Retiree			
2PXX	PP-Physicians	AGXX	A-Basis/ General Calendar	C	Full Time Hourly (monthly)	B1/2, R1, Z1
		CFXX	C-Basis/ Four-Track	G	Part Time Hourly (monthly)	
		CGXX	C-Basis/ General Calendar			
		CSXX	C-Basis/ Single-Track			
		EGXX	E-Basis/ General Calendar			
		ZXXX	Z-Basis			
		RXXX	Retiree			
2USX	UU-Support Services	BSXX	B-Basis/ Single-Track	A	Full Time Salaried (monthly)	D1, G1/2, F1/2, K1

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		CSXX	C-Basis/ Single-Track	E	Part Time Salaried (monthly)	B1/2, Q1/2, R1, S1,
		ESXX	E-Basis/ Single-Track			V1, Z1/2, X1/2

Code	Personnel Area	Code	Personnel Sub Area	Code	Employee Group	Employee Subgroup
		AFX	A-Basis/ Four-Track			
		BFXX	B-Basis/ Four-Track			
		CFXX	C-Basis/ Four-Track			
		AGXX	A-Basis/ General Calendar			
		BGXX	B-Basis/ General Calendar			
		CGXX	C-Basis/ General Calendar			
		EGXX	E-Basis/ General Calendar			
		XXXX	X-Basis			
		ZXXX	Z-Basis			
		CX SX	C-Basis/Day-to-Day Sub			
		RXXX	Retiree			
2UTA	UU-Teachers (Adult)	CAXX	C-Basis/ Adult	C	Full Time Hourly (monthly)	E1, L1, B1/2, R1
		AGXX	A-Basis/ General Calendar	G	Part Time Hourly (monthly)	S1, Z1
		BGXX	B-Basis/ General Calendar			
		EGXX	E-Basis/ General Calendar			
		XXXX	X-Basis			
		ZXXX	Z-Basis			
		CX SX	C-Basis/Day-to-Day Sub			
		RXXX	Retiree			
2UTE	UU-Teachers (ECE)	AGXX	A-Basis/ General Calendar	A	Full Time Salaried (monthly)	D1, G1/2, F1/2, K1
		BGXX	B-Basis/ General Calendar	E	Part Time Salaried (monthly)	B1/2, Q1/2, R1, S1,
		CGXX	C-Basis/ General Calendar			V1, Z1/2, X1/2
		EGXX	E-Basis/ General Calendar			
		XXXX	X-Basis			
		ZXXX	Z-Basis			
		AX SX	A-Basis/Day-to-Day Sub			
		RXXX	Retiree			
2UTH	UU-Teachers (Home School)	CSXX	C-Basis/ Single-Track	A	Full Time Salaried (monthly)	D1, G1/2, F1/2, K1
		CFXX	C-Basis/ Four-Track	E	Part Time Salaried (monthly)	B1/2, Q1/2, R1, S1,
		CGXX	E-Basis/ General Calendar			
		XXXX	X-Basis			
		ZXXX	Z-Basis			
		CX SX	C-Basis/Day-to-Day Sub			
		RXXX	Retiree			
2UTK	UU-Teachers (K12/Sp Ed)	AGXX	A-Basis/ General Calendar	A	Full Time Salaried (monthly)	D1, G1/2, F1/2, K1
		BFXX	B-Basis/ Four-Track	E	Part Time Salaried (monthly)	B1/2, Q1/2, R1, S1,
		BGXX	B-Basis/ General Calendar			V1, Z1/2, X1/2
		BSXX	B-Basis/ Single-Track			
		CFXX	C-Basis/ Four-Track			
		CSXX	C-Basis/ Single-Track			
		EGXX	E-Basis/ General Calendar			
		XXXX	X-Basis			
		ZXXX	Z-Basis			
		CX SX	C-Basis/Day-to-Day Sub			
		RXXX	Retiree			
3GXX	GG-Playground Aides	XXXX	X-Basis	G	Part Time Hourly (monthly)	T1, Z1

Code	Personnel Area	Code	Personnel Sub Area	Code	Employee Group	Employee Subgroup
3NBP	NB-Playground Supervisors Non-represented	XXXX	X-Basis	G	Part Time Hourly (monthly)	T1, Z1
		RXXX	Retiree			
3NBX	NB-Community Representatives	XXXX	X-Basis	G	Part Time Hourly (monthly)	T1, Z1
		RXXX	Retiree			
3NMX	NP-Medical Experts	XXXX	X-Basis	G	Part Time Hourly (monthly)	T1, Z1
		RXXX	Retiree			
3NPX	NN-Professional Experts	XXXX	X-Basis	G	Part Time Hourly (monthly)	T1, Z1
		RXXX	Retiree			
3NSX	NN-Student Workers	XXXX	X-Basis	H	Part Time Hourly (semi-monthly)	T1
		RXXX	Retiree			
3NXX	NN-Unclassified Non-represented	XXXX	X-Basis	G	Part Time Hourly (monthly)	T1, Z1
		RXXX	Retiree			
3YPX	YY-Personnel Commission Member	AGXX	A-Basis/ General Calendar	A	Full Time Salaried (monthly)	T1
		RXXX	Retiree			
3YYX	YY-Board of Education Member	AGXX	A-Basis/ General Calendar	A	Full Time Salaried (monthly)	T1
		RXXX	Retiree			
9NEX	Non-Employee	NONE	Non-Employee	N	Non-Employee	A1, N2
				P	Benefits (no pay)	
9NEC	Non-Employee-Charter School	NONE	Non-Employee	N	Non-Employee	N1, N3
				P	Benefits (no pay)	
9REC	RC-Converted Retired Employees	RXXX	Retiree	P	Benefits (no pay)	N1, N3

INFOTYPES

An Infotype is basically how data is stored in SAP. A group of Infotypes forms an employee's file. Each Infotype has its own date range to create an employee history. The aim of the Human Resources component is to enable LAUSD to process employee data in an effective structure. Infotypes are identified by their four-digit keys (for example, the Basic Pay Infotype 0008). There are hundreds of Infotypes in SAP. The following are just some examples.

Common Infotypes

- **0000 Actions** - Displays an overview of all of the important changes related to an employee, such as hire, reassignment, change of basic pay, termination, retirement, and so on
- **0001 Organizational Assignment** - Contains detailed information about an employee's position in the organization, including the position number, personnel area, personnel subarea, payroll area, employee group and employee subgroup. This Infotype contains the field that determines whether the payment of an employee has to be sent to school location or US mail.
- **0002 Personal Data** - Displays employee information, such as name, gender, social security number, and birth date
- **0003 Payroll Status** - Contains data that controls an employee's payroll runs and time evaluations; generally edited by the system only and is automatically created when an employee is hired; the system automatically updates this Infotype when the payroll is run, time is evaluated, or changes are made to the payroll past for the employee
- **0006 Addresses** - Contains an employee's home, work, and emergency addresses and phone numbers.
- **0007 Planned Working Time** - Displays an employee's work schedule rule, calendars, and TM status for a specific period of time.
- **0008 Basic Pay** - Displays the employee's pay scale information, such as pay scale group/level and annual salary
- **0009 Bank Details** - Used to store details of an employee's bank accounts so that direct deposit transfers can be made to the employee
- **0014 Recurring Payment/Deductions** - Used to enter a recurring amount and/or a value and a unit of measurement for a wage type that is paid or deducted (Such as longevity, shift, tax shelter, union dues, agency fees, and insurance). This Infotype is used to set-up recurring deductions in payroll that may be established by an employee or by the district.
- **0015 Additional Payments** – It is an Infotype used to set-up a one-time payment or deductions, (for example, bonus, National Board Certification, Semester Differential).
- **0016 Contract Elements** - Data is stored that is related to the employee's employment contract. With the Contract type field, contracts of employment can be subdivided in accordance with the planned duration of the work relationship and the employee's legal status.

- **0019 Monitoring of Tasks** - Monitoring of tasks for HR, Health Benefits, and Contract activities that need to be tracked.
- **0021 Family Member/Dependents** - Data concerning the employee's family members and other related persons is stored in the Family Members/Dependents
- **0022 Education** - Education qualifications an employee has passed can be stored in this Infotype. LAUSD's system holds the information for degrees and areas of study for the necessary employees.
- **0027 Cost Distribution** - Determines how costs for an employee are to be distributed to different account assignment objects. If the total sum of distributed costs is less than 100%, the master cost center of the employee is debited for the outstanding amount.
- **0028 Internal Medical Service** - Results and dates referring to an employee's medical examination can be stored in the Internal Medical Service.
- **0034 Corporate Function** - Utilized for maintaining employees on 10/90
- **0041 Date Specifications** - Used to store important employee entry/exit dates in the system which can be read by payroll. For example, District Hire Date, Separation, and Re-Hire etc.
- **0077 Additional Personal Data** - Stores personal information that is not stored in the other master data Infotypes. Contains information on Ethnic Origin and Veteran's Status, as well as whether the person is enrolled in Medicare.
- **0094 Residence Status** - Stores information regarding an employee's residence status as well as information regarding the compliance with the Immigration Reform and Control act (IRCA), which requires every employer to verify that each person hired can prove via documents their identity and their eligibility for employment.
- **0105 Communication** - An employee's communication ID is valid for a certain type of communication. It stores the system user name that is necessary for using SAP-Business-Workflow and SAP-Office. The user name that was set up in the subtype for the active SAP system is used for both of these applications. It stores an employee's communication data, for example the fax number or the internet address.
- **0128 Notifications** - Defines additional information that should be printed on the employee's remuneration statement
- **0167 Health Plans** - Stores details of the health plans in which the employee is enrolled, dental, medical, or vision. For each health plan in which the employee participates, a separate record exists. Usually this Infotype is created and updated in the enrollment procedures. The Infotype is used for payroll and for evaluations of employee benefits data.
- **0168 Insurance Plans** - Stores details of the insurance plans in which the employee is enrolled; life insurance, optional life, spouse optional life, or dependent life insurance. For each insurance plan in which the employee participates, a separate record exists. Usually this Infotype is created and updated in the enrollment procedures. The Infotype is used for payroll and for evaluations of employee benefits.
- **0169 Savings Plans** - Stores details of the savings plans in which the employee is enrolled; retirement plan or tax sheltered annuities. For each savings plan in

which the employee participates, a separate record exists. Usually this Infotype is created and updated in the enrollment procedures. The Infotype is used for payroll and for evaluations of employee benefits. (Must have an IT0171) set-up.

- **0170 Flexible Spending Accounts** - Stores details of the Flexible spending accounts (FSA) in which the employee is enrolled. For each FSA in which the employee participates, a separate record exists. Usually this Infotype is created and updated in the enrollment procedures. The Infotype is used for payroll and for evaluations of employee benefits.
- **0171 General Benefits Information** - Stores the benefit area, first program grouping, and second program grouping assignments of the employee. This record is essential for benefits processing. An employee must have a General Benefits Information record before enrolling in a benefits plan.
- **0194 Garnishment Document** - The garnishment document information is stored in the Infotype Garnishment Document Infotype 0194. This Infotype must be created before a garnishment order can be created.
- **0195 Garnishment Order** - Stores the processing data for a garnishment request. Which consist of the initial balance of the claim, periodic deduction information, and supplementary information on non-exempt and exempt limits
- **0207 Residence Tax Area (IT0207)** - The residence tax area is the group of authorities to which an individual employee pays tax
- **0208 Work Tax Area** - Records the amount of time an employee spends in each locality other than their Residence Tax Area (IT0207) throughout the tax period; typically defaults to "CA" for California
- **0209 Unemployment State** - Used to set up and maintain the unemployment state record for an employee
- **0210 Withholding Info W4/W5 US** - Used to store the details from an employee's Federal Employee Withholding Allowance Certificates (Form W-4) and from the employee's equivalent state and local Withholding Allowance Certificates, if applicable
- **0221 Payroll Results Adjustment** - Can be used to enter data for an employee's manual check, correct tax amount on W-2 and other tax forms, or update the balances in a wage type
- **0234 Add. With. Info. US** - Stores information for an employee that is used in conjunction with the employee's W-4 Withholding Information Infotype 0210 to calculate withholding taxes for the employee. Payroll uses the information on Infotype 0234 to calculate withholdings from special payments. The type of supplemental method to be used to calculate the tax is also likely to differ with each payment. For this reason, it may be advisable to create a new record for each payment.
- **0235 Other Taxes US** - Used to record alternatives to the standard calculation of taxes for an employee
- **0267 Additional Off-cycle Payments** - Used to enter additional off-cycle payments, such as late time pay and contractual base pay adjustments prior to go-live
- **2010 Employee Remuneration Information** - Used to process manually computed wages, bonuses, or other non-standard wage types

- **0302 Additional Actions** - Enables the automatic logging of all of the personnel action types that are performed for an employee on a specific date. It enables the performance and documentation of several personnel action types for an employee in the system on the same day as long as there is only one employment status across all of these actions.
- **0377 Miscellaneous Plans** - Stores details of the miscellaneous plans in which the employee is enrolled. For each miscellaneous plan in which the employee participates, a separate record exists. Usually this Infotype is created and updated in the enrollment procedures. The Infotype is used for payroll and for evaluations of employee benefits. At LAUSD the only miscellaneous plan is the Employee Assistance Program
- **0378 Adjustment Reason** - Stores adjustment reasons that determine the changes an employee can make to his/her benefits. This Infotype allows the tracking of adjustment reasons that have occurred. The type of adjustment reason is the subtype of the record, and points to the permitted changes for the adjustment reason.
- **0709 Person ID** - In a concurrent employment SAP system, when a new employee is hired, the system automatically creates the external person ID and stores it in the Person ID Infotype 0709. If another personnel assignment is created, the person ID is transferred by the copy mechanism for Infotypes. The Person ID at LAUSD is equivalent to the initial PERNR the employee is assigned by the system. For employees who transferred to SAP from the legacy system on 1/1/2007, the Person ID and first PERNR are equal to their legacy employee number.
- **0712 Main Personnel Assignment** - The personnel assignment of a concurrently person that should be valid as the main personnel assignment for a certain grouping reason.
- **2001 Absence** - Periods during an employee's planned working time in which he or she is not on-site are recorded. Created during the Time Transfer process during which the inputs that timekeepers make into CATS are transferred to this Infotype.
- **2002 Attendance** - Used to record worked times for an employee. For LAUSD all Attendance IT2002 records are created from CATS entries during the Time Transfer process.
- **2003 Substitutions** - Allow short-term deviations to an employee's work schedule and pay.
- **2006 Absence Quotas** - Used to manage time accounts that represent an employee's absence entitlements or time benefits.
- **2012 Time Transfers** - Allow changes to be made to the time balances that have been calculated in time evaluation.
- **2013 Quota Corrections** - Used to change absence entitlements that are generated by time evaluation.
- **2051 Monthly Calendar** - The Monthly Calendar displays, in a monthly format, an employee's working time or substitutions that have been made on IT2003.

Infotypes used in Payroll Processing

At LAUSD, an employee is processed for payroll during a major payroll run, a scheduled off-cycle run, or special off-cycle run. During these runs, a large amount of data is used by the payroll program to calculate payment for work performed by each employee.

Required Infotypes for Payroll Processing

If the following Infotypes are not set-up correctly for an employee, payroll will generate errors or inaccurate results:

- Actions (IT0000)
- Organizational Assignment (IT0001)
- Personal Data (IT0002)
- Payroll Status (IT0003)
- Addresses (IT0006)
- Planned Working Time (IT0007)
- Basic Pay (IT0008)
- Bank Details (IT0009)
- Residence Tax Area (IT0207)
- Work Tax Area (IT0208)
- Unemployment State (IT0209)
- Withholding Info W4/W5 US (IT0210)

Infotypes used in Time Management

- Planned Working Time (IT0007)
- Quota Compensation (IT0416)
- Absences (IT2001)
- Attendances (IT2002)
- Substitutions (IT2003)
- Absence Quotas (IT2006)
- Quota Corrections (IT2013)

Infotypes used in Benefits

- Flexible Spending Accounts (IT0170)
- General Benefits Information. (IT0171)
- Eligibility
- Insurance Plans (IT0168)
- Saving Plans (IT0169)
 - 403b
 - 457b
- Retirement System
- Health Plans (IT0167)
 - Medical
 - Dental
 - Vision
- Family Member/Dependents (IT0021)

- Additional Personal Data (IT0077)
- Miscellaneous Plans (IT0377)
- Adjustment Reasons (IT0378)

Subsequent Payroll Activities

Pre-DME (Data Medium Exchange)

The Pre-DME program runs after every payroll to create payment files. These files in turn are used to create a printable check file, or an ACH file for direct deposits.

- Bank details from IT0009 are gathered for all employees who will receive a payment based on the payroll run.
- Employee's address information is gathered to be used in the check printing file, and warrant printing file
- The information from IT0001 on where to distribute the checks and warrants (school location or US mail) are gathered to help the programs know how to sort the checks and warrants

3PR and FI/CO posting

After Pre-DME, Third Party Remittance and Financials and Controlling posting runs are run to create the garnishment payment amounts and allocate the payroll costs to the various cost centers.

- Garnishment information from IT0194 and IT0195 are used, along with payroll results for the withheld amount to create the garnishment payments
- Cost allocations are pulled from IT0001, absences and attendances on IT2001 and IT2002, and cost allocations from IT0014 and IT0015 to create the posting documents for FI/CO

Infotypes linked to HR Action

Dynamic Action

When data in a field is entered or changed in one Infotype, the change automatically updates a field in a different Infotype.

Action

Used to create and process changes to an employee's record. Each personnel action contains the Infotype(s) that must be maintained to perform that task automatically.

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- Mandatory Infotypes for Payroll**
- * **Created by System (Dynamic Action)**
- ** **Will only display if previously created for employee; need to delimit**

R	Rehire
<input type="checkbox"/> 0000	Personnel Action
<input type="checkbox"/> 0002	Personal Data
<input type="checkbox"/> 0001	Organizational Assignment
<input type="checkbox"/> 0006	Addresses
0077	Additional Personal Data
<input type="checkbox"/> 0007	Planned Working Time
<input type="checkbox"/> 0008	Basic Pay
<input type="checkbox"/> 0009	Bank Details
0014	Recurring Payments/Deductions
<input type="checkbox"/> 0210	Withholding Info W4/W5 US
<input type="checkbox"/> 0210	Withholding Info W4/W5 US
0028	Internal Medical Service
0094	Residence Status
9001	Licenses - 9001
0022	Education
0016	Contract Elements
9000	Credentials - 9000
*0019	Monitoring of Tasks
*0041	Date Specifications
*0105	Communications
*0169	Savings Plan
*0171	General Benefits Information
*0207	Residence Tax Area
*0208	Work Tax Area
*0209	Unemployment State
*0709	Person ID
0712	Main Personnel Assignment

SR	Retirement
0000	Personnel Action
0007	Planned Working Time
0008	Basic Pay
0105	Communication**
0167	Health Plans**
0168	Insurance Plans**
0169	Savings Plans**
0170	Flexible Spending Accounts**
0377	Miscellaneous Plans**
0027	Cost Distribution*
0712	Main Personnel Assignment

SS	Separation
0000	Personnel Action
0001	Organization Assignment
0007	Planned Working Time
0167	Health Plans (optional)
0168	Insurance Plans (optional)
0169	Savings Plans (optional)
0170	Flexible Spending Accounts (optional)
0377	Miscellaneous Plans (optional)
0016	Contract Elements**
0105	Communication (optional)
0712	Main Personnel Assignment

RL	Return from Long Term Leave
0019	Monitoring of Tasks
0001	Organizational Assignment
0007	Planned Working Time
0008	Basic Pay

TT	Termination
0000	Personnel Action
0001	Organizational Assignment
0019	Monitoring of Tasks
0712	Main Personnel Assignment
0007	Planned Working Time
0008	Basic Pay

- Mandatory Infotypes for Payroll**
- * **Created by System (Dynamic Action)**
- ** **Will only display if previously created for employee; need to delimit**

BASIS

A basis is a set number of paid days in a school or fiscal year. Certificated paid days consist of instructional days and holidays. Classified paid days consist of work days, holidays, and vacation days.

LAUSD Basis Chart

I. Certificated Basis

Basis	Instructional Days	Legal Holidays	School Holidays*	Total Paid Days
A	249	12	--	261
B	197	11	13	221
C - Single	182	9	13	204
C - 4 Track	182	9	13	204
E	210	11	13	234

School Holidays* = Winter and Spring break holidays

II. Classified Basis

Basis	Work Days	Legal Holidays	Vacation @	Total Paid Days
A	249	12	--	261
B	197	11	13	221
C	182	11	11	204
E	210	11	13	234
F^	236	11	7	254

@ Mandatory Vacation for School-based Classified Employees

^ F Basis is applicable to Food Services staff only at 4-Track schools. The number of days varies from school year to school year.

Note: This does not reflect any furlough day reductions.

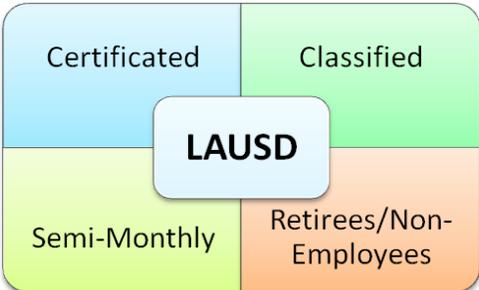
Assignment Basis Character

- A** From July 1 to June 30, inclusive. Certificated and Classified employees are eligible to be assigned to this basis.
- B** 221 total paid days, excluding Saturdays and Sundays but including legal and school holidays. The total paid days can occur at any time between July 1 to June 30. A Regular B-basis starts in the middle of August. While an Early Start, and Balanced Traditional, can start as early as July. Notwithstanding any other provision to the contrary, the annual hours of paid holidays and related benefits for a unique B-basis are to commensurate with those for a Regular B-basis. This basis is applicable to Certificated and Classified personnel.
- C** 204 total paid days excluding Saturdays and Sundays but including legal and school holidays from the first day of the fall semester to the last day of the spring semester, inclusive. As an exception, the 204 days of assignment for employees in a year-round school may take place at any time from July 1 to June 30. A Regular C-basis starts in August. A 4-Track, C-basis can start as early as July. This basis is applicable to most school site personnel.
- E** 234 total paid days, excluding Saturdays and Sundays but including legal and school holidays, occurring during the period of assigned time as designated by the Superintendent or his or her authorized representative. Such assignment shall include the period from the first day of the fall semester to the last day of the spring semester, inclusive. A Regular E-basis starts at the conclusion of July. While Related Services and Central Office Option E-basis can start at the commencement of July. This basis is applicable to Certificated and Classified personnel.
- F** Number of paid days varies each year. This basis is applicable to Food Services staff only assigned at 4-Track schools.
- X** Periods of assignment, as needed, not otherwise defined herein, including assignments in substitute, temporary, and relief status and the unclassified service). For use when an employee is not performing regular duties or when the employee is performing regular duties and the assignment is 10 working days or less.
- Z** The period between the ending date of an employee's assignment basis in one school year and the beginning date of the regular basis for the following school year, the periods of unassigned time, or the intersession periods for year-round school employees. This is restricted to employees having regular status in other than A Basis positions. For use when an employee is performing regular duties and the assignment is more than 10 working days.

Note: F basis is only for Food Services employees at a year round school at the time of conversion. The agreement with the bargaining units is that this will go away with all year round schools. No new employees may be assigned to this basis. Employees currently on F will continue to be on this base at this time.

PAYROLL AREA

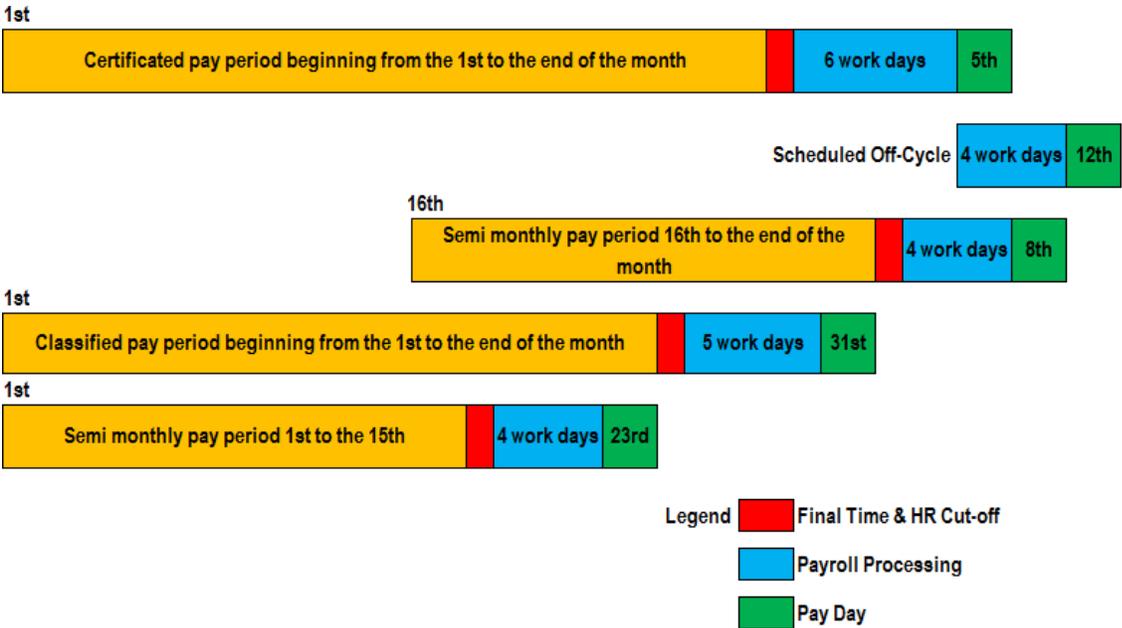
A grouping of employees with the same covered pay period and paid at the same date. LAUSD is divided into (4) payroll areas namely: Certificated (CE), Classified (CL), Semi-monthly (SM), and Retirees (RN).



Payroll Frequency

- CE Payroll – Paid every 5th of the month. If the 5th falls on a weekend, the payday will be the Friday previous to the 5th. Covering the period from the 1st through the end of the month prior to the payday.
- CL Payroll - Paid at the last working day of the month. Covering the period from the 1st through the end of the month.
- SM Payroll – Paid every 8th and 23rd of the month. If the 8th or 23rd falls on a weekend, the payday will be the Friday prior to the scheduled date. Payday (8th) cover period 16th through the end of the month. Payday (23rd) cover period 1st through 15th day of the month.

Month At-A-Glance



CALENDARS

Payroll Calendar/Schedule

A payroll calendar is a schedule that designates workdays, holidays, off-track days, and unassigned/unpaid days in a school or fiscal year. The designated school and legal holidays vary according to the assigned work periods on each type of calendar.

In SAP, a payroll calendar is the equivalent of a Work Schedule Rule (WSR). It is an assignment feature used to specify a reference date for a period work schedule.

All employees must be assigned to a defined work schedule in the system. The assigned work schedule determines how the employee should be time reported in a given period.

General Types of Payroll Schedules

- Single-Track (Traditional)
- Four-Track (90/30)
- Special Calendars (Non-Standard)
- 4/40 & 9/80

I. Single-Track

- a. A *Single Track* calendar schedule provides (180) days of instruction for Elementary and Secondary schools in order to comply with Education Code Section 46200.
- b. Two Pupil-Free/teacher preparation days. The approved dates are provided annually by the Board of Education Report.
- c. Twenty-two Legal and School Holidays. The dates are provided annually by the Board of Education Report.
- d. Unassigned, non-workdays approved dates are provided annually by the Board of Education Report.
- e. A type of calendar schedule used at non-year-round school sites.

II. Four-Track

- a. A *Four-Track* Year-Round calendar schedule provides (180) days of instruction for Elementary and Secondary schools in order to comply with Education Code Section 46200.
- b. Two Pupil-Free/teacher preparation days. The approved dates are provided annually by the Board of Education Report.
- c. Twenty-two Legal and School Holidays. The dates are provided annually by the Board of Education Report.
- d. Personnel staff assigned to this calendar schedule will have alternating periods of (90) On-Track days and (30) Off-Track days.

III. Special Calendars

- a. A *Special or Unique* calendar schedule that is created specifically according to the user or locations needs.
- b. Total Workdays, Legal & School Holidays are driven by the basis type. For example; Special C-basis calendar would still be equal to (204) paid days.
- c. Unassigned and non-workday dates must be specified by the user.

IV. 4/40 & 9/80

- a. A 4/40 calendar schedule allows employees to work (4) days at (10) hours per day during a week and have one scheduled day off each week (total of 40 hours each week). For additional information regarding compressed work week schedules, please refer to the Office of the Superintendent, Memorandum No. 49, "Compressed Work Week Guidelines, June 4, 1990".
- b. A 9/80 calendar schedule involves pairing work weeks so that employees are allowed to work (9) days and have one scheduled day off. The (9) work days consist of (8) days of (9) hours each day and (1) day of (8) hours (total of 80 hours for two weeks). For additional information regarding compressed work week schedules, please refer to the Office of the Superintendent, Memorandum No. 49, "Compressed Work Week Guidelines, June 4, 1990".
- c. For School Police (Unit A), employees may be assigned 3 day work-week (40 hours/week).

Where to Acquire Payroll Calendars

Payroll Administration staff creates the master payroll calendars and appropriate sign in/out cards following the Board approved holidays & work days. These templates are uploaded in the website that can be accessed and printed by all school and office sites, around the middle of June every year.

- Visit the Los Angeles Unified School District/Payroll Administration website at: [Payroll Administration / Calendar/Time Cards](#)
- Click on the “Calendar/Time Cards” link.

The screenshot shows the Los Angeles Unified School District website. The top navigation bar includes "Skip navigation", "Select Language", "SUPERINTENDENT", "BOARD OF EDUCATION", and "SIGN IN". The main header features the district logo and the text "Los Angeles Unified School District Investing in LAUSD". A search bar and social media icons are also present. The main menu includes "Home", "About LAUSD", "Employment", "Find a School", "Offices", and "Quick Links".

The "Payroll Administration" section is active, with a sidebar menu where "Calendar / Time Cards" is highlighted. Below this, there is a link for "2016-2017 Payroll Pay Dates" and a table titled "2016 - 2017 PAYROLL CALENDARS AND SIGN IN/OUT CARDS".

CALENDARS	SIGN IN/OUT CARDS
2016-2017 CERTIFICATED A BASIS	2016-2017 CERTIFICATED A BASIS
2016-2017 CERTIFICATED ADULT SCHOOLS & CENTERS	2016-2017 CERTIFICATED ADULT SCHOOLS & CENTERS
2016-2017 CERTIFICATED B BASIS OPT 4	2016-2017 CERTIFICATED B BASIS OPT 4
2016-2017 CERTIFICATED B BASIS OPT 6	2016-2017 CERTIFICATED B BASIS OPT 6
2016-2017 CERTIFICATED B BASIS 8HR SPE	2016-2017 CERTIFICATED B BASIS 8HR SPE
2016-2017 CERTIFICATED B BASIS 6HR SPE	2016-2017 CERTIFICATED B BASIS 6HR SPE
2016-2017 CERTIFICATED B BASIS OPT 7	2016-2017 CERTIFICATED B BASIS OPT 7
2016-2017 CERTIFICATED E BASIS OPT 4	2016-2017 CERTIFICATED E BASIS OPT 4
2016-2017 CERTIFICATED E BASIS OPT 5	2016-2017 CERTIFICATED E BASIS OPT 5
2016-2017 CERTIFICATED FOUR TRACK 90-30A	2016-2017 CERTIFICATED FOUR TRACK 90-30A
2016-2017 CERTIFICATED FOUR TRACK 90-30B	2016-2017 CERTIFICATED FOUR TRACK 90-30B
2016-2017 CERTIFICATED FOUR TRACK 90-30C	2016-2017 CERTIFICATED FOUR TRACK 90-30C
2016-2017 CERTIFICATED FOUR TRACK 90-30D	2016-2017 CERTIFICATED FOUR TRACK 90-30D
2016-2017 CERTIFICATED SINGLE TRACK B BASIS	2016-2017 CERTIFICATED SINGLE TRACK B BASIS
2016-2017 CERTIFICATED SINGLE TRACK C BASIS	2016-2017 CERTIFICATED SINGLE TRACK C BASIS
2016-2017 CERTIFICATED SINGLE TRACK E BASIS	2016-2017 CERTIFICATED SINGLE TRACK E BASIS

The **Work Schedule Rule** determines which period work schedule is used to set up the work schedule, and the day of the period as of which it applies. The work schedule rule consists of workdays, holidays (school & legal), off-track days and unassigned/unpaid days based on basis/plan/track and employee's work pattern. The work schedule is used as the basis for time data evaluation.

The **Time Management status** indicator is assigned to employees who take part in time evaluation.

It controls selection parameters for the time evaluation report RPTIME00. You can use the indicator to trigger different types of processing in time evaluation:

- 0** – No time will be allowed to be reported. This assignment does not run through time evaluation
- 1** – This assignment is processed through time evaluation based only on the absences and attendances that are reported by the timekeeper. Payment is processed strictly based on reported time.
- 9** – This assignment is processed through time evaluation based on the hours the employee is scheduled for in their work schedule rule, and any additional absences or attendances that the timekeeper has reported.

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

Positive Time reporting is the recording of actual times. Time Keepers must report all attendance and absence codes and wage types for all hours. For example, employees who are working part-time, teacher's assistants, instructional aides, cafeteria workers, bus drivers, or substitutes are positively time reported.

Note: For annualized employees who are TMS=1, the employee **MUST** be time reported every pay period. This will avoid a negative annualization settlement at the end of the school year.

Negative Time reporting means that employees' planned working times from their personal work schedule are used to populate their regular time through the process of time evaluation. Only deviations from their work schedule are **REQUIRED TO BE REPORTED** for them (i.e. absences, additional time, etc.). Employees with regular full-time work schedule include Principals, Teachers, Administrators, Custodians, and Plant Managers, etc.

Special Notes on Anticipating Time

Bulletin 6053.1, Elimination of Advanced Reporting of Hours, Mileage and Differential Pay, dated January 9, 2017 states that office and school administrators are responsible for ensuring that the following are accomplished:

- All employees' time **MUST** be carefully reviewed and certified by the payroll cut-off.
- Anticipation of hours beyond the current pay period is not an acceptable practice and should not be performed.
- All non-core/additional, differential and mileage pay **MUST** not be anticipated.
- Do not anticipate time for employees that **DO NOT** earn illness and/or vacation benefits, and/or that **DO NOT** follow a regular work schedule, even in the current pay period.

What Is Anticipated Time?

Pay periods for classified and certificated employees cover the first of the month through the last working day of the month. The cut-off and payroll process takes place prior to the last day of the pay period to ensure all classified and certificated employees are paid on their pay date. Anticipating time is reporting time (regular hours, benefits, and additional/non-core hours) for an employee before the day has been worked by the payroll cut-off date.

No employee is eligible to have **ANY** time anticipated past the current pay period. Employees who are eligible to have their time anticipated should only be time reported until the end of the current pay period. Employees who are not eligible to have their time anticipated will receive pay for all regular and additional hours worked up to the cut-off date.

Employees Eligible for Anticipation of Time

- **All negative reported (TM9) Employees:** Time is automatically anticipated until the end of the current pay period via their calendar/work schedule.
- **Positive Reported (TMS 1) Employees who follow a District published calendar:** TMS 1 employees that follow a District published calendar earn illness/vacation benefits. A District published calendar is specifically designed to follow a particular work schedule and are assigned to A, B, C or E Basis calendars.

Employees NOT Eligible for Time Anticipation

- **Positive Reported (TMS 1) Employees that don't follow a District published calendar:** TMS 1 employees that don't follow a District published calendar do not earn illness/vacation benefits. These employees have no definite work scheduled and are assigned an X Basis work schedule rule.
- Effective February 16, 2016, time keepers will be restricted from time reporting beyond the current date for Personnel Areas 2FDX, 2FNX, and 3GXX.

Personnel Area	Job Classification	
2FDX	Teacher Assistant, Degree	
2FNX	Teacher Assistant, Non-Degree	
3GXX	Community Representatives Supervision Aide School Supervision Aide	Out of School Program Helper Out of School Program Worker Out of School Program Supervisor

1st Character
 G = General Calendar
 1 = Single Track
 4 = Four Track
 A = Adult Ed
 B for B basis –three options

Work schedule rule	
Work schedule rule	1CA06 Single, Cc, Cbas, 6hr
Time Mgmt status	99 - Time evaluation of planned times
<input type="checkbox"/> Part-time employee	

For Example:

1CA06

2nd Character
 A = A Basis Assignment (260/261/262 days)
 B = B Basis Assignment (221 days)
 C = C Basis Assignment (204 days)
 E = E Basis Assignment (234 days)
 X = X Basis Assignment (Sub, temporary & relief)
 Z = Z Basis Assignment (Intersession & Unassigned periods)

3rd Character
 Assigned Track:
 " " = no Track
 A/B/C/D = Which calendar at Four Track School

4th and 5th Characters

Daily Planned Hours: 06, 08, 04, 03

Note 2: Daily planned hours may be different from Daily working hours

For part-Time Employees: Select the highest number of hours the employee can work in the assignment.

6th thru 8th Characters

Indicate Special Calendars:

OP1/2/3: Three different options for B-Basis

CAF: Cafeteria C&Z

SPE: E-Basis related services (APE, AT, LAS, OT, PT)

JBB: Early Start Calendar

1/2/3/4/5: Represent the different off-day for 9/30 and 4/40 work schedules for A Basis

ASSIGNMENTS

Certificated Assignment

Certificated assignment is an appointment assigned to a certificated employee. A certificated employee refers to an employee who holds one or more documents such as a certificate, a credential or a life diploma engaged in a school service as authorized in his/her license.

Classified Assignment

Classified assignment is an appointment assigned to a classified employee. A classified employee refers to an employee of the school district employed in a position not requiring certification qualifications.

Unclassified Assignment

Unclassified assignment is an appointment assigned to an employee not identified as classified or certificated service. Unclassified assignments can be an appointment “as is” or in addition to a regular appointment.

X-Basis Assignment

A temporary assignment:

- When an employee is not performing regular ongoing duties
- When an employee is performing regular duties for ten (10) working days or less
- Assigned to all teacher assistants
- In general, X basis employees do not receive holiday and illness benefits

Z-Basis Assignment

- An assignment is restricted to an employee in a regular status other than an A basis position during an off-basis/off-track period. Period of assignment is for more than ten (10) working days.
- In general, a Z basis employee receives holiday and illness/personal necessity benefits.
- A holiday occurring within the summer session or multi track intersession Z basis assignment is unassigned and unpaid for certificated employees, per agreements with UTLA and AALA.
- A holiday occurring during the Z basis assignment is paid for classified employees if it is a holiday that is not paid during the regular basis assignment and the employees are in paid status on either side of the holiday.

Intersession/Summer Assignment

- Intersession Assignment - An assignment assigned to an employee working at Multi-Track calendar school at various times during the year.
- Summer Assignment - Applies to employees working at a Single Track calendar school during their unassigned days (typically June, July, and/or August).

- **Certificated Assignments** - as authorized by the UTLA and the District Collective Bargaining Unit Agreement, Article XX, employees shall be paid only for the actual days/hours of the intersession/summer assignment. Holidays that fall prior to or at the end of intersession/summer shall be unassigned and unpaid.
- **Classified Assignments** - Non-A basis staff may be assigned as Z basis during summer session. Classified employees are entitled to holiday pay that occurs during an intersession/summer period only if it is *not* a holiday that is already paid during their regular school year assignment. In other words, the employee should not be paid twice for the same holiday.

Special notes for intersession/summer assignment

- **Certificated Salary** - A contract teacher assigned to a summer session or an intersession position which is time-reported for four hours or less will receive a salary rate equal to 1.09224 times the hourly rate derived from his/her pay period rate.
- An administrator and/or teacher assigned to a full time (6-8 hours) position – such as at an extended year program or development center – will receive his/her regular hourly rate of pay.
- Pay is allowed for absences e.g., bereavement, illness, personal necessity, family care and medical absence leave under the same limitations that apply during the regular session.
- A principal assigned to more than one school and/or an employee that performs intersession/summer related duties requiring travel is entitled to mileage reimbursement.

Auxiliary Assignment

An Auxiliary assignment is an appointment to a secondary school teacher or JROTC Instructor assigned to teach one additional regular class period each day. They shall be assigned on the appropriate basis and shall be paid at their contract hourly rate. Auxiliary teachers shall be paid only for ***time actually served***. Auxiliary assignment is not paid when the employee is not physically present at the school i.e. illness, PN, MS. Assignment as an auxiliary teacher may be terminated at any time.

Relief Assignment

Relief assignment is an appointment to a limited-term position that is established for not more than six months. This type of assignment applies to classified employees.

Extra Duty Pay For Certificated Administrators

The policy of the District is to provide extra duty pay for school site and non-school site salaried certificated administrators to address emergency and exigent circumstances in accordance with the guidelines set forth in Policy Bulletin BUL-101500, Extra Duty Pay for Administrators Policy.

Substitute Assignment

A substitute assignment provides a temporary replacement in the absence of a regular employee. The substitute employee is only reported for actual time worked.
General Types of Substitutes

Certificated Substitutes

- **Day-to-day Substitute.** These substitutes are assigned as needed on a day-to-day basis. A day-to-day substitute is paid a daily base rate. A substitute teacher is not entitled to holiday and illness/personal necessity benefits. In lieu of holiday and illness/personal necessity benefits, a substitute employee may be paid a continuity rate of \$10.00 per day after completion of 130 days of service. A certificated substitute who has previously accrued illness hours through another assignment has the option to use these illness hours during his/her substitute assignment only with the authorization of the administrator of school site they are working at. Completion of 100 days (600 hours) of substitute service in a given school year entitles the employee to medical benefits in the following school year.
 - A contract teacher working as a day-to-day substitute is a teacher who works during his/her off-track or unassigned time. Substitute service is reported for the actual time worked by the location where the employee provides the substitute service. A contract teacher working as a day-to-day substitute is paid the substitute base rate or if eligible, the incentive substitute pay rate. A Request for Personnel Assignment (RPA) is not required. The substitute pay is subject to retirement deduction. The provisions of AB 2700 effective July 1, 2002, and enhances members' benefits by expanding the types of service and compensation that are creditable to CalSTRS for retirement purposes. Compensation for summer school and intersession along with stipends for extra duties performed are now creditable. In addition, contributions by the member and the employer on compensation earned for service in excess of one year will be credited to the member's Defined Benefit Supplement, or DBS, account at the end of the fiscal year.
- **An extended day-to-day substitute** is a day-to-day substitute who serves for more than 20 consecutive working days in the same assignment in place of the same absent employee or in the same unfilled position, in regular K-12. After completion of the twenty (20) consecutive working days required, the school prepares and submits a "request" to a Personnel Specialist to process an assignment for the employee as an extended day-to-day substitute. This form can be submitted online at <http://achieve.lausd.net/Page/1550> . The employee shall be paid the extended day-to-day substitute rate retroactive to the beginning date of the assignment. Days used by the substitute for illness, bereavement shall not be counted as extended service and shall not constitute a break in the consecutive working days requirement. Upon the termination of the extended assignment, the substitute shall return to and be paid as a day-to-day substitute.
- **An incentive plan substitute** is a substitute who serves in schools of particular need as determined by the District and thereby qualifies for the daily incentive rate. The incentive plan is applicable to school nurses and to substitute teachers who are serving in place of regular K-12 program employees paid on Preparation Salary Table during the September-June academic year. For more information,

please refer to LAUSD Policy Guide; Certificated; Pers. Research (10-11-10).
See Appendix A: *Day to Day Substitute Information (Policy Guide A 5)*

- **Teacher Assistant Assignment** - This is a certificated assignment for an employee who assists in the preparation, presentation, and follow-up of instructional activities.

All Teacher Assistants are, on a continuing basis, required to be enrolled in, and successfully complete, college courses as described below.

- **Degree Track:** A minimum of 12 college semester units (or equivalent quarter units) must be successfully completed each school year. The units must be in courses leading toward a baccalaureate degree and a teaching credential.
- **Non-Degree Track:** Enrollment in a college course at all times during the September-June school year. Such coursework must be successfully completed and result in receipt of college units or credit.

All teacher assistants must be enrolled in a participating accredited public or private college, university, or community college at the time of employment approval, as well as during the period services are rendered as a Teacher Assistant. Enrollment during the previous semester or quarter qualifies for an assignment during the summer.

Teacher Assistants who meets the qualifications set forth below shall receive one of the following differentials. An employee shall be eligible for only one such differential, and it shall be the highest amount for which the employee qualifies. All differential require certification from the appropriate Local District Superintendent/Division or Branch Head that in addition to regular duties, the employee is required routinely to speak, interpret and write a specific non-English language, or communicate fluently in sign language. If such certification is withdrawn due to the language skill no longer being required, the differential shall no longer be payable.

All Teacher Assistants shall accrue paid non-work day benefits. Employees who have achieved "Degree Track" status shall accrue .0445 hours of credit for each hour of paid Teacher Assistant service. Non-Degree Track Teacher Assistants shall accrue at the rate of .0167 hours. However, accrual shall exclude hours for which overtime premium is paid.

Teacher Assistants are subject to an agency fee deduction based on the rate set by Local 99 (Unit F). They are also subject to the State Disability Insurance (SDI) deduction. SDI coverage is mandatory. The employee pays the full cost of this coverage. In addition, Teacher Assistants are covered by Public Agency Retirement System (PARS).

Notes on Salary Rates for Certificated Substitutes

- **Paid Non-Working Day for A Certificated Substitute** - In lieu of the previous lump sum payments for paid nonworking days, a certificated substitute serving in place of an employee who is paid on the Preparation Salary Table has the accrual factor of 0.11364 folded into his/her rate of pay. All other substitutes, such as Development Center and Children Center substitutes, will have the accrual rate factor folded into their rate of pay retroactively after they have been in paid status for the equivalent of 35 full-time days from the beginning of the school year.

Classified Substitutes

A classified day-to-day substitute does not have a regular assignment and is only paid for time worked. A classified substitute is not entitled to holidays, illness/personal necessity benefits, bereavement (refer to Collective Bargaining Unit Agreement), and jury duty absences. Completion of 100 days (800 hours) of substitute service in a given school year entitles the substitute to medical benefits in the following year.

- **Instructional Aide Assignment** - This is a classified assignment. Instructional Aides work sixty (60) hours per pay period to assist in the preparation, presentation and follow-up of instructional activities. Instructional Aides are eligible for the same language differentials as other classified employees.
 - Instructional Aides are subject to an agency fee deduction based on the rate set by Local 99 (Unit B). They are also subject to the State Disability Insurance (SDI) deduction. SDI coverage is mandatory. The employee pays the full cost of this coverage. In addition, Instructional Aides are covered by Public Agency Retirement System (PARS). For additional information, call the Instructional Assistance Personnel Office at (213) 241-3900.
- **Hiring Hall** - This is a temporary assignment. Employees are covered by PARS retirement. This position is eligible for SBTM hours. Employees are subject to SDI deductions and are paid in the SM payroll area.

Summary of Benefit Payments for “X”, “Z” or Substitute Assignments for Certificated Employees

<u>Benefits</u>	<u>X Basis</u>	<u>Contract Teachers working as “Subs”</u>	<u>“Z” Basis</u>
Holiday	No	No	No (2) (6)
Illness	No	No	Yes (1)
Personal Necessity	No	No	Yes
Bereavement	Yes	Yes (2)	Yes
Industrial Accident Injury	Yes	Yes	Yes
Jury Duty	No	No (3)	No (3)
Subpoena as Witness	No	Yes (2)	Yes
Vacation	No	No	No (4) (5)

- (1) On an earned basis.
- (2) The leave is not valid if the employee has been released from the assignment before the effective date of the leave.
- (3) May be paid for jury duty within the period of assignment.
- (4) With the approval of the immediate administrator and division/branch head, the employee may use previously earned vacation.
- (5) Eligible to accrue vacation based on assignment eligibility.
- (6) Certificated employees will not get any holiday pay for z-time except Adult Ed teachers (PA=2UTA).

Conditions

- Must be in paid status during any portion of the last working day of the assignment preceding the holiday, or during any portion of the first working day of the assignment following the holiday.
- Holidays must be reported in the timesheet for Adult Ed (PA=2UTA).

See Appendix K: Designation of Holidays for Certificated Employees (California Education Code 44988).

Summary of Benefit Payments for “X” or “Z” Assignments for Classified Employees

<u>Benefits</u>	<u>X Basis</u>	<u>“Z” Basis</u>
Holiday	No	Yes (3) (6)
Illness	No	Yes (1)
Personal Necessity	No	Yes
Bereavement	Yes (2)	Yes
Industrial Accident Injury	Yes	Yes
Jury Duty	No	No
Subpoena as Witness	No	Yes
Vacation	No	No (4) (5)

- (1) On an earned basis.
- (2) The leave is not valid if the employee has been released from the assignment before the effective date of the leave.
- (3) Classified Z written/intersession qualify for holiday; will pay holiday on the base assignment or Z written assignment. No double pay of holiday.
- (4) With the approval of the immediate administrator and division/branch head, the employee may use previously earned vacation
- (5) Eligible to accrue vacation based on assignment eligibility.
- (6) If the employee has been in paid status during any portion of the last working day of the assignment preceding the holiday, or during any portion of the first working day of the assignment following the holiday.

Conditions

See Appendix K: Designation of Holidays for Certificated Employees (California Education Code 44988).

TIME CARD

A time card is the District's official document of an employee's attendance/absence for time reporting purposes.

- The use of the time card is mandated in the Board Rules and is subject to the District designated auditors.
- Records substantiating the time reported to the Payroll Administration for salary payment must be kept on file and retained at the location for a period of five years in accordance with the Board of Education report.
- Completed and approved absence certification forms are required prior to reporting of absence time. The following certification forms should be retained on file at the location:
 - *Certification of Illness, Family Illness, Or New Child*, Form 60.ILL
 - *Certification of Absence for Non-Illness*, Form 60.NON-ILL
- Refer to Appendix R- New Certification of Absence Forms (BUL 6307.2) for samples of Certification of Absence(s) forms.

Instructions for Completing Time Cards

Certificated Employees

- Article IX, Section 2 of the UTLA Collective Bargaining Unit Agreement states that: "All employees shall, upon each arrival to and departure from their assigned work location, enter their initials on a form provided by the District. Itinerant employees serving less than a full day at a work location and Early Education Center employees shall also enter the correct time as part of their sign-in and sign-out."
- If the certificated employee has, in addition to his/her regular assignment, a supplemental assignment such as Adult Education, Driver Safety, etc., it is necessary for the employee to enter correct time for both the regular assignment and the supplemental assignment. The employee should have a separate time card for each additional assignment. This is necessary to provide documentation to substantiate the District's claims for government funding. Semi Annual Certification Form and the Multi-Funded Time Report Form should be completed for the fiscal year.
- The Association of Administrators of Los Angeles (AALA) and the District-represented employees do not have provisions for sign-in and sign-out procedures. By precedence, these employees sign-in and sign-out usually by initialing a time card.

Classified Employees

- Classified Collective Bargaining Agreements do not have provisions for sign-in and sign-out procedures. By precedence, all classified employees, except those identified in Personnel Commission Rule 596 (over-time exempt), sign in by recording the actual time of arrival but not earlier than the assigned start time and sign out by recording the actual time of departure but not later than the

scheduled stop time from their assigned work location(s). This procedure helps to manage the calculation of overtime.

- Classified employees whose principal duties and responsibilities are designated as executive/administrative in Personnel Commission Rule 596 (over-time exempt), indicate daily attendance by initialing a time sheet or a time card.

Unclassified Employees

- All unclassified employees are required to sign-in and sign-out showing the actual time of arrival but not earlier than the assigned start time to and departure from their assigned work location(s).

Where to Acquire Time Cards

Predated sign-in and sign-out cards can be obtained from the Payroll Administration website. Schools and offices may be able to download and print the time cards.

Website: <http://achieve.lausd.net/payroll>
 Menu path: payroll.lausd.net/Calendar/Time Cards

The screenshot shows the Los Angeles Unified School District website. The top navigation bar includes 'Skip navigation', 'Select Language', and links for 'SUPERINTENDENT', 'BOARD OF EDUCATION', and 'SIGN IN'. The main header features the LAUSD logo and the text 'Los Angeles Unified School District Investing in LAUSD'. A search bar and social media icons are also present. The main navigation menu includes 'Home', 'About LAUSD', 'Employment', 'Find a School', 'Offices', and 'Quick Links'. The 'Payroll Administration' sidebar menu is expanded, with 'Calendar / Time Cards' highlighted in a red box. The main content area displays a link for '2016-2017 Payroll Pay Dates' and a table titled '2016 - 2017 PAYROLL CALENDARS AND SIGN IN/OUT CARDS'. The table has two columns: 'CALENDARS' and 'SIGN IN/OUT CARDS', with multiple rows of links for different employee categories.

CALENDARS	SIGN IN/OUT CARDS
2016-2017 CERTIFICATED A BASIS	2016-2017 CERTIFICATED A BASIS
2016-2017 CERTIFICATED ADULT SCHOOLS & CENTERS	2016-2017 CERTIFICATED ADULT SCHOOLS & CENTERS
2016-2017 CERTIFICATED B BASIS OPT 4	2016-2017 CERTIFICATED B BASIS OPT 4
2016-2017 CERTIFICATED B BASIS OPT 6	2016-2017 CERTIFICATED B BASIS OPT 6
2016-2017 CERTIFICATED B BASIS 8HR SPE	2016-2017 CERTIFICATED B BASIS 8HR SPE
2016-2017 CERTIFICATED B BASIS 6HR SPE	2016-2017 CERTIFICATED B BASIS 6HR SPE
2016-2017 CERTIFICATED B BASIS OPT 7	2016-2017 CERTIFICATED B BASIS OPT 7
2016-2017 CERTIFICATED E BASIS OPT 4	2016-2017 CERTIFICATED E BASIS OPT 4
2016-2017 CERTIFICATED E BASIS OPT 5	2016-2017 CERTIFICATED E BASIS OPT 5
2016-2017 CERTIFICATED FOUR TRACK 90-30A	2016-2017 CERTIFICATED FOUR TRACK 90-30A
2016-2017 CERTIFICATED FOUR TRACK 90-30B	2016-2017 CERTIFICATED FOUR TRACK 90-30B
2016-2017 CERTIFICATED FOUR TRACK 90-30C	2016-2017 CERTIFICATED FOUR TRACK 90-30C
2016-2017 CERTIFICATED FOUR TRACK 90-30D	2016-2017 CERTIFICATED FOUR TRACK 90-30D
2016-2017 CERTIFICATED SINGLE TRACK B BASIS	2016-2017 CERTIFICATED SINGLE TRACK B BASIS
2016-2017 CERTIFICATED SINGLE TRACK C BASIS	2016-2017 CERTIFICATED SINGLE TRACK C BASIS
2016-2017 CERTIFICATED SINGLE TRACK E BASIS	2016-2017 CERTIFICATED SINGLE TRACK E BASIS

Absence & Attendance Codes

In SAP, absences and attendances are used to track an employee's working time. Time is entered through the Cross Applications Time Sheets (CATS) and eventually resides in either Infotype 2001 (Absence) or 2002 (Attendance).

In these Infotypes, the employee's worked or *not* worked for an assignment on a given date (or date range) are recorded. The absence/attendance type defines the reason for the event and can be used to drive business rules and wage type and time type generation in time evaluation. Hours and/or a start and end time (for bus drivers) are specified).

Personnel Subarea Groupings for Absence and Attendance types are utilized to limit the absences and attendances available in dropdowns by personnel area and personnel subarea. Each Absence type can be up to 4 characters and must be assigned to a grouping.

Commonly Used Absence/Attendance Codes

Regular Time (RG)

A code used to report actual time worked by an employee in a given assignment for Certificated and Classified employees.

Replacement Time (RP)

A code used to report the type of service rendered by a teacher for replacing another classroom teacher or a librarian assigned to the same school or pool location reported as absent on the payroll records. For Certificated use only.

- Replacement service is to be authorized only when there is no qualified substitute available.
- Replacement time does not earn illness benefits.
- Replacement time is not added to the employee's fiscal hours.
- The rate of pay for replacement service shall be the replacement teacher's hourly rate on the regular assignment.
 - An elementary teacher shall receive 1.0 hour of salary for each 30 pupil hours of replacement service.
 - An elementary level special education teacher shall receive 1.0 hour of salary for each 15 pupil hours of replacement service.
 - A secondary or secondary special education or adult education teacher shall receive 1.0 hour of salary for each hour during which he or she teaches the class of an absent teacher regardless of the number of pupils in the class.
 - A children center teacher shall receive 1.0 hour of salary for each 24 pupil-hours of replacement service rendered to students not normally assigned to that teacher.

Illness Time (IL)

A code used to report absence(s) of an employee due to illness.

- Absence code (IL) is used to report full-pay illness and half-pay illness. The system automatically deducts illness from the full-pay balance first. If the full-pay balance is exhausted, the system proceeds to deduct from available half-pay balance until there is zero balance. Further illness absence shall be unpaid absence.
- For annualized paid employees, for each hour half-pay illness reduces salary by the half the hourly rate. Refer to the example in the SALARY PAYMENT Section of the manual.
- For annualized paid employees, unpaid illness absence is reduced by the full-pay illness rate. Refer to the example in the SALARY PAYMENT Section of the manual.
- Illness absence is reported during the on-track period only.
- If an employee is on an extended illness leave, do not report illness during the off-track period.
- Completed illness certifications are to be retained at the location for each absent employee for auditing purposes.

Personal Necessity (PN)

A code used to report absence(s) of an employee due to any of the following reasons as specified in the applicable Collective Bargaining Unit Agreement, Personnel Commission Rules or Board Rules.

Eligibility

PA	PSA	EEG	ESG
All PA's that start with '1' & '2'	All PSA's except the ones that start with 'X' and 'R' EXCEPTION: (If PA=1DTX and PSA=XXXX)	A, C, D, E, G, H	All ESG's except A2, N1, N2, N3, S1, X2, Z1 & Z2 EXCEPTION: (If ESG=Z1/Z2 and PA=2MCX PSA=AGXX)

Entitlement and Projection

Personnel Area	Days
1AOX, 1APW, 1APX, 1ASX, 1BXX, 1CXX, 2UTA, 2UTE, 2UTH, 2UTK, 2USX	6
1LAX, 1LJX, 1LMX, 1LVX, 1NAX, 1NXX, 1SAS, 1SAX, 1SLL, 1SLX, 1SXX, 1VAC, 1VAD, 1VEX, 1VVX, 1VSX, 1YLX, 1ZDX, 1ZLX, 1ZSX, 1ZXX, 2MCX, 2MEX, 2PXX, 2MSX, 2MZX, 1DTX, 1DXX, 1DPX	7
1EXX	6 prior to 7/1/2008 7 starting 7/1/2008

- Death of a close friend or relative not included in the definition of immediate family.
- Death or serious illness of a member of the employee’s immediate family. Immediate family is defined as the employee’s: Spouse, cohabitant Parent (includes in-law, step and foster), parent of cohabitant, Grandparent (includes in-law and step), grandparent of Cohabitant Child (includes son/daughter-in-law, step and foster), child of cohabitant, Grandchild (includes grandchild of spouse and step grandchild), grandchild of cohabitant, sibling, or a relative living in the employee’s immediate household
- Accident involving the employee’s person or property or the person or property of a member of the employee’s immediate family.
- Birth of a child of the employee.
- Religious holiday of the employee’s faith. ***
- Imminent danger to the home of the employee occasioned by a disaster such as flood, fire or earthquake.
- Appearance in court as a litigant, or appearance in court or governmental agency as a non-litigant witness under subpoena. ***
- Attendance at a conference or convention which does not qualify as miscellaneous absence under the various Collective Bargaining Unit Agreements. ***
- Up to two hours for verifiable automobile failure if the employee’s automobile is required to be used for work purposes on that day (applicable to classified employees only).
- Up to one day a year for verifiable registration or final examinations at a District-recognized institution of higher learning (applicable to classified employees only).
- Required attendance in the classroom of the employee’s child or ward or a meeting with the school administrator because of the child’s or ward’s suspension.
- Adoption of a child by the employee (including child of cohabitant).
- Up to four hours of personal necessity leave and up to 36 hours of accrued vacation or unpaid leave not to exceed a total of eight (8) hours per calendar month or 40 hours per school year for each child or ward of the employee in kindergarten or grades 1 to 12 to visit the child’s or ward’s school provided under 230.8 of the Labor Code.

***Five (5) days advance notice is required.

- Other significant event of a compelling nature to the employee, the gravity of which is comparable to the above, which demands the personal attention of the employee during assigned hours and which the employee cannot reasonably be expected to disregard, limited to one (1) occasion in any school year.

Notes on Personal Necessity

- The total number of days allowed in one school year (July 1-June 30) for such leave or leaves shall not exceed six/seven (6/7) days as stipulated in the respective Collective Bargaining Unit Agreement, Personnel Commission Rules or Board Rules.
- The time allowed shall be deducted from and may not exceed the number of hours of paid illness leave to which the employee is entitled. When the allowed personal necessity or the full-pay illness balance is exhausted, the employee is considered **unpaid** for those hours and for any additional absence due to personal necessity during that school year.
- Personal necessity leave shall not be granted during a vacation or leave of absence.
- The personal necessity leave shall not be granted during a strike, demonstration or any work stoppage.
- A Certification of Personal Necessity Absence must be completed by the employee and approved by the administrator if payment is to be authorized. The certification is to be retained at the location reporting the absence. The administrator or supervisor shall take whatever steps are necessary to substantiate that a personal necessity is within the limits of the Collective Bargaining Unit Agreement, Personnel Commission Rule/Board Rule.

Kin Care (KC)

Kin Care days are absences used for attending to the illness of a parent, spouse or child.

Eligibility

PA	PSA	EEG	ESG
All PA's that start with '1' & '2'	All PSA's except the ones that start with 'X' and 'R' EXCEPTION: (If PA=1DTX and PSA=XXXX)	A, C, D, E, G, H	All ESG's except A2, N1, N2, N3, S1, X2, Z1 & Z2 EXCEPTION: (If ESG=Z1/Z2 and PA=2MCX PSA=AGXX)

Entitlement

- Employees are entitled to 6 Kin Care (KC) days per calendar year between January 1st and December 31st
- Kin Care is projected on all eligible assignments on January 1st. To determine the projection amount, multiply the daily entitlement (6 days) by the assignment hours for each assignment. Exclude Z-basis assignments.
- Kin Care is also projected when an employee is hired, becomes eligible for kin care for the first time, or returns from a leave and receives an illness projection.

- Kin Care is adjusted when a change to the maximum job hours occurs.
- Employees that do not receive an illness projection do not receive a KC entitlement.

Usage

- To be able to use Kin Care an employee must have both, sufficient Full Pay Illness and Kin Care balance. If either balance is zero, then the employee should not be paid.
- For Classified Employees on probationary status, only six days of illness absence are usable for all purposes, including kin care.

Carry Over

- Kin Care is not carried over from year to year. The balance is renewed every January 1st of the fiscal year.

Separation

- Kin Care is not paid out. Upon separation, the Kin Care balance should be wiped out.

Substitute/Temporary Absence (SBTM)

A code used to report absence(s) of a part-time, temporary or substitute employees due to any of the following reasons as specified in Bulletin-6529.1, "Legally- Mandated Paid Sick Time for Eligible Employees".

For substitutes only:

Healthy Workplaces, Healthy Families Act 2014 - SBTM for substitute. Any employee who is a sub or is not receiving any time compensation will be given 24 hours of illness. These hours can be used for Workers-compensation. If the employee is in a pool location, then Personnel Commission (Classified) and Human Resources (Certificated) will report the WC.

SBTM will be used first and then any illness (FPI) earned in a previous regular assignment. Once all the SBTM and FPI are used then the employee will be paid directly by the WC Insurance carrier.

Note: This is effective July 1st 2015.

Eligibility

- 24 hours of mandated paid sick time is available for substitute, temporary, and part-time employees.
- Employees with an Illness eligible assignment will be excluded.
(Note: If an employee has multiple assignments, where at least one assignment is illness eligible, they are not eligible for mandatory paid sick time).

- Teacher Assistants, Personnel Commission Members and CalPERS Retirees are not eligible for mandatory paid sick time.

PA	PSA	EEG	ESG
All eligible PA's	XXXX, CXSX, and AXSX	All	A2, N1, N2, N3, S1, T1, X2, Z1 & Z2
<u>EXCEPTION:</u> (2FDX, 2FNX & 3YPX)	<u>EXCEPTION:</u> (If PA=1DTX and PSA=XXXX)		<u>EXCEPTION:</u> (If ESG=Z1/Z2 and PA=2MCX, PSA=AGXX)

Usage

- Diagnosis, care or treatment of an existing health condition, or preventive care for, the employee or the employee's family member.
- "Family member" means any of the following:
 - A child, which for purposes of this article means a biological, adopted, or foster child, stepchild, legal ward, or a child to whom the employee stands in loco parentis. This definition of a child is applicable regardless of age or dependency.
 - A biological, adoptive, or foster parent, stepparent, or legal guardian of an employee or the employee's spouse or registered domestic partner, or a person who stood in loco parentis when the employee was a minor child.
 - A spouse.
 - A registered domestic partner.
 - A grandparent.
 - A grandchild.
 - A sibling.
- For an employee who is a victim of domestic violence, sexual assault, or stalking.
- Attend to the illness of a child, parent, spouse, or domestic partner.
- Child care or school emergency caused by a child's illness or injury, behavioral or discipline problems, closure of the facility, disaster, or extreme weather conditions.

Notes on Substitute/Temporary Absence

- The total number of hours allowed in one year for the mandatory paid sick time shall not exceed 24 hours as stipulated in bulletin 6529.1, "Legally- Mandated Paid Sick Time for Eligible Employees".
- The time allowed shall be deducted from and may not exceed the number of hours of paid sick time to which the employee is entitled.
- Eligible employees hired before 7/1/15 is allowed to use paid sick time immediately.
- Eligible employees hired after 7/1/15 will be entitled to use the paid sick time on the 90th day of employment.
- The month in which the employee becomes eligible for mandatory paid sick time will be designated as the "Anniversary Month".

- A new 24 hour paid sick balance will reload each year on the first day of the “Anniversary Month”.
- Unused paid sick balance from the previous year will NOT carry over to the next year.
- At the time of termination, resignation or retirement the paid sick balance will NOT pay out to the employee.
- Mandatory paid sick time balance will display on the employee’s pay warrant stub in the Leave HRS section as “Full Pay Illness”.
- Form No. 60.ILL “Certification of Absence for Illness, Family Illness, New Child” must be completed by the employee and approved by the administrator. The certification is to be retained at the location reporting the absence.

For additional information regarding reporting Substitute/Temporary Absences, refer to Reference-6528.1 “Procedures for Reporting Paid Sick Leave for Eligible Employees”.

Bereavement Time (BV)

A code used to report an approved absence due to the death of any member of the employee’s immediate family. Immediate family is defined as the employee’s: Spouse, cohabitant Parent (includes in-law, step and foster), parent of cohabitant, Grandparent (includes in-law and step), grandparent of Cohabitant Child (includes son/daughter-in-law, step and foster), child of cohabitant, Grandchild (includes grandchild of spouse and step grandchild), grandchild of cohabitant, sibling, or a relative living in the employee’s immediate household.

- Bereavement absence is limited to three (3) working days. However, if more than one death occurs simultaneously, leaves may be taken consecutively. If out-of-state travel is required and requested, an additional two (2) working days shall be granted. For classified employees, the two (2) additional days may be granted if more than 200 miles of one-way travel is required and requested.
- A Certification of Bereavement Absence must be completed by the employee and approved by the administrator if payment is to be authorized. The certification is to be retained at the location reporting the bereavement. Bereavement is reported during the on-track period only. Paid bereavement absence for certificated substitutes and temporary employees shall cease either upon the return of the absent employee whom the substitute was replacing or at the end of the projected assignment, whichever occurs first. Classified substitutes are not entitled to bereavement absence.
- Classified substitutes in Units B and C have the ability to take unpaid bereavement days if they have been in an assignment for longer than 40 days.

Miscellaneous Time (MS)

A code used to report an employee's absence due to reasons such as:

- Attendance at a District approved meeting
- Attendance at a District approved conference or convention (see the specific Collective Bargaining Unit Agreement for conditions to charge this type of absence)
- Organizational leave - a paid leave granted to an employee to serve as an officer of a qualifying organization (e.g. CSEA, UTLA, etc.)
- District employment examination
- Legal settlement payment

Miscellaneous Annual Physical (MSAP)

Annual physical examination (applicable to permanent classified employees only)

Miscellaneous Natural Disaster (MSND)

A code used to identify natural disaster

- Epidemics and emergencies (e.g. earthquake, riots, natural disasters)

Jury Service (JU)

A code used to report absence of an employee who is required to serve jury service in any court within the state.

- Leave may be granted for the days of attendance in court as certified by the clerk or its authorized officer.
- Jury duty or witness hours shall be reported as code "JU" absence for the on-track period only.
- All jury and witness fees received by the employee for the on-track days shall be forwarded to the Payroll Administration through the location time-reporter. The employee keeps fees received for non-work/off-track days and all mileage reimbursements.
- A certificated employee keeps jury duty fee received during winter/spring recess.
- Certificated employees other than A basis called to serve jury service during winter/spring recess are reported holiday (HO) not jury duty service.
- Classified substitutes are not entitled to jury service absence.
- A classified employee called to serve jury service while on an approved vacation time or during winter/spring recess should be reported jury service (JU).

Notes for Certificated Jury Service

- A certificated employee (including teacher assistants) summoned for jury duty during a work period must submit a written request to the Jury Commissioner or Clerk of the Court (from which the summons was received) that the service be deferred and be performed on the employee's non-work period (e.g., during unassigned or year-round school off-track periods).
- If jury service begins during a non-work period and the jury service unavoidably runs into the employee's next work schedule, a paid absence will be granted for up to twenty (20) working days.

- Upon request, an A basis employee and the District may jointly seek excusal from jury service. If denied excusal, the two parties shall request that the days of jury service be restricted to 10 consecutive days whenever possible. After exemption is petitioned and the request for the 10 consecutive days restriction is denied, a paid absence or leave shall be granted for up to 20 working days subject to exceptions as may be determined by the District.
- An employee who does not wish to request deferral or excusal from the jury summons will be granted an unpaid absence for the jury service.
- If the jury service is for a federal court and the request for deferral or excusal is denied, a paid absence is paid for the term of the service.

Mileage (ML)

A code used to report qualified employee's school business mileage.

- Mileage shall be calculated from the regular work location or headquarters of the employee to his or her various destinations, and return to such regular headquarters. In the event an employee does not visit his or her regular headquarters prior to his or her first trip on school business in any one day, he or she shall deduct from his or her total mileage (1) the distance from his or her home to such first stop or (2) the distance from his or her home to his or her regular headquarters, whichever is the lesser.
- In the event the employee does not visit his/her regular office location prior to the school business trip, mileage should be deducted for the distance between home and the employee's regular office location.
- Mileage reimbursement rate is based per Collective Bargaining Unit agreement or on the annual IRS Standard Mileage Rates. *See Appendix F: Mileage Rates by Personnel Area*
- Daily reports of mileage driven must be recorded on the Daily Mileage Statement. The statement must be approved by the administrator.
- The Daily Mileage Statement form is available on the District Office of Transition Services Website. This form is to be submitted in conjunction with timesheets.

Unpaid Absence (UP)

A code used to report an employee's absence for assigned time not worked and not paid.

- Upon request, an unpaid personal leave may be granted to a permanent employee for a period not to exceed 52 consecutive calendar weeks.
- Report unpaid time during the on-track period only.
- Per Personnel Commission, report unpaid absence for employees who do not have approved leave forms submitted to PC after 21st day.
 - Unpaid absence can be unauthorized and authorized.
 - The unauthorized unpaid absence may be due to absence without leave (AWOL).
 - The authorized unpaid absence may be due to any of the following reasons:
 - To be with a member of the immediate family who is ill (see Section 9 of this Article for the definition of the immediate family);

- To accept an opportunity of a superior character which will result in the employee rendering more effective service on return to the District;
- To rest, subject to the approval of the employee health coordinator;
- To accompany spouse, or a cohabitant who is the equivalent of a spouse, when change of residence is required;
- To pursue a program of study in residence in an approved institution of higher learning or under a fellowship foundation approved by the State Board of Education;
- To serve in an elective position in the city, county, state, or federal government, other than the State Legislature. Applications may be submitted at any time but must be on file in the Personnel Office by April 15 for fall semester and November 15 for spring semester. Paragraphs a, c and d above are not subject to these deadlines.
- For additional information, refer to the appropriate Collective Bargaining Unit Agreement.
- Maternity Leave - The absence must be reported unpaid until the Notice of Personnel Action for the maternity illness leave has been received at which time, unpaid time may be adjusted to paid illness benefit time, if available. The maternity absence is reported during the on-track period only. Optional Unpaid Portion: Upon request, a pregnant employee in active status shall be granted an unpaid pregnancy leave prior to the period of actual disability and still qualify for paid illness absence during the actual disability.
- Family Care and Medical Leave/Absence (Unpaid) shall be granted to a full time or part time employee employed for at least 12 months and has served at least 130 work days during the 12 months immediately preceding effective date of each separate family care and medical leave and is eligible for at least one benefit provided by the District. The Family Care Leave/Absence may be granted for the following reasons:
 - The birth of a child of the employee/cohabitant.
 - The placement of a child with an employee/cohabitant in connection with the child's adoption or foster care.
 - The serious illness of a child of an employee/cohabitant.
 - The care of a parent or spouse who has a serious health problem (excluding parents-in-law).
 - Illness of employee.
 - Family Care Leave granted for birth or adoption of a child must occur within one year of that birth or adoption or foster care unless otherwise agreed to by the District.
- Child Care Leave (Unpaid): An unpaid leave shall be granted to a permanent employee to care for such employee's own (including adopted) child of under five (5) years of age. The leave, together with any renewal thereof, shall not exceed four (4) semesters for permanent employees.

Note: Article 12 section 4.0 - No employee shall be eligible for a permissive leave from the District who has had three semesters of permissive leave during the six semesters immediately preceding the requested leave.

Overtime (OT)

A code used to pay eligible employees time and one-half for all work in excess of 8 hours per day or 40 hours per week (for employees on a standard work week; 5 days, 8 hours per day).

Note: If an employee does not work a standard work week or the work day is greater than eight hours or less than eight hours, refer to the applicable collective bargaining unit agreement and/or Personnel Commission rules to determine the point at which the employee(s) should be reported for overtime pay.

- As stated in the Office of the Superintendent Bulletin No. 41, "Fair Labor Standards Act," the policy of the District is to provide overtime pay at time and one-half for all work in excess of eight hours a day or forty hours a week for employees on a standard workweek (5 days, 8 hours per day). Variation from this policy is implemented in a manner consistent with the existing Collective Bargaining Unit Agreements or Personnel Commission Rules.
- The only currently authorized exception to the provision of overtime pay for excess hours worked is Bargaining Unit A (School Police) and certain Unit A aligned employees who are authorized to receive a limited amount of compensatory time-off in lieu of overtime pay.
- Both regular and substitute classified hourly employees are eligible for overtime pay.
- Certificated employees and all classes whose principal duties and responsibilities are classified as executive/administrative are not entitled to overtime payment. *See Appendix G: Overtime - Personnel Commission Rule 596.*
- An employee in an executive/administrative class who is required to work on a holiday shall be granted compensatory time-off on a straight time hour-for-hour basis within 12 calendar months following the month in which the holiday was worked.
- A classified employee who is required to work any hours that the Superintendent has designated as excused time shall be given equivalent time-off by the end of the following pay period.
- Overtime shall be computed only on the basis of working hours exclusive of meal time in excess of an established eight, nine or ten hour work day or 40 hours in any calendar week.
- Basic Guidelines for Reporting Overtime:
 - The workweek for employees whose average workday is four hours or more shall consist of five (5) consecutive days with overtime rate to be paid for work on the 6th and 7th days.
 - For employees whose average workday is less than four hours, overtime must be paid for work performed on the 7th day.
 - If a regular 8-hour employee is absent on unpaid time during the week and works on Saturday, the Saturday service shall be paid as regular time for a total of 40 hours for the week with the excess being reported and paid as overtime.
 - ❖ *Example:* A full-time regular employee who was absent for personal business (unpaid) for four (4) hours during the week worked 8

hours on Saturday, the service on Saturday would be reported as four (4) hours regular time and four (4) hours as overtime.

- For information regarding payment of overtime for full-time classified employees, part-time classified employees and executive, administrative and professional classes with multiple assignments, refer to Fair Labor Standards Act (FLSA) Bulletin or the appropriate Collective Bargaining Unit Agreement.

Workers' Compensation Absence (WC)

A code used to report the time of an employee who is absent due to a work-related illness or injury.

Medical Care

Every injured worker is entitled to appropriate medical care to alleviate the effects of injury. An employee who suffers a job-related illness or injury should be referred to one of the approved industrial clinics. After 30 days, the injured employee may seek treatment from another provider. An employee may see a particular doctor if he/she has filed a written statement at the work location to see that particular doctor in case of injury.

If the job-related illness or injury requires medical care and/or makes it necessary to take time off work, the employee may make a claim for Workers' Compensation benefits. The "Employee's Claim for Workers' Compensation Benefits" form may be obtained from the employee's supervisor or timekeeper and filed promptly at the location.

Time Reporting

1. Report the day of injury as regular time.
2. The time reporter shall enter payroll code "FWC" on the employee's timecard for each date of absence attributed to the injury if the condition has been designated as FMLA. The "FWC" code will be used until the employee's FMLA time is exhausted. If the employee is not eligible for FMLA, or has exhausted their FMLA time, report time off as "WC".
3. Report time as FWC or WC if employee reports time as industrial even if questionable. Sedgwick will determine if workers' compensation benefits are due and will notify payroll directly. The employee will be paid illness benefits unless payroll receives WC authorization from Sedgwick.
4. Advise employee that, if their disability extends beyond 20 days, they must submit a "Request for Leave Form" as with any other absences.
5. Provide injured worker the "Salary Continuation Verification Form" to use when reporting partial days off of work for medical appointments. The injured worker must forward this form to Sedgwick to receive salary continuation, once the doctor signs it. A copy should be returned to the work site.
6. Notify Sedgwick immediately at 866-247-2287 if injured worker returns to work and/or is then taken off work again.
7. Report time off for depositions as regular time – (Sedgwick can verify the deposition date and time).
8. Report time off for court appearances as personal necessity (requires proof from clerk of the court).

Paid Time-Off in Which to Recover

An employee who is off work because of a Workers' Compensation illness or injury will receive regular salary for up to 60 days. These 60 days is per injury, not per year. Any

time-off taken as a result of an injury or illness will be deducted from the illness leave balance until the industrial injury or illness is approved by the District's Workers' Compensation Administrator. Once the approval is granted, the illness time used will be restored up to 60 days. If an injured worker needs more than 60 days to recover, illness time and/or vacation time may be used.

After all benefits are used, a classified employee is separated from service and placed on a 39 month re-employment list. If able to return to work prior to the expiration of this 39 month period, an injured worker is entitled to be placed in the first available position in his/her job class.

The salary an employee receives from the District while out on an industrial injury or illness leave will be reduced by an amount equal to any temporary disability payments made directly to the employee by the Workers' Compensation Administrator. If the sum of the salary payments received from the District plus the temporary disability payments received from Workers' Compensation exceed the regular salary, the overpayment(s) will be deducted from the first available paycheck.

The District-paid health benefits will continue for as long as any part of the salary is received from the District. However, if an employee is placed on unpaid status, even though temporary disability payments are being received from the Workers' Compensation Administrator, a notice will be mailed requiring payment of premiums under COBRA if continuation of health coverage is desired.

What to Do – Summary

- Always report injuries promptly. State Law sets time limits for injuries to be deemed “accepted” and for benefits to be provided. If injuries are not reported in a timely manner, the District incurs financial penalties.
- Remember that injuries which do not result in time away from work and do not require more than first-aid for medical treatment **do not have to be reported**.
- Call 1 (800) 528-7392 (LAUSD WC) to report injuries. This number is maintained by a claims administration company, Sedgwick CMS and is available 24 hours a day.
- If you have doubts about the legitimacy of an injury reported to you, be sure to convey your doubts when you phone in the claim. Request an investigation.
- Don’t forget to give the injured worker the DWC 1 form - Employee’s Claim Form. State Law requires employers to provide this form to any employee within 24 hours of notice of an on-the-job injury. If the employee is not available, mail the form regular U.S. mail within 24 hours.

Early Return to Work Program

- LAUSD has recently implemented an Early Return to Work Program. Under this program, an employee who has not reached 100% recovery, but is expected to do so within 90 days and who has a work restriction which can be accommodated, may return to work prior to being released with no restrictions by his/her medical provider. Each case is considered on an individual basis.
- For additional information, please call the Workers’ Compensation Section at (213) 241-3139.
- IMPORTANT PHONE NUMBERS
 - To report injuries to Sedgwick CMS (800) LAUSDWC
 - To reach the local Sedgwick CMS (866) 247-2287
 - For assistance from LAUSD Workers’ Compensation Unit (213) 241-3139

FMLA WORKER’S COMP (FWC):

A code used to report the time of an employee who is absent due to an FMLA work-related illness or injury.

For information regarding FMLA, please refer to the Division of Risk Management and Insurance Services website: [Division of Risk Management and Insurance Services / FMLA Resources/Forms](#).

Holiday Time (HO)

In SAP, the legal and school holidays are pre-loaded into the employee’s work schedule rule and processed through Time Evaluation (except 2UTA, 2UTH). An employee shall receive holiday pay by being in a “paid” status during the last working day prior to the holiday or the immediate first working day after the holiday (Bridging Rule).

Authorized Paid Holidays

January 1.....	New Year’s Day
Third Monday in January.....	Martin Luther King, Jr. Day
Third Monday in February.....	Presidents’ Day
Last Monday in May.....	Memorial Day
July 4.....	Independence Day
That date declared by the Board.....	Admission Day
First Monday in September.....	Labor Day
November 11.....	Veterans Day
Fourth Thursday in November.....	Thanksgiving Day
Friday following Thanksgiving.....	Thanksgiving Friday
December 25.....	Christmas Day

**See LAUSD Basis Chart on section “Basis”

Employees Eligible for Holiday Pay

An employee serving in a regular assignment shall be paid for holidays under the following conditions:

- An employee is working on a regular assignment basis that includes the holiday(s). *Example:* A B-basis employee is paid for the Admission and Labor Day holidays, but a C-basis employee is not entitled to these holidays. (A C-basis assignment does not include these holidays.)
- A regular classified employee serving on multiple assignments shall receive pay for holidays in each assignment independently according to the employee’s status in each particular assignment.
- An employee on “leave to higher” is entitled to all holidays that are included in the assignment basis of the higher position.
- A, B, and E basis certificated employees are eligible to Admission Day and Labor Day holiday pay. However, with the administrator/supervisor’s approval, an employee required to work on Admission Day is to be reported for regular time for that day and the Admission Day holiday rescheduled before the end of the next pay period. See Special Conditions “Holiday on Admission’s Day (HOAD)”.

Special Conditions on Holiday

Certificated Employees

- A legal holiday that occurs during the winter recess shall be paid as a holiday if the employee was in paid status on the last day that school was in session before the recess or on the first day of the school session after the recess.
- C-basis employees are *not* entitled to Admission and Labor Day holiday pay. If Admission Day is a regular work day for these employees, then they are paid regular salary for working that day.
- Adult Teachers (PA=2UTA) and Home School Teachers (PA=2UTH) have to enter the (HO) code manually in the timesheet. The bridging rule is applied through the CATS time entry.
- Return Retiree (ESG=Z1, Z2) AALA (PA=2MSX) members are entitled to the holiday pay only if they worked (20) consecutive days immediately preceding the holiday.

Classified Employees

- If an employee works on a regular paid holiday, the time worked is reported as overtime in addition to the holiday pay.
- School Police Unit A and Unit H scheduled at 10 hours/day (4 days/week) or 13.3 hours/day (3 days/week) will receive Comp Time at one and a half hours credit for the holiday that falls on their off-day.

Certificated/Classified Employees

- An employee must have been in paid status for a portion of the working day immediately preceding or succeeding the holiday in order to be paid for the holiday.
- Employees in the executive/administrative classes shall be granted equal time-off for time worked on a holiday.
- A classified employee is not entitled to “double pay” or to be paid for the same holiday from both a regular assignment and a Z assignment.
- Employees in the following classes are excluded from holiday compensation and are to be paid at their regular rates of pay for time worked on holidays:
 - Classes in the playground group, recreation series.
 - Plant Security Aide (Saturday, Sunday and Holiday).
 - Substitute, relief classified and unclassified employees are not eligible for holiday pay. If these employees work on a holiday, their service is to be time-reported as regular time.

Holiday On Admission's Day (HOAD)

- Floating Admission Day Holiday for A, B, E, F and N basis
- Applicable to Overtime exempt employees
 - All Certificated employees
 - Classified employees (PA=1LAX, 1LJX, 1LMX, 1LVX, 1SLL, 1VAC, 1VAD, 1VEX, 1VSX, 1VVX, 1YLY, 1ZLX)
- If the employee works on Admission Day, the time reporter enters RG, then employee will be allowed to enter HOAD within the next 2 payroll periods for CL/CE.
- Such employee shall not be allowed to take the holiday (report attendance code HOAD) prior to the designated Admission Day holiday nor two pay periods after the holiday.
- If the employee worked on Admission Day holiday and does not take the holiday (does not report HOAD) within the given time, the employee will lose the Admission Day holiday pay.
- If employee is entitled to the Admission Day holiday but does not work (no RG reported), the system will automatically generate holiday pay.

Cross-Applications Time Sheet (CATS)

The Cross-Application Time Sheet (CATS) is a cross-application tool for recording working times and tasks. It enables one to control all business processes concerning employees' tasks – from paying the employees, monitor correct funding lines, additional payments.

Features

- A number of functions, in particular for storing data and transferring data to the target components, are available with all user interfaces of the Time Sheet.
- You can integrate a procedure for approving recorded working times. *SAP Business Workflow* is available optionally as a means of controlling the approval procedure.
- To protect personal data against unauthorized access, the *Time Sheet* uses the *SAP Human Resources* authorization concept.
- All data records are assigned a unique document number, which means they can be audited at any time.

Steps in CATS Process

- Time entry in time sheet
- Release of time data
- Approval of time data
- Data transfer to target applications

Time Data Entry Profile

A profile that controls the display of the CATS time entry screen by setting the process and determines the screen layout and targeting applications for time data transfer.

- Examples of data entry profiles in SAP:
 - AA-HOURS Absence & Attendance Hours for MULTIPLE employees
 - AA-HRS-1 Absence & Attendance Hours for ONE employee
 - BATCH-IN Daily Interface - No Approval Required
 - ESS Employee Self Service Entry profile
 - JC-2WEEK Job Cost 2-Week Hours for ONE employee
 - JC-CLK-1 Job Cost with Clock Times for ONE employee
 - JC-CLOCK Job Cost with Clock Times for MULTIPLE employees
 - JC-HOURS Job Cost Hours for MULTIPLE employees
 - JC-HRS-1 Job Cost Hours for ONE employee
 - PROJ-HR1 Project and Cost Center Bi-monthly Time Entry
 - PROJ-HR2 Project and Cost Center Daily Time Entry
 - SUMMER Time Entry for Summer Assignments
 - WCOMP Worker's Comp - No Approval Required

Approval Process

- Data must be released before approval
- Approval can be enabled via Workflow
- Rejection will result in a new non approved entry in CATS database
- Records in CATS are assigned statuses to indicate the stage of the processing, such as, 10 = in process, 20 = released, 30 = approved, etc.

Status	Description	Icon	Meaning
10	In process		The record is being processed and is not yet ready for transfer to the target components.
20	Released for approval		The record has been released and is ready for approval or rejection by the person responsible.
30	Approved		The record has been  approved and is ready for transfer to the target components.
40	Approval denied		The record has been  rejected . It cannot be transferred to the target components.
50	Changed after approval		An approved record has been changed. The original record is assigned this status until the new record has been approved. A reference counter allows you to track the new record back to the original record. Once the new record has been approved, the original record is assigned status 60 (cancelled).
60	Cancelled		The record was  cancelled after approval. You cannot cancel a record if your profile settings determine that approved data may not be changed.

Benefits & Incentives

VACATION BENEFITS

PA	PSA	EG	ESG
All PA's that start with '1' & '2'	<p style="color: red; text-align: center;">For PAs that start with '1':</p> All PSA's except the ones that start with 'X' and 'R' <p style="color: blue; text-align: center;">EXCEPTION: (If PA=1DTX and PSA=XXXX)</p> <p style="color: red; text-align: center;">For PAs that start with '2':</p> PSA=A*** except AXSX for 2UTE	A, C, D, E, G, H	All ESG's except A2, N1, N2, N3, S1, X2, Z1 & Z2 <p style="color: blue; text-align: center;">EXCEPTION: (If ESG=Z1/Z2 and PA=2MCX PSA=AGXX)</p>

*Refer to Appendix E: Vacation Accrual Rates to view accruals and entitlements.

Employees Eligible to Earn Vacation

1. Certificated employees assigned on A basis.
 - An A basis certificated employee who has served less than 19 school years shall earn .06923 hour of vacation for each hour assigned to active service; after 19 school years, the employee shall earn .07693 hour of vacation for each hour assigned to active service; after 24 school years, the employee shall earn .08462 hour of vacation for each hour assigned to active service.
 - Employees in classes designated as executive/administrative earn vacation credit at the rate of .09232 hour of credit for each hour for which pay is received. Executive and administrative employees will thus receive a maximum of 24 days of vacation credit per year.

2. Classified regular employees
 - Full-time regular employees on 12-month assignments, except for those in certain administrative or executive classes earn 80 hours vacation (ten days) annually. After four years, they earn vacation at the rate of 120 hours (15 vacation days) a year. After 15 years, they earn an extra 8 hours of vacation each year until at 20 years or more they earn 160 hours (20 vacation days) annually. Those who work fewer than 40 hours a week or fewer than 12 months a year will earn proportionally fewer hours. Employees may not accrue more vacation than they can earn during 18 pay periods.
 - Employees in classes designated as overtime exempt earn vacation credit at the rate of .09232 hour of credit for each hour for which pay is received. Executive and administrative employees will thus receive a maximum of 24 days of vacation credit per year.

Vacation Usage Policy:

- A regular employee may take vacation up to the number of hours already earned. The rate of pay during vacation shall be the employee's current rate.
- Employees may be required to take vacation during the school year on days designated as school holidays (winter recess, spring recess). Refer to Collective Bargaining Unit Agreements for exceptions.
- No payment for vacation accumulation shall be made to employees who terminate employment prior to completion of 130 days of paid service.
- Vacation balance is shown on the pay warrant stub in the "vacation balance field" and should be checked when the employee receives the warrant. No audit of vacation balance will be made for an employee for a period greater than three prior school years.
- A permanent employee may be permitted to interrupt or terminate vacation to begin illness leave, bereavement leave, jury duty leave or military leave. (Supervisor should be notified when employee requesting change)
- Overtime hours do not accrue vacation earnings.
- An employee on a workers' comp leave may request to use vacation to avoid going over his/her vacation maximum cap.

Vacation Accumulation Policy

- All employees may accumulate unused vacation up to an amount not to exceed that which the employee earns in 18 pay periods (the employee's "vacation maximum earnings").
- Vacation accrued through the 1993-94 school year shall be deemed vested. Thereafter, no employee shall be entitled to carry over vacation hours in excess of his/her vacation cap (maximum vacation earnings and vested bank) from one fiscal year to the next.

Vested Vacation Adjustment

- Maximum vacation allowed formula: 18-month cap + vested vacation
- For additional information regarding vacation usage, and when the employee's vested vacation balance is adjusted in a fiscal year, refer to your Collective Bargaining Unit Agreements.

Lump Sum Vacation

- An employee who retires, resigns, separates from service or changes to a non-vacation earning assignment shall be paid a lump-sum vacation if the following requirements are met:
 - The employee must have been in paid service for at least 130 days.
 - Separation action or a change of assignment was processed by Personnel Division.
 - Lump sum vacation payment is processed only one time.
 - Employee who changes assignment from earning to non-vacation earning assignment may request payment of lump-sum vacation by filing out the appropriate form.

Rates Used for Lump-Sum Vacation Payment

- The vested vacation hours of the lump-sum balance will be computed at the employee's vested rate as of June 30, 1994. This balance is paid first.
- Any balance in addition to the vested vacation hours up to the maximum vacation earnings will be calculated at the rate in effect on the last day of paid time in the vacation-earning assignment.
- Any outstanding overpayments such as salary or illness over-usage will be deducted from lump-sum vacation payment, retirement bonus (RBX), attendance incentive plan (AIP).

ILLNESS BENEFITS

Illness is absence due to a health related condition that is paid out in two methods: Full-Pay and Half-Pay. The business rules below describe how illness benefits are granted, used, and paid for an employee

Eligibility

The following employee groups are eligible to receive illness benefits:

PA	PSA	EEG	ESG
All PA's that start with '1' & '2' except 2FDX & 2FNX	All PSA's except the ones that start with 'X' and 'R' EXCEPTION: (If PA=1DTX and PSA=XXXX)	A, C, D, E, G, H	All ESG's except A2, N1, N2, N3, S1, X2, Z1 & Z2 EXCEPTION: (If ESG=Z1/Z2 and PA=2MCX PSA=AGXX)

- All regular employees (working in an assignment with regular status) are entitled to illness benefits.
- An employee shall earn 0.05 hours of full-pay illness absence credit for each hour for which salary is paid.
- At the beginning of each school year, each regular employee will receive a projection of full-pay illness leave. The projection will equate to the number of full-pay illness hours an employee should earn in the school year.
- Hours worked as an auxiliary teacher, replacement teacher or registration adviser does not accumulate illness credit.
- Unused full-pay illness absence credit shall be carried over from year to year without limitation. Half-pay illness credit is not carried over to the following year.
- An employee’s full-pay balance is shown on the pay warrant stub in the “Illness Balance” field.

Full-Pay Projection

The Full-Pay Illness Entitlement is projected on July 1st based on the number of days in the basis contract multiplied by the number of assignment hours multiplied by the earnings factor.

- **Appendix E: Illness Projection Values by Personnel Subarea** contains the number of days per personnel subarea (basis) and the total number of projected illness hours for a 6 hour and 8 hour assignment. For assignments with different assignment hours and FTE percentage, prorate accordingly. The maximum projection a person will receive is 104 hours. [Note: PSA CTXX projects based on a 0.054 accrual factor]

Full-Pay Illness Projection = ((assignment hours * contract days * earnings factor) * FTE%

- For mid-year projections, the entitlement is prorated based on the number of days remaining in the fiscal year for the basis contract hours (i.e. assignments hired mid-year).

Full-Pay Illness Projection = ((assignment hours * (contract days*x) * earnings factor) * FTE% where x=the proportion of remaining months in the contract year

- Home School Teachers (Personnel Area 2UTH) receive an illness projection based on one-half of their assignment hours (This is a part of the UTLA Bargaining Unit agreement/Based on the fact that these employee work hours can fluctuate based on student attendance.)

Full-Pay Illness Projection = (assignment hours/2) * contract days * earnings factor) * FTE%

Half-Pay Illness Balance

- A regular employee who is assigned for a full year and has accrued fewer than the number of full-pay illness absence hours equivalent to 100 days shall be credited with the number of half pay illness absence days which, when added to the accrued full pay illness balance, equals the equivalent of 100 days of full-pay and half-pay illness absence.
- 100 days is based on the assignment hours multiplied by 100, then multiplied by the FTE%.
- For employees with multiple assignments. The maximum number of illness hours should be 800 hours. If the total number of assignment hours across assignments exceeds 8 hours per days, limit the total illness project (half plus full) to 800 hours.
- For mid-year projections, half-pay illness projection is not pro-rated. The full 100 days (minus the full-pay projection days) is granted.

Half-Pay Illness Projection = (100 * FTE% * assignment hours) – Full-Pay Illness Projection

- If full-pay is more than 100 days, no half-pay is projected.

Employees who are on leave must meet the following criteria

- A certificated employee who is on illness, “act of violence”, workers’ compensation, undetermined leave, mandatory illness leave or disability leave must have one of the following to receive an illness projection.
 - Has full-pay illness balance to carryover, if not separated or
 - Has been returned to service in the new school year. The illness projection may not be used for time prior to the effective date of the return to service or
 - Has been approved for a once-in-a-career extended illness benefit (10 & 90) request.
- A classified employee must meet the following conditions to receive an illness projection

- If on a paid leave, has an illness (full or half-pay) balance or vacation balance carryover or
- Has returned and served in the new school/fiscal year. Illness projection may not be used for time served prior to the effective date of the return to service.
- An employee who is on a paid illness leave of absence is to be continuously time-reported until illness and vacation benefits are exhausted. They may not have unauthorized gaps (absence without approved leave) in a pay period, thereby extending District-paid benefits and allowing them to qualify for the new projection.

ATTENDANCE INCENTIVE PLAN (AIP)

This is an incentive to certain classified and certificated administrative employees to be credited with two (2) additional days of vacation for the first 50 days of illness accumulated on a one-time basis.

Eligibility

PA	PSA	EG	ESG
1BXX, 1CXX, 1EXX, 1SLX, 1LAX, 1SAX, 1SXX, 1SLL, 1LVX, 1LMX, 1VAC, 1VAD, 1VSX, 1VVX, 1VEX, 1YLX, 1ZDX, 1ZSX, 1ZXX, 1ZLX, 1NXX, 1SAS	All except PSA's that start with "X" and "Z"	A, C, D, E, G, H	All ESG's except A2, N1, N2, N3, S1, X2, Z1 & Z2
2MCX, 2MEX, 2MSX, 2MZX	All PSAs that start with "A"	A, C, D, E, G, H	All ESG's except A2, N1, N2, N3, S1, X2, Z1 & Z2

- The employee must be in a vacation earning status that has accumulated fifty (50) (**INDA**) days or more of full-pay illness benefits subsequent to June 30, 1995 or by the prior year of the employee's qualifying year.
- An additional vacation day will be credited for each additional increment of twenty-five (25) days of unused full pay illness benefits. An employee whose full-pay illness absence credit earned subsequent to June 30, 1995 and thereafter, drops below 50 or more days shall not be entitled to additional vacation until they meet their new qualifying goal (**INGO**).
 - a. A vacation-earning employee who accumulates a total of fifty (50) days or more days of full-pay illness absence credit earned subsequent to June 30, 1995 shall, on a one-time basis as of June 30 of the school year in which he or she accumulated those fifty (50) days, be credited with two (2) additional days of vacation. An employee whose full-pay illness absence credit earned subsequent to June 30, 1995, thereafter drops below fifty (50) or more days shall not be entitled to additional vacation under this section, except pursuant to subparagraph (b).
 - b. Each additional increment of twenty-five (25) days of unused full-pay illness absence credit beyond fifty (50) days and earned subsequent to June 30, 1995 shall entitle the employee to one (1) additional vacation day.
- At the option of the appropriate Division Head, B, C and E basis employees may be paid for the additional days of vacation earned in **A** and **B** on the basis of their daily rate of pay during the preceding fiscal year.
- An incentive payment to certain classified employees and certificated administrative employees to be credited with two (2) additional days of vacation on a onetime basis.
- An additional vacation day will be credited for each additional increment of twenty-five (25) days of unused full pay illness benefits. An employee whose full-pay illness absence credit earned subsequent to June 30, 1995 and thereafter, drops below 50 or more days shall not be entitled to additional vacation.
- The Certificated AIP has been suspended since July 1st 2005.

PAID NON-WORKING DAYS (PNWD)

Teacher Assistant employees do not receive vacation and illness benefits like other employees. Instead, they accrue generic days off the called “Paid Non-Working Days” or PNWD.

Eligibility

PA	PSA	EEG	ESG
2FDX 2FNX	XXXX	C	T1

- Paid Non-Working Day is a system of payment in lieu of the paid benefits such as illness, holidays and vacation (Winter/Spring Recess).
- The accrual factor for PNWD is equal to 0.11364 added into the employee’s base hourly rate.
- An eligible employee must be paid the equivalent of 35 days from the beginning of school year in order to qualify.
 - 280 hours for 8-hour employees
 - 210 hours for 6-hour employees
 - 140 hours for 4-hour employees
- Accrued, unused paid non-worked time will be processed for lump-sum payment every 30th of June.

Employees Who Are Qualified to Accrue Paid Non-Working Days

- Certificated Special Services Substitutes

Title
Audiometrist, Sub, D/D
Psychologist, Sub, D/D
Counselor, PSA, Sub, D/D
Psychiatrist Social Worker, D/D
Instr., JROTC, Sub, ext.
Instr., JROTC, Sub, D/D
Instructor, Dvr Sfty, D/D

- Children Center/Development Center Substitutes

Title
Teacher, CC, Sub, D/D, L-T
Teacher, CC, Sub, D/D
Teacher, Dev. Ctr, D/D ext.

Entitlement and Projection

- Employees earn PNWD credit for each hour for which pay is received, excluding relief time (ZT). The PNWD accrual factors are:
 - Degree track employees (2FDX) accrue at 0.0445 hours of credit for each hour paid.
 - Non-degree track employees (2FNX) accrue at 0.0167 hours of credit for each hour paid.

The higher accrual rate for the Degree Track employees (2FDX) becomes effective the first pay period following submission of a certified transcript or valid certificate from the college.

Usage

- The following absence reasons are valid for PNWD:
 - Any legal or school holiday
 - Illness
 - Vacation
 - Personal Necessity
 - Kin Care
 - Jury Duty Service
 - Bereavement
 - Other absences permitted under Article XIII of the Unit F Agreement, except industrial injury/illness and family care leave other than one's own serious health condition.
- PNWD is paid at the employee's hourly rate. This would also include any differentials (example: Bilingual).

Carry Over

- Paid non-work days are NOT carried over from year to year. The employees begin to accumulate at the start of every fiscal year on July 1st.

Payout

- Any accrued, unused time will be paid off in a lump sum after the close of the school year. This payment will be issued in the June pay period payroll run. Furthermore, if all of an employee's assignments are transferred to a non-TA job or terminate the employee's PNWD balance is paid out on the last active day of the TA assignment.
- Employees that move to a non-earning PNWD position will have their accumulated balance paid as a lump sum payment on the next major pay-cycle.
- TAs with perfect attendance will earn 1 PNWD day at the end of the fiscal year, to be included in their PNWD payout. To determine if a TA has perfect attendance, they must work 180 days within the fiscal year. The number of hours in a day is equal to the employee's assigned hours. The PNWD calculation is performed at the assignment level only.

COMPENSATORY TIME-OFF

Compensatory time-off is time-off to be taken in the future in lieu of overtime pay. The use of compensatory time-off in lieu of paid overtime is prohibited for most classified employees. The only current exceptions to this provision are Bargaining Unit A (Sworn Officers) and Unit H (Sergeants and Lieutenants) employees who are authorized to receive a limited amount of compensatory time-off in lieu of overtime pay.

Eligibility

PA	PSA	EEG	ESG
PA = 1AOX, 1SAS & 1SAX	All PSA's except the ones that start with 'X' and 'R'	C, G	All ESG's except A2, N1, N2, N3, S1, X2, Z1 & Z2

The following information is applicable to Unit A and Unit H employees:

- An employee who is eligible for compensatory time-off may request that overtime hours worked (maximum of 130 hours per year) each pay period be credited to a compensatory time-off balance account at the rate of one and one-half (1-1/2) hours for each hour reported.
- Compensatory time cap is at 195 hours per year.
- Once employee reaches the 195 maximum of compensatory time, the employee will automatically be paid overtime.
- An employee who does not want compensatory time-off may elect to receive regular overtime pay.
- An employee will be allowed to use accrued compensatory time-off in conjunction with scheduled vacation, holidays or at other times where such use will not unduly disrupt work schedules.
- Usage of compensatory time is reported as time code "CU."
- The employee's accumulated compensatory time-off balance will be indicated on the payroll pay stub under the heading "COMP BAL" which is located immediately below the illness balance box.
- Any compensatory time accrued but unused shall be paid to the employee as a cash payment every October.
- The rate of pay is at the employee's current hourly rate in effect during the pay period in which it is paid.
- Payment will be processed upon changing from an assignment eligible for compensatory time-off, retirement or separation from the District employment.
- If the employee promotes out of the bargaining unit, the cash payment will be at the rate of the bargaining unit position last occupied.
- Pay code for unused compensatory time lump-sum pay is "CM".
- Gross payments are taxed at current tax flat rate (25% Federal and 6% State) or if paid with additional payment your current tax exemptions.

AVERAGE PAID TIME (APT)

The Education Code states that the District pay part-time classified employees benefit hours based on their average work hours from a previous quarter. Since average work hours can vary from quarter to quarter, APT can be different from one quarter to the next.

Section 45137 of the California Education Code states:

" A classified employee who works a minimum of 30 minutes per day in excess of his part-time assignment for a period of 20 consecutive working days or more shall have his basic assignment changed to reflect the longer hours in order to acquire fringe benefits on a properly prorated basis as specified in Section 45136.

If a part-time employee's average paid time, excluding overtime for which the employee receives compensation at a rate at least equal to time and one-half, exceeds his average assigned time by 50 minutes or more per working day in any quarter, the hours paid per day for compensable leaves of absence and holidays in the succeeding quarter shall be equivalent to the average hours paid per working day in the preceding quarter, excluding overtime."

Eligibility

- Part-time classified employees may qualify if their average work hours are more than their average assigned hours by 50 or more minutes per day within a quarter. A part-time person is someone who works less than seven (7) hours per day.
- Only classified employees are eligible and we will exclude X-basis assignments.
- Working Hours are Regular (RG), Miscellaneous (MS), and Professional Development (PD) time.
- Benefit Hours and all absences including Holiday (HO) time.
- Quota accruals and projections are not affected by this education code.
- Teacher assistants and unclassified assignments are not included in the statute.

Calculation of Benefit Hours

The average assignment hours are a weighted average of assigned time during a three month period. To calculate the average assignment hours, for each day in the quarter, count the days in which time is reported. Exclude days in which the person (across all assignments) is full-time (7 hours or more) and any Z-time worked for each day, accumulate the assignment hours on the day in which time is reported. Then divide by the total number of days with time recorded.

Average Assignment Hours:
$$\bar{A} = \frac{\sum_{i=1}^z A_i}{z}$$

Where Z is the total number of days with time reported, and A is the assignment hours on I.

The Average Working Hours is the sum of all RG, MS, and PD hours divided by the total number of days with RG, MS, and PD reported.

Average Working Hours:
$$\bar{W} = \frac{(RG + MS + PD)}{z}$$

If the average working hours minus the average benefit hours is greater than or equal to 50 minutes [$\bar{W} - \bar{A} \geq 0.83$ (0.83 = 50/60 which is 50 minutes decimalized)] then the average working hours become the new benefit time for the next quarter. Otherwise the assignment's current assignment hours are used for reporting benefit time for the next quarter. The maximum number for an assignment's benefit time is 8 hours.

Example:

Day	1	2	3	4	5	6	7	8	9	10	11
Asg Hrs	4	4	4	4	4	4	4	4	5.5	5.5	5.5
Rprt Hrs	RG 6	RG 1 IL 3	IL 4	UP 4	RG 5	Off	Off	VA 4	VA 5.5	RG 6	MS 4

$$\bar{A} = \frac{4 + 4 + 4 + 4 + 4 + 4 + 4 + 5.5 + 5.5 + 5.5}{9} = \frac{40.5}{9} = 4.5 \text{ Hours}$$

$$\bar{W} = \frac{6 + 1 + 5 + 6 + 4}{5} = \frac{22}{5} = 4.4 \text{ Hours}$$

TRANSPORTATION VACATION BIDDING (VBID)

The Bus Drivers attend a bid they are entitled to receive vacation accrual as compensation. The District is required to give employees (in the below groupings) two hours vacation credit when they attend bids in June and August for a total of 4 hours of vacation credit.

Eligibility

PA	PSA	Job Key
1CXX	All PSA's except the ones that start with 'X' and 'R'	22305804 = Area Bus Supervisor 22305806 = Assistant Area Bus Supervisor 22305826 = Heavy Bus Driver 22305861 = Light Bus Driver 22305864 = Light Bus Driver

The Fleet Maintenance (groupings below) receives vacation accrual for bidding once a year (2 hours).

PA	PSA	Cost Center
1CXX	All PSA's except the ones that start with 'X' and 'R'	9128401

LONGEVITY - CLASSIFIED EMPLOYEES

Regular employees serving in classes and positions designated by the Board, Superintendent, or Superintendent's designee, as being eligible for longevity salary increments shall be paid longevity salary increments after completing the required years of District classified service as follows

Longevity Increment is an incentive paid to classified employees for a specified length of service of ten (10) years or more. The payment schedule varies according to the Collective Bargaining Unit Agreements.

- Eligible employees do not need to apply for their longevity increment. Eligibility for longevity pay is automated and is activated once the employee has completed ten years of service and every five years thereafter.
 - Longevity pay is effective in the beginning of the fiscal year (July 1st) following completion of the qualifying number of years of service.
 - For purposes of computing District years of service, only time paid in regular status in the classified service shall be counted. An employee must have been paid for at least 130 days of assigned time in order to be credited with a year of service.
 - Prior years of service in regular status shall be counted in determining eligibility of an employee who is reinstated or re-employed from layoff.
 - The longevity increment shall be part of the employee's base salary. An employee paid less than eight (8) hours per day or forty (40) hours per week shall receive a proportionate amount of the applicable increment.
 - The longevity increment schedule for years of qualifying District service shall be:
 - \$25 per pay period (equivalent to \$.15625 per hour) after 10 years
 - \$30 per pay period (equivalent to \$.18750 per hour) after 15 years
 - \$35 per pay period (equivalent to \$.21875 per hour) after 20 years
 - \$40 per pay period (equivalent to \$.25000 per hour) after 25 years
 - \$45 per pay period (equivalent to \$.28125 per hour) after 30 years
- ❖ Refer to Collective Bargaining Unit Agreements for longevity increment schedule for Units A and E employees.
- Currently, only employees who belong to Bargaining Units A, B, C, D, E, S (except overtime-exempt employees) and Z are eligible to receive a longevity increment.

Note: The PC rule 580 dated September 8, 2008 is currently under review by the Personnel Commission and will be subject to changes in the future.

MILITARY LEAVE OF ABSENCE (MD)

A military leave of absence is one granted to eligible employees ordered to active military duty.

Requirements for Military Leave of Absence:

- Employees except substitutes or temporary employees (e.g. categorical limited contract teacher, teacher assistant) may be granted a military leave of absence. Substitute and temporary employees will not be placed on military leave, but will be considered as “not available” for a period not to exceed six (6) months. If they have not become available by that time, they will be separated and may reapply after completion of military service.
- Employees must be in active District service or on paid leave at the time of the requested military leave.

Length of Military Leave

- A temporary military leave is provided when the period of military order specifies duty for less than 180 calendar days (6 months), including travel time.
- An indefinite unpaid military leave may be granted up to six (6) months after the employee is discharged from military service.

Request Procedure for Military Leave

The request procedure for military leave is as follows:

- Certificated Employees:
 - Complete Certificated Request for Leave of Absence (Form 1065) and obtain the signature of the immediate administrator.
 - Attach official orders from the appropriate branch of military service to Form 1065.
 - Return completed Form 1065 and attachment to Certificated Assignments and Support Services. The mailing address is:

Los Angeles Unified School District
Certificated Assignments and Support Services
P. O. Box 3307
Los Angeles, CA 90051
Attention: Dept. S, Beaudry Bldg., 15th Floor

- If, due to the urgent nature of the activation, the employee is unable to complete Form 1065, the employee should send a copy of the military orders to the Certificated Assignments and Support Services of the Certificated Employment Operations Branch as soon as possible.
- For certificated employees, refer to Personnel Division Bulletin on the subject of “Military Leaves of Absence for Certificated Employees.”

- Classified Employees:

Note: The Leave of Absence Request for Classified Employees form and supporting documents (if applicable) must be submitted for all leaves over 20 consecutive work days in addition to any workers' compensation paper work. For Laws and Rules on Leaves of Absences, refer to Personnel Commission Rule 803, which can be obtained by visiting the Personnel Commission home page at <http://achieve.lausd.net/Page/2135>.

- Complete Leave of Absence Request for Classified Employees Form 5006 and Request for Military Leave Pay, Form B5048.
- Attach official military order from the appropriate branch of military service.
- Return completed forms and attachment to:

Los Angeles Unified School District
Classified Personnel Assignment Branch
P. O. Box 512298
Los Angeles, CA 90051-0298

- If, due to the urgent nature of the activation, the employee is unable to complete Forms 5006 and Form B5048, the employee should send a copy of the military orders to the Classified Placement Unit of the Classified Personnel Assignment Branch as soon as possible.
- Please refer to the FORMS Section of the manual for samples of military leave forms.

Time Reporting Procedure

- Time reporters or administrators should, as soon as they become aware that one of the employees on their payroll is going on military duty, advise the employee of the documents required to process the leave assignment.
- Absence in connection with military service is to be reported as Military Duty Leave (MD).
- If the employee is required to report on military duty prior to completion of the required forms, report military leave as Unpaid Absence (UP). Once the military order is received and approved by Certificated/Classified Personnel, adjust unpaid military absence to Military Duty Leave (MD).

Return Procedure from Military Leave

- A "Return to District" employment should be within the approved period of leave.
- An employee returning from any military leave or other Government Order Leave of over twenty days shall file with the appropriate Certificated/Classified Personnel Office a "request to return from leave" with official discharge papers.
- After completing military service, the employee will be returned to a position in the employee's classification or to a comparable vacant position for which qualified at the salary to which the employee would have been entitled.

- Failure to report for District duty at the expiration of the time permitted under pertinent education code and military and veteran's code sections is adequate cause for dismissal.

Salary and Benefits

An eligible employee shall be paid regular salary for time on military leave up to:

- Twenty (20) working days for C basis (by location)
- Twenty-two (22) working days for all other basis (by location).
- During the District-paid portion of the military leave, the employee receives all accompanying benefits such as illness accrual, holiday pay, vacation (if eligible) and health and welfare benefits.
- For substitute and temporary employees, pay will be allowed for the number of days worked in the preceding school month in which compensation was earned subject to the above maximum limitation of 20 or 22 working days.

Effects on Benefits

- Time spent on paid and unpaid military leave will count toward salary step advancement for a certificated employee.
- Time spent on the District-paid portion of military leave will count toward retirement service credit.
- District-paid life insurance coverage for an employee on unpaid military leave will not be provided.
- For the employee-paid Optional Life Insurance Plan, an employee on the unpaid portion of military leave may continue coverage for a period not to exceed one year by making direct payments of the appropriate premiums.
- For further assistance concerning health benefits information, contact the Health Insurance Section at (213) 241-4262.

RETIREMENT BONUS (RBX)

A retirement bonus is an incentive bonus payment to an employee who worked during the 1992-93 school year and who retired on or after July 1, 1994 under the State Teachers' Retirement System (STRS), Public Employees' Retirement System (PERS) or the Public Agency Retirement System (PARS).

- The amount of the bonus will correspond to the percentage that the employee's compensation was reduced in the 1992-93 school year based on the employee's salary band for that year.
- An eligible employee in Salary Band 3 will be paid a cash bonus for up to maximum of 20.4 days (10% of his/her annual salary based on a C basis year) for the school year preceding his/her retirement date.
- An eligible employee in Salary Bands 1 and 2 will receive a proportionately lower payment based on the percentage of compensation reduction in the 1992-93 school year (i.e. maximum of 6.12 days, 3% reduction for Band 1 and 19.38 days, 9.5% for Band 2 employees).
- Employees are only eligible for the RBX when they retire and have had continuous service from 92-93 school year with no break in service. RBX payments are not issued to employees who have a separation action after 7/1/1994.
- Any employee that has been separated from the District is not eligible for an RBX.
- A Salary Band 4 employee will receive a bonus based on the maximum rate paid to the highest paid Band 3 employee for the school year preceding the retirement date maximum pay out of 20.4 days.
- An eligible retired employee **does not** need to fill out any forms other than the retirement application and the District resignation forms to apply for the bonus.
- The retirement bonus (coded as RBX) is subject to deductions of Federal, State and other applicable taxes.
- RBX payment is not subject to retirement deductions.
- Payroll Administration will process the RBX payment within 45 working days.
- The retirement bonus payment will automatically be mailed to the employee's official home address.
- Any outstanding overpayments such as salary or illness over-usage will be deducted from retirement bonus payment.

PAY SCALE STRUCTURE

A Pay Scale Structure is essentially an employee’s basic pay attributes. It consists of a class code, bargaining unit, salary table, schedule and step or level of the employee which is then used to pull associated salary.

The Personnel Area and Personnel Subarea are used to default the Pay Scale area on IT0008 (Basic Pay). The Employee Group and Employee Subgroup are used to put together the Employee Subgroup Grouping for PCR (Personnel calculation Rule). This PCR determines how an employee is processed in Payroll. For example, 1=hourly, 3=salaried. The PCR is a pointer or key to salary tables in SAP.

Infotype 0008 – Basic Pay

Subtype	0	Basic contract		
Pay scale				
Reason		Capacity Util. Level	100.00	
PS type	01	Classified	Work hours/period	130.50 Monthly
PS Area	BX	BU B tables	Next increase	
PS group	4700	Level	05	Annual salary 35,471.28 USD

Subtype – Basic contract to represent the record for the employee’s hourly rate or salary amount. LAUSD only uses subtype “0”

Reason – An indicator as to why IT0008 was changed. A blank indicates the record was part of original action.

R1	Step Advance
R2	Rating In
R3	Schedule Advancement
R4	Restoration
R6	Accelerated Hiring Rate
R7	Remove from Star Rate
R9	Delaying Rate In
RA	Career Increment
RF	Rate Forgiveness
RY	Correction
RZ	2.75% Adjustment

PS Type – The highest level of definition for the employee

01	Classified
02	Certificated
03	Unclassified
ZZ	No Pay Scale

PS Area – Represents the salary table the employee is assigned to

AX	BU A tables	SX	BU S Tables
BX	BU B tables	UA	Teachers - THR Table
CX	BU C tables	UC	Teachers - C Table
DX	BU D tables	UD	Spec Svcs - D Table
EX	BU E tables	UL	Teachers - L Table
FX	Teacher Assistants	UT	Teachers - T Table
GX	BU G Tables	UU	Teachers - Sub Table
HX	BU H Tables	VX	BU V Tables
LX	BU L Tables	XX	Unknown
MG	Mgmt - G Table	YX	BU Y Tables
NX	BU N Tables	ZX	BU Z Tables
PJ	Physicians - J Table	ZZ	No Pay scale

PS group – The pay scale group is either the class code for a classified salary table, or the schedule for a certificated salary table.

PS level - The pay scale level represents the step or level from the salary table.

Capacity Util. Level – The capacity utilization level represents the percentage of the salary that the employee should receive.

Work hours/period – This field displays the work hours per pay period for the employee to help in calculating the hourly rate for a salaried employee, or the per pay period average pay for an hourly employee.

Next increase – This field is not used by LAUSD

Annual salary – This field displays a calculated amount that either multiplies the hourly rate by the annual hours, or the monthly salary by 12.

IT0008 Basic Pay Wage types

0001	A Basis Salary
0003	B Basis Salary
0005	C Basis Salary
0007	E Basis Salary
0021	Hourly Rate

DIFFERENTIALS

Salary differentials maybe paid in addition to the employee's regular salary due to:

- An additional earned degree
- Longevity of service
- Extra assignments involving additional duties
- Specialist nurse duties
- Additional responsibilities
- Work location involving additional duties
- Temporary assignment of different duties
- Difference in assigned time

Such differentials may be computed on a pay period; either seasonal, by semester, by session, quarterly, daily, or on an hourly basis. Payment will be made in lump sum following the end of the semester or season or as an additional pay at the end of the pay period.

Differential Salary Rates

A salary differential may be paid for an additional assignment or responsibility per semester, season or pay period.

Assignment Differential

An assignment differential is a supplemental payment to a school-based employee for performing additional duties related to his/her basic assignment.

- Assignment Differential Types:
 - Activity Assignment Differential – may be assigned each semester or season to an employee for service in the areas such as drama, drill team, journalism, student activities, yearbook, etc.
 - Athletics Coaching Differential – may be assigned each season to a secondary school employee for service as an athletic coach.
 - Coordinating Differential for Athletic Coordinator – may be assigned each semester to a secondary employee for school coordinating service in interscholastic athletics.
 - Coordinating Differential – may be assigned each semester to an employee for coordinating service in the areas such as counseling, gifted, health, library, reading, special education, student government, work experience, etc.
 - Bilingual Classroom Teacher Program (BCTP) Differential – A bilingual classroom teacher serving in a designated school participating in a Master Plan program for Limited-English-proficient students shall receive lump-sum differential pay for a full semester of service.
 - Urban Classroom Teacher Program (UCTP) Differential – An urban classroom teacher serving in a designated Educationally Impacted School and fulfilling all program requirements shall receive a lump sum differential payment for a full semester of service or a portion thereof.

- Mentor Teacher Program Differential – An incentive paid to a classroom teacher who assists a District intern or a new and inexperienced teacher at all grade levels.
- Responsibility Differential – A responsibility differential may be granted to an employee for duties regularly assigned to the position, which result in a higher level of responsibility.

Degree Differential

A degree differential is an incentive paid to an employee on the Preparation, Children's Center or Development Center Salary Table who possesses a master's or doctor's degree.

Career Increment Differential

A career increment differential is an incentive paid to a certificated employee on the Preparation (T and L) Salary Table, Children's Center (C) Salary Table, Development Center (V) Salary Table, Special Services (D) Salary Table or Master (G) Salary Table for longevity of service.

Shift Differential

A shift differential is an increase in the regular salary to compensate for differences in assigned time.

- Types of Shift Differentials
 - A Shift - Regularly assigned time is during the day and no differential is authorized.
 - B Shift - One-half or more of the regularly assigned time is between the hours of 5:00 p.m. and 12:00 midnight. A flat-rated employee assigned to work during "B" shift receives a shift differential of five and one-half (5-1/2%) percent above the regular rate of pay.
 - C Shift - One-half or more of the regularly assigned time is between 12:00 midnight and 7:00 a.m. A flat-rated employee assigned to work during "C" shift receives a shift differential of eleven (11%) percent above the regular rate of pay.

Bilingual Differential

A regular employee shall be paid a salary differential for using bilingual skills upon certification from the appropriate superintendent, division or branch head that, in addition to regular duties of the class, the employee is frequently called upon to speak, interpret and write a non-English language or to converse fluently in a non-English language.

Skill or Responsibility Differential

A differential paid to an employee based on the special requirements of a particular position or the authorized use of the employee's special skills. Differential rates vary according to the type of skills required in a particular position.

Premium Tools (Daily Flat Rate)

In recognition of the fact that many unit employees regularly use their own vehicle to haul District materials, tools, supplies and equipment, employees assigned to one of the classes below shall be eligible for "flat rate" mileage in addition to the per mile reimbursement. Flat rate mileage shall be authorized for eligible field assigned employees for each day or part of a day of such used of their personal vehicle. Those eligible employees regularly assigned to shops shall receive flat rate mileage each day their personal vehicle is driven in District service. Rate varies based on a passenger car or station wagon, and for a pick-up truck or van and for the weight of equipment carried (refer to Collective Bargaining Unit Agreement).

Categories of Differentials in SAP

Percentage (%) differentials from Infotype 14/15

WT	DESCRIPTION	PAYROLL AREA	INFOTYPE
1101	U-A Sworn Basic Cert 2%	CL/SM	IT0014
1102	U-A Sworn Intermediate Cert 5%	CL/SM	IT0014
1103	U-A Sworn Advanced Cert 8%	CL/SM	IT0014
1104	U-A SSO Safety Cert 2%	CL/SM	IT0014
1106	U-H SSO Safety Cert 2%	CL/SM	IT0014
1107	U-H Sworn Intermediate Cert 3%	CL/SM	IT0014
1108	U-H Sworn Advanced Cert 7.5%	CL/SM	IT0014
1109	U-H Sworn Supervising Cert 9%	CL/SM	IT0014
1110	U-H Sworn Management Cert 9%	CL/SM	IT0014
1318	Scarcity Differential 20%	CL	IT0014
1319	4% Salary Differential	CL	IT0014
1321	Additional 4% Salary Diff	CL	IT0014
1370	0903 Diff Natl Board Cert	CE	IT0014

Fixed rate differentials from Infotype 14/15

WT	DESCRIPTION	PAYROLL AREA	INFOTYPE
1006	Bilingual(SP,K,RD,WRT)	CL/SM/CE (TA's only)	IT0014
1008	Bilingual (SPEAK ONLY)	CL/SM/CE (TA's only)	IT0014
1015	Teacher Assistant Diff-V	CE	IT0014
1038	Notary Public Diff-Y	CL	IT0014
1046	BAL-SSO 10 yrs Longevity U-A	CL/SM	IT0014
1047	BAM-SSO 15 yrs Longevity U-A	CL/SM	IT0014
1048	BAN-SSO 20 yrs Longevity U-A	CL/SM	IT0014
1049	BAO-SSO 25 yrs Longevity U-A	CL/SM	IT0014
1050	BAP-SSO 5 yrs Longevity U-A	CL/SM	IT0014
1051	BAS-PSA 10 yrs Longevity U-A	CL/SM	IT0014
1052	BAT-PSA 15 yrs Longevity U-A	CL/SM	IT0014
1053	BAU-PSA 20 yrs Longevity U-A	CL/SM	IT0014
1054	BAV-PSA 25 yrs Longevity U-A	CL/SM	IT0014
1055	BAW-PSA 30 yrs Longevity U-A	CL/SM	IT0014
1059	BBA-10 yrs Longevity U-B	CL/SM	IT0014
1060	BBB-15 yrs Longevity U-B	CL	IT0014
1061	BBC -20 yrs Longevity U-B	CL	IT0014
1062	BBD- 25 yrs Longevity U-B	CL	IT0014

WT	DESCRIPTION	PAYROLL AREA	INFOTYPE
1063	BBE-30 yrs Longevity U-B	CL	IT0014
1064	BCA-10 yrs. Longevity U-C	CL/SM	IT0014
1065	BCB-15 yrs. Longevity U-C	CL/SM	IT0014
1066	BCC-20 yrs Longevity U-C	CL/SM	IT0014
1067	BCD-25 yrs Longevity U-C	CL/SM	IT0014
1068	BCE-30 yrs. Longevity U-C	CL/SM	IT0014
1069	BDA-10 yrs. Longevity U-D	CL	IT0014
1070	BDB-15 yrs. Longevity U-D	CL	IT0014
1071	BDC-20 yrs. Longevity U-D	CL	IT0014
1072	BDD-25 yrs. Longevity U-D	CL	IT0014
1073	BDE-30 yrs. Longevity U-D	CL	IT0014
1074	BEA-10 yrs. Longevity U-E	CL/SM	IT0014
1075	BEB-15 yrs. Longevity U-E	CL/SM	IT0014
1076	BEC-20 yrs. Longevity U-E	CL/SM	IT0014
1077	BED-25 yrs. Longevity U-E	CL/SM	IT0014
1078	BEE-30 yrs. Longevity U-E	CL/SM	IT0014
1079	BEF-35 yrs. Longevity U-E	CL/SM	IT0014
1080	BSA-10 yrs. Longevity U-S	CL	IT0014
1081	BSB-15 yrs. Longevity U-S	CL	IT0014
1082	BSC-20 yrs. Longevity U-S	CL	IT0014
1083	BSD-25 yrs. Longevity U-S	CL	IT0014
1084	BSE-30 yrs. Longevity U-S	CL	IT0014
1085	BZA-10 yrs. Longevity U-Z	CL	IT0014
1086	BZB-15 yrs. Longevity U-Z	CL	IT0014
1087	BZC-20 yrs. Longevity U-Z	CL	IT0014
1088	BZD-25 yrs. Longevity U-Z	CL	IT0014
1089	BZE-30 yrs. Longevity U-Z	CL	IT0014
1090	BHA-10 yrs. Longevity U-H	CL/SM	IT0014
1091	BHB-15 yrs. Longevity U-H	CL/SM	IT0014
1092	BHC-20 yrs. Longevity U-H	CL/SM	IT0014
1093	BHD-25 yrs. Longevity U-H	CL/SM	IT0014
1094	BHE-30 yrs. Longevity U-H	CL/SM	IT0014
1095	BHJ Sworn Supervising Cert U-H	CL/SM	IT0014
1096	BHK Sworn Advanced Cert U-H	CL/SM	IT0014
1097	SGT/LT 7 yrs Longevity U-H	CL/SM	IT0014
1098	BLA- Intermd Post Cert	CL/SM	IT0014
1099	BLB - Adv. Postt	CL/SM	IT0014
1105	BH1-5 yrs Longevity U-H	CL/SM	IT0014

Fixed Rate differentials from Time Result (ZL table)

WT	DESCRIPTION	PAYROLL AREA	TABLE
0117	B-Shift	CL/SM	Time
0119	B-Shift OT	CL/SM	Time
0210	ECE & Cld.Dev. Sub. 35 da	CE	Time
0212	Continuity for subs	CE	Time
1500	0916 Diff, JTPAwrk Exprnc	CL	Time

Seasonal and Semester differentials from Infotype 15

WT	DESCRIPTION	PAYROLL AREA	INFOTYPE
0946	Early Declaration Incentive	CE	IT0015
1200	Coach Stipend \$2500	CE	IT0015
1220	Master Teacher Stipend	CE	IT0015
1305	CSMP Stipend	CE	IT0015
1308	Coord Assignment Rate 1	CE	IT2010
1310	Gate Coordinator Diff	CE	IT2010
1311	Coord Assignment Rate 2	CE	IT2010
1330	0963 Diff Bilingual	CE	IT0015
1332	0965 Diff Bilingual	CE	IT0015
1340	Diff UCTP	CE	IT0015
1342	0978 Diff Bilingual	CE	IT0015
1343	0981 Diff Bilingual	CE	IT0015
1350	Stipend BCC Cult Cmp	CE	IT0015
1352	Stipend BCC Meth/Cmp	CE	IT0015
1353	Prof Dev/Train Stip	CE	IT0015
1355	0991 Diff Bilingual MP	CE	IT0015
1357	0994 Diff Bilingual MPrt13	CE	IT0015
1358	0995 Diff Bilingual MPrt14	CE	IT0015
1364	8884 Diff Bilingual MP	CE	IT0015
1366	Master plan Level A	CE	IT0015
1367	8886 Diff Bilingual MP	CE	IT0015
1385	Stdt Wrkr CAHSEE Stipend	CE	IT0015
1386	Diff Lib MDI Tchr	CE	IT2010
1393	Diff Crd ErlyEd Tch4	CE	IT2010
1394	Diff Activity Rate 1	CE	IT2010
1397	Diff Crd ErlyEd Tch8	CE	IT2010
1401	Diff Activity Rate 2	CE	IT2010
1402	Diff Activity Rate 3	CE	IT2010
1403	Diff Activity Rate 4	CE	IT2010

WT	DESCRIPTION	PAYROLL AREA	INFOTYPE
1404	Diff Activity Rate 5	CE	IT2010
1405	Lit Stipnd Train/ProfDev	CE	IT0015
1406	Math Stipnd Train/ProfDev	CE	IT0015
1407	Diff Activity Rate 6	CE	IT2010
1409	Stipend/Training	CE	IT0015
1410	Diff Activity Rate 7	CE	IT2010
1411	BTB Stipnd Train/ProfDev	CE	IT0015
1423	8809 Stipnd Mntor Prn Rt1	CE	IT2010
1424	8810 Stipnd Mntor Prn Rt2	CE	IT2010
1429	8826 NBPTS Incent Tch LPS	CE	IT0015
1430	Diff PAR Program	CE	IT0015
1432	Diff Support Provider	CE	IT0015
1460	8860 Diff. Bilng Mstr Plm	CE	IT0015
1461	8861Diff. Bilng Mstr Plm	CE	IT0015
1462	8862 Diff. Bilng Mstr Plm	CE	IT0015
1464	8864 Diff. Bilng Mstr Plm	CE	IT0015
1465	8865 Diff. Bilng Mstr Plm	CE	IT0015
1501	Advance Placement	CE	IT2010

Job-based differentials initialized with Payroll

WT	DESCRIPTION	PAYROLL AREA	
1320	Diff, Temp Advsr	CE	Job code
1322	8850 Diff Instruct Coach	CE	Job code

Master's and Doctorate differentials

WT	DESCRIPTION	PAYROLL AREA	INFOTYPE
1301	Masters Degree	CE/CL	IT0014
1323	Doctorate Degree	CE/CL	IT0014

SALARY PAYMENTS

Annualization

Annualization is the process of spreading a certificated employee annual salary equally over all pay periods in the fiscal year.

- An annualized employee works less than 12 months but their salary is spread over 12 months. Employees are paid a level amount of money each month regardless of the number of hours worked each month (fiscal year salary / 12 pay periods).
- Worked hours in relation to salary received are tracked and summarized by the system. The amounts are displayed on the remuneration statement as Annualized Status and Hours Summary fields.
- At the end of the fiscal year or when the employee is no longer annualized, the system will “settle” the contract.
- If the employee works all of his/her assigned hours, the settlement should be as closed to zero (rounding issues occurs occasionally).
- If the employee has not worked all of the assigned hours, the employee will have a negative settlement and will be overpaid.
- Subsequently, over the course of a year there is often a difference between what is paid and what is earned. If an employee does not work the required hours, then the system needs to recover the overpayments.

Eligibility

- Eligibility is the term used to define which employee’s assignments may participate in the annualization process. This is the first and highest level of annualization status determination in the system

PA	PSA	ESG
2MSX, 2USX, 2UTE, 2UTK	B***, C***, E***, Except the ones that start with ‘X’ and ‘R’	All ESG’s except S1, T1, Z1, Z2

- See Appendix B: Annualization Eligibility to view the complete list of eligible PA/PSA/ESG combination

Processes associated with Annualization

CASBO Projection

- The California Association of School Business Officials (CASBO) has a recommended method for paying Annualized employees. The main concept is the first pay period salary will be adjusted such that the remaining pay period salaries match the Basic Pay Infotype 0008.
- LAUSD has employed an alternate version of the CASBO formula. The system will check the projected earnable salary for the remainder of the fiscal year and try to pay the employee the basic pay salary from the next period forward but not cause the current pay period to be negative or more than the basic pay.

- If the current pay period salary (after the CASBO projection) turns out to be negative (insufficient), then the employee should be paid as worked.
- Regardless whether the employee will be paid with a zero amount or not, and the remaining monthly pay is equal to their Base Pay from Infotype 0008, employee will be annualized.
- If the salary for the current pay period is more than the pay period salary in the Basic Pay Info-type 0008, then cap the current amount to the pay period salary and spread the difference over the remainder of the fiscal year.
- See Appendix C: Annualization Formulas to see the CASBO Calculation

Late Starter Spread

- Late starter spread is generated when an employee enters Annualization and the current calculated pay period salary (after the CASBO projection) is greater than the salary on the Basic Pay Infotype 0008. In this case, the District only pays the contract pay period salary and spread the excess over the remaining periods in the fiscal year.
- The initial threshold value is set at \$200, which means that if an employee enters the spread process and the total value to be spread is less than this limit, then the spread process is stopped and the full amount is processed in the current payroll.
- See Appendix C: Annualization Formulas to view Late Starter Spread Calculation

Salary Spread

- Salary spread is needed if there is a change in the remaining projected salary for the rest of the fiscal year excluding any possible negative shortfall or positive excess in contract hours. Some examples that will trigger a salary spread are:
 - Salary Change - The system will calculate the projected earnable salary based on the new rate and subtract the projected earnable salary based on the old rate and spread the difference over the remaining pay periods in the fiscal year (including the current pay period).
 - Work Schedule Change - Change of assigned hours from six to three hours per day. The system will prorate the hours going forward that the employee will not be able to earn. The unearned hours multiplied by the hourly rate will give the negative earnings. This negative earning will be spread the difference over the remaining pay periods in the fiscal year (including the current pay period).
- The initial threshold value is set at \$200, which means that if an employee enters the spread process and the total value to be spread is less than this limit, then the spread process is stopped and the full amount is processed in the current payroll.
- See Appendix C: Annualization Formulas to view Salary Spread Calculation

Salary Spread (Positive) Example:

Employee switches from E Basis 6 hour schedule 33d to 34d on October 1, XXXX

Change in salary for fiscal year = total earnable salary for fiscal year – old base salary

Change in salary for fiscal year = \$72,039.15 – 70,468.00 = \$1,571.15

Number of checks to spread increase = 9 checks (includes current check)

Salary spread = \$1,571.15 / 9 checks = \$174.57 per check

Settlement Spread

- The process of closing out an annualization set and collecting the difference between the earned and paid amounts up to the date when the settlement is triggered.
- The settlement spread is applicable to the following:
 - When an employee re-annualizes in the middle of the fiscal year (and therefore remains active).
 - When an employee returns from inactive and the settlement was not previously processed but there is a settlement holding.
- The initial threshold value is set at \$200, which means that if an employee enters the spread process and the total value to be spread is less than this limit, then the spreading process is stopped and the full amount is processed in the current payroll.
- See Appendix C: Annualization Formulas to view Settlement Spread Calculation

Core Hours

A group of attendances and absences (wage types in payroll) which are considered “core work hours”. During payroll processing, all wage types will be checked if they have either of the following two values:

- 1) Hours for Annualization – Wage types with this value will be considered as core work hours. The hours will be evaluated with the contract hourly rate to determine the earned amount. Each earned amount is added to the “earned” bucket.
- 2) Unpaid Absence – Wage types with this value will be evaluated as negative earning when it occurs. There will be no update on “earned” bucket.
(Paid bucket will be reduced by the negative earning.)

Earned vs. Paid Amounts

An annualized employee’s pay stub shows three monetary fields. Below is a brief description of each field:

- Earnings- This amount represents the dollars earned based on the actual hours paid (for the assigned calendar) multiplied by the effective contract hourly rate.
- Paid- This amount represents the actual dollar amount paid including the monthly salary payment and any salary spread amount.
- Difference- This amount represents the difference between the “**Earnings**” amount and the “**Paid**” amount.

For example, suppose a C basis certificated teacher works at a single-track school and earns \$5,000 each month. In August, she would have a “paid” field of \$5,000, but an “earnings” field of \$0, since she did not work in July. The “difference” field would be - \$5000, since earnings-paid = difference.

Half-Pay Illness

When an annualized employee uses their half-pay illness time, they earn half of their contract hourly rate for those hours, but their pay is deducted by an equal amount.

For example, suppose a C basis certificated teacher works at a single-track school and earns \$60,000 annually. Since C-basis employees work 1224 contract hours per year, this would translate into:

- A contract hourly rate of \$49.02 (since \$60,000 per year/1224 hours per year = \$49.02 an hour) and
- A \$5,000 monthly salary (since \$60,000 per year/12 months per year = \$5,000 per month).

Suppose, in September, this teacher works 100 hours and uses 3 hours of half-pay illness time. The teacher’s earnings and payment amounts would be updated as follows:

Earnings for June	Payment for June
=93 hours @ contract rate + 3 hours @ half of the contract rate	=\$5,000 monthly salary – 3 hours @ half of the contract rate
= (93*\$49.02) +(3*.5*\$49.02)	=\$5,000-(3*.5*\$49.02)
= \$4558.82+\$73.53	=\$5,000-73.53
=\$4632.35	=\$4926.47

Unpaid Time

If an annualized employee has unpaid time, there is no adjustment to his or her earnings, but their payment for that month will be reduced accordingly. For example, if the same above employee worked 36 hours in June and had thirty hours of unpaid time for that month, their earnings and payment amounts would be updated as follows:

Earnings for June	Payment for June
=36 hours @ contract rate + 30 hours unpaid time	=\$5,000 monthly salary – 30 hours unpaid time
= (36*\$49.02) + 0	=\$5,000-(30*\$49.02)
=\$1,764.41	=\$5,000-\$1,470.59
	=\$3,529.41

Paid-As-Worked

An employee is paid-as-worked for the following reasons:

- The employee is classified (with the exception of salaried employees).
- The certificated employee is approved for a Reduced Work Load leave and is working one semester on, one semester off.
- The employee is not following a District published calendar.
- There is a future-dated settlement action, such as retirement, that caused HR to request that an Opt-out flag be loaded to prevent the employee from being overpaid.
- The employee has an assignment that started after the beginning of the fiscal year (late start) and the first check calculation amount is negative.

SALARY TABLES

Certificated Salary Tables

PREPARATION (T AND L) SALARY TABLE

The Preparation (T and L) Salary Table is a schedule of payments applicable to Elementary, Secondary and Special Education Teachers, School Counselors, Nurses and Adult Education (class code 0837) Pay Period Rate employees. An employee paid on the Preparation (T and L) Salary Table is assigned to the A, B, or C basis.

- The table indicates monthly and annual salary rates.
- The salary table is based on salary point credits earned/completed training and years of experience.
- The minimum requirements for the Preparation Salary (T and L) Tables are a bachelor's degree, or possession of a Special Secondary Limited Industrial Arts Credential, Special Secondary Vocational Class A Credential, or any Designated Subjects Teaching Credential with Specialization in Vocational Trade and Technical teaching.
- The salary point credits may be granted after completion and submission of additional qualifying university courses or Staff Development Point Projects which enable an employee to advance to a higher salary schedule.
- The steps may be granted based on years of qualifying paid service. A year of school experience is defined as paid service for the number of hours corresponding to at least 130 days during a school year.
- An additional \$584 annually is paid for one or more earned master's degree or an additional \$1,168 for one or more earned doctor's degree based on a C basis assignment.
- An employee with both a master's degree and a doctor's or equivalent degree will receive the \$1,168 differential only.
- An eligible employee allocated to the Preparation (T/L) Salary Table shall receive a career increment after five years of meeting maximum step advancements on Schedule 27 of the Preparation Salary Table, provided the employee has met the multicultural requirement.
- To be eligible for the second career increment, the employee must have been paid on the first career increment for five years while meeting step advance requirements.
- To be eligible for the third career increment, the employee must have been paid on the second career increment for five years while meeting step advance requirements.
- To be eligible for the fourth career increment, the employee must have been paid on the third career increment for five years while meeting step advance requirements.

DAY-TO-DAY SUBSTITUTES SALARY RATES

Substitute salary is a flat rate paid to a substitute employee based on a six (6) hours a day assignment. The basic rate of pay for a substitute employee shall be increased based on the following conditions:

- a) Participation in the District Incentive Plan Program and service in a designated school in the K-12 program (Incentive Plan Rate),
- b) Completion of service equivalent to 130 days during the year (Continuity Rate), or
- c) Continuous service for more than twenty (20) consecutive working days in the same assignment in place of the same absent employee or after 10 consecutive days to an unfilled position in which the substitute opens a class at the beginning of the school year (Extended Rate).

A substitute teacher serving in place of a contract teacher assigned during summer school/intersession is paid at an hourly rate, depending on the hours per day. A substitute employee who serves for more than twenty (20) consecutive working days in place of the same absent employee during summer school/intersession is entitled to extended rate of pay.

DEVELOPMENT CENTER/EARLY EDUCATION CENTER (V AND C) SALARY TABLE

- V Table applies to C basis employees who are assigned at a Development Center
- C Table applies to A and C basis employees who are assigned to an Early Education Center
- The rates indicated are for both annual and monthly payments for full-time employees
- The salary schedule is determined by the number of semester units of credit submitted or completion of a bachelor's degree or completion of requirements for the appropriate teaching credential.
- An eligible C basis employee allocated to either the V or C Salary Table shall receive a career increment differential of \$73.00 per pay period provided the employee has met pay scale level advancement requirements for five or more years while allocated to the maximum pay scale level and pay scale group of the V or C Table, or a higher rate while paid on another salary table.

HOURLY RATE (THR) SCHEDULE

This schedule displays hourly rates for a teacher assigned at a Community Adult School or Occupational Skill Center.

- An adult education employee who is not paid on a pay period rate salary table is paid either on the Hourly Rate (THR) Schedule or the Flat Hourly Rate.
- THR Schedule is a seven-step salary schedule applicable to an adult teacher serving in a certain classification such as an academic instructor, ESL teacher, counselor, adviser, etc.
- A new hourly rate employee and a day-to-day substitute are placed on the first step of the seven-step schedule.

- An employee may advance one step per school year up to Step THR03 of the schedule provided he/she has been paid on the Hourly Rate Schedule for 734 hours during the previous school year.
- An employee can combine two consecutive years of service to reach the required 734 hours for a step advance. The eligibility for this process is that an employee cannot be assigned more than 18 hours per week.
- An employee with at least ten (10) consecutive school years of adult education service is eligible to advance to THR044.
- A Flat Hourly Rate is paid to an adult education employee in charge of staff development, JTPA Work Experience Program, extended teaching assignment, extended counseling/advisement assignment, etc.

PHYSICIANS AND DENTISTS (J) SALARY TABLE

This salary table has a three-step schedule of payments.

- A new physician and dentist are assigned on the first step of the salary table.
- One step advance is granted per school year provided that the number of hours corresponding to 130 full-time days is served the previous year.

SPECIAL SERVICES (D) SALARY TABLE

This schedule is for certificated employees who provide a special service such as a psychologist, psychiatrist, audiologist, physical therapist, audiometrist, social worker, etc. Employees paid on the Special Service (D) Salary Table include those assigned to the A, B, C, and E basis

- The rates indicated reflect annual and monthly salaries.
- An eligible employee allocated to the Special Services Salary Table shall receive a career increment differential because of longevity of service.
- An employee shall qualify for a first career increment differential when the following requirements are met:
 - a) Must be serving under a credential requiring a baccalaureate degree,
 - b) Must have served for at least 14 school years,
 - c) Must have served five (5) school years on the top rate of either a Special Services Salary Table or the Preparation Salary Table (or a combination of both). The five years need not be consecutive, and
 - d) Must have completed the required staff development credits described in the Collective Bargaining Unit Agreement between the District and UTLA.

MASTER (G) SALARY TABLE

This table displays the payment schedule for certificated management positions, including directors, specialists, coordinators, elementary and secondary school principals and assistant principals. Employees paid on the G salary table include those to the A, B, and E basis.

- The salary rates indicated on the G Salary Table reflect annual and monthly salaries.
- An eligible employee paid at the G Salary Table shall receive a career increment differential each month. Applicable differential rate is identified in the Master Salary (G).

- An elementary, secondary school principal and an assistant principal may be eligible to receive responsibility differentials based on student enrollment, compensatory education and urban impact designations.

EXECUTIVE FLAT RATES

Annual contract salary for:

- a) General Superintendent
- b) Deputy Superintendents
- c) Certain Executive Positions

Classified Employees Salary Table

A salary step for a classified employee is a schedule of payment rates applicable to classified employees.

- Includes monthly and hourly rates based on full-time employment, depending on the position.
- A new employee is placed at the lowest step and is paid on the next step after completion of 130 workdays.
- An employee is paid the next step increase each year thereafter until the maximum step is reached.
- A salary differential may be authorized for an employee who uses bilingual skills, who is assigned to other than the day shift or who is assigned certain responsibilities. A differential can be a flat (fixed amount) rate or a percent of the base pay.

For more information, please refer to the Classified Salary schedules at <http://achieve.lausd.net/PC>

Shift Differential

A shift differential is an increase in the regular salary to compensate for differences in assigned time. An employee may be assigned to one of the following shifts:

- A Shift - Regularly assigned time is during the day and no differential is authorized.
- B Shift - One-half or more of the regularly assigned time is between the hours of 5:00 p.m. and 12:00 midnight. A flat-rated employee assigned to work during “B” shift receives a shift differential of five and one-half (5-1/2%) percent above the regular rate of pay. Non-flat-rated employees who work one-half or more of their assigned time between 5:00 p.m. and midnight shall receive a long-term salary differential of one step on the salary schedule for their class/
- C Shift - One-half or more of the regularly assigned time is between 12:00 midnight and 7:00 a.m. A flat-rated employee assigned to work during “C” shift receives a shift differential of eleven (11%) percent above the regular rate of pay. A non-flat-rated employee assigned to work during “C” shift receives a shift differential of two steps on the salary schedule of the respective classification.

Bilingual Differential

A regular employee shall be paid a long-term salary differential for using bilingual skills upon certification from the appropriate superintendent, division or branch head that, in addition to regular duties of the class, the employee is frequently called upon to speak, interpret and write a non-English language or to converse fluently in a non-English language. To qualify for a bilingual differential, the employee must meet non-English language proficiency standards prescribed by the Personnel Commission. The differentials are discontinued upon promotion, demotion, transfer, change of location or any other change of assignment. The differential authorized by this Rule is not available to those employees who use of non-English language skills as a part of the regularly assigned duties of their position has been recognized in the salary allocation of their class. For example, Translators and Interpreters are not eligible for the differential.

Skill or Responsibility Differential

A differential paid to an employee based on the special requirements of a particular position or the authorized use of the employee's special skills. Differential rates vary according to the type of skills required in a particular position.

Unclassified Salary Rates

A schedule of salary rates for an employee who is neither classified nor certificated. The salary for these classifications is a flat rate and is paid by the hour, day, meeting, or session worked.

Most common classes of unclassified assignments paid on this salary table include the following:

- Professional Experts
- Part-time Playground Positions
- Community Representatives
- Forum Lecturers
- Student Aides
- Elected and Appointed Officers
 - (a) Board of Education Members
 - (b) Personnel Commission Members
- Medical Experts

Teacher and Assistants

The salary is a flat rate and is paid by the hour.

Teacher Assistant – Degree Track - New

Teacher Assistant – Non-Degree Track

Teacher Assistant – Degree Track – Continuing

Counseling Assistant

A degree track teacher assistant may be eligible for an additional one-time 5% salary step above his/her base hourly rate following successful completion of 15 qualifying units begun and completed during a 12 month period.

OVERPAYMENTS

An overpayment occurs when one receives monies to which one was not entitled to. In SAP Payroll, the amount owed by the employee to the employer is also called a “claim” and is grouped under a specific wage type. The Los Angeles Unified School District, like many California based employers suppresses or plugs claims following a specific process to defer the negative impact to the employee.

Overpayments have many causes, but in most cases occur as a result of retroactive time adjustments, annualization settlements, Personnel/Human Resources changes to assignments, and salary/deduction corrections.

IDENTIFYING AN OVERPAYMENT

An overpayment is identified by a negative line item in the employee remuneration statement. Most of the time, the negative line item is reflected under “Prior Pay Adjustments”. A positive offset identified as “Adjusted Overpayment” is created to prevent the collection of overpaid amount until the district is able to notify the employee and the response time period specified in the notification has elapsed. The amount of offset may not necessarily be the same as the negative line item because of other adjustments that may have factored in the computation such as retirement and other time adjustments.

NOTIFICATION

When an overpayment occurs, the employee will be notified in writing of the overpayment and given options of repayment. The employee may choose to have the entire overpayment amount deducted from the next pay check, agree to the repayment plan set forth by the District, or request a different repayment plan subject to District approval. The employee must return the repayment agreement within ten working days after the notification date. Repayment responses and requests for research of the overpayment must be sent via fax to Payroll Administration Payroll Customer Services fax number (866) 761-7413. While it may take several weeks to respond to an employee’s request for research, the employee should be aware that collection of the overpayment will begin as stated on the letter.

TAX IMPLICATIONS

All taxes associated with any current year overpayment paid within the year and through automatic payroll deductions are adjusted systematically to produce correct wage and tax statements at the end of the year. Current year overpayments are recovered as gross deductions to the full amount of the overpayment plug and allowed to reduce the employee’s current year taxable gross. Overpayments which occurred in a prior year and are repaid in the current calendar year are recovered as net deductions and are reduced by Social Security and Medicare taxes, if applicable. An Overpayment Remittance Statement will be sent to the employee at the end of the year reflecting the amount repaid in the current year. The Remittance statement may be used to obtain a credit (or deduction in some cases) when filing federal and state tax returns for the current tax return year.

DEDUCTIONS

Payroll Deductions are a set amount deducted from the employee's salary.

The three general types of payroll deductions are:

- A. Mandatory Payroll Deductions - payroll deductions required by law
- B. Voluntary Payroll Deductions
- C. Other Deductions

MANDATORY PAYROLL DEDUCTIONS

Examples of mandatory payroll deductions include:

- 1. Federal and State Withholding Tax
- 2. Medicare Tax, if applicable
- 3. Social Security Tax, if applicable
- 4. State Disability Insurance, if applicable
- 5. Retirement Contributions (STRS, PERS, PARS)
- 6. Agency Fee
- 7. Fingerprints, if applicable

1. Federal and State Taxes

Applicable Federal and State taxes are withheld each time salary is paid to an employee. The employee, upon start of employment must complete and submit his/her federal and state withholding allowance certificates to Payroll Administration Post Processing to enable the district to withhold taxes.

To change existing withholding allowances, the employee may access the Employee Self Service online resource <https://selfservice.lausd.net> to enter changes or submit new forms. Withholding Tax forms for Federal taxes (Form W-4) and State Taxes (Form De-4) are available at www.irs.gov and www.edd.ca.gov.

Mail completed forms to:

Los Angeles Unified School District
Payroll Administration – Deduction Reconciliation
P.O. Box 513307, Terminal Annex
Los Angeles, CA 90051-1307

If the employee expects to owe more taxes than will be withheld, provisions have been made which allow an employee to increase the tax withheld from each salary payment. The procedure is as follows:

- Claim fewer allowances than entitled to or claim zero allowances on line 4 of the W-4 card.
- Request that additional amount be deducted on line 6 in addition to allowance claimed on line 5 of the W-4 form.
- Request that additional amount be deducted on line 2 in addition to allowance claimed on line 1 of the DE-4 form.

Annual withholding tax statements (Form W-2) are distributed to employees on the last week of January. However, information on accumulated gross wages, Federal and State withholding taxes is available on the last warrant stub issued in that calendar year.

Withholding Tax forms for Federal tax (Form W-4) and State Tax (Form De-4) are available at www.irs.gov and www.edd.ca.gov.

2. Medicare Tax

This deduction applies to the following employees:

- Employees hired or rehired after April 1, 1986 (Medicare only)
- Certificated employees hired prior to April 1, 1986 and elected Medicare coverage in September 2001
- PERS members who contribute to Social Security
- PERS members who pay Medicare tax even if the employee is not paying Social Security tax

Rate is calculated at 1.45% of True Gross (including overtime, TSA, differentials).

3. Social Security Tax

This deduction applies to employees who are PERS members.

- Deduction is computed at 6.2% of true gross (including overtime, TSA, differentials)
- District pays matching 6.2% towards the fund
- Maximum taxable amount varies every year

4. State Disability Insurance (SDI)

This applies to employees in the following bargaining units:

- Unit B - Instructional Aides
- Unit C - Operations - Support Services
- Unit D - Office -Technical and Business Services
- Unit F - Teacher Assistants
- Unit S – Some Classified Supervisory Employees

The employee pays for the cost of this insurance through payroll deduction. SDI tax is deducted from salary payments received starting in January of each year up to the maximum set amount, which varies from year to year.

5. Retirement Deductions

A. **State Teachers' Retirement System (STRS)** deductions are contributions to the retirement funds of the following certificated employees:

1. Regular contract certificated employees.
2. Substitute teachers who completed 100 workdays in any given school year.
3. Children/Development Center teachers (Assigned 4 or more hours per day).
4. Adult Education and part-time Adult Education employees who completed 60 hours or 10 days of service in a pay period.
5. Any substitute or part-time certificated employees may elect to become STRS member, if the mandatory membership provisions do not apply. This election is irrevocable.
6. Established members of STRS.

* Please note: As of January 1, 2013, STRS members have two membership categories; Classic and New. The new members' withholding and retirement reporting follow the Public Employees' Pension Reform Act (PEPRA) 2013. A New member is any employee that came into STRS membership on or after January 1, 2013 with no prior service reported.

STRS contributions are collected from the employee's basic assignment and **are not** deducted from the following:

- Retirement Bonus payment
- Attendance Incentive payment
- Mileage
- Lump-Sum Vacation Payment
- Automobile Allowance
- Opt Out

Public Employees' Retirement System (PERS) deductions are contributions to the retirement funds of the following qualifying classified employees:

1. Employees working in a regular assignment for 4 hours per day or more.
2. Substitute or temporary employees that work 1,000 or more hours in a given school year.

PERS contributions are collected from the employee's assignment(s) and **are not** deducted from the following:

- Mileage
- Lump-Sum Vacation payment
- Retirement Bonus payment
- Overtime*
- Any additional assignment over 173.33 hours per month
- Tools differentials

*Employees whose assignment is less than 173.33 per month, will have overtime credited up to 173.33 hours of reported time.

PERS is deducted from the following:

- Salary from a regular assignment up to 173.33 hours per month
- Uniform allowance (Unit A) -Classic Members only

* Please note: As of January 1, 2013, PERS members have two membership categories; Classic and New. The new members' withholding and retirement reporting follow the Public Employees' Pension Reform Act (PEPRA) 2013.

Public Agency Retirement System (PARS) deductions are contributions to the retirement funds of part-time, seasonal, or temporary employees (with exception of student workers). Any employee who is not a member of STRS or PERS automatically becomes a PARS participant, such as teacher assistants, and student aides. PARS

contributions are collected from the employee's gross salary (including overtime, differential).

TAX TABLE UPDATES

To comply with the law, it is the District's standard operating procedure to apply new regulatory bulletins every quarter or as necessary, to reflect new tax rates. The District subscribes to the Business Software, Inc. (BSI) Tax Factory, a tax calculation software that computes payroll taxes to be applied based on complex regulations of the Internal Revenue Service (IRS), Franchise Tax Board (FTB), and Employment Development Department (EDD). This eliminates the burden of tracking regulatory rules manually. The District receives email and notifications via the BSI Tax Update Bulletins (TUB), prompting us of system enhancements related to general taxation, including Federal, State, Social Security, Medicare, Unemployment, and State Disability Insurance (SDI).

Tax Tables are posted for employee reference through the Payroll Administration webpage as shown below.

Payroll Administration

- ▶ Home
- ▶ Calendar / Time Cards
- ▶ LAUSD MyPay
- ▶ Payroll Forms
- ▶ Payroll Information
 - Bargaining Unit Information
 - ▶ SEIU
 - ▶ Retirement Information
 - ▶ Time Reporting and Time Approving Information
- ▶ Resources
- ▶ **W-2/ Tax Info**

Every attempt has been made to ensure accuracy of the 2015 W-2 statement information. However, any employee who feels the information is inaccurate may complete a W-2 Inquiry Form, Attachment B of the 2015 W-2 Wage and Tax Statements, and submit the completed form to the Payroll Support Services office fax (866) 761-7413. If the W-2 is inaccurate, an amended W-2 (W-2c) will be issued.

W-2/Tax Information

- [2015 Wage and Tax Statements](#)
- [2015 General Instructions for Forms W-2 and W-3](#) - Access the IRS's instructions, definitions and codes for W-2 forms
- [2015 State Withholding Tax Table](#) - Access the withholding tax table and tax rate schedules
- [2015 Federal Withholding Tax Table](#) - Access the withholding tax table and tax rate schedules
- [2016 State Withholding Tax Table](#) - Access the withholding tax table and tax rate schedules
- [2016 Federal Withholding Tax Table](#) - Access the withholding tax table and tax rate schedules
- [W-2 Memorandum](#) - This memo provides assistance to employees in understanding their Wage and Tax Statement (W-2) for 2015
- [View and Print your W2](#) - View W2 and reprint W2

Forms

- [How to View and Print Your W2](#) - View W2 and reprint W2 using LAUSD Employee Self Service
- [W-2 Inquiry Form/ W-2 Duplicates](#) - Please use these forms to fax any concerns you may have about your 2015 W-2 Statement
- [W-4 Form](#) - Please use this form to change your Federal tax exemptions
- [DE-4 Form](#) - Please use this form to change your California tax exemptions

Quick Links

- [Internal Revenue Service](#)
- [California Franchise Tax Board](#)

6. Agency Fee

Most employees are represented by exclusive bargaining representatives in matters related to wages, hours, and other terms and conditions of employment. If a member of a bargaining unit does not wish to join the Union, the District processes a mandatory payroll deduction for agency fee.

Below are the exclusive bargaining representatives for different collective bargaining units of employees:

Teachers: UTLA

United Teachers Los Angeles
3303 Wilshire Boulevard, 10th Floor, Los Angeles, CA 90010
(213) 487-5560
<http://www.utla.net>

Certificated and Classified Administrators: AALA

Associated Administrators of Los Angeles
1910 Sunset Boulevard, Suite 510, Los Angeles, CA 90026
(213) 484-2226
<http://www.aala.us>

Unit a (School Police): LASPA

L.A. School Police Association
824 Wilshire Blvd., #10, Los Angeles, CA 90017
(800) 541-9395 or (213) 627-1175
<http://www.laspoa.com>

Unit B (Instructional Aides), Unit C (Operations - Support Services), Unit F (Teacher Assistants) and Unit G (Playground Aides): SEIU (LOCAL 99)

L.A. City & County Service Employees International Union
2724 West Eighth Street, Los Angeles, CA 90005
(213) 387-8393
www.seiu99.net

Unit D (Office - Technical & Business Services): CSEA

California School Employees Association, Los Angeles Chapter 500
1505 Gardena Avenue, Glendale, CA 91204
(818) 244-1545 or (800) 834-9959
www.csea.com

Unit E (Skilled Crafts)

L.A./Orange County Building & Construction Trades Council AFL/CIO
1626 Beverly Boulevard, Los Angeles, CA 90026
(213) 483-4222

Unit H (Sergeant and Lieutenants)

Los Angeles School Police Management Association

2202 S. Figueroa St., #724

Los Angeles, CA 90007

(818) 631-3169

Unit S (Classified Supervisors)

Teamsters Local 572

450 Carson Plaza Drive, Suite A, Carson, CA 90746-3227

(310) 515-0601

www.teamsters572.org

7. Fingerprint Fees

The following employees must be fingerprinted by the Los Angeles Unified School District and receive clearance from the Los Angeles Unified School District prior to reporting for work:

- I. All new employees
- II. All former employees, if their most recent employment with the Los Angeles Unified School District was prior to January 25, 1992.
- III. All former employees who have not worked for the Los Angeles Unified School District within the last 39 months.
- IV. Current employees who were initially hired before January 25, 1992, who are changing their employment status or classification.

The authorization cards to deduct the fingerprinting fees are received and processed by Payroll Administration from HR Credentials, Contracts, and Compliance or from the Classified Employment Transaction Services Branch. The amount deducted for fingerprint fees ranges from \$32.00 to \$88.00.

VOLUNTARY PAYROLL DEDUCTIONS

Voluntary payroll deductions are deductions taken as a result of a specific request by the employee (*see Appendix – Q for details*). Voluntary Payroll Deductions include:

1. Employee Organization Dues

The District shall deduct union dues for bargaining unit members who have the appropriate dues deduction card on file with the Payroll Administration.

Additionally, there are professional organizations that employees may join.

For example: California Association of School Psychologists and Southern California Social Science Association

- Union due is deducted from an employee even if employee is no longer a member of the bargaining unit. It is the responsibility of the employee to submit a cancellation form to terminate the union deduction.

2. Credit Union

There are five Credit Unions available for which district employees may have dollar-amount deductions coming from their payroll.

- The California Credit Union
- Downey Federal Credit Union
- First Financial Federal Credit Union
- LACSE – Federal Credit Union
- Schools First Federal Credit Union

3. Charitable Contributions

Each year, the Los Angeles Unified School District gives back to the community through its annual employee giving campaign. The fundraising efforts encourage employees to donate through payroll deductions. Payroll Giving Cards to set-up, change, or cancel deductions are usually distributed during the campaign period. Currently, there are twelve fund distribution agencies representing over 400 non-profit groups.

- Asian Pacific Community Fund
- Brotherhood Crusade
- Community Health Charities of California
- Earth Share of California
- Kathryn L. Kurka Children's Health Fund
- Auxiliary Services Trust Fund - LAUSD
- The Los Angeles Trust for Children's Health
- United Latino Fund
- United Negro College Fund
- United Teachers Educational Foundation
- United Crusade/United

To enroll, change, or discontinue any type of voluntary payroll deductions, contact the specific office/organization directly. Allow a minimum of four (4) weeks for the requested action to become effective the following pay period.

1. **Tax Shelter Annuities (TSA)**
2. **Flexible Spending (FSA) (Health Care and Dependent Care)**
3. **Flexible Dependent Care Plan**

Tax Shelter Annuities, Flexible Medical Plan and Flexible Dependent Care Plan are handled and maintained by Benefits Administration.

All deductions are on a calendar basis (January - December). The Voluntary Deductions Schedule - Appendix Q identifies the payroll area, the deduction schedule, and frequency per year for voluntary deductions.

OTHER DEDUCTIONS

Health and life insurances are under Benefits Administration. They are only included in this section because they appear in the remuneration statements as components of pay. Employees should contact Benefits Administration at (213) 241-4262 or email benefits@lausd.net for any health and life insurance questions.

1. Health Insurance

District-Paid Health and Welfare deductions are divided into three (3) groups:

1. **Medical Insurance**
2. **Dental Insurance**
3. **Vision Insurance**

Employees may change insurance companies for a given type of deduction only once a year. Health Insurance Section mails out information packages each year to qualified employees that list and compare the various health plan services and benefits available to employees.

A year-round school employee who is off-track and is not paid any salary for an entire pay period does not receive health benefits from the District.

Any questions on Life and Health and Welfare benefits, Flexible Plans claims, qualifications, etc. should be directed to Insurance Section at (213) 241-7362.

2. Life Insurance

Life Insurance deductions are divided into two (2) groups:

1. **District-Paid Life Insurance**. All eligible employees with health welfare benefits and un-benefited employees of Local 99 are entitled to a District-paid life insurance coverage of \$20,000.
2. **Employee-Paid Life Insurance**. Employees who are eligible for health and welfare benefits have the opportunity to purchase Optional Life Insurance coverage up to three times (3x) the employee's annual salary. Optional Life Insurance is updated in April of each year. Contact Health Insurance Section for exceptions.

GARNISHMENTS

Garnishments are deductions taken from an employee's salary following a court order or as demanded by government agencies such as the Franchise Tax Board (FTB), Internal Revenue Service (IRS) and United States Superior Courts.

Reasons for Garnishments:

1. Delinquent Taxes – Federal, State, Property Tax
2. Child Support/Alimony
3. Unpaid Vehicle Registration/ Court Ordered Debt Collection
4. Unpaid Student Loans
5. Civil Judgments

Most garnishments are a percentage of the employee's disposable net. The garnished amount may be anywhere from 15% (student loan) to 50% (support) of disposable earnings. Federal tax levies provide the employee an amount exempt from the levy, after which the remainder of employee's earnings will be garnished. Federal tax levies remain in effect until a release is received from the IRS. Until the District receives a release or termination of the order from the IRS, the employee's pay will continue to be garnished even if the levy is paid in full.

Garnishment orders should only be served to Payroll Customer Services located at 333 S. Beaudry Ave 1st floor.

A release, termination, or modification of the order by the issuing agency can be mailed to Payroll Administration at 333 S. Beaudry Ave 27th floor, Los Angeles, CA 90017 or faxed to (213) 241-8937. The release must be received by Payroll Administration no less than 7 business days prior to the payroll cutoff to be effective for the next pay date. It is the responsibility of the employee to ensure that this document was received by Payroll Administration.

For compliance reasons, if an employee has a garnishment with a set monthly amount, he/she will be unable to receive off-cycle payments. Any payment due to the employee from a previous period will be paid on their next regular pay date.

3. Attach a voided check if the APD is to a checking account, a monthly bank statement showing employee's bank account number if the APD is to a savings account; or bank letterhead showing the employee's bank account number if APD is to any special type of account where the employee does not use checks or receive conventional bank statements. The Warrant Reconciliation Unit at the Payroll Administration Branch will complete Part II of the APD card from this information contained on the deposit slip, statement, or bank letter.
4. When an account is changed, the employee must submit a new APD card, marking the change acct # box, and providing the required attachment for the new account. The new form will supersede previous information.
5. When an APD is to be canceled entirely, the employee must submit an APD card, marking the cancel APD box. No attachments required to cancel.
6. Faxes and e-mails are not accepted.
7. An employee may also walk in to Payroll Customer Services (PCS) located on the 1st floor in the Beaudry Bldg. to fill out and/or drop off the APD form with the required attachment.
8. Signed forms with required attachments may also be submitted via school mail to:
Payroll Administration Branch
Attn: Payroll Accounting Unit
Beaudry Bldg. 27th Floor

Expect the APD to be in effect within one to two pay periods from the time the card is submitted.

B) PAYROLL CARD OR "PAY CARD"

LAUSD has partnered up with the California Credit Union in order to offer exclusively LAUSD employees with the CCU Pay Card. Instead of receiving paper checks each payday, pay will be electronically loaded onto the employees' CCU Pay Card on payday.

The California Credit Union Pay Card offers the following benefits

- No monthly maintenance, minimum balance or reloading fees
- Receive your pay on time, every time – no matter where you are
- Withdraw your entire pay or Cash Out from a CCU ATM or bank branch free of charge
- No checking account or membership required
- Access to over 28,000 fee-free ATMS nationwide
- Make purchases anywhere the Visa[®] logo is accepted - including online transactions

Enrollment is easy. Simply visit www.ccupaycard.org or pick up an enrollment form from Payroll Customer Services, or any CCU branch.

Viewing Your Pay Stub Information:

With APD or the Pay Card, you will be part of LAUSD’s paperless initiative and payment details can be viewed by doing the following:

1. Go to the Employee Self-Service web site (ESS) <https://selfservice.lausd.net> on any computer connected to the internet (on a designated My Pay computer, in your classroom, at home, in a school or public library, etc.)
2. Log in with your single sign on and password.
3. Click on Online Pay Stub you want to print.
4. The District will only issue pay stubs to direct deposit employees that “opt out” of the Districts paperless initiative. To opt out, log on to Employee Self-Service web site <https://selfservice.lausd.net> and click on the Paper Pay Stub Option link from the Overview screen. A step by step instruction on how to opt-out is available in the LAUSD My Pay home page.

The employee’s salary warrant stub will be delivered to the work location or home address.

C) WARRANTS

If an employee elects to receive warrant payments delivered by school mail or U. S. Postal Services, any delay or loss is the responsibility of the employee.

LOST WARRANTS

If an employee has not received a warrant by the end of the payday, the employee must complete a lost warrant affidavit and submit it to Salary Delivery Unit. The affidavit must be signed by the employee, witnessed and verified by the time reporter or site administrator.

If a signed lost warrant affidavit is received by the Salary Delivery Unit by 10:30 a.m. on any day, a replacement warrant will be issued within 3 business days following receipt. Once a stop payment is placed on the original warrant, it cannot be cashed even if it is subsequently received by the employee.

If the stop payment order is rejected by the bank because the warrant has been cashed, the employee will receive a notification of the canceled warrant. A letter of instruction regarding the procedure for filing a forgery affidavit shall be mailed if the employee disputes cashing the warrant. The County Warrant Investigation Office will determine if employee’s claim of forgery is legitimate. If the signature was forged, a duplicate check will be released to the employee by the County Investigator.

VERIFICATION OF IDENTIFICATION

Employees opting to pick-up off-cycle or replacement checks must be prepared to present valid picture identification. The following are acceptable identifications:

- Driver's license
- California ID or Other State ID
- U.S. Passport

CHANGE IN OFFICIAL HOME ADDRESS

Change in "Official Home Address" and/or telephone number must be updated via the Employee Self Service at <https://selfservice.lausd.net>.

If you are unable to access the Employee Self Service, report your changes to Payroll Customer Services by completing Change of Address Request Form or form HR8201. This form is available at all schools and offices, and may be downloaded from <http://achieve.lausd.net/Page/1545>.

It must be filled out completely, signed by the employee and forwarded via school mail to:

Los Angeles Unified School District
Payroll Customer Services
333 S Beaudry, 1st Floor
Los Angeles CA 90017
Or faxed to (866) 761-7413

Forms not completely filled out will be returned.

Salary Warrants or stubs not sent via school mail to pay location will be U. S. mailed to official home address.

A returned salary warrant or stub is forwarded to the employee's current address if the information is provided by the US Postal Services. If there is no current address information available, the Salary Delivery Unit will hold the warrant until the employee contacts the unit.

Stale Dated Warrants

Warrants 6 months and older are considered stale dated. To replace stale dated warrants, the employee will need to fill out an affidavit and submit it along with a letter stating why the warrant was not cashed to Payroll Salary Delivery. The request to reissue shall be forwarded to the Los Angeles County Office of Education (LACOE). The process may take 4-6 weeks depending on LACOE's timeline.

DECEASED EMPLOYEES

The Payroll Administration must be notified promptly by telephone as soon as a school or office is informed of the death of an employee. The telephone number of Payroll Administration is (213) 241-2896. The following information should be provided to Payroll Administration

- Employee's payroll name and employee number
- School/section and location number where the employee last worked
- Employee's status and classification
- Name and address of next of kin, if known
- Date of death

Warrants of Deceased Employees

Under the provisions of California Government Code Section 53245, effective November 13, 1968, an employee should file a Warrant(s) Recipient Designation (Form 60.466) with the Accounting and Disbursements Division, Payroll Administration. The form is available at the Payroll Administration website under Payroll Forms.

On the death of the employee, the person named as designee shall be entitled to receive the warrant(s) that would have been payable to the deceased had he/she survived. Payments made under this section are limited to warrants for salary, mileage, travel expense reimbursement and similar purposes.

The form may show the name(s) of person(s) as designee(s) who may be of any age. Filing the form does not serve to change the beneficiary designated to receive death benefits under the applicable retirement system or any other designation of beneficiary.

All employees should have a "Warrant(s) Recipient Designation" form on file with the Payroll Administration in order to avoid probate for moneys due, in case of death. A new form should be filed if any of the following items have changed:

1. Name of Employee
2. Person(s) named as Designee(s)
3. Address of Employee or Person Named as Designee(s)

If a person is not certain as to whether a Warrant Recipient Designation form has been filed or the information on the form has been updated, a new one should be completed and forwarded to the Payroll Administration.

EMPLOYEE SELF SERVICE (ESS)

The Employee Self Service (ESS) Website was designed to assist employees to:

1. View Time Statements
2. View Online Pay Stubs
3. Update Tax Withholding for W-4 (Federal) and DE-4 (State)
4. Update Address
5. Reprint of W2 starting calendar year 2012

Information on how to access Employee Self Service Website:

Go to <http://achieve.lausd.net/Page/4662>

On the Employee Tools website click on Employee Self Service.

Your User ID is your single sign-on LAUSD email and password

Questions	Answers
ESS Help	
Problem using Employee Self Service website?	Email payrollsupport@lausd.net
Operating System and Browser Requirements for Employee Self Service Website	Read Operating System and Browser Requirement
Time Statement Help	
Step by Step Instruction / Job Aid	<ol style="list-style-type: none"> 1. Click Time Statement link in Home Page 2. Your Time Statement for current month appears. 3. To view other periods, click "Display more Time Statement" link. Read Job Aid
Questions on Time Statement?	Read FAQ and Tips and Tricks
Incorrect Time Entry?	Contact your time keeper
Online Pay Stub Help	
Step by Step Instruction	<ol style="list-style-type: none"> 1. Click Online Pay Stub link in Home page 2. Most recent Pay Stub appears. 3. To view Pay Stub for other periods, click "View Pay Stub for Other periods" link above the pay stub. 4. Click the pay day that you are interested in. Read Job Aid
Questions on how to read Pay Stub?	Read FAQ Visit Pay Stub section of Payroll Website
Incorrect Pay Stub?	Call at (213)241-2570 or fax the Service Request form to (866)761-7413

Latest Payroll Information (Payroll Customer Services Hours, Payroll Calendar)	Visit Payroll Website
Change Tax Withholdings for W-4 and DE-4	
Step by Step Instruction	<ol style="list-style-type: none"> 1. Click Tax Withholdings for W-4 and DE-4. 2. Most recent California and Federal Tax Withholdings are displayed. 3. Click "Edit" button to change your Tax Withholdings. 4. Read the provided document from IRS. 5. Click the message pop-up box in order to continue. 6. Place check mark in "Declaration Box" and click "Review" to continue. 7. Click "Save" button to save the changes. <p>Read Job Aid for detailed instructions.</p>
Problems changing your Tax Withholdings? Questions?	Fax the Service Request form to (866)761-7413 and call Payroll Customer Services at (213) 241-2570
Latest Tax Information	Visit Tax Information of Payroll Website.
Change of Address Help	
Step by Step Instruction	<ol style="list-style-type: none"> 1. Click Change Address and Phone Number link in Home page. 2. Your current district record for home address and phone number appears. 3. Click "Edit" button to change your address and phone number. 4. Click "Review button" to review the changes. 5. Click "Save button" to save the changes. 6. Message will appear, "The changes you made to your Address data were saved". <p>Read Job Aid</p>
Problems changing your address? Questions?	Call ITD Services Desk 213-241-5200 option 6 and then option 7. You may also call Payroll Customer Services at (213) 241-2570.
W2 Help	
Step by Step Instruction	<ol style="list-style-type: none"> 1. Click W2 Reprint link in Home page. 2. Your W2 can be reprinted from 2011-2015. <p>Read Job Aid</p>
Questions on W2 or W2-Corrections?	Visit W2 section of Payroll Website.

PAYROLL CUSTOMER SERVICES

Payroll Customer Services (PCS) has been established to assist all current and displaced District Employees to address a variety of work related questions and to access resources. The goal of PCS is to ensure that each employee receive exceptional customer service, an efficient response to concerns and to resolve payroll inquiries on the first call.

What can PCS do for employees?

Address questions regarding:

- Payroll
- Benefits
- Certificated and classified concerns
- Retirement
- Frequently asked questions

Direct employee to LAUSD online resources regarding:

- District policies and procedures

Other payroll inquiries can also be made by email, fax, mail and face to face.

The contact address:

Payroll Customer Services

LAUSD Administration Building
333 South Beaudry Avenue, 1st Floor
Los Angeles, CA 90017

TELEPHONE SERVICE REQUEST (213) 241-2570

(Hours: 8:00-4:30 pm)

FAX SERVICE REQUEST (866) 761-7413

E-MAIL SERVICE REQUEST payrollsupport@lausd.net

*Please include name and employee number on all written request.

BUSINESS RULES AND POLICY

LACOE Fiscal Monitoring Review Compliance - Payroll System

It is the policy of the District to immediately notify LACOE before a new payroll system is implemented.

When a new payroll system is implemented, the following procedures shall occur:

- The District will initiate an action to obtain Board approval of an anticipated implementation of a payroll system. Board approval shall be obtained prior to allowing any action of consideration that a new system be adopted.
- Upon receipt of Board approval, the District shall notify LACOE in writing within 45 days of consideration for implementation of a new payroll system.
- The District shall consult and involve LACOE of any action that will impact employee pay and the District financial standing.

LACOE Fiscal Monitoring Review Compliance - Signatory

It is the policy of the District to immediately notify LACOE when any authorized signatory such as a board member or employee signatory officer under the authority of Office of the Chief Financial Officer who is authorized to sign orders for employee or vendor warrants on behalf of the District leaves the District.

When a board member or official employee signatory officer leaves the District, the following procedures shall occur:

- The District will notify LACOE in writing within 45 days of the departing board member or employee signatory officer
- The District will initiate an action to obtain Board approval of an amendment to the current Certification Signatures for All Orders document. Board approval shall be obtained prior to allowing a new board member or official employee signatory officer to sign orders for employee or vendor warrants on behalf of the District.

Appendix A: Day to Day Substitute Information (Policy Guide A5)

LOS ANGELES UNIFIED SCHOOL DISTRICT A 5
 POLICY GUIDE ASSIGNMENT
 SERVICE: Certificated DAY-TO-DAY SUBSTITUTE INFORMATION
 ISSUED BY: Pers. Research (12-06-11)
 REPLACES: PG: A 5 (10-11-10)
 REFERENCE: LAUSD - UTLA Collective Bargaining Agreement, Article XIX
 CHANGES: Requires mandatory use of SubFinder system. Compliance with Office of Civil Rights (OCR) Settlement.

Substitute teachers play an important role in providing classroom instruction at the highest level of consistency in the absence of the regular classroom teacher. It is required that teachers and principals identify a list of preferred substitute teachers who will ensure that the quality of instruction for our students remains consistent during the absence of a regular teacher.

All substitute teaching assignments must be filled by utilizing the SubFinder system. Failure to use the SubFinder system for any substitute teaching vacancies at a school site can result in disciplinary action. To review, create, cancel absences and jobs, and to modify preference lists please refer to the [SubFinder Site Administrator Instructions](#).

1. Day-To-Day Assignment Defined. A day-to-day substitute is assigned as needed on a day-to-day basis to replace a regular certificated employee who is absent from service or to fill an unfilled position for which there is no available contract employee. Regular credential or emergency 30 day substitute permits authorize the holder to serve as day-to-day substitute teachers in any classroom, including preschool, kindergarten, and grades 1-12. Permits are valid for one year.
2. Day-To-Day Assignment, Extended. Any day-to-day substitute who serves for more than twenty (20) consecutive working days in the same assignment in place of the same absent employee or in the same unfilled position shall be classified as a day-to-day substitute, extended employee retroactive to the beginning date of the assignment. Also, a substitute teacher who is assigned for ten (10) consecutive days to an unfilled position in which the substitute teacher opens a class in the regular K-12 program. at the beginning of the school year shall be paid at extended substitute rate.
 - a. Days used by the substitute for illness, personal necessity, or bereavement shall not count toward, but shall not constitute a break in, the consecutive working days requirement.
 - b. Upon the termination of the extended assignment, the substitute shall return to, and be paid as, a day-to-day substitute. Should that same substitute, within five (5) working days of the termination date be returned to the previous extended assignment and continue in that same assignment for a minimum of ten (10) additional working days, the substitute shall again be classified and paid as an extended substitute retroactive to the beginning date of the return to the position.
 - c. A substitute may not be released from an assignment as the 21st day approaches, for the sole purpose of preventing the substitute from qualifying for the extended substitute pay rate.
 - d. The school administrator shall certify the service dates for each extended substitute assignment by submitting the Request for Extended Day-to-Day Substitute form ([HR Form 2139](#)), on-line in a current payroll cycle to ensure the substitute is paid correctly and on time for the assignment.

DAY-TO-DAY SUBSTITUTE INFORMATION
A5 (12-06-11)

3. Credential.

- a. Must hold a regular credential or a valid day-to-day permit to teach thirty (30) days or less.
- b. If serving on a day-to-day permit, cannot teach beyond twenty (20) days in a Special Education class.
- c. If in an extended assignment for more than twenty (20) consecutive days, must hold a valid credential for the level/subject to be taught.

4. Preferred Substitute Calling List (Name Request).

- a. Definition. A school's Preferred Substitute Calling List (Name Request List) contains the names and employee numbers of day-to-day substitutes who may be specifically requested for assignment and off-track, year-round school teachers specifically requested for assignment to their home school. In order to be eligible for placement on a school's Preferred Substitute Calling List, the employee must be available a minimum of Monday and Friday, and approved by the site administrator in consultation with the faculty.

In developing a school's Preferred Substitute Calling List, consideration must be given to the substitute's credential and subject matter expertise and prior successful service at the school site. Additionally, substitutes should be identified based on their ability to provide instruction at the highest level of consistency with the regular classroom teacher.

- (1) The procedures described in this guide are not applicable to Child Development, Early Education, or Adult and Occupational Education Division substitutes. These divisions compile their individual calling lists.
 - (2) Name requests for substitutes serving concurrently as Categorical Limited Contract (CLC) teachers may be honored if the combined service meets the minimum Monday and Friday (two days per week) requirement.
- b. Compilation of Preferred Substitute Calling List.

The Preferred Substitute Calling List will be developed cooperatively by the regular faculty and the principal. Priority shall be given to individuals holding a valid regular credential. The principal shall have the responsibility for final approval of the list and the right to add or delete from the list as deemed necessary. The number of names on the list shall not normally exceed the equivalent of one-third of the regular teaching faculty. The approved lists for each school shall include names and employee numbers and shall be posted and a copy distributed to each faculty member.
 - c. Use of Lists.
 - (1) Name requests will be honored by the Certificated Substitute Assignment (CSA) Unit only under the following circumstances:
 - (a) The substitute is requested by name and employee number.
 - (b) The requested substitute has not been previously assigned on the requested day.
 - (c) The name and employee number of the requested substitute is on the school's Preferred Substitute Calling List, and the assignment coincides with the substitute's designated subject fields or grade level availability.
 - (d) The requested day is one of the days of stated availability.
 - (e) The requested substitute is not on the "Standby List".
 - (f) The request was made through SubFinder system.
 - (2) Substitutes whose names appear on the school's Preferred Substitute Calling List shall be called before their regular order for assignment only when they are requested by name and employee number by an absent teacher or the principal/designee from the school. If they are not requested by name and employee number for that particular day, they are called according to their regular calling order priority outlined in Section 6, below.

DAY-TO-DAY SUBSTITUTE INFORMATION
A5 (12-06-11)

5. Assignment Procedures for Substitutes.
 - a. Day-to-day substitutes may apply to only one geographic Service Area (South, Central, or North) for assignment.
 - b. Upon request, day-to-day substitutes will be placed on a calling list within the geographic Service Area, but are subject to assignment to any school within the geographic Service Area. In addition, when necessary, substitutes may be assigned to any school in an adjacent calling area.
 - c. Substitutes must be available for at least two consecutive days per week (Friday-Monday meets the consecutive days requirement). Substitutes who are unable to comply with the consecutive days availability requirement because they are also Categorical Limited Contract (CLC) teachers are exempt from this requirement.
 - d. All initial assignments for substitute teachers, including those who are name-requested, must be requested through SubFinder and come from the CSA Unit.
 - e. The school administrator or designee (not the substitute teacher) shall call the SubFinder system for any extension. For reduction of initial assignment days the administrator or designee must call the CSA Unit and notify the substitute.
 - f. When a substitute receives a Certificated Day-to-Day Substitute Teacher Inadequate Service Report (ISR) ([HR Form 1079](#)) at a school, either the principal or the substitute may request that the substitute not be assigned to that particular school in the future.
 - g. An elementary substitute must be available to teach grades K through 6.
 - h. Separate calling lists will be maintained for Child Development and Early Education Centers.
 - i. A substitute who should have been assigned, but was not assigned due to a clerical error, shall be granted one of the following remedies, at the employee's option:
 - (1) A make-up assignment on a day the employee would not normally be called, such as during winter or spring recess or during summer session; or
 - (2) Cancellation of an "unavailable" charge against the employee.
 - j. Substitutes who are assigned by SubFinder or the CSA Unit have a right to work and be paid for the service they provide whether at the school site to which originally assigned or, if necessary, to an alternate assignment specified by the District. If assigned to an alternate assignment, the substitute shall be reported from the time of arrival at the original school site. If a substitute declines an alternate assignment, the substitute shall not be entitled to pay for that day; however, such substitute shall not receive an "unavailable" charge.
6. Calling Order.
 - a. Substitute teachers shall be called for assignment in the following priority order:
 - (1) Contract Pool (Displaced) Teachers temporarily assigned to substitute pools, and year-round school teachers newly assigned or whose track is changed and who therefore need to make up time in order to complete one full year of retirement service credit.
 - (2) Incentive Plan substitutes. (Currently not in effect)
 - (3) Substitutes requested by name and employee number (Preferred Substitute Calling List), and available year-round school teachers, who are off-track and requested by name and employee number at their home school. The request list is limited to those who are available at least Friday and Monday, and are approved by the school administrator in consultation with the faculty.

DAY-TO-DAY SUBSTITUTE INFORMATION
A5 (12-06-11)

6. Calling Order. (Cont'd)

a. Substitute teachers (Cont'd)

- (4) All remaining openings shall be filled from geographic Service Area pools. Substitutes' names shall be ranked by the date of election to certificated service on separate lists for each pool according to service category (K-6 or a given secondary subject field), and called in the following priority order:
 - (a) Substitutes available five (5) days per week
 - (b) Substitutes available at least two (2) consecutive days per week but less than five (5) days.
- (5) Remaining year-round school teachers who are off-track and not assigned in accordance with (3) or (4) above, off-track teachers not available to substitute at their home school, or teachers on traditional calendars serving as substitutes during unassigned periods.
- (6) Year-round school teachers, who are off-track and available to substitute at least two (2) days per week at their home school, but need not remain available each week of their off-track period. These teachers shall be ranked by their seniority date within the service category (K-6 or a given secondary subject field) for assignment at their home school.

Note: A day-to-day substitute who also serves as a Categorical Limited Contract (CLC) teacher will not be considered to have a break in the consecutive days of service for calling priority.

(7) Standby List. Substitutes on a Standby List shall be assigned by rank by date of election to certificated service within service category - see Section 8.a.

- b. Upon request, substitutes shall be advised of their rank on the calling priority list.
- c. During the summer hiatus and off-track periods for year-round schools (i.e., Z Basis - refer to Agreement, Article IX, Section 10.0), the calling order shall be as described above, but will be restricted to a limited number of substitutes who have volunteered and have been selected for summer duty, again based upon the above priority order.
- d. During emergencies, the above priorities may be temporarily suspended.

7. Unavailability. An "unavailable" will be recorded on the service record each time the substitute:

- a. Refuses an assignment within the geographic Service Area set forth in Section 6.a. above. However, if the call is received before 5:30 a.m. or after 8:30 a.m. or if the call is for an assignment of less than a full day, an "unavailable" will not be charged.
- b. Refuses to accept the extension of an assignment within availability designation. However, a substitute may decline to accept extension of an assignment without penalty as an "unavailable" in any of the following circumstances:
 - (1) If the extended assignment conflicts with a previous commitment by the substitute for a different name-requested assignment; or
 - (2) If the substitute has already served ten (10) consecutive days in the assignment; or
 - (3) If the assignment is for a subject field other than that designated on the availability form.
- c. Fails to answer the telephone personally between 5:30 a.m. and 8:30 a.m. In the case of Children's Centers, the hours are 7:30 a.m. to 9:30 a.m.
- d. Is unreachable by telephone during two attempted calls within the hours specified in c. above.
- e. Declares unavailability. However, if the substitute satisfies the District that the unavailability was for more than one day because of a continuing illness (or compelling personal reason), only one "unavailable" will be charged for that period.

DAY-TO-DAY SUBSTITUTE INFORMATION A5 (12-06-11)

8. Standby Lists.
 - a. A substitute may be changed from any higher priority to a Standby List for the following causes:
 - (1) Ten (10) "unavailables" in any one semester or four (4) "unavailables" during summer session from July 1 through the start of the fall semester (three (3) in any intersession period for a year-round school teacher substituting during his/her off-track period).
 - (2) Receipt of a second Inadequate Service Report (ISR) in any one semester or summer session from July 1 through the start of the fall semester.
 - (3) Receipt of a second report of late arrival in any one semester or summer session from July 1 through the start of the fall session, which has been determined to be the fault of the substitute.
 - b. Names of substitutes on the Standby List shall be called after all other available substitutes have been assigned. Name requests will not be honored for those on the Standby List. A substitute who is placed on the Standby List shall be given immediate notice thereof and an opportunity for prompt administrative review by the administrator in charge of the CSA Unit. Such review shall be without prejudice to any rights the substitute may have under the grievance procedure. After a period equivalent to six (6) working months, a substitute on the Standby List may be returned to a regular priority, provided that he/she does not receive an Inadequate Service Report (ISR) during that period.
 - c. Each school shall post and distribute to teachers a copy of its substitute Preferred Substitute Calling List (Name Request List) and a copy of the list of off-track teachers (if any) available to substitute during their off-track period. These lists shall include the teacher's employee number to ensure that the proper substitute is requested and assigned.
9. Commendation

The school administrator should memorialize substitute employee's outstanding performance by commendation by completing the Certificated Day-to-Day Substitute Teacher Commendation Report ([HR Form 1081](#)).
10. Late Arrivals.

If a substitute cannot reasonably expect to reach a school before class begins, he/she must notify the CSA Unit upon receiving the assignment call and must also attempt to call the school.

If a regularly assigned teacher in a secondary school is providing replacement service for the class of a late arrival substitute, the regularly assigned teacher may complete the period of replacement service if one-half of the period has already been completed.
11. Time Reporting.
 - a. A substitute teacher must serve a full teaching day to receive a full day's pay. Time should be reported to the nearest tenth of an hour (6 minutes) from the time instruction begins.
 - b. A substitute who serves a full day shall be time-reported for the same number of hours as the employee for whom he/she is substituting. A substitute who is assigned duties beyond the regular assignment for which the regular employee is compensated (e.g., UCTP duties) shall be time reported for the full time of the additional assignment.

DAY-TO-DAY SUBSTITUTE INFORMATION A5 (12-06-11)

11. Time Reporting. (Cont'd)

- c. Service for less than a full day will be compensated proportionately unless the late arrival is due to a late call from SubFinder or the CSA Unit which does not permit the substitute to reach the school before class begins. If the substitute has complied with the provisions of Section 10 above, and the school confirms the time of the Unit's call, the substitute will be given an opportunity to make-up the late time (up to a maximum of one hour) at the end of the school day.
- d. A substitute who is assigned for less than a full teaching day, but was not so informed at the time of the assignment offer (and it was not otherwise apparent), shall be entitled to a full day's pay provided that he/she performs other duties as assigned for the balance of the workday. For example, if it is determined that a substitute was not informed of a half-day assignment, the substitute will be permitted to serve and be paid for a full day. The school must confirm the terms of the assignment offer with the CSA Unit.

12. Release from Assignment.

Any employee serving as a substitute may be released from a particular substitute assignment by the immediate administrator or designee at the end of any working day. The Daily Time Report for Substitutes which is completed by the school administrative assistant or designee, reflects hours worked, and indicates whether the substitute has been held over or released from the assignment. This procedure shall not be applicable to substitutes serving in extended substitute assignment status.

13. Termination. Although there are no legal constraints that restrict the dismissal of a substitute, District practice is that a substitute will usually be terminated based upon, but not limited to, an unsatisfactory act, criminal activity, issuance of Inadequate Service Report (ISR), expiration of permit of credential, out of compliance with Child Abuse Awareness Training (CAATS), or non-availability.

14. Duties. A substitute is expected to perform in a competent manner all of the regular instructional duties of the absent teacher and other duties reasonably assigned by the principal. Failure to satisfactorily perform these duties may result in an Inadequate Service Report (ISR). Instructional and other duties include but are not limited to:

- a. Arrive at school on time (substitutes should be ready to leave home immediately upon receiving an assignment) and remain on site for the full day;
- b. Present the Payroll Authorization Card to the principal or school administrative assistant/office manager and report the name of the absent teacher;
- c. Review lesson plans for the day, if available. If no plans are available, determine areas currently being studied and the activities to be pursued;
- d. Account for pupil attendance as prescribed by the school;
- e. Conduct class and enforce rules in accordance with school and Board of Education policies;
- f. Perform classroom and special duties as assigned (e.g., lunch, hall, yard duty, etc.). Such special duties may be assigned either during or outside normal conference periods;
- g. Leave classroom in good order with a summary of the day's accomplishments;
- h. Inform the principal or office staff when ready to leave the school at the completion of the assignment.

DAY-TO-DAY SUBSTITUTE INFORMATION A5 (12-06-11)

15. Substitute Photo Identification Card. The Photo Identification card serves as identification and authorizes time reporter to report time to Payroll.
 - a. In the event a substitute reports to the school without his/her Photo Identification Card, the school administrator shall make every effort to verify the substitute teacher's assignment with the CSA Unit before permitting the employee to work.
 - b. If an original Photo Identification Card is lost, a substitute must request a replacement card from the CSA Unit.
16. School Site Responsibility.
A substitute shall be provided with the information needed to perform the duties of the position, including but not limited to student attendance information, lesson plans, class roster, appropriate keys, seating charts, and security and emergency plans.

DAY-TO-DAY SUBSTITUTE INFORMATION

Anticipated Time: Because anticipated time cannot be reported for substitute teachers, approved time worked at the end of each month will be paid on the next pay date for the following month or the next off-cycle pay date scheduled.

Appendix B: Annualization Eligibility

Personnel Area	Personnel Subarea	Employee Subgroup exception
2MSX	BGXX	S1, Z1 &Z2
2MSX	BSXX	S1, Z1 &Z2
2MSX	EGXX	S1, Z1 &Z2
2MSX	ESXX	S1, Z1 &Z2
2USX	BFXX	S1, T1,Z1 & Z2
2USX	BGXX	S1, T1,Z1 & Z2
2USX	BSXX	S1, T1,Z1 & Z2
2USX	CFXX	S1, T1,Z1 & Z2
2USX	CGXX	S1, T1,Z1 & Z2
2USX	CSXX	S1, T1,Z1 & Z2
2USX	EFXX	S1, T1,Z1 & Z2
2USX	EGXX	S1, T1,Z1 & Z2
2USX	ESXX	S1, T1,Z1 & Z2
2UTE	CFXX	S1, T1,Z1 & Z2
2UTE	CGXX	S1, T1,Z1 & Z2
2UTE	CSXX	S1, T1,Z1 & Z2
2UTK	BFXX	S1, T1,Z1 & Z2
2UTK	BGXX	S1, T1,Z1 & Z2
2UTK	BSXX	S1, T1,Z1 & Z2
2UTK	CFXX	S1, T1,Z1 & Z2
2UTK	CGXX	S1, T1,Z1 & Z2
2UTK	CSXX	S1, T1,Z1 & Z2
2UTK	EGXX, ESXX	S1, T1,Z1 & Z2

Appendix C: Annualization Formulas

Input:	Rate Calculations
<p>X = Pay Period Salary</p> <p>Y = Daily Contract Hours</p> <p>Z = Number of Contract Days in Fiscal Year for Basis</p> <p>D = Master and/or Doctorate Differential</p> <p>N = Total number of pay periods in Fiscal Year</p>	
<p>Output:</p> <p>A = Hourly Contract Rate (wage type /004)</p> <p>B = Total Hourly Rate (wage type /005)</p>	
<p>Formulas:</p> $A = (X * N) / (Y * Z)$ $B = A + D$	
<p>Notes:</p> <ul style="list-style-type: none">➤ Wage types 0003, 0005, 0006, 0007 and 0009 are taken from the payroll input table and used to determine the pay period salary.➤ The Job key is from Organizational Assignment Infotype (0001) of the personnel assignment and used to determine the daily contract hours of the job through Infotype 1010 (Maximum daily hours).➤ Depending on the Personnel Subarea of Infotype 0001, the Basis is determined and the fiscal year 'contract days' constants are used.➤ Master/Doctorate Differential is determined at the start of the pay period.	

CASBO Calculation

Components:

Earnable Salary = (Contract Salary / Contract Hours) * (Remaining Hours in the FY)

Salary on Remaining Periods = (Pay Period Salary on Basic Pay Infotype) *
(Remaining Pay Periods in Fiscal Year)

Input:

X = Earnable Salary

Y = Salary on Remaining Periods

Z = Pay Period Salary on Basic Pay Infotype (0008)

Output:

F = Pay period salary when entering annualization

Formula:

$F = \min \{ \max [(X - Y), 0], Z \}$

Notes:

- Remaining Hours in the Fiscal Year – this is the number of hours in the employee’s work schedule from a specific date to the end of the fiscal year. This is also called “anticipation” of hours in the fiscal year.
- Remaining Pay Periods do not include the current pay period
- If X is less than Y, employee will be paid as worked (i.e. hourly).
- If the remaining earnable salary is 0, then switch to PAW (June)

Late Starter Spreading

Input:

A = projected earnable salary for remainder of fiscal year

B = CASBO projection for remaining pay periods in year

C = pay period salary (contract salary divided by pay periods in year)

D = number of pay periods remaining in fiscal year excluding current one

Output:

LSS = late starter spreading per pay period for remainder of FY (including current period)

Formula:

$LSS = \max [(A - B - C), 0] / (D + 1)$

	Projected Z-time
<p>Input:</p> <p>S = scaling factor {(new daily hours * new FTE) / (old daily hours * old FTE)}</p> <p>A = current YTD planned hours (wage type 4017)</p> <p>B = projected planned hours remaining in the fiscal year</p> <p>C = total fiscal hours for current basis (wage type 4006)</p> <p>Output:</p> <p>Z = projected Z-time hours</p> <p>Formula:</p> <p>$Z = \max [(S * A) + B - C, 0]$ [only project positive hours]</p> <p>FTE is the field from Infotype 0007 and when it is 0 it is replaced with 1 in the formula.</p>	

	Salary Spreading
<p>Input:</p> <p>S = scaling factor {(new daily hours * new FTE) / (old daily hours * old FTE)}</p> <p>A = old hourly rate</p> <p>B = new hourly rate</p> <p>C = projected planned hours remaining in the fiscal year</p> <p>D = number of pay periods remaining in fiscal year excluding current one</p> <p>Z = projected Z-time hours (total)</p> <p>Output:</p> <p>SLS = salary spread per pay period</p> <p>Formula:</p> <p>$SLS = (C - Z) * (B - A/S) / (D + 1)$</p> <p>FTE is the field from Infotype 0007 and when it is 0 it is replaced with 1 in the formula.</p>	

Input:

A = settlement amount

B = number of pay periods remaining in fiscal year excluding current one

Output:

STS = settlement spread per pay period

Formula:

$$STS = A / (B + 1)$$

Settlement Spreading

Appendix D: Vacation Accrual Rates

VAC CODE	A	I	I	C	C	F	B	B	D	E	G	H	J	K	N	M
Accrual Rate	0.09232	0.08462	0.08462	0.07663	0.07693	0.06923	0.07693	0.07693	0.07308	0.06923	0.06539	0.06155	0.05770	0.03846	0.04087	0.04379
District Year of Service	Executive Classes	24 and up	24 and up	19 and up	19 and up	0 - 18	19 and up	19 thru 23	18	17	16	15	4-14	0-3 < 35 hrs/wk > 40 hrs/wk	0-3 37.50 - 39.50 hrs/wk	0-3 35 - 37 hrs/wk
1AOX							x		x	x	x	x	x	x	x	x
1APW							x		x	x	x	x	x	x	x	x
1APX							x		x	x	x	x	x	x	x	x
1ASX							x		x	x	x	x	x	x	x	x
1BXX							x		x	x	x	x	x	x	x	x
1CXX							x		x	x	x	x	x	x	x	x
1DPX							x		x	x	x	x	x	x	x	x
1DTX							x		x	x	x	x	x	x	x	x
1DXX							x		x	x	x	x	x	x	x	x
1EXX							x		x	x	x	x	x	x	x	x
1LAX	x															
1LJX	x															
1LMX	x															
1LVX	x															
1NAX																
1NXX																
1SAS							x		x	x	x	x	x	x	x	x
1SAX							x		x	x	x	x	x	x	x	x
1SLL	x															
1SLX							x		x	x	x	x	x	x	x	x
1SXX							x		x	x	x	x	x	x	x	x
1VAC	x															
1VAD	x															
1VEX	x															

VAC CODE	A	I ¹	I ²	C ³	C ⁴	F	B	B ⁵	D	E	G	H	J	K	N	M
Accrual Rate	0.09232	0.08462	0.08462	0.07663	0.07693	0.06923	0.07693	0.07693	0.07308	0.06923	0.06539	0.06155	0.05770	0.03846	0.04087	0.04379
District Years of Service	Executive Classes	24 and up	24 and up	19 and up	19 and up	0 - 18	19 and up	19 thru 23	18	17	16	15	4-14	0-3 < 35 hrs/wk > 40 hrs/wk	0-3 37.50-39.50 hrs/wk	0-3 35 - 37 hrs/wk
1VJX	x															
1VSX	x															
1VVX	x															
1YLX	x															
1ZDX							x		x	x	x	x	x	x	x	x
1ZLX	x															
1ZSX							x		x	x	x	x	x	x	x	x
1ZXX							x		x	x	x	x	x	x	x	x
2MCX	x															
2MEX		x	x		x	x		x								
2MSX		x	x		x	x		x								
2MZX		x	x		x	x		x								
2PXX				x	x	x										
2USX				x	x	x										
2UTA				x	x	x										
2UTE				x	x	x										
2UTH				x	x	x										
2UTK				x	x	x										

¹2M* effective from 7/1/2007 to 6/30/14 only

¹2M* effective after 7/1/14

¹2U* & 2P* effective after 10/1/2009

¹2M* effective before 7/1/2007. 2U* & 2P* effective before 10/1/2009

¹2M* effective from 7/1/2007 to 6/30/14 only

²2M* effective after 7/1/14

³2U* & 2P* effective after 10/1/2009

⁴2M* effective before 7/1/2007. 2U* & 2P* effective before 10/1/2009

⁵2M* effective after 7/1/14

¹2M* effective after 7/1/14

Appendix E: Illness Projection Values by Personnel Subarea

Personnel Subarea	Personnel Subarea Description	No of Days	6/DAY	0.05 (Accrual Factor)	8/DAY	0.05 (Accrual Factor)
AAXX	A-Basis/ Adult	260	1560	78.00	2080	104.00
AFXX	A-Basis/ Four-Track	260	1560	78.00	2080	104.00
AGXX	A-Basis/ General Calendar	260	1560	78.00	2080	104.00
AJXX	A-Basis/ Job Cost Calendar	260	1560	78.00	2080	104.00
BAXX	B-Basis/ Adult	221	1326	66.30	1768	88.40
BFXX	B-Basis/ Four-Track	221	1326	66.30	1768	88.40
BGXX	B-Basis/ General Calendar	221	1326	66.30	1768	88.40
BJXX	B-Basis/ Job Cost Calendar	221	1326	66.30	1768	88.40
BSXX	B-Basis/ Single-Track	221	1326	66.30	1768	88.40
CAXX	C-Basis/ Adult	204	1224	61.20	1632	81.60
CFXX	C-Basis/ Four-Track	204	1224	61.20	1632	81.60
CGXX	General Calendar/ C-Basis	204	1224	61.20	1632	81.60
CJXX	C-Basis/ Job Cost Calendar	204	1224	61.20	1632	81.60
CSXX	C-Basis/ Single-Track	204	1224	61.20	1632	81.60
EAXX	E-Basis/ Adult	234	1404	70.20	1872	93.60
EFXX	E-Basis/ Four-Track	234	1404	70.20	1872	93.60
EGXX	E-Basis/ General Calendar	234	1404	70.20	1872	93.60
EJXX	E-Basis/ Job Cost Calendar	234	1404	70.20	1872	93.60
ESXX	E-Basis/ Single-Track	234	1404	70.20	1872	93.60
FFXX	F-Basis/Four-Track	247	1506	75.30	2008	100.40

Appendix F: Mileage Rates by Personnel Area

PA	DESCRIPTION	How Mileage Rates are Determined
1AOX	AA-Safety (Detectives & Officers)	Union Agreement
1APW	AA- Plant Security Aide Weekends	Union Agreement
1APX	AA- Misc (Plant Security Aides)	Union Agreement
1ASX	AA- School Safety Officers	Union Agreement
1BXX	BB- Instructional Aides	Based on IRS Standard Mileage Rates
1CXX	CC- Operations Support Svcs	Based on IRS Standard Mileage Rates
1DPX	DD- Student Integration Helper	Based on IRS Standard Mileage Rates
1DTX	DD- TV Studio Assistant	Based on IRS Standard Mileage Rates
1DXX	DD- Office, Technical and Bus Svcs	Based on IRS Standard Mileage Rates
1EXX	EE- Skilled Crafts	Based on IRS Standard Mileage Rates
1LAX	LL- Safety (Captain)	Based on IRS Standard Mileage Rates
1LJX	JJ-Classified Management (AALA) I	Based on IRS Standard Mileage Rates
1LMX	LL- Classified Management	Based on IRS Standard Mileage Rates
1LVX	VE- Executive Officer, Board of Education	Based on IRS Standard Mileage Rates
1NAX	NN- Safety (Security Officer)	Based on IRS Standard Mileage Rates
1NXX	NN- Classified Non-represented	Based on IRS Standard Mileage Rates
1SAS	HH- Supervising School Safety Officer	Based on IRS Standard Mileage Rates
1SAX	HH- Safety (Lieutenants & Sergeants)	Based on IRS Standard Mileage Rates
1SLL	SS- Classified Supervisory O/T Exempt	Based on IRS Standard Mileage Rates
1SLX	SL- Classified Supervisory - SDI Exempt	Based on IRS Standard Mileage Rates
1SXX	SS- Classified Supervisory	Based on IRS Standard Mileage Rates
1VAC	VS- Safety Chief of Police	Based on IRS Standard Mileage Rates
1VAD	VV- Safety Deputy Chief	Based on IRS Standard Mileage Rates
1VEX	VE- Classified Exec Management-JR	Based on IRS Standard Mileage Rates
1VJX	JJ-Classified Management (AALA) High	Based on IRS Standard Mileage Rates
1VSX	VS- Classified Exec Management-SR	Based on IRS Standard Mileage Rates
1VVX	VV- Classified Exec Management	Based on IRS Standard Mileage Rates
1YLX	YL- Program Analyst IAU, Director of Budget Financial Policy and Director of Ed. Policy	Based on IRS Standard Mileage Rates
1ZDX	ZD- Bargaining Unit D Confidential	Based on IRS Standard Mileage Rates
1ZLX	ZZ- Classified Confidential O/T Exempt	Based on IRS Standard Mileage Rates
ZSX	ZS- Classified Confidential Supervisory	Based on IRS Standard Mileage Rates
1ZXX	ZZ- Classified Confidential	Based on IRS Standard Mileage Rates
2FDX	FF- Teacher Assistants (Degree)	Based on IRS Standard Mileage Rates
2FNX	FF- Teacher Assistants (Non-degree)	Based on IRS Standard Mileage Rates
2MCX	MM- Certificated Contract Management	Based on IRS Standard Mileage Rates
2MEX	MM- Certificated Exec Management	Based on IRS Standard Mileage Rates
2MSX	MS- Certificated Management Supervisory	Based on IRS Standard Mileage Rates
2MZX	MZ- Certificated Management Confidential	Based on IRS Standard Mileage Rates
2PXX	PP- Physician	Based on IRS Standard Mileage Rates
2USX	UU- Support Services	Based on IRS Standard Mileage Rates
2UTA	UU- Teachers (Adult)	Based on IRS Standard Mileage Rates

2UTE	UU- Teachers (ECE)	Based on IRS Standard Mileage Rates
PA	DESCRIPTION	How Mileage Rates are Determined
2UTH	UU- Teachers (Home School)	Based on IRS Standard Mileage Rates
2UTK	UU- Teachers (K12/Sp Ed)	Based on IRS Standard Mileage Rates
3GXX	GG- Playground Aides	Based on IRS Standard Mileage Rates
3NBP	NB- Playground Supervisors Non-represented	Based on IRS Standard Mileage Rates
3NBX	NB- Community Representatives	Based on IRS Standard Mileage Rates
3NMX	NP- Medical Experts	Based on IRS Standard Mileage Rates
3NPX	NN- Prof Experts	Based on IRS Standard Mileage Rates
3NSX	NN- Student Workers	Based on IRS Standard Mileage Rates
3NXX	NN- Unclassified Non-represented	Based on IRS Standard Mileage Rates
3YPX	YY- Personnel Commission Member	Based on IRS Standard Mileage Rates
3YYX	YY- Board of Education Member	Based on IRS Standard Mileage Rates

Appendix G: Overtime - Personnel Commission Rule 596LOS ANGELES UNIFIED SCHOOL DISTRICT
PERSONNEL COMMISSION

LAW AND RULES

596
(Reissue) August 4, 1986

596 OVERTIME

Education Code 45127

The workweek of a classified employee, as defined in Section 45103 or Section 45256, shall be 40 hours. The workday shall be eight hours. These provisions do not restrict the extension of a regular workday or workweek on an overtime basis when such is necessary to carry on the business of the district. Nothing in this section shall be deemed to bar the district from establishing a workday of less than eight hours or a workweek of less than 40 hours for all or any of its classified positions.

Notwithstanding the provisions of this section and Section 45128, a governing board may, with the approval of the personnel commission, where applicable, exempt specific classes of positions from compensation for overtime in excess of eight hours in one day, provided that hours worked in excess of 40 in a calendar week shall be compensated on an overtime basis. Such exemption shall be applied only to those classes which the governing board and personnel commission, where applicable, specifically find to be a subject to fluctuations in daily working hours not susceptible to administrative control, such as security patrol and recreation classes, but shall not include food service and transportation classes.

This section shall apply to districts that have adopted the merit system in the same manner and effect as if it were a part of Article 5 (commencing with Section 45240) of this chapter.

Education Code 45128

The governing board of each district shall provide the extent to which, and establish the method by which ordered overtime is compensated. The board shall provide for such compensation or compensatory time off at a rate at least equal to time and one-half the regular rate of pay of the employee designated and authorized to perform the overtime.

Overtime is defined to include any time required to be worked in excess of eight hours in any one day and in excess of 40 hours in any calendar week. If a governing board establishes a workday of less than eight hours but seven hours or more and a workweek of less than 40 hours but 35 hours or more for all of its classified positions or for certain classes of classified positions, all time worked in excess of the established workday and workweek shall be deemed to be overtime. The foregoing provisions do not apply to classified positions for which a workday of fewer than seven hours and a workweek of fewer than 35 hours has been established, nor to positions for which a workday of eight hours and a workweek of 40 hours has been established, but in which positions employees are temporarily assigned to work fewer than eight hours per day or 40 hours per week when such reduction in hours is necessary to avoid layoffs for lack of work or lack of funds and the consent of the majority of affected employees to such reduction in hours has been first obtained.

CHANGE:

Correction of error.

Remove: August 4, 1986, page 1 of 8. Add: (Reissue) August 4, 1986, page 1 of 8.

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LOS ANGELES UNIFIED SCHOOL DISTRICT
PERSONNEL COMMISSION

LAW AND RULES

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August 4, 1986

For the purpose of computing the number of hours worked, time during which an employee is excused from work because of holidays, sick leave, vacation, compensating time off, or other paid leave of absence shall be considered as time worked by the employee.

This section shall apply to districts that have adopted the merit system in the same manner and effect as if it were a part of Article 6 (commencing with Section 45240) of this chapter.

Education Code 45129

When compensatory time off is authorized in lieu of cash compensation, such compensatory time off shall be granted within 12 calendar months following the month in which the overtime was worked and without impairing the services rendered by the employing district.

This section shall apply to districts that have adopted the merit system in the same manner and effect as if it were a part of Article 6 (commencing with Section 45240) of this chapter.

Education Code 45130

Notwithstanding the provisions of Sections 45127 and 45128, a personnel commission, when applicable, or a governing board of a school district may specify certain positions or classes of positions as supervisory, administrative, or executive and exclude the employees serving in such positions and the positions from the overtime provisions.

To be excluded from such overtime provisions, the positions or classes of positions must clearly and reasonably be management positions. In approving positions or classes of positions for exclusion from the overtime provisions, the personnel commission, when applicable, or the governing board of a school district shall certify, in writing, that the duties, flexibility of hours, salary, benefit structure, and authority of the positions or classes of positions are of such a nature that they should be set apart from those positions which are subject to the overtime provisions, and that employees serving in such excluded positions or classes of positions will not be unreasonably discriminated against as a result of the exclusion.

Notwithstanding the provisions of this section, if a person serving in an excluded position is required to work on a holiday, as provided for in this code, or by action of a governing board, he shall be paid, in addition to his regular pay for the holiday, compensation, or given compensating time off, at a rate not less than his normal rate of pay.

This section shall apply to districts that have adopted the merit system in the same manner and effect as if it were a part of Article 6 (commencing with Section 45240) of this chapter.

CHANGE:

Editorial changes. No changes in text.

Remove: June 3, 1973, page 2 of 8. Add: August 4, 1986, page 2 of 8.

Overtime

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LOS ANGELES UNIFIED SCHOOL DISTRICT
PERSONNEL COMMISSION

LAW AND RULES

596
(Reissue)* August 4, 1986

Education Code 45131

Notwithstanding the provisions of Section 45127, the workweek shall consist of not more than five consecutive working days for any employee having an average workday of four hours or more during the workweek. Such an employee shall be compensated for any work required to be performed on the sixth or seventh day following the commencement of the workweek at the rate equal to 1-1/2 times the regular rate of pay of the employee designated and authorized to perform the work.

An employee having an average workday of less than four hours during a workweek shall, for any work required to be performed on the seventh day following the commencement of his workweek, be compensated for at a rate equal to 1-1/2 times the regular rate of pay of the employee designated and authorized to perform the work.

Positions and employees excluded from overtime compensation pursuant to Section 45130 shall likewise be excluded from the provisions of this section.

This section shall apply to districts that have adopted the merit system in the same manner and effect as if it were a part of Article 6 (commencing with Section 45240) of this chapter.

Education Code 45132

Notwithstanding the provisions of Section 45131, a governing board of a district may establish a 10-hour-per-day, 40-hour, four-consecutive-day workweek for all, or certain classes of its employees, or for employees within a class when, by reason of the work location and duties actually performed by such employees, their services are not required for a workweek of five consecutive days, provided the establishment of such a workweek has the concurrence of the concerned employee, class of employees, or classes of employees as ascertained through the employee organization representing a majority of the concerned employees or class or classes, of employees, as determined by the payroll deduction authorizations for dues in classified employee organizations on file with the district on the last day of the month next preceding the date the board action was taken.

Where a board has previously established the workweek of not less than 35 hours, it may require the established workweek to be performed in four consecutive days by any class or classes of employees or by employees within a class, when by reason of the work location and duties actually performed by such employees their services are not required for a workweek of five consecutive days, with the concurrence of employee personnel as provided herein.

When a four-day workweek is established, the overtime rate shall be paid for all hours worked in excess of the required workday, which shall not exceed 10 hours. Work performed on the fifth, sixth and seventh days shall be compensated for at a rate equal to 1-1/2 times the regular rate of pay of the employee designated and authorized to perform the work.

CHANGES:

Correction of clerical error.

Remove:(Reissue) August 4, 1986, page 3 of 8. Add:(Reissue)* August 4, 1986, page 3 of 8.

Overtime

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LOS ANGELES UNIFIED SCHOOL DISTRICT
PERSONNEL COMMISSION

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LAW AND RULES

(Reissue) November 19, 1990

An employee working an average workday of five hours or less during a workweek shall, for any work required to be performed on the sixth or seventh day following the commencement of his workweek, be compensated for at a rate equal to 1-2/3 times the regular rate of pay of the employee designated and authorized to perform the work.

This section shall apply to districts that have adopted the merit system in the same manner and effect as if it were a part of Article 6 (commencing with Section 45240) of this chapter.

Education Code 45133

(a) Notwithstanding sections 45127 and 45131, a governing board of a school district or a county superintendent of schools may establish a 9-hour-per-day, 80-hour-per-2-week work schedule, provided the establishment of the work schedule has the concurrence of the employee organization, or in the absence of an employee organization, the concurrence of the affected employee.

(b) When a 9-hour-per-day, 80-hour-per-2-week work schedule is established, it shall consist of nine work days, eight of which shall be nine-hour days, and one of which shall be an eight-hour day. The overtime rate shall be paid for all hours worked in excess of the required work day, which shall not exceed nine hours, at a rate equal to one and one-half times the regular rate of pay for the employee designated and authorized to perform the work.

(c) When a 9-hour-per-day, 80-hour-per-2-week work schedule is established, the workweek shall be defined in either of two ways, as follows:

(1) The workweek shall begin on noon Friday and will end at noon the following Friday, with the employee working nine hours each day except on alternate Thursdays when the employee will work eight hours, and on alternate Fridays when the employee will not work; or,

(2) The workweek shall begin at noon on any other day of the week and shall be defined so that no employee will be required to work more than 40 hours during any given workweek.

(d) This section shall apply to districts that have adopted the merit system in the same manner and effect as if it were a part of Article 6 (commencing with Section 45240) of this chapter.

CHANGE:

Adding to Education Code Section 45133.

Remove: November 19, 1990, page 4 of 8. Add:(Reissue) November 19, 1990, page 4 of 8.

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LOS ANGELES UNIFIED SCHOOL DISTRICT
PERSONNEL COMMISSION

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LAW AND RULES

(Reissue) November 30, 1992

- A. Overtime shall be paid at the rate of time and one-half. Overtime shall be computed only on the basis of working hours exclusive of meal time in excess of an established eight, nine, or ten hour work day or 40 hours in any calendar week. Less than 15 minutes overtime in any one day shall not be counted.
- B. An employee who is in paid status for an average of four hours or more a day for five consecutive days shall be paid at time and one-half for any work required to be performed on the sixth or seventh day of the workweek. An employee who is in paid status for an average of less than four hours a day for five consecutive days shall be paid overtime for work performed on the seventh day of the workweek.
- C. An equitable distribution of overtime shall be made among qualified members of a given office or unit as the circumstances permit. Need, seniority, availability, and fitness are proper factors for consideration in making this distribution.
- D. Classes whose principal duties and responsibilities are classified as executive/administrative in terms of the following definitions shall be excluded from the overtime payment provisions of this Rule:

The primary duties and responsibilities consist of management or supervision of a customarily recognized division or subdivision and the following characteristics:

- 1. Customarily and regularly direct the work of employees in the division or subdivision.
- 2. Have authority to hire and discharge employees or make recommendations as to the hiring and discharging and as to the advancement and promotion or any other change of status of employees, which recommendations are given particular weight.
- 3. Customarily and regularly exercise discretionary powers.
- 4. Do not devote more than 20 percent of total hours worked to activities that are not directly and closely related to the performance of the work described in Paragraph D.1. through 3. above.

The Personnel Commission may designate other classes as executive/administrative when special circumstances warrant exceptions to these definitions.

CHANGE:

Amending Paragraph A. Deleting Paragraph C. Relettering Paragraph D. & E. to C. & D.

Remove: (Reissue) August 4, 1986, page 5 of 8. Add: (Reissue) November 30, 1992, page 5 of 8.

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PERSONNEL COMMISSION

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LAW AND RULES

April 20, 2011

E. Incumbents of positions in the classes listed below are assigned as executive/administrative and are thereby exempt from the overtime payment provisions of this Rule:

Executive/Administrative Classes

Administrative Project Coordinator, Superintendent's Office	Chief of Intensive Support and Intervention Schools
Administrative Services Manager	Chief of Police
Administrative Officer	Chief of Staff
Adult Education Administrative Specialist	Claims Coordinator
Application Server Administrator	Classified Assignments Coordinator
Application Server Specialist	Complex Project Manager
Area Facilities Services Director	Computer Applications Administrator SAP
Area Food Services Supervisor	Computer Applications Specialist
Area Operations Supervisor	Computer Applications Specialist (Accounting)
Assistant Budget Director	Computer Applications Specialist (Certificated Personnel)
Assistant Chief Human Resources Officer	Computer Applications Specialist (Facilities)
Assistant Contract Administration Manager	Computer Applications Specialist (Finance)
Assistant Director, Maintenance and Operations Central Facilities	Computer Applications Specialist (Internet/Intranet)
Assistant Director, Design Standards and Technical Specifications	Computer Applications Specialist (Payroll-SAP)
Assistant Director, Personnel	Computer Applications Specialist (Pupil Services/AB922)
Assistant General Counsel	Computer Applications Specialist (Purchasing)
Assistant Project Manager	Computer Applications Specialist (Student Data Warehousing)
Assistant Stores Operations Manager	Construction Claims Manager
Assistant Truck Operations Manager	Construction Manager
Associate General Counsel I	Construction Safety Manager
Associate General Counsel II	Contract Administration Manager
Audit Manager	Contracts Supervisor
Benefits Manager	Controller
Bond Oversight Administrator	Coordinator of IT, Security
Branch Director	Coordinator of Legislation Implementation
Branch Human Resources Manager	Coordinator of Legislative Analysis and Advocacy
Budget Director	Coordinator of Local Government Relations
Budget Policy Analyst	Coordinator of Policy Research and Development
Business Manager	Data Base Administrator
Carpentry Technical Supervisor	Data Base Specialist
Central Business Advisor	Data Center Architect
Charter Schools Director	Deputy Branch Director
Charter Schools Operations Coordinator	Deputy Branch Director - Facilities
Chief Accountant	Deputy Budget Director
Chief Boundary Coordinator	Deputy Chief Building/Construction Inspector
Chief Broadcasting Engineer	Deputy Chief Facilities Executive
Chief Building/Construction Inspector	Deputy Chief Financial Officer
Chief Educational Research Scientist	Deputy Chief Human Resources Officer
Chief Estimator	Deputy Chief Information Officer
Chief Facilities Executive	Deputy Chief of Police
Chief Financial Officer	Deputy Controller
Chief Human Resources Officer	Deputy Director of Acquisition and Planning
Chief Human Resources Specialist	Deputy Director of Architecture and Engineering
Chief Information Officer	Deputy Director of Communications and Media Relations
Chief Inventory Analyst	Deputy Director of Data Processing Operations
Chief Operating Officer	Deputy Director of Facilities Contracts
Chief Procurement Officer	Deputy Director of Facilities Design
Chief Risk Officer	Deputy Director of Facilities Legislation, Grants, and Funding
Chief Strategy Officer	Deputy Director of Facilities Planning and Development
Chief Technology Director	Deputy Director of Facilities Program Support Services

CHANGES: Remove: March 2, 2011, page 6 of 8. Add: April 20, 2011, page 6 of 9.

Overtime

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LOS ANGELES UNIFIED SCHOOL DISTRICT
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Executive/Administrative Classes (Continued)

E. (Continued)

- Deputy Director of Facilities Project Execution
- Deputy Director of Facilities Projects
- Deputy Director of Food Services
- Deputy Director of Information Systems
- Deputy Director of Information Technology, Customer Support
- Deputy Director of Information Technology, Training
- Deputy Director of IT, Infrastructure Project Management
- Deputy Director of Maintenance and Operations
- Deputy Director of Maintenance and Operations (Operations Services)
- Deputy Director of Maintenance and Operations (Maintenance Services)
- Deputy Director of Payroll Administration
- Deputy Director of Project Management - New Construction
- Deputy Director of Project Support - Preconstruction and Cost Estimation
- Deputy Director of Project Support-School Occupancy
- Deputy Director of Transportation
- Deputy Director, Claims
- Deputy Director, Employee Relations
- Deputy Director, Insurance Risk and Finance
- Deputy Director, Student Information Systems
- Deputy Environmental Health & Safety Director
- Deputy ERP Project Director
- Deputy Ethics Officer
- Deputy General Counsel
- Deputy Inspector General, Audits
- Deputy Inspector General, Investigations
- Deputy Personnel Director
- Design and Technical Specification Coordinator
- Design Director
- Director of Accounting
- Director of Accounts Payable
- Director of Acquisition and Relocation
- Director of Asset Management
- Director of Benefits Administration
- Director of Communications and Media Relations
- Director of Community Outreach
- Director of Contracts Administration
- Director of Data Processing Operations
- Director of Environmental Health and Safety
- Director of External Affairs and Administration
- Director of Facilities Contracts
- Director of Facilities Design
- Director of Facilities Legislation, Grants, and Funding
- Director of Facilities Maintenance & Operations
- Director of Facilities Planning and Development
- Director of Facilities Program Support Services
- Director of Facilities Programs
- Director of Facilities Project Execution
- Director of Facilities Projects
- Director of Food Services
- Director of Grants and Funding
- Director of Information Systems
- Director of Information Systems - Facilities
- Director of Information Technology, Customer Support
- Director of Information Technology, Network Operations
- Director of IT, Security
- Director of Information Technology, Software Project Management
- Director of Information Technology, Strategic Planning & Implementation
- Director of Information Technology, Support Services
- Director of Information Technology, Telecommunications
- Director of Information Technology, Training
- Director of Insurance
- Director of IT, Infrastructure Project Management
- Director of Integrated Disability Management
- Director of LA's BEST
- Director of Leasing and Asset Management
- Director of Legislative Affairs and Governmental Relations
- Director of Marketing and Communications
- Director of Masterplanning and Demographics
- Director of Materials Management and Purchasing
- Director of Non-Academic Facilities Planning
- Director of Payroll Administration
- Director of Program Evaluation and Research
- Director of Programming and Operations
- Director of Project Support-New Facilities
- Director of Real Estate
- Director of School Information Management
- Director of Sustainability
- Director of Television Engineer and Technical Operations
- Director of Translations
- Director of Transportation
- Director of Treasury
- Director, Human Resources Management and Support Services
- Director, iDesign
- Disability Manager
- Division Human Resources Administrator
- Electrical Technical Supervisor
- Electronics Technical Supervisor
- E-Mail Administrator
- Energy Program Manager
- Environmental Health Manager, Environmental Programs
- Environmental Health Manager, Safety & Industrial Hygiene
- ERP Director of Change Management
- ERP Project Director, Business Systems
- ERP Project Director, School Management Systems
- Ethics Officer
- Executive Chef
- Executive Director, Adult and Career Education
- Executive Director, Innovation and Charter Schools

CHANGES: Remove: April 6, 2011, page 7 of 8 Add: April 20, 2011, page 7 of 9.

Overtime

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April 20, 2011

Executive/Administrative Classes (Continued)

E. (Continued)

Executive Director, Office of Data and Accountability	Police Captain
Executive Director, Special Education	Principal Administrative Analyst
Executive Director, Visual and Performing Arts	Principal Administrative Assistant
Executive Officer of the Board of Education	Principal Administrative Assistant, Office of the Superintendent
Facilities Asset Development Director	Principal Financial Analyst
Facilities Development Manager	Principal Human Resources Specialist
Facilities Information Systems Project Administrator	Principal Procurement Officer
Facilities Project Manager II	Principal Realty Agent
Facilities Support Services Financial Specialist	Procurement Policy Officer
Fiscal Reports Specialist	Program Associate L
Fleet Maintenance Manager	Program and Policy Development Advisor
Fiscal Resources and Training Manager	Program Evaluation and Research Coordinator
Fiscal Services Manager	Project Management Administrator, Office of the Chief Operating Officer
Food Production Manager	Purchasing Services Manager
Food Services Program Manager	Real Estate Project Director
General Counsel	Regional Construction Director
General Manager, KLCS	Regional Outreach Manager
Head Accountant	Regional Project Management Director
Heating and Air Conditioning Technical Supervisor	Regional Transportation Manager
Human Resources Officer	Relocatable Housing Program Manager
Information Systems Executive Director	Relocation Program Manager
Information Technology Administrator, Shared Technical Services	Reprographic Services Manager
Information Technology Project Manager	Resident Construction Engineer
Inspector General	Roofing Technical Supervisor
Insurance Coordinator	Safety Manager
IT Infrastructure Project/Program Manager	SAP Basis Administrator
Joint Use Program Director	SAP Enterprise Portal Specialist
Labor Compliance Manager	SAP Functional Analyst (eRIC, BN, BW, Security)
Legislative Advocate	SAP Functional Analyst (PA/OM)
Litigation Research Coordinator	SAP Functional Analyst (TMPY)
Local District Facilities Director	SAP Functional Analyst (FI/CO, Budget)
Los Angeles Pilot Schools Coordinator	School Business and Operations Manager
Manager - Central Facilities	School Volunteer Programs Director
Manager of Computer Repair Services	Senior Administrative Assistant, Office of the Superintendent
Manager of Customer Support Services	Senior Construction Claims Manager
Manager of Data Processing Operations	Senior Contract Administration Manager
Manager of Telecommunications	Senior Facilities Development Manager
Medi-Cal Reimbursement and Cost Recovery Manager	Senior Facilities Project Manager
Medical Director of Employee Health Services	Senior Food Services Supervisor
Metal Technical Supervisor	Senior IT Infrastructure Project/Program Manager
Network Operations Manager	Senior Maintenance Planner
Nutrition Services Manager	Senior Operations Training Specialist
OCIP Coordinator	Senior Resident Construction Engineer
Operating Systems Administrator	Senior Sustainability Specialist
Operating Systems Specialist	Senior Systems Specialist
Operations Program Manager	Senior Systems Specialist-FileNet
Operations Training Specialist	Senior Technical Project Manager
Outdoor-Education Center Manager	Senior Technical Project Manager-Facilities
Painting Technical Supervisor	Small Business Outreach Administrator
Payroll Administration Manager	Special Assistant, Facilities Services
Payroll Operations Manager	Special Assistant to the Chief of Staff
Personnel Director	
Plumbing Technical Supervisor	

CHANGE: Remove: April 5, 2011, page 8 of 8. Add: April 20, 2011, page 8 of 9.

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PERSONNEL COMMISSION

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February 12, 2003

Executive/Administrative Classes (Continued)

E. (Continued)

Special Assistant to the Chief Facilities Executive
Special Assistant to the Inspector General
Special Assistant to the Superintendent
Special Assistant to the Superintendent - Legislation
Special Facilities Projects Manager
Strategic Planning Network Engineer
Supervising Building/Construction Inspector
Supervising Investigator
Supervising Purchasing Services Coordinator
Systems and Programming Director
Systems and Programming Manager
Systems and Programming Manager (SAP)
Systems Science Specialist
Systems Standards Manager
Technical Project Manager
Technical Specialist
Telecommunications Specialist
Textbook Services Manager
Transportation Dispatch Manager
Transportation Services Manager
Truck Operations Manager
Vendor Services Manager
Warehouse Manager
Web Architect

- F. An employee in an executive/administrative class who is required to work on a holiday shall be granted compensating time off on a straight time hour-for-hour basis within 12 calendar months following the month in which the holiday was worked.
- G. Classified employees who work any hours that the Board of Education has designated as excused time shall be given equivalent time off by the end of the following pay period.

CHANGE: Continuation of Rule
Overtime

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Appendix H: Overtime Policy – Classified Employees (BUL-5996.0)



**LOS ANGELES UNIFIED SCHOOL DISTRICT
POLICY BULLETIN**

<p>TITLE: Overtime Policy – Classified Employees</p> <p>NUMBER: BUL-5996.0</p> <p>ISSUER: Michelle King Senior Superintendent, School Operations</p> <p>V. Luis Buendia Interim Controller, Accounting & Disbursements Division</p> <p>DATE: March 11, 2013</p> <p>POLICY: The policy of the District, in accordance with the federal Fair Labor Standards Act and California law, is to provide overtime pay to eligible employees at time and one-half for all work in excess of eight hours a day or forty hours a week for employees on a standard workweek (5 days, 8 hours per day). Variation from this policy is described under Section II and III of this bulletin.</p> <p>Regular and probationary classified employees are eligible for overtime pay. Classified administrative and executive employees (as described in Personnel Commission Rule 596) are not eligible for overtime pay. Certificated employees are not eligible for overtime pay.</p> <p>For information regarding the assignment of overtime, managers and supervisors should refer to the applicable collective bargaining agreement.</p> <p>MAJOR CHANGES: This revision replaces Bulletin No. DB-31 (REV.) regarding the same subject, dated October 31, 2001. The bulletin has been revised to remove obsolete references and to remind time reporters and administrators of the importance of complying with overtime policies.</p> <p>GUIDELINES:</p> <p>I. PURPOSE</p> <p>This bulletin provides information to administrators, time reporting personnel, and affected employees regarding the District’s overtime pay policy and how time should be reported.</p> <p>II. ADMINISTRATIVE PROCEDURES</p> <p>A. Overtime must be approved in advance except in the case of extreme circumstances. The approval must <u>always</u> be confirmed in writing by the site administrator within the next three working days. Administrators must ensure that funds are available for authorized overtime, except when the health and safety of students and/or staff members is in severe and immediate danger. For audit purposes, written authorization for overtime must be retained at the work location for five years from the date that the</p>	<p>ROUTING</p> <p>All Schools and Offices Administrators Time Reporters All Employees</p>
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BUL-5996.0

March 11, 2013

overtime is approved. Attached for your convenience is a sample overtime request form as Attachment A.

- B. Employees should not be assigned to work more than 44 hours of overtime per month or more than 528 hours of overtime per fiscal year. In emergencies, employees may work more than 44 hours of overtime per month with the administrator's prior written approval.
- C. If an employee does not work a standard workweek or the workday is greater than eight hours or less than eight hours, refer to the applicable collective bargaining agreement and/or Personnel Commission rules to determine the point at which employees should be reported for overtime pay.

For instructions on time report preparation, please refer to the Payroll Administration, Payroll Concepts Manual on Inside LAUSD. Overtime is to be reported to the nearest minute. A conversion chart is included as Attachment B to this document to assist in entering minutes as decimal portions of hours.

- D. It shall be the responsibility of the location and division administrator to review all overtime usage to determine if the overtime was authorized and worked. It shall also be the responsibility of the location and division administrator to ensure that the limitations stated in this bulletin have been followed. Each Local District or Division may develop and document criteria for overtime approval within the district or department.

III. EXCEPTIONS

- A. The only currently authorized exception to the provision of overtime pay for overtime hours worked is Bargaining Unit A (School Police Officers) and certain Unit A aligned employees who are authorized to receive a limited amount of compensatory time off in lieu of overtime pay.
- B. Financial Managers who have been pre-authorized by their administrator to work overtime as a result of evening, weekend, or holiday student body activities shall be paid overtime from Student Body funds.

RELATED Attachment A – Overtime Request Form
RESOURCES: Attachment B – Conversion Table: Minutes to Decimals

Attachment B
Conversion Table for Time Reporting

MINUTES TO HOURS (IN DECIMAL FORMAT)					
01 = .02	11 = .18	21 = .35	31 = .52	41 = .68	51 = .85
02 = .03	12 = .20	22 = .37	32 = .53	42 = .70	52 = .87
03 = .05	13 = .22	23 = .38	33 = .55	43 = .72	53 = .88
04 = .07	14 = .23	24 = .40	34 = .57	44 = .73	54 = .90
05 = .08	15 = .25	25 = .42	35 = .58	45 = .75	55 = .92
06 = .10	16 = .27	26 = .43	36 = .60	46 = .77	56 = .93
07 = .12	17 = .28	27 = .45	37 = .62	47 = .78	57 = .95
08 = .13	18 = .30	28 = .47	38 = .63	48 = .80	58 = .97
09 = .15	19 = .32	29 = .48	39 = .65	49 = .82	59 = .98
10 = .17	20 = .33	30 = .50	40 = .67	50 = .83	60 = 1.00

Appendix I: Documentation for Employees Paid from Federal and State Categorical Programs (BUL 2643.6)



**LOS ANGELES UNIFIED SCHOOL DISTRICT
POLICY BULLETIN**

TITLE: Documentation for Employees Paid from Federal and State Categorical Programs

NUMBER: BUL-2643.6

ISSUER: V. Luis Buendia, Controller
Accounting and Disbursements Division

DATE: October 31, 2013

ROUTING

ESC Superintendents
 ESC Operations Administrators
 Central Office Coordinators
 Directors
 Fiscal Services Mgrs
 Food Services
 Principals
 School Admin. Asst.
 Time Reporters

POLICY: Federal and State regulations require supporting documentation, in addition to time cards, for all personnel who receive any payment (compensation) from federal funds or from state categorical funds. This supporting documentation will vary depending upon the funding source(s) or nature of the job duties. Payroll time reporting must reflect actual hours worked on each program as indicated in the supporting documentation.

MAJOR CHANGES: This Bulletin replaces Bulletin 2643.5 titled "Time Reporting for Federal and State Categorical Programs". There is one major change which reflects the removal of references to the SBCP program.

In addition, the ESC Administrator of Operations is responsible for receiving Attachment I from schools within their ESC, and submitting Attachment J to the Accounting Controls & Oversight Branch.

GUIDELINES: I. DETERMINING AFFECTED EMPLOYEES AND REQUIRED DOCUMENTATION

Employees who receive compensation from federal or state categorical programs are required to complete additional supporting documentation which confirms that the activities or work that was completed was indeed for the program that funded the activity. Required supporting documentation will vary depending upon the funding source(s) and/or nature of the employee's job duties. Completed documents should be retained with the time-keeper; copies can be kept with a program coordinator or another individual if so desired by the site. The overall guiding principle must be that site administrators must know where the documents are kept and that the documents be readily available for audit purposes.

A Time Reporting Documentation Matrix (Attachment A1-2) is included to summarize and assist school site, ESC, and central office staff in identifying the required documentation for federal and/or state categorical funded

personnel. In addition, the following questions and answers are designed to provide further assistance in determining who is funded and what supporting documentation must be OODL provided. Guidelines for required supporting documentation have been changed from the implementation reports to the more complete:

Failure to complete and/or provide the documentation results in the release that must be paid for by your office's General Fund resources.

Q: How do I know if I am affected by the Federal and State requirements?

A: If you do not know whether you are funded by a Federal or State categorical program, one of the easiest ways to find out is to ask your time-keeper to look at the CAT2 screen (time entry; providers can look on the CATI screen) under 'Fund'. If the ending four digits are "0000", you are not required to complete the additional information. If the ending four digits are "3xxx-7xxx", then it means the position is funded from a federal or state categorical program. (See screen shot below for example.) In addition, each December and May, time keepers are provided with a listing of employees companies to be from federal or state categorical.



Q: My position is funded 100% by a single federal or state categorical program and the services that I provide are only related to this program. What supporting documentation, in addition to my time card, must I be completed?

A: The Semi-Annual Certification (Attachment B) or Budget Semi-Annual Certification (Attachment C) must be completed each fiscal year. The first semi-annual certification is for the period July 1st through December 31st, and the second semi-annual certification is for the period January 1st through June 30th. These reports should be completed no later than January 31st and July 31st, respectively. If you leave this position anytime during the fiscal year, the semi-annual certification must be completed prior to your departure, or if your funding is changed, the Semi-Annual Certification could be completed up to the date of the funding change.

Q3: My position is funded from a combination of federal and state categorical sources as described in the Title I School Wide Program (SWP) plan. What supporting documentation must be completed?

A3: The position is considered to have a “single cost objective”. A single cost objective is defined as a set of work activities where both the service(s) being performed and the population(s) being served are allowable under any of the programs from which you are funded. A Semi-Annual Certification (Attachment B) should be completed twice each fiscal year as described in A2. (Information on the SWP schools can be found on the Federal and State Education Programs (FSEP) website under District Offices.)

However, a Blanket Semi-Annual Certification (Attachment C) could be completed by the site administrator in lieu of the Semi-Annual Certification, if there are multiple employees at this school site whose positions are funded by sources listed in the SWP plan. This form should be completed twice a year, as described in A2.

Please note that due to requests for information from Federal Program Monitoring reviewers related to the English Language Program, positions funded with EIA/LEP and other funding sources should complete a Multi-Funded Time Report (MFTR) and activity log. Attachment F is a sample MFTR which incorporates an activity log for personnel funded with EIA/LEP and Title 1 resources.

Q4: My position is a Literacy Coach, Math Coach or Instructional Content Expert (Educational Service Centers (ESC)/Central Office only) and it is funded from federal/state categorical sources. What supporting documentation must be completed?

A4: These positions have been determined to have a “single cost objective”. Therefore, a Semi-Annual Certification (Attachment B) must be completed twice each fiscal year as described in A2.

A “Blanket Semi-Annual Certification” (Attachment C) could be completed by a supervisor/administrator who has first-hand knowledge of the work performed by these individuals.

Q5: My position is a teacher with an auxiliary period at a Title I SWP school. The position is funded with federal and/or state categorical sources. What supporting documentation must be completed?

A5: These positions have been determined to have a “single cost objective”. Therefore, a Semi-Annual Certification (Attachment B) must be

completed twice each fiscal year as described in A2.

A “Blanket Semi-Annual Certification” (Attachment C) could be completed by a supervisor/administrator who has first-hand knowledge of the work performed by these individuals.

- Q6: My position is funded by a combination of federal funding and other sources. The hours I work on each of the programs is routine and consistent, but my position doesn't qualify as a single cost objective. What supporting documentation must be completed?
- A6: You would need to complete a Multi-Funded Time Report. An example is provided in Attachment D.
- Q7: My position is funded from a combination of federal and state categorical sources. I provide similar services throughout the day, but the eligibility of participants or allowable costs for each funding source is different. The time that I spend on each program *varies* significantly from day-to-day. What supporting documentation must be completed?
- A7: Because of the variation in the number of hours spent on each program each day, a more detailed report is required. In addition to Attachment D, most employees will use Attachment E which is a “generic” Daily Activity Log.
- However, Attachment F provides a sample Multi-funded Time Report which has incorporated a Daily Activity Log. It was designed for employees funded with Title 1 and EIA-LEP resources.
- Q8: My regular position does not require time reporting documentation. However, my administrator approved and paid my overtime to perform work for a federal or state categorical program. What supporting documentation must be completed?
- A8: Per District policy, overtime must be authorized in advance by your administrator/supervisor and documented on an overtime request form. This form must include the funding source, reason for the overtime, specific work to be performed for the program funding the overtime, and number of hours authorized. In addition, after the overtime has been performed, a certification must be completed indicating that these services and hours authorized were actually performed. Attachment G is the recommended overtime request form and it will meet the certification requirements.
- Q9: My regular position's funding source(s) requires additional documentation which I have completed. However, I also have a

supplemental assignment outside of my normal work hours that is paid for with federal or state categorical funds. What supporting documentation for the supplemental assignment must be completed?

A9: If this supplemental assignment is a routine assignment with fixed hours over a fixed period of time (i.e. semester differential for an activity) then a Semi-Annual Certification for the supplemental assignment as described in A2 must be completed. If the supplemental assignment is not performed on a routine basis, but occurs every now and then, a certification such as found on Attachment H should be completed by the employee.

Q10: My regular position's funding source(s) requires additional documentation which I have completed. I have a supplemental assignment outside the work hours of my regular duties that is paid for with funds that do not require additional documentation. Is there any other documentation for the supplemental assignment outside of my timecard that must be completed?

A10: If the supplemental assignment is outside the scope of the regular assignment work hours, then there would not be any additional federal or state documentation required.

Q11: I will be attending (or have attended) a training that is paid for using federal or state categorical funds. What supporting documentation must be completed?

A11: The "Federal and State Categorical Funded Certification" form found in Attachment H is a suggested form that could be used. It would be completed and signed by yourself and the training instructor. This form should then be submitted to your time reporter.

If multiple employees from the same school/office attend the same training, the sign-in sheet containing the date, time, funding source, employee number, employee name, and employee signature can be attached to Attachment H.

Q12: I am a substitute teacher, how do I know if any additional required documentation is necessary for my sub assignment?

A12: The school to which you are assigned must notify you if your sub assignment is funded from federal or state categorical sources. The substitute sign-in log should contain the program code from which you are funded. A certification such as the one in Attachment H, could also be completed and turned in to the time reporter each day. Failure to submit this documentation may make you ineligible for future

assignments that are funded from federal or state categorical sources.

Q13: I have completed Attachment D, E or F and the actual hours that I worked on a federal or state categorical program do not reflect how my position was budgeted. I have recorded my actual hours worked; what should be done to reflect these changes?

A13: Your site's time-keeper must enter the changes in the payroll system so that your actual hours worked are properly recorded.

Q14: I am funded with Title I and EIA-LEP, and I am required to complete the Multi-Funded Time Report. Which form should I complete each month?

A14: Attachment F, Time-Accounting Log for Multi-Funded Categorical Personnel, should be completed. Activities for "direct" and "indirect" services are provided, and percentages may be calculated so that the maximum allowable for indirect services are not exceeded.

II. MONITORING COMPLIANCE

The California Department of Education has requested that procedures to monitor compliance with these federal and state documentation requirements be included in District policies. As such, the following procedures have been implemented.

- A. Each December and May, the Accounting & Disbursements Division will provide administrators with a listing of their employees who must complete the additional required documentation.
- B. Administrators should remind affected employees that semi-annual certifications should be completed by January 31st and July 31st, and that monthly multi-funded time reports or daily activity logs be completed if required. This documentation should be retained by the time-reporter at the site along with other payroll time-reporting documentation for a period of five (5) years.
- C. By January 31st and July 31st, school site administrators and offices should submit to their ESC Operations Administrator or Division Administrator a written assurance (Attachment I) that they have received the appropriate documentation for each listed employee and that any necessary payroll adjustments have been made.
- D. By February 15th and August 15th, the ESC Operations Administrator and Division Administrators should provide a written assurance (Attachment J) to the Accounting Controls & Oversight Branch.

OMB Circular A-87 – Attachment B – Paragraph 11(h)(3)
CDE Federal Program Monitoring (FPM), Compensatory Education (CE)19,
English Learner (EL) 12

California School Accounting Manual Procedure 905

ASSISTANCE: For assistance or further information please contact the following:

Child Nutrition	David Binkle	(213) 241-1765
Nutrition Network	Roberta Acantilado	(818) 609-2570
GEAR-UP	Kathy Norris	(213) 241-2100
Special Education	Sharyn Howell	(213) 241-6701
Title I,	Debbie Ernst	(213) 241-6990
Title III, EIA/LEP	Hilda Maldonado	(213) 241-5582
Title II, A (HR)	Vivian Ekchian	(213) 241-6131
Title II, A (Talent Management)	Donna Muncey	(213) 241-7000
Title II, A (Instruction)	Jaime Aquino	(213) 241-6131

Fiscal Staff

Accounting - Cafeteria	(213) 241-7954
Accounting - Specially Funded Programs	(213) 241-7918
Accounting Controls Branch	(213) 241-7988
Budget Services - Adult and ECE	(213) 241-3175
Budget Services - Compensatory Education & Specially Funded Programs	(213) 241- 2100
Budget Services - Special Education	(213) 241-3367
Cafeteria Federal Programs	(213) 241-1537

TIME REPORTING DOCUMENTATION MATRIX					
FUNDING SOURCE	SCHOOL SITES		ESC / CENTRAL OFFICE		
	Title I - TAS** <u>or</u> Title I - SWP <u>or</u> Non-Title I	Single Cost Objective*	Single Cost Objective*	Single Indirect Cost Activity	Other
Multi-funded Sources (Federal, State, <u>or</u> Federal+State)	MFTR + LOG	SAC	SAC	SAC	MFTR + LOG
Single Funding Source (Federal <u>or</u> State-Restricted)	SAC	SAC	SAC	SAC	SAC

*Approved Single Cost Objective Programs/Positions (Please check programs included in the school wide plan)

1. Schools that are SWP for those programs that are included in the school wide plan.
2. Literacy and Math Coaches
3. Instructional Content Experts
4. Class Size Reduction teacher at a Title I SWP school
5. Auxiliary teacher at a Title I SWP school
6. Certain positions funded from Special Education programs. Please check with the Special Education Budget Office at (213) 241-3367.

** See Question Q 7

LEGEND

TAS - Title I Targeted Assistance School
 SWP - Title I Schoolwide Program School
 MFTR - Multi-funded Time Report
 LOG - Log of Daily Activities
 SAC - Semi-Annual Certification

TIME REPORTING DOCUMENTATION MATRIX FOR BASE ASSIGNMENT

FUNDING SOURCE	DOCUMENTATION REQUIRED	FREQUENCY
100% by Single Federal or State Categorical Fund	SAC <i>Or</i> Blanket SAC for individuals with same funding source.	Usually for the period: July – December January – June Completed and signed last working day of December and last working day of June
Combination of Federal/State Funds that is an approved Single Cost Objective (SCO) Most common SCO for schools are programs in the School Wide Program (SWP)	SAC <i>Or</i> Blanket SAC for individuals with same funding source	Usually for the period: July – December January – June Completed and signed last working day of December and last working day of June
Combination of Federal/State Funds but NOT Single Cost Objective	MFTR (and in some cases an Activity Log) <i>Or</i> Combined MFTR/Activity Log Please see question Q&A #3, Q&A #7, and Q&A #14 in bulletin regarding situations requiring an activity log.	Monthly – MFTR Daily – Activity Log Recorded Daily/Weekly and signed at the end of each month

SAC=Semi-Annual Certification, Attachment B
Blanket SAC=Blanket Semi-Annual Certification, Attachment C
MFTR=Multi-Funded Time Report, Attachment D
Activity Log =Daily Activity Log, Attachment E
Combined MFTR/Activity Log, Attachment F (sample)

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Attachment A-2

TIME REPORTING DOCUMENTATION MATRIX FOR OTHER PAY TYPES

PAY TYPE	FUNDING SOURCE	DOCUMENTATION REQUIRED	FREQUENCY
Overtime	Federal or State Categorical Fund	Attachment G or similar document that includes all fields of Attachment G	As Needed
SAXB, Training, PD	Federal or State Categorical Funds	Attachment H or similar document that includes all fields of Attachment H	As Needed
Day-to-Day Substitute	Federal or State Categorical Funds	Attachment H or similar document that includes all fields of Attachment H	Daily
		Or Substitute Log that includes substitutes name, employee number, program code and substitutes signature (all on same line)	Daily

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ATTACHMENT B

LOS ANGELES UNIFIED SCHOOL DISTRICT
Accounting and Disbursements Division

SEMI-ANNUAL CERTIFICATION

Period Covered _____ Fiscal Year _____
(e.g. July-Dec, Jan-June)

Name _____ Position _____

School/Office _____

Program(s) Name or Single Cost Objective (e.g. SWP schoolwide plan) _____

Program Code(s) _____

I hereby certify that I was funded solely (100%) from the above program funds or worked solely on these program(s), single cost objective or single indirect cost activity. (Please note that EITHER the employee signature OR the responsible supervisor signature satisfies the compliance requirement.)

Employee Signature

Date

OR

*Responsible Supervisor Signature

Date

*Supervisor having first-hand knowledge of the activities.

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ATTACHMENT C

Los Angeles Unified School District

Blanket Semi-Annual Certification

Period Covered: _____ Fiscal Year: _____
 (e.g. July-Dec, Jan-June)

School Name: _____

The following individuals have worked 100% of their time during the period covered (not more than six months) under a single funding source or an approved single cost objective.

Program Code(s): _____

Cost Objective Name, if applicable: _____ (e.g. SWP schoolwide plan)

<u>Name</u>	<u>Position</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

I hereby certify that this report is an after-the-fact determination of actual effort expended for the period indicated.

Supervising Official:

 Signature Date

 Name, Title

Payroll Concepts Manual

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ATTACHMENT D

LOS ANGELES UNIFIED SCHOOL DISTRICT
Multi-Funded Time Report (MFTR)

Employee Name: _____ Class Code: _____ Pay Period Month: _____

Employee No. _____ Class Code Title: _____

		Days of the Month																																	
Program	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	Actual Hours			

Certification:

I certify that the information recorded on this Daily Time Report is true and correct to the best of my knowledge. For the period of _____ through _____, I spent my time on the following programs:

_____ %	_____ Program	_____ %	_____ Program
_____ %	_____ Program	_____ %	_____ Program

Signature of Employee Date

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ATTACHMENT E

LOS ANGELES UNIFIED SCHOOL DISTRICT
Accounting and Disbursements Division

DAILY ACTIVITY LOG (Generic)

Employee Name: _____

Pay Period No. _____

Class Code & Title: _____

Employee No. _____

DATE	DAY	ACTIVITY	Hours Program #1	Hours Program #2	Hours Program #3	Hours Program #4	Hours Program #5	Total Hours
	Mon							
	Tue							
	Wed							
	Thu							
	Fri							
	Sat							
	Sun							

I certify that the information recorded on this Activity Log is true and correct to the best of my knowledge.

Signature of Employee: _____

Date: _____

Program #1 Name/Number: _____

Program #2 Name/Number: _____

Program #3 Name/Number: _____

Program #4 Name/Number: _____

Program #5 Name/Number: _____

MULTI-FUNDED TIME REPORT AND TIME-ACCOUNTING LOG FOR CATEGORICAL PERSONNEL (Special Purpose) (SAMPLE)

Employee Name: _____ Class Code: _____ Month: _____
 Employee #: _____ Position: _____ School/Office: _____

Date:																										
Program	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F	
Title I	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I
# of Hrs																										
Activity # (s)																										
Program	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F	
EIA-LEP	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I
# of Hrs																										
Activity # (s)																										
Program	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F	
	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I
# of Hrs																										
Activity # (s)																										
Program	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F	
	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I	D	I
# of Hrs																										
Activity # (s)																										

Direct Activities (1-12) for the Week:

Indirect Activities (a-k) for the Week:

- | | | | |
|---|---|--|---|
| 1. Demonstration lessons
2. Conduct Professional Development for Teachers/Administrators
3. Conference/meetings with Parents
4. Implement Instructional Program
5. Working directly with students/intervention
6. Professional Development/Conference Attendance | 7. Meeting Attendance (Intervention)
8. Teaching
9. Plan/Coordinate Professional Development
10. Train Community Members/Parents
11. Coordinating Intervention
12. Other _____ | a. Develop/Construct/Organize/Select/ Evaluate instructional materials
b. Develop/monitor program budgets
c. Approve program activities/purchases
d. School Site Visit
e. On-going Program Compliance
f. Develop Schedules for Program Intervention | g. Conference with District Office Personnel
h. Assist with site needs assessments
i. School Plan Writing/Modifications
j. Meeting Attendance (Operations)
k. Other _____ |
|---|---|--|---|

Program	Services	# of Hours	%
Title I	Direct (D)		
	Indirect (I)		
EIA-LEP	Direct (D)		
	Indirect (I)		
	Direct (D)		
	Indirect (I)		
	Direct (D)		
	Indirect (I)		

Certification: I certify that the information recorded on this Daily Time Report is true and correct to the best of my knowledge.

Signature of Employee _____ Signature of Administrator _____

Date _____ Date _____

*Only categorical funds are subject to direct and indirect.

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ATTACHMENT G

LOS ANGELES UNIFIED SCHOOL DISTRICT
Overtime Request Form

REQUEST FOR PRE-APPROVAL TO WORK OVERTIME	
Name: _____	Employee #: _____
Requested Date(s) _____	Estimated Total Hours: _____
Reason for Overtime (Project/Activity): _____	
Overtime Charged to Fund: _____ Program Code: _____ Name of Program Code: _____	
<small>(If funding source is from a federal or state categorical program, activities performed must be an allowable cost.)</small>	
APPROVED BY: _____ Supervisor	Date: _____ Total Est. Hours Approved: _____

The information below is to be completed by the employee after prior approval has been obtained and overtime work is completed.

OVERTIME REPORT

Date(s) Worked: _____ Actual Hours Worked: _____

I hereby certify that the overtime worked was solely (100%) related to activities for the above program.

Employee's Signature _____ Date: _____

Approved By: _____ Date: _____
Administrator

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ATTACHMENT H

LOS ANGELES UNIFIED SCHOOL DISTRICT
Accounting and Disbursements Division

FEDERAL AND STATE CATEGORICAL FUNDED CERTIFICATION
(Training or Occasional Assignments)

Fiscal Year _____ Date (s) Worked _____

Hours Worked: _____

Description of Activity _____

Name _____

School/Office _____

Categorical Program _____

Program Code _____

I hereby certify that I was funded solely (100%) from the above program funds and received training/performed work as set forth on this program(s), single cost objective or single indirect cost activity.

Employee Signature

Date

NOTE: If multiple employees from the same cost center attend a training, Attachment H could be completed as a cover sheet and the sign-in sheet and agenda could be attached. The sign-in sheet should include training description, funding source(s), employee name, employee number, signature, and date(s) of training.

ATTACHMENT I

LOS ANGELES UNIFIED SCHOOL DISTRICT
Accounting and Disbursements Division

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ADMINISTRATOR ASSURANCES

Period Ending _____ Fiscal Year _____
(e.g. July-Dec, Jan-June)

School/Office _____

I hereby certify that I have obtained the appropriate supporting documentation, as outlined in this bulletin, for those employees who were paid using federal and/or state categorical funds. All necessary adjustments have been entered in the payroll system so that actual hours worked are properly reflected.

These documents have been retained by the time-reporter at my location and are available for review.

Administrator's Name

Administrator's Signature

Date

A copy of this signed assurance must be sent to your ESC Operations Administrator or Division Administrator by January 31st and July 31st of each fiscal year.

ATTACHMENT J

LOS ANGELES UNIFIED SCHOOL DISTRICT
Accounting and Disbursements Division

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EDUCATIONAL SERVICE CENTER (ESC) OPERATIONS
ADMINISTRATOR/DIVISION
ADMINISTRATOR ASSURANCES

I hereby certify that:

I have received the Administrator Assurances form from each school within my ESC or each office under my responsibility that the appropriate supporting documentation as outlined in Bulletin 2643.6 has been obtained.

ESC or Division Name

ESC Operations Administrator/Division Administrator Name

ESC Operations/Division Administrator Signature

Date

Please fax a copy of this signed assurance to the Accounting Controls and Oversight Branch at (213) 241-6829 by February 15th and August 15th of each fiscal year.

Appendix J: Mapping of Personnel Area to Bargaining Unit

Personnel Area	Personnel Area Description	Affiliated Bargaining Union
1AOX	AA-Safety (Detectives & Officers)	Los Angeles School Police Assoc
1APW	AA-Plant Security Aide Weekends	Los Angeles School Police Assoc
1APX	AA-Misc (Plant Security Aides)	Los Angeles School Police Assoc
1ASX	AA-School Safety Officers	Los Angeles School Police Assoc
1BXX	BB-Instructional Aides	Local 99 - SEIU
1CXX	CC-Operations Support Svcs	Local 99 - SEIU
1DTX	DD-TV Studio Assistant	CSEA
1DXX	DD-Office, Technical and Bus Svcs	CSEA
1DPX	DD-Student Integration Helper	CSEA
1EXX	EE-Skilled Crafts	LA/Orange County Building and Construction Trades Council
1LAX	LL-Safety (Captain)	District Represented
1LJX	JJ-Classified Management (AALA) I	AALA
1LMX	LL-Classified Management	District Represented
1LVX	VE-Executive Officer, Board of Education	Non-represented
1NAX	NN-Safety (Security Officer)	Non-represented
1NXX	NN-Classified Non-represented	Non-represented
1SAS	HH Supervising School Safety Officer	Los Angeles School Police Management Association
1SAX	HH-Safety (Lieutenants & Sergeants)	Los Angeles School Police Management Association
1SLL	SS-Classified Supervisory O/T Exempt	Teamsters Local 572
1SLX	SL-Classified Supervisory	Teamsters Local 572
1SXX	SS-Classified Supervisory	Teamsters Local 572
1VAC	VS-Safety Chief of Police	District Represented
1VAD	VV-Safety Deputy Chief	District Represented
1VEX	VE-Classified Exec Management-JR	District Represented
1VSX	VS-Classified Exec Management-SR	District Represented
1VJX	JJ-Classified Management (AALA) High	AALA
1VVX	VV-Classified Exec Management	District Represented
1YLX	YL-Program Analyst IAU, Director of Budget & Financial Policy and Director of Ed. Policy	District Represented
1ZDX	ZD-Bargaining Unit D Confidential	District Represented
1ZLX	ZZ-Classified Confidential O/T Exempt	District Represented
1ZSX	ZS-Classified Confidential Supervisory	District Represented
1ZXX	ZZ-Classified Confidential	District Represented
2FDX	FF-Teacher Assistants (Degree)	Local 99 - SEIU
2FNX	FF-Teacher Assistants (Non-Degree)	Local 99 - SEIU
2MCX	MM-Certificated Contract Management	District Represented
2MEX	MM-Certificated Exec Management	District Represented
2MSX	MS-Certificated Management Supervisory	AALA
2MZX	MZ-Certificated Management Confidential	District Represented
2PXX	PP-Physician	District Represented
2USX	UU-Support services	UTLA
2UTA	UU-Teachers (Adult)	UTLA
2UTE	UU-Teachers (ECE)	UTLA

2UTH	UU-Teachers (Home School)	UTLA
2UTK	UU-Teachers (K12/Sp Ed)	UTLA
3GXX	GG-Playground Aides	Local 99 - SEIU
3NBP	NB-Playground Supervisors Non-represented	District Represented
3NBX	NB-Community Representatives	District Represented
3NMX	NP-Medical Experts	District Represented
3NPX	NN-Prof Experts	District Represented
3NSX	NN-Student Workers	District Represented
3NXX	NN-Unclassified Non-represented	District Represented
3YYX	YY-Board/Commission Member	Not a district employee
9NEC	Non Employee-Charter School	Not a district employee
9NEX	Non Employee	Not a district employee
9REC	Converted Retiree	Non-represented

Appendix K: Designation of Holidays for Certificated Employees (California Education Code 44988)

(44988). Prior to July 1 of any school year, the governing board of any school district may designate other days during such year as the holidays to which certificated employees are entitled in lieu of the holidays on February 12 known as "Lincoln Day," the third Monday in February known as "Washington Day," the last Monday in May known as "Memorial Day," or November 11 known as "Veterans Day," provided that such designated days will provide for at least a three-day weekend. Certificated employees shall be required to work on the regular holiday, for which another day is designated pursuant to this section, and for work of eight hours or less, shall be paid compensation at their regular rate of pay. If any certificated employee would be entitled to the regular paid holiday but would not be in a paid status during any portion of the working day immediately preceding or succeeding the day so designated in lieu of such holiday and therefore would not be entitled to such day in lieu of the holiday, he or she shall be entitled to the regular holiday.

This section shall not be construed to authorize the maintenance of schools on holidays other than as provided in Article 3(commencing with Section 37220) of Chapter 2 of Part 22.

Appendix L: Designation of Holidays for Classified Employees (California Education Code 45205)

(45205). Prior to July 1 of any school year, the governing board of any school district may designate other days during such year as the holidays to which classified employees are entitled in lieu of the holidays on February 12 known as "Lincoln Day," the third Monday in February known as "Washington Day," the last Monday in May known as "Memorial Day," or November 11 known as "Veterans Day" as specified in Section 45203, provided that such designated days will provide for at least a three-day weekend. Classified employees shall be required to work on the regular holiday for which another day is designated pursuant to this section, and for work of eight hours or less, shall be paid compensation at their regular rate of pay. If any classified employee would be entitled to the regular paid holiday but would not be in a paid status during any portion of the working day immediately preceding or succeeding the day so designated in lieu of such holiday and therefore would not be entitled to such day in lieu of the holiday, he shall be entitled to the regular holiday; however, if he is required to work on such holiday, he shall be paid compensation at the rate of time and one-half of his regular rate of pay in addition to the regular pay received for the holiday.

This section shall not be construed to authorize the maintenance of schools on holidays other than as provided in Article 3 (commencing with Section 37220) of Chapter 2 of Part 22 of this division.

This section shall apply to districts that have adopted the merit system in the same manner and effect as if it were a part of Article 6 (commencing with Section 45240) of this chapter.

Appendix M: Time Reporting and Time Approval Policy – (BUL-6638.0)



**LOS ANGELES UNIFIED SCHOOL DISTRICT
POLICY BULLETIN**

TITLE:	Time Reporting and Time Approval Policy	ROUTING All Locations Time Reporters Time Approvers Administrators
NUMBER:	BUL-6638.0	
ISSUER:	Michelle King Superintendent of Schools Luis Buendia, Controller Accounting & Disbursements Division	
DATE:	April 4, 2016	
PURPOSE:	<p>The purpose of this bulletin is to remind all time reporters, time approvers and administrators of their payroll responsibilities. Principals have oversight responsibility to ensure school site time keepers are in compliance with payroll policies and procedures. Local Districts have oversight responsibilities to ensure school time approvers are in compliance with payroll policies and procedures. Directors and Division level administrators have oversight responsibility to ensure non-school time keepers and non-school time approvers are in compliance with payroll policies and procedures.</p> <p>The primary goal of the Payroll Administration Branch is to administer the payroll fiscal affairs of the District efficiently and to compensate employees for time worked in an accurate and timely manner in accordance with applicable laws and to maintain the required supporting documents and records.</p> <p>The Superintendent’s Office has directed Payroll Administration that all employees are to be compensated in a timely manner. In order to follow this directive, it is critical that time reporters and time approvers follow the policies and procedures in this bulletin.</p>	
MAJOR CHANGES:	<p>Payroll has outlined various supportive measures that will be taken to assist and prompt timekeepers and approvers to facilitate timely and accurate pay checks through adherence to payroll procedures. Continued non-compliance with payroll policies and procedures may result in progressive disciplinary action.</p> <p>This bulletin replaces BUL-5909.0, Policy on Time Reporting, BUL-5933.1, Policy on Time Approval/Certification, and BUL-4705.0, Time Keeping and Approval/Certification of Payroll. The information contained in these three bulletins has been combined into one document for accessibility to time reporters and time approvers. Adherence to the new payroll policies and procedures will ensure employees are compensated in a timely manner, increase efficiency,</p>	



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A subset of employees that are positively time reported are those who DO NOT earn illness and/or vacation benefits. Examples of these employees include certificated, classified, and semi-monthly substitutes, professional experts, and at-will and relief employees assigned to temporary assignments.

**TIME
REPORTER
GUIDELINES:**

Below is a list of time reporter guidelines that must be followed in order to ensure compliance. Principals and District administrators have oversight responsibility over time keepers to ensure that the guidelines are being followed.

1. Accurately time report all employees by the cut-off deadline for each payroll area: Classified (CL), Certificated (CE), and Semi-Monthly (SM).
2. Time report all employees on a weekly basis. Time entries must be entered every Friday by 6:00 PM.
3. Time report all employees by 6:00 PM on the cut-off deadline for each payroll area and Scheduled Off-Cycles per the established payroll calendar.
4. Be in possession of a completed and approved Certification of Absence Form (60. ILL or 60.NON-ILL) for each absence prior to reporting.
5. Have a designated back-up time reporter that is available to fulfill the duties of the time reporter at all times.
6. The Time Sheet must be adjusted for any employee that is TMS 9 (negative time reported) that has not worked on an assigned day according to their work schedule.
7. Report positive time reported employees who do not earn illness and/or vacation benefits and/or do not follow a regular work schedule (X Basis) through the payroll cut-off date only. Any work scheduled after the cut-off date for these employees must be reported after the time is worked. Pay for time reported after the payroll cut-off date will be accounted for and processed during the next regular off-cycle or payroll run.
8. Report positive time reported employees who earn illness and/or vacation benefits and who follow a regular work schedule for work to be performed and/or scheduled approved absences through the end of the pay period.
9. Report non-core/additional hours (overtime, Z time, SAXB, replacement time, relief time, etc.) that are worked through the payroll cut-off date only. Any non-core/additional hours scheduled after the cut-off date



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must be reported after the time is worked. Pay for time reported after the payroll cut-off date will be accounted for and processed during the next regular off-cycle or payroll run.

10. Enter differentials and mileage only once incurred.
11. Do not anticipate time beyond the current pay period.
12. Report time adjustments for employees assigned to Semi-Monthly (SM) within 15 days of the pay period.
13. Report time adjustments for employees assigned to Certificated (CE) and Classified (CL) within 3 days of the pay period ending and by the Scheduled Off-Cycle Cut-Off Dates.
14. Report time using the Employee List by Cost Center Report (ZMEMPLIST) to ensure all employees listed are currently at the location and are time reported properly. Contact your Human Resources Specialist or Assignment Technician if there are employees that should no longer be assigned to your location.
15. Run/generate the report option Reported Hours vs. Planned Hours for TMS 1 in Time Reconciliation by Cost Center (ZTIMERECON_SCHOOL) before time is approved to identify TMS 1 employees with differences between hours reported and planned hours.
16. Run/generate the report option Time in CATS Not Yet Approved in Time Reconciliation by Cost Center (ZTIMERECON_SCHOOL) immediately after approval to confirm that all time entries have been approved.
17. Ensure that the employee's timecard reflects the benefit reported, such as illness, personal necessity, kin care, vacation, etc.
18. Make certain that supporting documents are on file for every absence such as Certification of Absence Forms, Physician Statements or Family Medical Leave Act (FMLA) Certification of Health Care Provider if FMLA/California Family Rights Act (CFRA) protection is requested.
19. Confirm that the time card used corresponds with the assigned basis and work schedule for each employee.
20. Verify that employees are signing in and out or initialing on a daily basis.



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21. Manage and maintain the pre-designated monthly calendar for each employee.
22. Review and audit reported time regularly to ensure compliance with time keeping policies.
23. Review and refer to policy bulletins, memorandums, reference guides, job aids and email blasts for information, clarification and training.

**TIME
APPROVER
GUIDELINES:**

Below is a list of time approver guidelines that must be followed in order to ensure compliance. Local Districts and Division administrators have oversight responsibility over administrators to ensure that the guidelines are being followed.

1. Review and approve all employees by the cut-off deadline for each payroll area: Classified (CL), Certificated (CE), and Semi-Monthly (SM).
2. Approve time entries on a weekly basis. Time entries should be approved every Friday by 6:00 PM.
3. Time approve all employees by 6:00 P.M. on the cut-off deadline for each payroll area and Scheduled Off-Cycles per the established payroll calendar.
4. Have an Illness (60. ILL) or Non-Illness (60.NON-ILL) Certification Form for every employee reported as absent.
5. Approve or deny Certification of Absence Forms (60. ILL or 60.NON-ILL) for each pay period and return to the time reporter.
6. Approve or deny requests for non-core/additional hours and mileage (Overtime, Z-time, SAXB, replacement time, relief time, etc.) for each pay period and return to the time reporter on a weekly basis.
7. Run/generate the report option Time in CATS Not Yet Approved in Time Reconciliation by Cost Center (ZTIMERECON_SCHOOL) immediately after approval to confirm that all time entries have been approved.
8. Have a designated back-up time approver that is available to fulfill the duties of the time approver at all times.
9. Contact your Local District or Division designee time approver for assistance in the event the principal, site administrator or the back-up is unavailable to approve the time entries by the cut-off deadline.



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Effective immediately, Payroll Administration is directed to monitor the following activities to ensure compliance of payroll policies and procedures so that employees will be paid timely and accurately on their assigned payroll pay date.

- a) Time is reported and approved by the cut-off deadline.
- b) Time is reported and approved weekly by 6:00 P.M. every Friday.
- c) The frequency of checks requested outside of normal payroll runs.
- d) Anticipation of Time.
- e) Time adjustments reported and approved within the 15 day period for Semi-Monthly and within 3 days of the pay period ending by the Scheduled Off-Cycle Cut-Off Dates for Classified and Certificated.

Payroll Administration staff will contact any time reporter or time approver who appears on the reports listed above for noncompliance of the above time reporting and time approving policies. The Local District Administrator or its designee or Division Chief will also be notified of employees that are noncompliant.

Once time reporters and time approvers have incurred the 4th level of support for noncompliance within a fiscal year, it may result in written notification and revocation of their SAP Payroll access.

Payroll Administration is directed to implement the following procedures in order to address the time reporter's and time approver's failure to comply with the procedures mentioned in this bulletin.

Support		Action Taken By
1 st Level	Contact the time reporter or time approver via email.	Payroll Support Services
	Address time reporting and time approving areas of concern.	Payroll Support Services
	Review the policy bulletin and procedures.	Time Reporter or Time Approver
	Provide job aids.	Payroll Support Services
2 nd Level	Send notification to the time reporter, time approver, and Local District Administrator or other District management staff.	Payroll Support Services
	Must successfully complete the Payroll Support Services Time Reporting/Time Approver check list.	Time Reporter or Time Approver



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Support		Action Taken By
3 rd Level	Send notification to the time reporter, time approver, and Local District Administrator or other District management staff.	Payroll Support Services
	Conduct site visit to observe time keeping or time approval practices and provide recommendations for improvement.	Payroll Support Services
	Address time reporting and time approving areas of concern.	Payroll Support Services
4 th Level	Revoke SAP Payroll access; all time reporting or time approval access will be revoked.	Payroll Support Services and ITD-BASE Security
	Must identify another employee at the assigned cost center to fulfill the duties as time reporter and report payroll for their assigned cost centers.	Principal or Administrator
	Address noncompliance issues with the principal or director.	Local District Adm, Division Chief or Designee
	Support their respective schools and cost centers per the established process.	Local District Division Staff
	Must complete the Time Reporting Policy Training in order for access to be restored.	Time Reporter or Time Approver
	Attain a 100% pass rate on the assessment.	Time Reporter or Time Approver
	Provide written justification to the Superintendent's Office designee and document measures taken before security access is restored to those individual(s) whose access has been removed.	Local District Leadership or Division Chief

All administrators are responsible for ensuring that the proper time reporting and time approval policies and procedures are implemented immediately at their school site or work locations. Failure to follow this administrative directive may lead to disciplinary action such as, but not limited to, a Notice of Unsatisfactory Acts(s), Notice of Unsatisfactory Service, and/or Suspension and/or dismissal.

AUTHORITY: This is a policy of Michelle King, Superintendent of Schools and Megan K. Reilly, Chief Financial Officer.



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RELATED RESOURCES: Payroll Administration website – <http://achieve.lausd.net/payroll>
 Payroll Calendars/Time Cards – <http://achieve.lausd.net/Page/1085>
 Payroll Concepts Manual – <http://achieve.lausd.net/Page/1082>
 2015-2016 Cut-Off Dates for CATS Time Reporting
 Certificated 2015-2016 Payroll Calendar
 Classified 2015-2016 Payroll Calendar
 Semi-Monthly 2015-2016 Payroll Calendar
 Employee List by Cost Center job aid
 Time Reconciliation by Cost Center job aid
 Time Approval job aid

ASSISTANCE: For assistance, please contact Payroll Support Services at (213) 241-2570, Monday thru Friday, 8:00 AM – 4:30 PM or via email at payrollsupport@lausd.net.

Each Local District Office has the ability to support their schools by time reporting and time approval for any school site within their respective geographic area. For assistance with designating back-up time approvers/reporters issues, please contact your Local District Office.

North East	(818) 252-5400
North West	(818) 654-3670
West	(310) 914-2102
East	(323) 224-3177
South	(310) 354-3515
Central	(213) 241-0167

For non-school sites, each Division has the ability to support their cost centers by time reporting and time approval. For assistance, please contact your division office.

For assistance with calendar or assignment issues, please contact Certificated Assignments at (213) 241-5300, Classified Assignments at (213) 241-6300 or Certificated Administrative Assignments at (213) 241-6365.

For assistance with contract or disciplinary matters, please contact the Office of Staff Relations at (213) 241-6056.

For assistance with any bargaining unit agreement questions, please contact the Office of Labor Relations at (213) 241-8322.

Appendix N: Elimination of Advance Reporting of Hours, Mileage and Differential Pay (BUL-6053.1)



**LOS ANGELES UNIFIED SCHOOL DISTRICT
POLICY BULLETIN**

TITLE:	Elimination of Advance Reporting of Hours, Mileage and Differential Pay	ROUTING All Schools and Offices
NUMBER:	BUL-6053.1	
ISSUER:	Michelle King, Superintendent of Schools Alma Peña-Sanchez, Chief of Staff	
DATE:	January 9, 2017	
PURPOSE:	The purpose of this Bulletin is to bring awareness to the elimination of advance time reporting of hours for LAUSD employees and request your adherence in addressing this important issue with your timekeepers. Non-compliance may result in progressive disciplinary action.	
MAJOR CHANGES:	This revision replaces and supersedes BUL-6053.0 issued on May 2, 2013.	
BACKGROUND:	Trend and analysis of payroll data showed that a great amount of an employee's overpayment is caused by advanced reporting of their time and other supplemental pay including mileage and differentials beyond the current pay period. This causes an increase in administrative costs to recoup the overpayment. It is the District's goal to continuously lessen these overpayments. Hence, the practice of advanced reporting of time, mileage and differentials beyond the current pay period should be discontinued.	
GUIDELINES:	Time keepers must ensure that all employees' time is accurately submitted for their respective work locations by the payroll cut-off date. The office and school administrators are responsible for ensuring that the following are accomplished: <ul style="list-style-type: none"> • All employees' time MUST be carefully reviewed and certified by the payroll cut-off dates and times. • Advanced reporting of hours beyond the current pay period is not an acceptable practice and should not be done. • All differential pay as well as mileage MUST NOT be reported in advance. Approved differentials and mileage must be reported only when incurred. • Review and audit the time regularly to ensure compliance with the policy. 	



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- Do not time report in advance for employees that DO NOT earn illness and/or vacation benefits, and/or that DO NOT follow a regular work schedule, even in the current pay period (Attachment A).

Payroll Administration Branch, in conjunction with the Local Districts and the Administrators of Operations, will provide important information to you on training sessions and materials that will be available for educating your timekeeper(s) on the District's policies related to advanced time reporting of hours. It will be important for your timekeepers to attend the sessions and/or review the materials carefully.

We are directing all administrators to ensure that the proper timekeeping procedures are followed and that all advance reporting beyond the current period is discontinued immediately at their school site or work locations. The advanced reporting of hours, mileage and differentials will be carefully monitored. Failure to follow this administrative directive may lead to disciplinary action such as, but not limited to, a Notice of Unsatisfactory Act(s), Notice of Unsatisfactory Service, and/or Suspension and/or dismissal.

AUTHORITY: This is a policy issued from the Office of the Superintendent.

RELATED RESOURCES: BUL-6638.0, *Time Reporting and Time Approval Policy*, dated April 4, 2016.
Attachment A - Time Management Status

ASSISTANCE: For assistance or further information please contact the Payroll Customer Services at (213) 241-2570.

For assistance with contract or disciplinary matters, please contact the Office of Staff Relations at (213) 241-6056.

For assistance with any bargaining unit agreement questions, please contact the Office of Labor Relations at (213) 241-8322.

For assistance with calendar or assignment issues, please contact Certificated Assignments and Support Services at (213) 241-5100, Classified Employment Services at (213) 241-6300 or Certificated Administrative Assignments at (213) 241-6365.



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ATTACHMENT A

Time Management Status (TMS)

Payroll Area	TMS	Description
Classified/Semi-Monthly	Positive (TMS 1)	All assignments less than 7 hours per day.
Classified/Semi-Monthly	Positive (TMS 1)	All substitutes, provisional, temporary and summer assignments (X Basis).
Classified/Semi-Monthly/ Certificated	Positive (TMS 1)	All unclassified assignments, including Teacher Assistants and School Supervision Aides.
Certificated	Positive (TMS 1)	K-12 teachers and support services assigned to flexible schedules (60%, 80%), split assignments or assigned less than 6 hours per day.
Certificated	Positive (TMS 1)	Early Childhood Education assignments less than 8 hours per day.
Certificated	Positive (TMS 1)	All Adult Education assignments.
Certificated	Positive (TMS 1)	Administrators, contract management and confidential assignments less than 8 hours per day.
Classified/Semi-Monthly/ Certificated	Positive (TMS 1)	All employees on an approved leave of absence
Classified/Semi-Monthly	Negative (TMS 9)	All assignments 7 hours per day or more.
Certificated	Negative (TMS 9)	K-12 teachers and support services 6 hours per day.
Certificated	Negative (TMS 9)	Administrators, contract management and confidential assignments 8 hours per day.



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Time Management Status (TMS) *Effective February 16, 2016, time keepers are restricted from time reporting beyond the current date for Personnel Areas 1BXX, 1CXX, 3GXX, 2FDX, and 2FNX

Employee Subgroup	Employee Subgroup Description
S1	Substitutes
T1	Temporary
Z1	Return Retiree
Z2	Return Retiree (Exempt)

Appendix O: Longevity Salary Increment (PC Rule 580)

LOS ANGELES UNIFIED SCHOOL DISTRICT
PERSONNEL COMMISSION

LAW AND RULES 580
September 8, 2008

580 LONGEVITY SALARY INCREMENTS

A. Regular employees serving in classes and positions designated by the Board, Superintendent, or Superintendent's designee, as being eligible for longevity salary increments shall be paid longevity salary increments after completing the required years of District classified service as follows:

<u>Years</u>	<u>Increment</u>	
	<u>Per Hour</u>	<u>Per Pay Period</u>
after 10	\$.15625	\$25
after 15	\$.18750	\$30
after 20	\$.21875	\$35
after 25	\$.25000	\$40
after 30	\$.28125	\$45

B. For the purpose of this Rule, a year of service is a 12-month period of time starting from the first date an employee is assigned in regular status. In order to be credited with a year of service, an employee must have been in regular paid status for a number of days equal to 75 percent of the employee's assignment basis. Only regular time spent in the Classified Service shall count toward years of service.

C. A longevity salary increment shall become effective on the first day of the pay period following completion of the qualifying number of years of service.

D. Time served prior to a break in service shall not be counted toward years of service unless the employee is reinstated in accordance with Rule 771 or reemployed in accordance with Rule 740, in regular status.

E. Longevity salary increments shall be part of an employee's basic salary for the purpose of computing overtime.

F. Individual employees are responsible for monitoring their eligibility for a longevity salary increment. Individual employees should apply for a longevity salary increment on the prescribed form to the Employment Transactions Services Branch of the Personnel Commission immediately prior to completion of the qualifying number of years of service. Failure to do so does not constitute a waiver of the employee's right to receive a longevity salary increment, up to three year rights to recovery.

CHANGE:
Rule amended to update outdated language and clarification of existing procedures.
Remove: April 27, 1988. Add: September 8, 2008.

Appendix P: Voluntary Deductions Schedule

VOLUNTARY DEDUCTIONS SCHEDULE										
TYPE	WAGE TYPES	3PR	SAP	VENDOR NAME	FREQUENCY	PAY DATE				
		VENDOR #	GL ACCT.			Calendar Year		SM (23RD)	SM (8th)	CL
① Bargaining Units	6020, 800(1,3) B, C, F, G	9500032	962021	LOCAL 99 Dues/Agency Fee [B-C-F-G]	each applicable pay		X	X	X	X
	6021	9500032	962021	LOCAL 99 Premium	12 times per yr.		X		X	X
	6063, 6066, 800(1) J-M	9500030	962021	AALA Dues/Agency Fee	12 times per yr.		X		X	X
	6023, 6026, 800(1)U	9500074	962021	UTLA	12 times per yr.		X		X	X
	6035, 6036, 6037,800(1)D	9500076	962021	CSEA Dues/Agency Fee	10 times per yr.		X		X	
	6040, 6041, 800(1)E	9500036	962021	LA BDG & TRADE Dues/Agency Fee	12 times per yr.		X		X	
	6110; 8005; 8015	9500064	962021	TEAMSTERS Dues/Agency Fee	12 times per yr.		X		X	
	6070, 6071, 800(1)A	9500105	962021	PEACE OFFICER ASSN Dues/Agency Fee	12 times per yr.		X		X	
800H	9500019	962021	LA SCHOOL POLICE ASSOC. /Agency Fee	12 times per yr.		X		X		
① 3rd PARTY VENDORS	6000	9500049	962021	HORACE MANN INS (EDUCATORS LIFE INS)	10 times per yr.		X		X	X
	6003	9500036	962021	CA ASSOC. SCHOOL PSYCHOLOGIST	10 times per yr.		X			X
	6010	9500063	962021	SO CALIFORNIA SOCIAL SCIENCE ASSOC.	10 times per yr.		X			X
	6015	9500033	962021	AEDE (Bulger, Lenardson & Assoc., Inc.)	10(SM)/10 (CL,CE)times per yr.		X		X	X
	6030	9500031	962021	ASSOC. CA SCHOOL ADMINISTRATORS	12 times per yr.		X		X	X
	6043	9500041	962021	COUNCIL OF BLACK ADMINISTRATORS	10 times per yr.		X		X	X
	6030	9500044	962021	EDUCARE c/o ELLIE TOSTADO SECT.	10 times per yr.		X			X
	6033	9500061	962021	PEPPERDINE UNIVERSITY GC	10 times per yr.		X			X
	6060	9500077	962021	COUNCIL OF MEXICAN AMERICAN ADMIN.	10 times per yr.		X		X	X
	6073	9500032	962021	ASSOC OF MEXICAN AMERICAN EDUCATORS	* times per yr.		X		X	X
	6080; 834U	9500067	962021	THE UCLA FOUNDTN	12 times per yr.		X			X
	6090	9500046	962021	FRIENDS OF THE SCHOOL OF EDUC. - CSULA	10 times per yr.		X			X
	6093	9500023	962021	ALLIANCE OF ASIAN/PACIFIC ADMIN.	10 times per yr.		X		X	X
	6100	9500037	962021	CA COUNCIL FOR ADULT EDUCATION	10 times per yr.		X		X	X
	6103	9500083	962021	CAROC - LA COUNTY OFFICE OF EDUC.	10 times per yr.		X		X	X
	6113	9500033	962021	LA CITY ELEM. SCH. MUSIC ASSOC. -LACESMA	10 times per yr.		X		X	X
	6120	9500080	962021	WOMEN EDUCATORS	10 times per yr.		X		X	X
	803D; 803U	9500072	962021	UNITED NEGRO COLLEGE FUND	10 (CL), 12 (CE) times per yr.		X		X	X
	809U	9500065	962021	THE CITY OF HOPE DEVELOPMENT CENTER	12 times per yr.		X			X
	829U	9500038	962021	CHILD HELP USA	12 times per yr.		X			X
842F; 842U	9500039	962021	CHILDREN'S HOSPITAL OF LOS ANGELES	12 times per yr.		X	X		X	
847U	9500066	962021	THE CRISIS PREGNANCY CENTER - SFV	12 times per yr.		X			X	
848U	9500073	962021	WORLD VISION	12 times per yr.		X			X	
② Credit Unions	9000	9500043	962021	FIRST FINANCIAL FEDERAL CREDIT UNION	20-24 (SM), 10-12 (CL,CE) per yr.*		X	X	X	X
	9003	9500020	962021	LACSE - FEDERAL CREDIT UNION	20-24 (SM), 10-12 (CL,CE) per yr.*		X	X	X	X
	9010	9500042	962021	DOWNNEY FEDERAL CREDIT UNION	20-24 (SM), 10-12 (CL,CE) per yr.*		X	X	X	X
	9014	9500123	962021	SCHOOLS FIRST FEDERAL CREDIT UNION	20-24 (SM), 10-12 (CL,CE) per yr.*		X	X	X	X
	9015	9500079	962021	THE CALIFORNIA CREDIT UNION	20-24 (SM), 10-12 (CL,CE) per yr.*		X	X	X	X
③ Charitable Contributions	810D; 810U; 9200	9500070	962021	UNITED CRUSADE/UNITED WAY	12 times per yr.*		X	X	X	X
	9203	9500018	962021	BROTHERHOOD CRUSADE	12 times per yr.*		X	X	X	X
	9210; 803D; 803U	9500072	962021	UNITED NEGRO COLLEGE FUND	12 times per yr.*		X	X	X	X
	9215	9500034	962021	AUXILIARY SERVICES TRUST FUND	12 times per yr.*		X	X	X	X
	9220	9500029	962021	ASIAN PACIFIC COMMUNITY FUND	12 times per yr.*		X	X	X	X
	9223	9500040	962021	COMMUNITY HEALTH CHRARITIES	12 times per yr.*		X	X	X	X
	9230	9500043	962021	EARTH SHARE OF CALIFORNIA	12 times per yr.*		X	X	X	X
	9243	9500078	962021	LA TRUST FOR CHILDRENS HEALTH	12 times per yr.*		X	X	X	X
	9230	9500071	962021	UNITED LATINO FUND	12 times per yr.*		X	X	X	X
	9233	9500048	962021	HISPANIC SCHOLARSHIP FUND	12 times per yr.*		X	X	X	X
	9270	9500030	962021	KATHRYN L. KURKA CHILDREN'S HLTH FUND	12 times per yr.*		X	X	X	X
9273	9500073	962021	UNITED TEACHERS EDUC. FOUNDATION	12 times per yr.*		X	X	X	X	
④ Tax Shelter Annuities - TSA	2103, 2123	9500126	962021	403B WELLS FARGO TSA	24(SM) / 12(CL,CE)per yr. *		X	X	X	X
	2113, 2123, 2117	9500127	962021	437B TIAA-CREF	24(SM) / 12(CL,CE)per yr. *		X	X	X	X
⑤ Flexible Spending	397E; (381E)	9500003	962021	DEPENDENT CARE FLEX	24(SM) / 12(CL,CE) times per yr.		X	X	X	X
	398E; (382E)	9500003	962021	MEDICAL CARE FLEX	24(SM) / 12(CL,CE) times per yr.		X	X	X	X

* Deduction frequency determined by employee

Appendix Q: District Policy for Travel and Attendance at Conferences, Conventions, or Meetings (BUL-5525.1)



**LOS ANGELES UNIFIED SCHOOL DISTRICT
POLICY BULLETIN**

<p>TITLE: District Policy for Travel and Attendance at Conferences or Conventions</p> <p>NUMBER: BUL-5525.2</p> <p>ISSUER: Michelle King Senior Deputy Superintendent, School Operations</p> <p>George Silva, Chief Procurement Officer Procurement Services Division</p> <p>DATE: July 1, 2014</p>	<p>ROUTING All Employees All Locations</p>
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POLICY: The purpose of this Bulletin is to inform employees of changes to travel procedures, which are based on the District’s new Finance and Procurement system. The changes reflect new SAP Travel Management processes for schools and offices. The Bulletin explains the responsibilities for adherence to District policy on travel by schools, Educational Service Centers (ESCs), and Central Offices, and the changes in the travel request, approval, and reimbursement process. These changes will be effective July 1, 2014.

This Bulletin replaces BUL- 5525.1 District Policy for Travel and Attendance at Conferences, Conventions or Meetings, dated July 15, 2013.

Note: This Bulletin does not address Travel, Conference or Convention Attendance for students or parents, for student travel refer to REF-2111.0- The Field Trip Guide. For the policy on parent travel please refer to Bulletin 5449.0- District Policy for Parent Conference.

MAJOR CHANGES:

The major changes are as follows:

- Only out of state travel must be approved by the Senior Deputy Superintendent, School Operation, regardless of dollar amount.
- In state conference and travel expenses over \$2,000 will no longer require the approval of the Senior Deputy Superintendent.



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- On a periodic basis (to coincide with the regular payroll schedule), the approved travel expenses will be settled in SAP Travel Management Module (TMM), transferred to Payroll, and paid on the employee's next regular scheduled paycheck.
- For schools, 10.12.1 forms and supporting documents will only be accepted via Scan and email –no faxes and no school mail.
- Changes in dates, amounts, or funding to approved 10.12.1 will require re-approval
- Changes to claim reimbursement process via accounts payable

SCHOOLS: All School request(s) for Travel, Conference or Convention Attendance require the completion of Form 10.12.1 approved by the Site Administrator and the Educational Service Center (ESC) Superintendent or Administrator of Operations (AOO). All out-of-state or international conference/convention and travel must be approved by the Senior Deputy Superintendent, School Operations. All requests must be received by the Procurement Travel Desk no later than 20 calendar days in advance of travel. Incomplete 10.12.1 forms will be returned and late submissions may be denied. It is the responsibility of the traveler to submit the approved Form 10.12.1 and supporting documentation to the Procurement Travel Desk on time and completely filled out by:

Scanning and emailing to procurement.traveldesk@lausd.net

- Upon receipt of the emailed request, Procurement staff will enter estimated travel expenses into SAP and attach the supporting documentation into the system. The traveler will receive a confirming email with an Approved Travel Request Notification Form (ATRN) and Trip Number. Note: It is imperative that all employees check and clear emails on a regular basis to ensure that District related communications get through.

OFFICES: All Central Office requests for Travel, Conference or Convention Attendance require the completion of Form 10.12.1. The Administrative staff (assigned with the new Site Travel Specialist role), will enter estimated travel expenses into SAP TMM and scan the supporting documentation into the system. The required approval(s) will be obtained via electronic workflow and a confirming email will be sent to the traveler with an Approved Travel Request Notification Form (ATRN) and Trip Number.



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GENERAL INFORMATION

The conference attendance procedures have been modified based on the District's new Finance and Procurement system to reflect SAP Travel Management processes for schools and offices, as well as changes in the District's organizational structure and to explain the responsibility for adherence to District policy on travel by schools, Educational Service Center's (ESC) and Central Offices. This Bulletin applies to LAUSD employee travel only.

The Form 10.12.1 may be ordered from the District Stores Warehouse via a Shopping Cart, using Commodity Code/Product ID 9661222055.

Please Note: The Superintendent may periodically impose a travel freeze as needed. Please review the applicable current freeze memo. The memo will provide procedures and criteria required to obtain the necessary approvals. Freeze forms can be found on the Procurement Travel Desk website. Only one Freeze Exemption Request is required per group of attendees per conference.

A. TRAVEL, CONFERENCE OR CONVENTION LOCATION GUIDELINES

Conference attendance should be limited to the closest location to the employee's home or work location. For example, if a conference is offered in Los Angeles and San Diego, the selected location must be Los Angeles.

The approving authority is responsible for ensuring that the continuation of the education program and other job duties will be maintained while the participant is away from the work location. Appropriate funding should always be used for travel and conference attendance. The approving authority must ensure that the request follows District policy (including the correct and accurate completion of Form 10.12.1), appropriate substitute coverage is provided (if required), and proper funding is available. Upon entry of the estimated travel expenses in SAP, a budget availability check will take place and the funds will be reserved (pre-encumbered) for the applicable reimbursable expenses.

Lodging and Per Diem

Expenses for lodging and per diem are not reimbursable if the conference is within 45 miles from home or work. However, an exception may be allowed with pre-approval by the assigned site administrator. The approving authority must indicate on both the 10.12.1 AND the Travel Expense Claim Form that an exception was granted. For example, the attendee is required to be at the conference or convention late in the evening and is required to attend early the subsequent morning; or meals are included as



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part of the conference fee.

All expenditures for mileage and parking related to travel to a conference or convention must be included on Form 10.12.1 using the Travel Expense Claim, and subsequently entered into the SAP TMM.

**B. APPROVAL CHART FOR TRAVEL, CONFERENCE OR CONVENTION
(Form 10.12.1) (see Appendix A-Travel Request Workflow for Schools and Appendix C-Travel Request Workflow for Offices).**

SCHOOLS:

Participant/ School Traveler	Approvers*
Teacher (Elem/Secondary)	Principal and ESC Superintendent/AOO
Teacher (DACE)	Principal and Executive Director, DACE.
Teacher (ECED)	Principal and Executive Director, ECED
Assistant Principal/Co-Administrator (Elem/Secondary)	Principal and ESC Superintendent/AOO
Assistant Principal/Co-Administrator (DACE)	Principal and Executive Director, DACE
Assistant Principal/Co-Administrator (ECED)	Principal and Executive Director, ECED
Principal (Elem/Secondary)	ESC Superintendent/AOO
Principal (DACE)	Executive Director, DACE
Principal (ECED)	Executive Director, ECED

OFFICES:

Central Office Travelers	Approved via SAP Workflow**
ESC Non-School Based Staff	ESC Superintendent/AOO
Central Office-Non-School Based Staff	Director/Division Head
ESC Director	ESC Superintendent/AOO
Central Office Director	Executive Management
Division Head	Executive Management
Executive Management/ ESC Superintendent	Superintendent of Schools

*Relating to school employee travel, if a Central Office is funding the Travel/Conference, the TMM will trigger an electronic workflow to the Administrator of that funding office for approval in SAP. This also applies to No Cost Travel/Conference Attendance Requests.



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**Relating to central office employee travel, if another Central Office (in addition to the originating cost center) is funding the Travel/Conference, the TMM will trigger an electronic workflow to the Administrator of the funding office(s) as well, for approval in SAP.

C. REQUEST AND APPROVAL PROCEDURE

SCHOOLS:

Step 1. Each traveler must complete a separate Form 10.12.1 in order to travel to a Conference or Convention, including events that have no cost to the District. All expenses, including prepaid expenses (i.e. expenses paid via Shopping Cart, Imprest Fund, P-Card, and Travel Credit Card) and substitute(s) must be listed on the Form 10.12.1 and subsequently entered into the TMM in SAP. All Prepaid expenses must be captured for reporting purposes and will not be part of the actual reimbursement to the traveler. ALL sections of the form must be completed, including Cost Center, ESC, funding line in SAP format, etc. To assist the Procurement Travel Desk operators, please include a contact name, telephone number or email somewhere on the Form 10.12.1.

Step 2. Attach documentation (registration brochure/flyer, lodging/hotel rate quotes, airfare, etc.) supporting the conference or convention. Enter dates, times, fees, location, and other pertinent information on the Form 10.12.1.

Step 3. School travelers must obtain appropriate approval signature(s)/title (refer to Approval Chart) prior to submitting Form 10.12.1 and attachments to the Procurement Travel Desk for entry into the TMM in SAP.

Step 4. Upon successful entry of estimated travel expenses in SAP, a confirmation email with an Approved Travel Request Notification (ATRN) form, including trip number, will be sent to the traveler. The ATRN must be received and provided to the P-Card holder prior to paying the conference fee. Conference fees may also be paid via Imprest or Shopping Cart when the ATRN and trip number is provided.

Step 5. Travel expenses (i.e., lodging and transportation) can be booked and charged to the Travel Credit Card. The cardholder must have an approved ATRN and assigned trip number from the traveler prior to booking travel.

If the School does not have a Travel Credit Card, the travelers may book their trip and pay out of pocket to be reimbursed after returning from the travel event.

Step 6. Upon return from the travel and/or conference, the traveler must complete and sign the Travel Expense Claim Form (last page of the Form 10.12.1) to obtain



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reimbursement for allowable expenditures. Each attendee must complete a separate Travel Expense Claim Form and attach copies of the receipt(s), page(s) of the conference brochure that show the date, place, time, agenda and fees, cancelled checks, approved Form 10.12.1, ATRN, and other documentation for itemized travel expenses. (Refer to the Section E for list of reimbursable expenses.)

Step 7. The traveler must obtain the signature of the approving administrator on the Travel Expense Claim form.

Submit the approved Form 10.12.1 with the approved Travel Expense Claim and legible copies of receipts, cancelled checks or credit card charges directly to the Accounts Payable Section, Travel Desk via one of the following delivery methods:

Facsimile: Attention Accounts Payable Travel Desk at (213) 241-8913
School Mail: Accounts Payable Section Travel Desk, Beaudry 27th Floor

The approved actual expenses will then workflow to Accounts Payable for review. Upon review, Accounts Payable will approve the actual expenses and enter a settlement date in the TMM. At such time, a confirmation email with an Approved Actual Travel Expenses Notification will be sent to the traveler indicating the reimbursement amount approved by Accounts Payable.

The method in which the traveler will receive reimbursement is through the employee's LAUSD pay check. The settlement entry date by Accounts Payable and where it falls on the employee's Classified, Certificated or Semi-Monthly Payroll calendar will determine when the employee receives payment.

Schools must maintain copies of the approved Form 10.12.1, Travel Expense Claim Form, receipts and supporting documentation for their records, and have them available for audit requirements

Step 8. Reconciliation for conference fees on the P-Card and Shopping Cart must be to General Ledger account 520002.

OFFICES:

Step 1. Each traveler must complete a separate Form 10.12.1 in order to travel to a Conference or, Convention. All expenses including prepaid expenses (i.e. expenses paid via Shopping Cart, Imprest Fund, P-Card, or Travel Credit Card) must be listed on the Form 10.12.1 and subsequently entered into the TMM in SAP. All prepaid expenses must be captured for reporting purposes and will not be part of the actual reimbursement to the traveler.



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Step 2. Attach documentation (registration brochure/flyer, lodging/hotel rate quotes, airfare, etc.) supporting the conference or convention. Enter dates, times, fees, location, and other pertinent information on the Form 10.12.1.

Step 3. The Administrative staff (assigned with the new Site Travel Specialist role) will enter all the information, scan, and attach all the documents in TMM. The request will be routed via SAP electronic workflow for approval.

Step 4. Upon successful approval of estimated travel expenses in SAP, a confirmation email with an Approved Travel Request Notification (ATRN) Form, including trip number, will be sent to the traveler. The ATRN must be provided to the P-Card holder for conference fee payment. Conference fees may also be paid via Imprest or Shopping Card when the ATRN and trip number is provided.

Step 5. Travel expenses (i.e. lodging and transportation) can be booked and charged to the Travel Credit Card. The cardholder must have an approved ATRN and assigned trip number from the traveler prior to booking travel.

If the Office does not have a Travel Credit Card, the travelers may book their trip and pay out of pocket to be reimbursed after travel event.

Step 6. Upon return from the travel and/or conference, the traveler must complete and sign the Travel Expense Claim form, (last page of the Form 10.12.1) to obtain reimbursement for allowable expenditures. Each attendee must complete a separate Travel Expense Claim Form and attach original receipt(s), page (s) of the conference brochure that show the date, place, time, and fees (do not include other pages of the brochure), cancelled checks, ATRN, and other documentation for itemized travel expenses and submit it to the Site Travel Specialist for final entry into TMM. The Site Travel Specialist will scan and attach the supporting documentation in TMM. (Refer to Section E for list of reimbursable expenses.)

Step 7. After completing entry of actual travel expenses in TMM and attaching support documents, a budget check will take place and will be routed via electronic workflow to the appropriate approver. The approved actual expenses will then workflow to Accounts Payable for review. Upon review, Accounts Payable will approve the actual expenses and enter a settlement date in the TMM. At such time, a confirmation email with an Approved Actual Travel Expenses Notification will be sent to the traveler indicating the reimbursement amount approved by Accounts Payable.

The method in which the traveler will receive reimbursement is through the employee's LAUSD pay check. The settlement entry date by Accounts Payable and where it falls on the employee's Classified, Certificated or Semi-Monthly Payroll calendar will determine



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when the employee receives payment. For example, Accounts Payable enters a settlement date of November 15th. The employee follows the Classified payroll calendar, therefore the payroll cut-off date is November 19th. The employee will receive payment on their November 29th check because the settlement date was entered prior to the payroll cut-off date of November 19th. However, if Accounts Payable had entered a settlement date on November 22nd which is after the November 19th payroll cut-off date, the employee would receive payment in the following month on their December 31st pay check. In general, employees are paid on the following days.

Classified:	Paid on the 30th or 31st of the month
Certificated:	Paid on the 5th of the month
Semi-Monthly:	Paid on the 8th and 23rd of the month

Payroll calendars can be found on the Payroll Administration website at <http://payroll.lausd.net>.

Step 8. Reconciliation for conference fees on the P-Card and Shopping Cart must be to General Ledger account 520002.

D. SUBSTITUTE REIMBURSEMENT

The following information applies only if an outside organization (e.g., Cal State, UCLA) sends documentation requesting the services of District personnel and is providing reimbursement for substitutes:

1. Employees are required to use Form 10.12.1.
2. Send the completed Form 10.12.1 to the appropriate ESC Office, DACE, or ECED along with documentation indicating that an outside agency will provide reimbursement for the substitute.
3. The ESC Office, DACE, or ECED will provide the school with the fund and functional area to time-report a substitute along with the approved Form 10.12.1.
4. The ESC Office, DACE or ECED will send copies of appropriate documentation for billing purposes to General Accounting Branch, Accounts Receivable, Beaudry Building, 26th floor.



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REIMBURSABLE EXPENDITURES GUIDELINES AND REQUIRED DOCUMENTS (see Appendix B- Travel Reimbursement Process For Schools and Appendix D- Travel Reimbursement Process For Offices)

1. **Airfare:** Airfare associated with the business travel is reimbursable if the traveler booked it on their personal Credit/Debit (CC/DC) card. A copy of the itinerary with the charges reflecting the last 4 digits of Credit/Debit card number and/or copies of the flight tickets with the supporting CC/bank statement of charges are acceptable forms of receipt for reimbursement.
2. **Baggage Fees:** Baggage fees associated with the business travel are reimbursable, so long as the baggage tickets or CC/bank statement reflecting the charges are submitted with the Travel Claim Form.
3. **Conference Fees:** Conference fees paid by the Traveler are reimbursable with the supporting documentation (i.e., paid receipt from the venue, a copy of the CC statement, or cancelled check reflecting the charges).
4. **Conference Rooms (for Recruiters):** Conference rooms/booths for teacher recruitments are reimbursable if the room/booth was charged on a personal Credit/Debit card for teacher recruitments. A CC/DC statement or receipt reflecting the charges inclusive of the last 4 digits of CC/DC are acceptable forms of receipts for reimbursement.
5. **Per Diem: NO RECEIPTS REQUIRED.** Per Diem is allowed if the travel is outside of 45 miles from the work/home location. The Per Diem amount includes Meals and Incidental expenses. Attendees departing before noon will be reimbursed a maximum of \$49.00 per travel day and departing after noon will be reimbursed a maximum of \$24.50 for the travel day. If a meal is included as part of the conference fee, a half-day per diem of \$24.50 will be allowed. Attendees returning before noon will be reimbursed a maximum of \$24.50 and returning after noon will be reimbursed a maximum of \$49.00. The attendee will pay all expenses exceeding the per diem rate.
6. **Gasoline:** Gasoline expenses are reimbursable if a rental car was used for the travel only if pre-approved by Administrator.
7. **Hotel:** Hotel expenses paid with personal credit or debit cards are reimbursable with a copy of the hotel folio/statement showing the last 4 digits of the CC/DC or a bank statement. It is advisable to secure a copy of the folio/statement during check out. Personal extended stays not relevant to the conference/travel should be removed from



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the reimbursable total. Personal extended stays should NEVER be paid with a District Travel Card.

8. **Parking:** Parking expenses paid with personal funds incurred on business travel are reimbursable with supporting receipts (i.e., hotel parking, airport parking, etc.)
9. **Postage/Shipping:** Postage/shipping expenses are reimbursable on a case by case basis and must relate to the business trip's agenda. Postage/Shipping for personal items is not reimbursable.
10. **Car Rental:** With pre-approval from the Administrator, expenses related to a car rental for a Conference/Travel are reimbursable with supporting receipts. Receipts received upon rental returns or CC/Bank statements are acceptable. District-prepaid car rentals are not reimbursable when booked by Tzell Travel Group Northwest (refer to Section H).
11. **Taxi/Shuttle:** Conference related Taxi/Shuttle expenses paid with personal funds are reimbursable with Taxi or Shuttle company receipts. Tips associated with the bill are not reimbursable.
12. **Telephone/Fax/Internet:** Telephone, Fax, or Internet charges are reimbursable for District recruiters only.
13. **Miscellaneous:** Miscellaneous expenses are reimbursable if they are business related and deemed appropriate and are approved by Administrator.
14. **Mileage:** Personal vehicles used for business travel will be reimbursed for mileage only with the print out of the round trip mileage calculated from school or work location using Google Maps, Yahoo or MapQuest. The rate is based on the Internal Revenue Service established standard business rate for all miles driven.

Retroactive Travel, Conference or Convention Claims are against District Policy and will only be processed as exceptions and may delay processing of your reimbursement request. All retroactive requests must be accompanied by a signed written justification from the school or office administrator. Therefore, plan conference travel well in advance.

Approved reimbursable expenditures claimed on the Travel Expense Claim form shall not be requested for reimbursement through the Imprest Fund, the Request for Payment of Miscellaneous Bills, or any other process. All travel expenses are to be reconciled to General Ledger account 520002. Due to privacy issues, staff is advised to conceal their credit card number by redacting CC/DC numbers except the last four digits.



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F. FULL SERVICE TRAVEL AGENCY

If utilizing a full service travel agency, Travelers should contact the travel agency at least thirty (30) days prior to travel to ensure the most economical airfare. Tzell Travel Group Northwest is a full service travel agency currently contracted with the District and may be utilized for assistance in booking prepaid: airfare, lodging and rental car arrangements Tzell Travel Group Northwest can be reached at (877) 644-0333 or online at www.tzellnw.com. Expenses, and the accompanying booking fees, are not reimbursable if purchased with the District Travel Credit Card.

G. NON-REIMBURSABLE PREPAID EXPENDITURE GUIDELINES

Payment for conference registration fees and/or the booking of travel (airfare, lodging, car rental) shall occur only "after" receipt of an emailed Approved Travel Request Notification (ATRN) Form. The traveler may pay for conference registration fees and travel related expenses (transportation, lodging, etc.) utilizing District issued credit card, by processing a SAP Shopping Cart, or the Imprest Fund (excluding airfare), whichever is applicable.

Note: The Imprest fund may be used for ground transportation only, no airfare.

Conference Registration Fees

After an ATRN is received for each traveler, conference registration fees may be paid with P-Card, Imprest, and SAP Shopping Cart (PO) or self-paid using personal funds. When procuring conference registration fees utilizing one of the aforementioned payment methods you must indicate *P-Card*, *Imprest*, or *PO* respectively on the Form 10.12.1 and enter the estimate(s) into the TMM.

- The Shopping Cart should be created using product ID 9246023100. Assistance with the Shopping Cart is available by contacting the Procurement Customer Service at (562) 654-9009. The Approved Travel Request Notification (ATRN) must be attached to the Shopping Cart.

Travel Expenses

After an ATRN is obtained, the Travel Credit Card may be used to pay for travel expenses (i.e., airfare, lodging, car rental). The cardholder may contact the full service travel agency Tzell Travel Group Northwest, travel providers such as Orbitz, Expedia, Travelocity, or other travel agencies to procure travel. It is the Travel Credit Card holder's responsibility to select the most economical rates (e.g. GSA rates, government rates, etc.). To check GSA Rates for travel expenses, you may access their website at www.gsa.gov.



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1. Airfare reservations may be made through Tzell Travel Group Northwest, other travel agencies, travel providers, or airline websites. However, it is the traveler's responsibility to select the most competitive rate. All travel should be coach only. Also, be aware that you are responsible for providing accurate information to obtain airfare, therefore ensure you have the traveler's legal name as it appears on their legal identification that they will use to travel since the name of the airline ticket and legal identification must match.

The traveler is responsible for disputing incorrect flight charges, and tracking credits. In most cases, travel agencies will hold reservations for 24 hours "without ticketing" or provide a price quote based on current demand and availability of flights. Since rates are subject to change, it is important to promptly enter the estimated travel expense into SAP and to immediately contact the travel provider for booking. Travel Credit Card holders may proceed with booking only after receipt of the ATRN. If the traveler is unable to secure airfare travel utilizing a Travel Credit Card, the traveler will need to pay out of pocket for airfare expenses and follow the reimbursable process guidelines.

2. Lodging reservations may be made through Tzell Travel Group Northwest, other travel agencies, travel providers or hotel websites. The traveler must be prepared to provide a personal credit card at check-in for lodging or incidentals. Moreover, in some instances the traveler may have to pay out of pocket although the reservation was made with the Travel Credit Card. The cardholder for the Travel Credit Card will need to negotiate with the hotel to ensure pre-payment, if allowed by the hotel. Otherwise, the traveler, if not the Travel Credit Card holder, will need to pay out of pocket for lodging expenses and follow the reimbursable process guidelines. Lodging expenses may also be prepaid via the SAP Shopping Cart when accepted by the vendor (hotel).
3. Car Rental reservations may be made through Tzell Travel Group Northwest, other travel agencies, travel providers or car rental websites. If you are a Travel Credit Card holder you may select from various car rental providers and may book through any car rental agency (i.e., Enterprise, Avis, Hertz, Budget, etc.). However, it is the cardholder's responsibility to select the most competitive rate. Rental cars must be exclusively operated by the LAUSD employee approved to travel.

Travel Credit Card holder's will be required to present in person to the Car Rental Agency their physical Travel Credit Card along with proper photo identification which bears the cardholder's legal name, which must match the name on the Travel Credit Card. If the traveler is not the Travel Credit Card holder, the traveler may utilize District Paid Transportation (reference Section H) or will need to



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pay out of pocket for car rental expenses and follow the reimbursable process guidelines.

4. When procuring travel with the Travel Credit Card, indicate *T-Card* on the Form 10.12.1 and enter the estimate(s) into the TMM. Once travel has been approved, the Expense Type will appear as a District Paid Amount on the ATRN. The Travel Credit Card holder may proceed in booking travel expenses (i.e., airfare, lodging, car rental) after receipt of the ATRN. All expenses paid with a District issued credit card (P-Card or Travel Credit Card), Shopping Card, or Imprest fund are not reimbursable to the traveler. These District prepaid expenses must be listed on the Travel Expense Claim form in the prepaid column.

H. DISTRICT PAID TRANSPORTATION EXPENDITURE GUIDELINES

District employees may book Enterprise car rental services through Tzell Travel Group Northwest and utilize the District's Corporate Bill Account. District employees seeking to use such services must contact Tzell Travel Group Northwest for a price estimate, indicate *District paid* on the Form 10.12.1, indicate the Rental Company in the Comments section and enter the Prepaid estimate into the TMM. Once travel has been approved, the Expense type will appear as a District Paid Amount on the ATRN. The District employee must submit the ATRN to Tzell Travel Group Northwest in order to proceed in booking car rental services with Enterprise. District paid transportation fees are not reimbursable to the traveler and expenses must be listed on the Travel Expense Claim form in the prepaid column.

CONTACT INFORMATION:

For assistance or further information please contact:

1. Your local ESC
2. Procurement Travel Desk Hotline (562) 654-9058 or email procurement.traveldesks@lausd.net
3. Tzell Travel Group Northwest at (877) 644-0333, fax (866) 907-7990 or online at: www.tzellnw.com
4. District's Credit Card Program Representatives:
ESC North and West (562) 654-9062
ESC South and ISIC (562) 654-9428
Central Offices, ESC East, Adult Schools (562) 654-9061
5. Accounts Payable Customer Service at (213) 241-4800

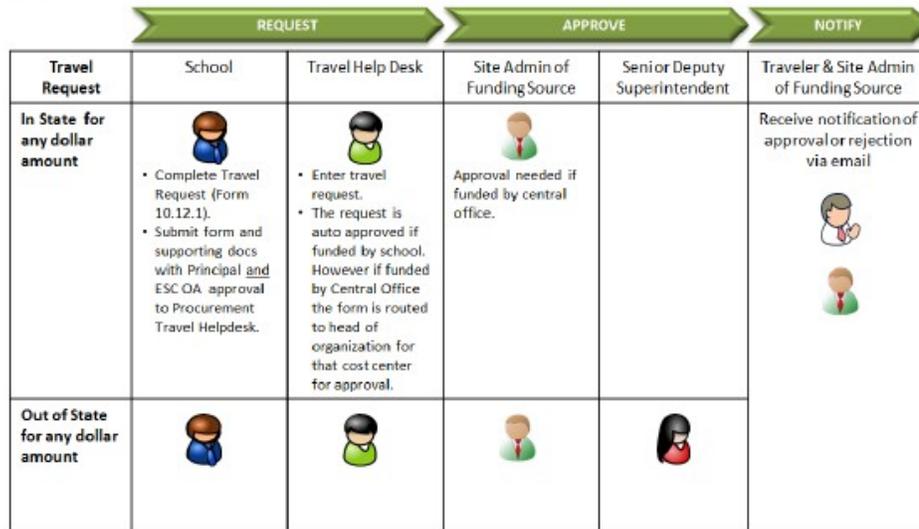


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Appendix A. Travel Request Workflow for Schools.



Schools – Travel Request Workflow





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Appendix B. Travel Reimbursement Process for Schools.



Schools – Travel Expense Process

	SUBMIT	PROCESS	APPROVE	PAY & NOTIFY
Travel Expenses	School  Completes Travel Expense Claim (Form 10.12.1) with ESC OA approval. Submits actual travel expenses to Accounts Payable.	Accounts Payable  Enter travel expenses and verify against receipts. <u>SAP Payroll Run</u> • Reimbursable travel expenses will pay in regular payroll cycle if submitted prior to cut-off, otherwise it will pay in next regular cycle.	Site Admin of Funding Source  Applicable only if a different cost center has been identified from the Initial Estimated Request.	Traveler  Receive notification that travel expenses were processed. Receive reimbursement in paycheck in regular payroll cycle.  Receive notification via email.

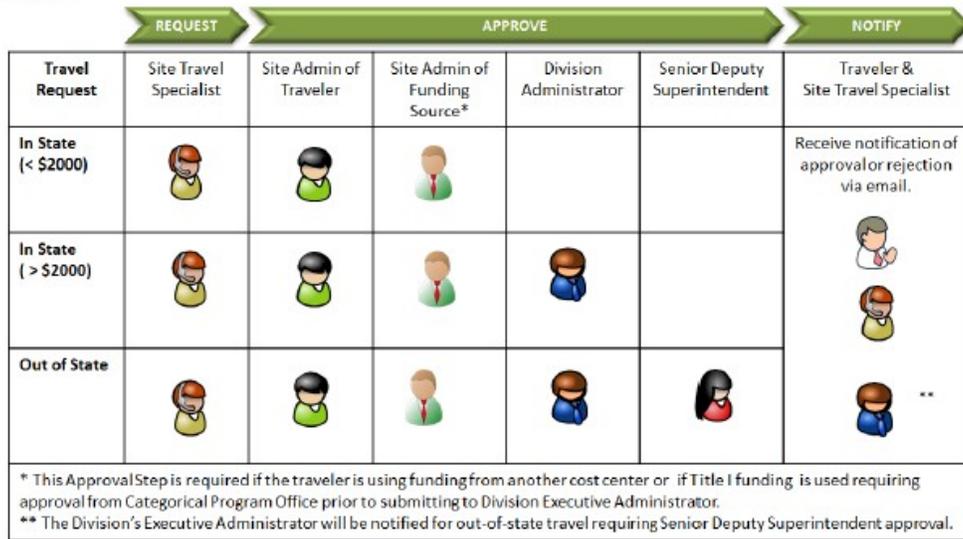


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Appendix C. Travel Request Workflow for Offices.



Central Offices – Travel Request Workflow



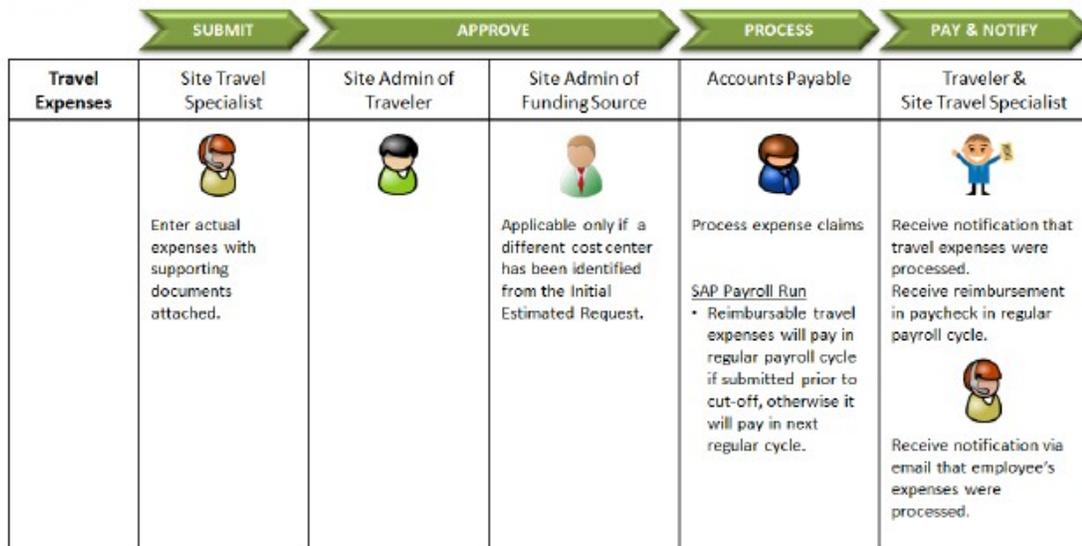


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Appendix D. Travel Reimbursement Process for Offices.



Central Offices – Travel Expense Process



Appendix R: New Certification of Absence Forms (BUL-6307.3)



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TITLE: Certification of Absence Forms

NUMBER: BUL-6307.3

ISSUER: Alma Peña-Sanchez, Chief of Staff,
Office of the Superintendent

V. Luis Buendia, Controller,
Accounting & Disbursements Division

DATE: July 1, 2016

ROUTING

All Offices and Schools
Administrators
Principals
Time Reporters
Risk Management

PURPOSE: The purpose of this bulletin is to advise administrators and time-reporters of the updated Certification of Absence Forms. The District has updated Form No. 60.ILL, Certification/Request of Absence for Illness, Family Illness, New Child, in order to include certification of FMLA supporting documents.

MAJOR CHANGES: The updated forms replace Certification/Request of Absence for Illness, Family Illness, New Child (Form No. 60.ILL; 7/8/2015) and Certification/Request of Absence for Non-Illness (Form No. 60.NON-ILL; 7/8/2015). Form No. 60.ILL has been revised to include statements indicating receipt of FMLA supporting documents, FMLA supporting documents are on file and the usage of time code SBTM for eligible Substitute/Temporary employees.

GUIDELINES: The following guidelines are provided for the use of the new forms:

- A. Certification/Request of Absence for Illness, Family Illness, New Child (See Attachment A)

This form consists of five sections: Employee Information, Reason for Absence, FMLA/CFRA Information, Important LAUSD Information, and Administrator/Supervisor’s Acknowledgment/Approval.

- 1. Employee Information section requires the following employee data:
 - a) Name
 - b) Employee number
 - c) Work location
 - d) Job title
 - e) Substitute/temporary status
 - f) Employee’s telephone number



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2. Reason for Absence section requires the employee to provide absence data as follows:
 - a) The starting date and last date of absence or expected last date of absence.
 - b) Total time or expected total time of absence (days or hours).
 - c) The selection of the type of absence (Time reporters may refer to the FMLA Supervisors' Reference Guide or Payroll Concepts Manual for the appropriate time/pay codes).

Note: All types of absence selections must be made according to the applicable Board Rules, Personnel Commission Rules, Collective Bargaining Agreements and District Policies governing the employee.

The types of absence are:

- i. Employee's personal illness/injury/disability/Medical Appointment/Accident
 - ii. Employee's occupational illness/injury or act of violence.
 - iii. Employee's pregnancy-related illness/disability.
 - iv. Illness/injury/disability/accident of employee's family member – the employee may request to use up to *six (6) days per their collective bargaining agreement or up to seven (7) days per their collective bargaining agreement of personal necessity per fiscal year, or the employee may request to use up to six (6) days of kin care per calendar year. However kin care is restricted for the use of illness for a parent, child, registered domestic partner or spouse, per Labor Code Section 233 (kin care).*
 - v. Employee's time-off for new-born/newly adopted/new foster care.
3. FMLA/CFRA Information Section addresses the requirements for a "serious health condition" absence.
 4. Important LAUSD Information Section addresses the requirement for a Certification of Health Care Provider. The certification is required when requested by the Administrator/Supervisor under FMLA, District rules or if absence is over five consecutive working days. The employee must also indicate if the requests are for an unpaid leave of absence. The section also includes a statement to use SBTM time code for eligible Substitute/Temporary employees.
 5. The Administrator/Supervisor Section addresses the following:
 - a) Confirmation that FMLA supporting documentation has been received and is on file.



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- b) Approval/disapproval of the received FMLA request.
- c) Administrator/supervisor's acknowledgment/approval which requires the name and signature of supervisor.
- d) Approval/disapproval of the absence.

B. Certification and/or Request of Absence for Non-Illness (See Attachment B)

This form consists of three sections: Employee Information, Reason for Absence, For Administrator/Supervisor, and Administrator/Supervisor's Acknowledgement/Approval.

1. Employee Information section requires employee data as follows:

- a) Name
- b) Employee number
- c) Work location
- d) Job title
- e) Employee's telephone number

2. Reason for Absence section requires employee to provide absence data as follows:

- a) The starting date and last date of absence or expected last date of absence.
- b) The total time or expected total time of absence (days or hours).
- c) The selection of the type of absence. Time reporters may refer to the Payroll Concepts Manual for the appropriate time/pay codes.

Note: All types of absence selections must be made according to the applicable Board Rules, Personnel Commission Rules, Collective Bargaining Agreements and District Policies governing the employee.

The types of absence are:

- i. Accident or imminent danger to employee's property
- ii. Accident to employee's family members' property
- iii. Automobile failure if required for work performance (for employees in bargaining units A, B, C, D & S)
- iv. Registration or final exam in higher education (for employees in bargaining units A, C & S)
- v. Religious holiday of employee's faith
- vi. Bereavement
- vii. Conference approved by the District



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- viii. Jury duty or appearance in court under order – *is an acknowledgment, but employee must provide the appropriate notification and documentation.*
- ix. Vacation – *For eligible regular classified and certificated “A” basis employees. This request is subject to approval only. The certification statement does not apply and no additional explanation is required.*
- x. Other absences – not specifically indicated above but provided in the collective bargaining agreement and PC Rules.

3. The Administrator/Supervisor Section addresses the following:

- e) Confirmation that FMLA supporting documentation has been received and is on file.
- f) Approval/disapproval of the received FMLA request.
- g) Administrator/supervisor’s acknowledgment/approval which requires the name and signature of supervisor.
- h) Approval/disapproval of the absence.

C. Employee’s Signature (Authorization)

Employees agree and authorize that if they do not have sufficient benefit time to cover their absences, any unearned wages they receive for hours they did not work will be collected from their next paycheck.

The form must be signed and dated by employees under penalty of perjury.

D. Time Reporter and Time Approver Responsibility

A time card is the District’s official document of an employee’s attendance/absence for time reporting purposes. The use of the time card is mandated in the Board Rules and is subject to the District designated auditors.

Records substantiating the time reported to the Payroll Administration for salary payment must be kept on file and retained at the location for a period of five years in accordance with the Board of Education report.

Completed and approved absence certification forms are required prior to the reporting of absence time.

Effective 7/1/16, the time reporter shall distribute and accept only the following certification forms from the employee. Therefore, the time reporter shall destroy all Certification forms dated 07/8/2015.



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Certification/Request of Absence for Illness, Family Illness, New Child
Form No. 60.ILL; Revised 7/1/2016

Certification and/or Request of Absence for Non-Illness
Form No. 60.NON-ILL; Revised 7/1/2016

Utilization of the revised certification forms will be closely monitored for compliance. Failure to use the revised certification forms above is in violation of proper time reporting procedures and will be addressed with those time reporters and time approvers that are non-compliant.

- E. Copy of the forms may be downloaded via Inside LAUSD by following these steps:
1. Log-on to Inside LAUSD at <http://notebook.lausd.net>.
 2. Click on E-Library and sub-menu "Templates and Forms".
 3. Type 60.ILL or 60.NON-ILL in the Search field box.
 4. Click on GO.
 5. Click on desired form title "Certification/Request of Absence for Illness, Family Illness, New Child" or "Certification and/or Request of Absence for Non-Illness.
 6. Click on Document (Employees may fill out the document on-line prior to printing and signing the document).
 7. Click on print icon.
- F. These new forms replace form numbers: 60.ILL; Revised 7/8/2015 Certification/Request of Absence for Illness, Family Illness, New Child and 60.NON-ILL; Revised 7/8/2015 Certification/Request of Absence for Non-Illness.

These new forms must be maintained on file with the sign-in and sign-out documents for auditing purposes.

RELATED RESOURCES:

Office of the General Counsel, Policy Bulletin No. BUL-6529.1, *Legally-Mandated Paid Sick Leave for Eligible Employees*

Accounting and Disbursements Division, Reference Guide No. REF-6528.1, *Reporting Paid Sick Leave for Substitute/Temp Eligible Employees*

Division of Risk Management & Insurance Services, Reference Guide No. REF-6022.0, *Family and Medical Leave Act/California Family Rights Act – Supervisors' FMLA/CFRA Reference Guide*



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Payroll Concepts Manual dated July 1, 2016

Attachment A – Certification and/or Request of Absence for Illness, Family Illness,
New Child

Attachment B – Certification and/or Request of Absence for Non-Illness

ASSISTANCE: For time reporting assistance, contact Payroll Customer Services at
(213) 241-2570.

Questions regarding protected absences can be directed to the District's FMLA
Leaves Section at (213) 241-3954, or (213) 241-2820.



**LOS ANGELES UNIFIED SCHOOL DISTRICT
POLICY BULLETIN**

ATTACHMENT A

Los Angeles Unified School District
CERTIFICATION/REQUEST OF ABSENCE FOR ILLNESS, FAMILY ILLNESS, NEW CHILD

EMPLOYEE INFORMATION (Please Print)

Last Name	First Name	M.L.	Employee No.
Work Location Name	Job Title	Substitute/Temporary <input type="checkbox"/> Yes <input type="checkbox"/> No	Employee's Telephone ()

REASON FOR ABSENCE

1. Starting date of absence ____/____/____ Last date of absence (expected) ____/____/____
Mo. Day Yr. Mo. Day Yr.

2. Total time (expected) of absence: ____ days; ____ hours.
 NOTE: This form does not supersede or replace the Leave of Absence Request Form (PC Form 5006 or HR Form 1065), when required.

3. Select appropriate type of leave:
 The following types of absence may qualify for protection under the Family and Medical Leave Act ("FMLA") and/or the California Family Rights Act ("CFRA"). You may request protection if the absence is covered under the qualifying conditions. LAUSD may also, on its own, designate an absence/leave as FMLA/CFRA, if the absence meets legal requirements.

A) My Personal Illness/Injury/Disability/Medical Appointment/Accident..... [See #6 & 8 below]
 B) My Occupational Illness/Injury or Act of Violence..... [See #6 below.]
 C) My Pregnancy-related Illness/Disability..... [See #6 below.]
 D) Illness/Injury/Disability/Accident-My Family Member (relation _____) [See #6 below.]
Personal Necessity requested _____ Kin-Care requested _____
 E) Time-off for New-Born/Newly adopted/New foster care _____ Provide verification _____

NOTE: Absences "A" through "C" may qualify as Illness leave; "D", and "E" as Personal Necessity; "D" may also be Kin-Care.

FMLA/CFRA INFORMATION

4. Is the absence due to a "serious health condition" (see separate FMLA form for Definitions)..... Yes No
Note: To confirm serious health condition, you are required to return "FMLA Certification of Health Provider within 15 calendar days

5. Do you request FMLA/CFRA protection? (See District website or your supervisor for FMLA facts)..... Yes No

IMPORTANT LAUSD INFORMATION

'Physician Statement' is required if absence is over 5 consecutive days or if required by Administrator under LAUSD Rules. 'FMLA Certification of Health Care Provider' is required if FMLA/CFRA protections are being requested.

6. Is the appropriate medical certification submitted with this request? Yes No Not Required (new child)
NOTE: If the answer is "No", the correct medical certification must be submitted separately and promptly.

7. Is the request being made for unpaid leave/absence? Yes No

8. Eligible Substitute/Temporary employee as part of the Healthy Workplaces Healthy Families Act, use SBTM time code _____

I certify I was/will not be employed elsewhere during my regular work hours within the time period claimed on this certification, unless taking vacation. I certify my absence during this period was not and is not for participating in a strike/work stoppage or because of my unwillingness to cross picket lines and I would have been available for duty if it had not been for the reason cited above. Furthermore, I certify my absence during my hours of assigned duty is because of the above listed reason in accordance with any applicable Board/PC rule or Collective Bargaining Agreement. I also agree and authorize that once the correct benefit usage charged above is processed, any unearned wages paid as a result will be collected from the next paycheck. I declare under the penalty of perjury that the foregoing is true and correct.

Employee's Signature: _____ Date: _____

For Administrator/Supervisor: Is the FMLA supporting documentation received/on file? Yes No

Is the FMLA approved? Yes No

Explanation _____

Use separate paper, if needed

Administrator/Supervisor's Acknowledgment/Approval:

Print Name _____ Signature _____ Date _____

Form No. 60.ILL, Revised 7/1/2016

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Los Angeles Unified School District

CERTIFICATION AND/OR REQUEST OF ABSENCE FOR NON-ILLNESS

EMPLOYEE INFORMATION (Please Print)

Last Name	First Name	M.I.	Employee No.
Work Location Name	Job Title	Employee's Telephone ()	

REASON FOR ABSENCE

1. Starting date of absence ____ / ____ / ____ Last date of absence (expected) ____ / ____ / ____
Mo. Day Yr. Mo. Day Yr.

2. Total time (expected) of absence: ____ days; ____ hours.
 NOTE: This form does not supersede or replace the Leave of Absence Request Form (PC Form 5006 or HR Form 1065), when required.

3. Select the appropriate type of absence:
 Typically, these types of absence do **NOT** qualify for the Family and Medical Leave Act ("FMLA") and/or the California Family Rights Act ("CFRA"). However, if the reason meets legal requirements, you may request such FMLA/CFRA protection. LAUSD may also, on its own, designate an absence as FMLA/CFRA protected, if information indicates that the legal requirements are met.

A) Accident or Imminent Danger to My Property (see rule') Explain _____

B) Accident to Family Member's Property (see rule') Explain _____

C) Auto failure (up to 2 hours) if car used for work (see rule') Explain _____

D) Registration or Final Exam in Higher Education (see rule') Explain _____

E) Religious Holiday of My Faith Explain _____

F) Bereavement (see rule') Identify Family Relation _____

G) Conference Approved by District Provide verification, Explain _____

H) Jury Duty, or Appearance in Court under Order Provide documentation from the Court _____

I) Vacation (All regular classified employees & Certificated A basis) Subject to Approval _____

J) Other Absences (identify _____) Explain _____

NOTE: Absences "A" through "E" may qualify as Personal Necessity.

Additional Explanation, if needed _____

I certify I was/will not be employed elsewhere during my regular work hours within the time period claimed on this certification, unless taking vacation. I certify my absence during this period was not and is not for participating in a strike/work stoppage or because of my unwillingness to cross picket lines and I would have been available for duty if it had not been for the reason cited above. Furthermore, I certify my absence during my hours of assigned duty is because of the above listed reason in accordance with any applicable Board/PC rule or Collective Bargaining Agreement. I also agree and authorize that once the correct benefit usage charged above is processed, any unearned wages paid as a result will be collected from the next paycheck. I declare under the penalty of perjury that the foregoing is true and correct.

Employee's Signature _____ Date _____

For Administrator/Supervisor: Is the FMLA supporting documentation received/on file? Yes No
 Is the FMLA approved? Yes No
 Explanation _____
Use separate paper, if needed

Administrator/Supervisor's Acknowledgment/Approval:

Print Name _____ Signature _____ Date _____
 For Administrator/Supervisor: Do you approve the requested absence? Yes No
 Explanation (if No): _____

¹ Rule to #3.A or B: Accident to property must be either your property or immediate family member's (either your family or spouse's, such as parent, child, grandparent, grandchild, brother, sister, step/fother child or other relative living in employee's immediate household). Reference the specific section of the bargaining unit agreement or any applicable Board/PC rule if another relationship is claimed. Imminent danger to property includes only your property, and is occasioned by disaster such as flood, fire, or earthquake.
² Rule to #3.C: Refer to applicable bargaining unit agreement or any applicable Board/PC rule.
³ Rule to #3.D: Upon at least two days' notice to their immediate supervisor, a classified employee shall be permitted to take any examination and to participate in other District employment procedures during working hours without loss of pay or other penalty. If less than two days' notice is provided, permission to participate without loss of pay is subject to approval by the employee's immediate supervisor. (PC Rule 784, Paragraph B)
⁴ Rule to #3.F: The rule requires that the relationship be an immediate family member meaning under LAUSD's definition for bereavement, either your family or spouse's family, such as parent, child, grandparent, grandchild, brother, sister, step/fother child or other relative living in employee's immediate household. Reference the specific section of the bargaining agreement or any applicable Board/PC rule if another relationship is claimed.

Form No. 60 NON-ILL; Revised 07/01/2016

NON ILLNESSES

Appendix S: Reporting Paid Sick Leave for Substitute/Temp Eligible Employees (REF-6528.1)



**LOS ANGELES UNIFIED SCHOOL DISTRICT
REFERENCE GUIDE**

TITLE:	Reporting Paid Sick Leave for Substitute/Temp Eligible Employees	ROUTING All Schools and Offices Administrators School Administrative Assistants Time Keepers Time Approvers
NUMBER:	REF-6528.1	
ISSUERS:	V. Luis Buendia, Controller Accounting and Disbursements Division Justo H. Avila, Chief Human Resources Officer Human Resources Division Karla Gould, Personnel Director Personnel Commission Alvaro Cortés, Executive Director Beyond the Bell Branch	
DATE:	August 31, 2015	
PURPOSE:	The purpose of this Reference Guide is to provide District employees with information about the procedures for notification, reporting and approval of California mandatory paid sick leave for eligible employees who currently do not receive sick days.	
MAJOR CHANGES:	This reference guide replaces REF-6528.0, Reporting Paid Sick Leave for Substitute/Temp Eligible Employees, dated June 30, 2015. This revised reference guide reflects change necessitated by the July 13, 2015, amendment to the Healthy Workplaces, Healthy Families Act of 2014. The amendment excludes a retired annuitant of a public agency from the definition of employees eligible for mandatory paid sick leave. More specifically, the definition of “employee” does not include an employee who is a recipient of a retirement allowance and employed without reinstatement in the Public Employees’ Retirement System (PERS).	
BACKGROUND:	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. Effective July 1, 2015, eligible employees are entitled to up to three (3) protected paid sick days or 24 hours in a 12-month period, for the diagnosis, care or treatment of a health condition, or for preventative care for an employee or an employee’s family member. The new law does not provide additional sick days to District employees who already receive paid sick days. The Act also provides paid sick days to an employee for certain purposes related to being a victim of domestic violence, sexual assault or stalking. The Act defines employee eligibility, prescribes use of mandatory paid sick days, eligible family members, notice requirements and contains non-retaliation provisions.	



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The legislative intent of the Healthy Workplaces, Healthy Families Act is to ensure workers in California can address their own health needs and the health needs of their families by requiring employers to provide a minimum level of paid sick days, including time for family care. The Act is also intended to decrease public and private health care costs by enabling workers to seek early and routine medical care for themselves and their family members, and to address domestic violence or sexual assault; to provide economic security to those who take time off from work for reasons related to domestic violence or sexual assault; and, safeguard the welfare, health, safety and prosperity of the people of California.

The provisions of the Act are in addition to and independent of any other rights, remedies or procedures available under any other law and do not diminish, alter or negate any other legal rights, remedies or procedures available to an aggrieved person.

PROCEDURES: Day to Day K-12 Substitutes

All illness time for Day to Day K-12 substitute teachers will be reported and approved by staff in the Certificated Substitute Unit. For procedures regarding time reporting of illness for extended substitutes, please refer to additional information within this Reference Guide.

A Day to Day K-12 substitute teacher may request to use their illness benefit by declining a call in SubFinder and by completing and submitting the Certification/Request of Absence for Illness, Family Illness, New Child form (Form No. 60.ILL) to the Certificated Substitute Unit as soon as practicable to ensure timely payroll reporting. Form No. 60.ILL may be obtained online at <http://achieve.lausd.net/hr>. In addition, school office personnel will be required to make the forms available to substitute teachers. The completed form must be faxed or emailed to the Certificated Substitute Unit at (213) 241-8410 or Subillnessreporting@lausd.net. Once an Absence Request Form is received, Certificated Substitute Unit staff will verify that the substitute received a call from SubFinder on the requested date and ensure that time is reported.

K-12 substitutes who become ill after reporting to a school site and request to leave before the assignment day ends may request to use hours equivalent to the portion of the day that remains. Form No. 60.ILL must be submitted following the directions outlined above.

Day to Day Early Childhood Education Substitutes

All illness time for Day to Day Early Childhood Education substitutes will be reported and approved by staff in the Early Childhood Education Certificated Unit. For procedures regarding time reporting of illness for extended substitutes, please refer to additional information within this Reference Guide.



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An Early Childhood Education Day to Day substitute teacher may request to use their illness benefit by declining a call in SmartFindExpress and by completing and submitting the Certification/Request of Absence for Illness, Family Illness, New Child form (Form No. 60.ILL) to the Early Childhood Education Certificated Substitute Unit as soon as practicable to ensure timely payroll reporting. Form No. 60.ILL may be obtained online at <http://achieve.lausd.net/ece-hr>. In addition, school office personnel will be required to make the forms available to substitute teachers. The completed form must be faxed or emailed to the Early Childhood Education Certificated Substitute Unit at (213) 241-2479 or Earlyvedsubillnessreporting@lausd.net. Once an Absence Request form is received, Early Childhood Education Certificated Substitute Unit staff will verify that the substitute received a call from Smart Find Express on the requested date and ensure that time is reported.

Early Childhood Education substitutes who become ill after reporting to a school site and request to leave before the assignment day ends may request to use hours equivalent to the portion of the day that remains. Form No. 60.ILL must be submitted following the directions outlined above.

Adult Education Substitutes

Adult Education substitute teachers may request to use their illness benefit by declining a call from the requesting school site and by completing and submitting the Certification/Request of Absence for Illness, Family Illness, New Child form (Form No. 60.ILL) to the requesting school site as soon as practicable to ensure timely payroll reporting. Form No. 60.ILL may be obtained online at <http://achieve.lausd.net/hr>. In addition, school office personnel will be required to make the forms available to substitute teachers. Once an Absence Request form is received, the requesting school site will verify that the substitute received a call on that date and ensure that time is reported and certified. Mandatory paid sick days shall be reported under the time reporting code Substitute/Temporary Absence (SBTM).

Adult Education Substitutes who become ill after reporting to a school site and request to leave before the assignment day ends may request to use hours equivalent to the portion of the day that remains. Form No. 60.ILL must be submitted following the directions outlined above.

K-12, Early Education, and Adult Education Extended Substitutes, Professional Experts and Return Retirees

Illness time for substitutes in extended assignments, of 21 days or more, professional experts and return retirees must be reported by the school or office at which the employee is assigned. Prior to time entry, time reporters must be in receipt of a Certification/Request of Absence for Illness, Family Illness, New Child form (Form No. 60.ILL) for each substitute employee, professional expert or return retiree



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requesting paid sick leave. Mandatory paid sick days shall be reported under the time reporting code Substitute/Temporary Absence (SBTM). Please report the appropriate hours by the deadline established on the Cut-Off and Pay Dates for CATS Time Reporting payroll calendar.

Time records for certificated substitutes in extended assignments, professional experts and return retirees will be approved by the administrator at the assigned location.

Classified Day to Day Substitutes

A substitute or temporary employee may request to use their illness benefit by completing and submitting the Certification/Request of Absence for Illness, Family Illness, New Child form (Form No. 60.ILL) to the Classified Employment Services Branch as soon as practicable to ensure timely payroll reporting. The completed form may be faxed to the Classified Employment Services Branch (213) 241-6808 or may be scanned and emailed to classifiedpersonnel@lausd.net. Form No. 60.ILL may be obtained online at <http://achieve.lausd.net/Page/1083>. In addition, school office personnel will be required to make the forms available to substitute and temporary employees. Once an Absence Request form is received, Personnel Commission staff will verify that the substitute received a call from SmartFindExpress on the requested date and ensure that time is reported. Employees may contact the time reporter at (213) 241-6337 to check the status of their request.

Classified Long Term Substitutes

Substitutes assigned to a site for more than five (5) days may submit the Certification of Absence Request Form to the time reporter at the site.

Substitutes who become ill after reporting to a school site and request to leave before the assignment day ends may submit a request to the time keeper to use hours equivalent to the portion of the day that remains. Form No. 60.ILL must be submitted following the directions outlined above.

Time records for substitutes on long term assignments will be approved by the administrator at the assigned location.

Part-Time, Unclassified Employees (Includes Beyond the Bell, LA's BEST, School-Based Employees)

A part-time, unclassified employee may request to use their illness benefit by completing and submitting the Certification/Request of Absence for Illness, Family Illness, New Child form (Form No. 60.ILL) to the school or office at which the employee is assigned. Form No. 60.ILL may be obtained online at <http://achieve.lausd.net/Page/1083>. In addition, school office personnel will be required to make the forms available to part-time, unclassified employees. Once an



LOS ANGELES UNIFIED SCHOOL DISTRICT REFERENCE GUIDE

Absence Request form is received, the time reporter will review, submit to the administrator for approval and ensure that time is reported. For procedures regarding time reporting of illness for part-time, unclassified employees, please refer to additional information within this Reference Guide.

- EMPLOYEES:** As an eligible employee, following the instructions outlined below will enable the time keeper and time approver to perform the functions necessary to facilitate timely compensation.
1. Follow the procedures as outlined in prior sections for notification purposes according to your classification; certificated, classified or unclassified.
 2. Complete the Certification/Request of Absence for Illness, Family Illness, New Child form (Form No. 60.ILL).
 3. When completing Form No. 60.ILL, mark/select A2 under #4 for the appropriate type of leave.
 4. Form No. 60.ILL can be found at <http://achieve.lausd.net/Page/1083>.
 5. Submit Form No. 60.ILL to the applicable office or site as outlined in prior sections according to your classification; certificated, classified or unclassified.
 6. Verify or view the status of hours reported and approved via the Time Statement and/or viewing the Online Pay Stub by logging into the LAUSD Employee Self Service website at <https://selfservice.lausd.net>.
 7. Print the payroll calendar that is most applicable; Certificated (CE), Classified (CL) or Semi-Monthly (SM).
 8. Be mindful of the payroll cut-off deadlines and the date in which forms are submitted to the applicable office or site. Hours that are reported by the time keeper and approved by the administrator for each payroll area deadline (CE, CL, SM) will be paid according to the designated calendar pay dates; no exceptions.

- TIME KEEPERS:** As the time keeper, following the instructions outlined below will help eligible employees receive timely compensation.
1. School and office personnel are required to make Form No. 60.ILL available to substitute and temporary employees.
 2. Must be in receipt of a completed and administrator acknowledged Form No. 60.ILL for each employee requesting paid sick leave prior to time entry.
 3. Use the four character time entry absence code "SBTM" which is an abbreviation for Substitute/Temporary Absence.
 4. Verify employee eligibility and available SBTM balance.
 5. Time report the appropriate hours by the deadline established on the Cut-Off and Pay Dates for CATS Time Reporting payroll calendar.
 6. The allocation of funds used to report the absence time code SBTM has been established and will automatically default with funding line information for eligible employees.
 7. Maintain the records substantiating the time reported to Payroll Administration for five years.



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- Failure to report the time and have it approved by 6:00 p.m. per the payroll deadline, will delay compensation to employees.

TIME APPROVERS:

As the administrator and time approver, following the instructions outlined below will help eligible employees receive timely compensation.

- Authorize by signing the Administrator/Supervisor's acknowledgement on the employee submitted Certification/Request of Absence for Illness, Family Illness, New Child form (Form No. 60.ILL). A request to use mandatory paid sick leave cannot be denied.
- Time approve the appropriate hours by the deadline established on the Cut-Off and Pay Dates for CATS Time Reporting payroll calendar.
- Failure to approve the time by 6:00 p.m. per the payroll deadline, will delay compensation to employees.

FORM NO. 60.ILL:

When completing the Certification/Request Of Absence For Illness, Family Illness, New Child form (Form No. 60.ILL), mark/select A2 under #4 for the appropriate type of leave as seen below:

- A2) Eligible Substitute/Temporary employee as part of the Healthy Workplaces Healthy Families Act. My Family Member (relation).

Los Angeles Unified School District
CERTIFICATION/REQUEST OF ABSENCE FOR ILLNESS, FAMILY ILLNESS, NEW CHILD

EMPLOYEE INFORMATION (Please Print)

Last Name	First Name	ML	Employee No.
WORK LOCATION Name	JOB TITLE	Employee's Telephone No.	

REASON FOR ABSENCE

1. Check one: New absence Extension of ongoing absence Intermittent absence/Reduced schedule

2. Starting day of absence: ____/____/____ Last date of absence (or end of) ____/____/____

3. Total time requested of absence: weeks: ____ days: ____ hours: ____

NOTE: This form does not supersede or replace the Leave of Absence Request form (FC Form 0096), or DRH Form 1065, when required.

4. Select appropriate type of leave:
(The following types of absence may qualify for protection under the Family and Medical Leave Act (FMLA) and/or the California Family Rights Act (CFRA). You may request protection if the absence is covered under the qualifying conditions (see page 2). LAUSD may also, in its own discretion, designate an absence as FMLA/CFRA, if the absence meets legal requirements.)

A2) Eligible Substitute/Temporary employee as part of the Healthy Workplaces Healthy Families Act. My Family Member (relation) [See #7 below.]

A1) My Program or related illness/Disability. [See #7 below.]

C) Accident Involving My Person. [See #7 below.]

D) Personal Care/Disability-My Family Member (relation) (Person at necessity requested) [See #7 below.]

E) Accident Involving My Family Member (relation) (Person at necessity requested) [See #7 below.]

F) Temporary Care of Family Member (relation) (Person at necessity requested) [See #7 below.]

NOTE: Absences "A1" through "F" may qualify as illness leave; "C", "D", "E" & "F" as Personal Necessity; "C" may also be Kin Care.

FMLA/CFRA INFORMATION

5A. Is the absence due to a "serious health condition" (see separate FMLA form for definition)? Yes No
circumstances. To qualify serious health condition, you are required to submit FMLA Certification of Health Provider within 15 calendar days.

5B. If yes, do you have in your possession the form "FMLA Certification of Health Provider"? Yes No

6. Do you request FMLA/CFRA protection? (See District website for your supervisor for FMLA facts) Yes No

IMPORTANT LEAVE INFORMATION

*Physician Statement is required if absence is over 3 consecutive days or if required by Administrator under LEAVE POLICY. FMLA Certification of Health Care Provider is required if FMLA/CFRA protection is being requested.

7. Is the appropriate medical certification submitted with this request? Yes No Not Requested (see #6B)

8. Is the request being made for unpaid leave/absence? Yes No

NOTE: If the answer is "No", the correct medical certification must be submitted separately and promptly.

I certify I was not and will not be employed elsewhere during my regular work hours within the time period claimed on this certification. I certify my absence during this period was not and is not for participating in a strike/work stoppage or because of my unwillingness to work. I certify that I would have been available for duty if it had not been for the reason stated above. Furthermore, I certify my absence during my hours of assigned duty is because of the stated reason in accordance with the appropriate Collective Bargaining Agreement. I also agree and authorize that once the correct benefit usage charged above is processed, any unworked wages paid as a result will be collected from the next paycheck. I do not accept the penalty of points that the foregoing is true and correct.

Employee's Signature: _____ Date: _____

Administrator/Supervisor's Acknowledgment:

For/Title: _____ Signature: _____ Date: _____

For Administrator/Supervisor: Do you recommend that absence be approved? Yes No

Explanation: _____

Use separate paper if needed

FORM NO. 60.ILL (REVISED 7/2015)



LOS ANGELES UNIFIED SCHOOL DISTRICT
REFERENCE GUIDE

**PAYROLL
CALENDARS:**

The 2015-2016 payroll calendars for Certificated (CE), Classified (CL), Semi-Monthly (SM) and Cut-Off and Pay Dates for CATS Time Reporting as seen below can be found on the Calendar/Time Cards section on the Payroll Administration website at <http://achieve.lausd.net/payroll>. Payroll calendars are posted to the Payroll Administration website every fiscal year.

**Los Angeles Unified School District
2015 - 2016 Certificated Calendar (CE)**

Legend: Cut-off for CATS Time Reporting Approval Pay Day Holiday Holiday and Pay day

July							August							September							October																
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S										
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**Los Angeles Unified School District
2015 - 2016 Classified Calendar (CL)**

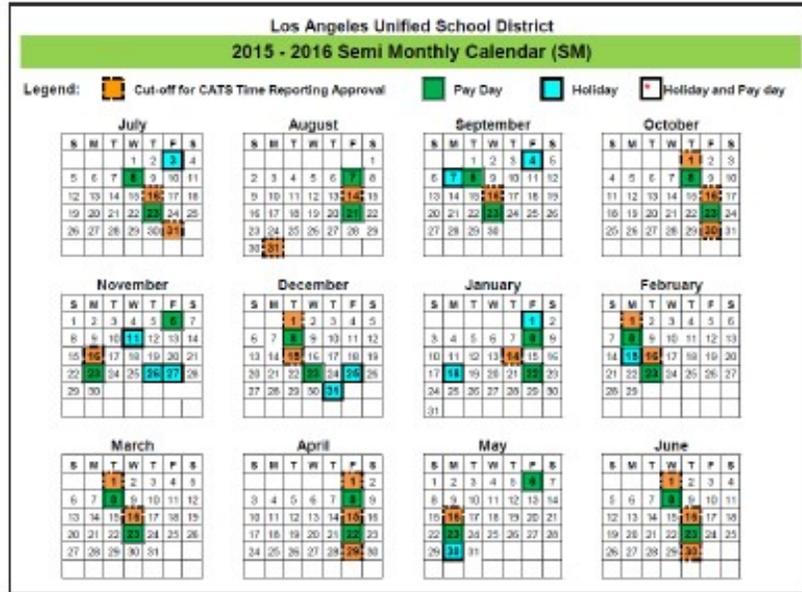
Legend: Cut-off for CATS Time Reporting Approval Pay Day Holiday Holiday and Pay day

July							August							September							October																
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REFERENCE GUIDE

PAYROLL
CALENDARS:



2015-2016 Cut-Off and Pay Dates For CATS Time Reporting			
PAY PERIOD	CUT-OFF DATES	PAY DATES	PAYROLL AREA
Scheduled Off-cycles	Monday, July 06, 2015	Friday, July 16, 2015	Certificated & Classified Off-cycles
07/01/2015 - 07/31/2015	Thursday, July 16, 2015	Thursday, July 23, 2015	Semi-Monthly
07/01/2015 - 07/31/2015	Wednesday, July 22, 2015	Friday, July 24, 2015	Classified
07/01/2015 - 07/31/2015	Monday, July 27, 2015	Wednesday, August 05, 2015	Certificated
07/01/2015 - 07/31/2015	Friday, July 31, 2015	Friday, August 07, 2015	Semi-Monthly
Scheduled Off-cycles	Wednesday, August 05, 2015	Wednesday, August 12, 2015	Certificated & Classified Off-cycles
08/01/2015 - 08/31/2015	Friday, August 14, 2015	Friday, August 21, 2015	Semi-Monthly
08/01/2015 - 08/31/2015	Thursday, August 20, 2015	Monday, August 31, 2015	Classified
08/01/2015 - 08/31/2015	Tuesday, August 25, 2015	Friday, September 04, 2015	Certificated
08/01/2015 - 08/31/2015	Monday, August 31, 2015	Tuesday, September 08, 2015	Semi-Monthly
Scheduled Off-cycles	Thursday, September 03, 2015	Friday, September 11, 2015	Certificated & Classified Off-cycles
09/01/2015 - 09/30/2015	Wednesday, September 16, 2015	Wednesday, September 23, 2015	Semi-Monthly
09/01/2015 - 09/30/2015	Monday, September 21, 2015	Wednesday, September 23, 2015	Classified
09/01/2015 - 09/30/2015	Wednesday, September 23, 2015	Monday, October 05, 2015	Certificated
09/01/2015 - 09/30/2015	Thursday, October 01, 2015	Thursday, October 08, 2015	Semi-Monthly
Scheduled Off-cycles	Monday, October 05, 2015	Tuesday, October 13, 2015	Certificated & Classified Off-cycles
10/01/2015 - 10/31/2015	Friday, October 16, 2015	Friday, October 23, 2015	Semi-Monthly



**LOS ANGELES UNIFIED SCHOOL DISTRICT
REFERENCE GUIDE**

RELATED RESOURCES: BUL-6529.1, Legally-Mandated Paid Sick Leave for Eligible Employees
BUL-6307.2, New Certification of Absence Forms

ASSISTANCE: For assistance or further information, please contact the following offices.

Office	Telephone
Certificated Substitute Unit	(213) 241-6117
Certificated Early Childhood Education Unit	(213) 241-2404
Adult Education Unit	(213) 241-4953
Classified Assignments	(213) 241-6337
Beyond the Bell	(213) 633-3535
Payroll Administration	(213) 241-6670

Appendix T: Legally-Mandated Paid Sick Leave for Eligible Employees (BUL-6529.1)



**LOS ANGELES UNIFIED SCHOOL DISTRICT
POLICY BULLETIN**

TITLE: Legally-Mandated Paid Sick Leave for Eligible Employees

NUMBER: BUL-6529.1

ISSUER: David Holmquist, General Counsel
Office of the General Counsel

DATE: August 3, 2015

ROUTING
All Employees
All Locations

PURPOSE: The purpose of this Bulletin is to provide District employees with information and guidance in regard to California mandatory paid sick leave for eligible employees who currently do not receive sick days.

MAJOR CHANGES: This bulletin replaces BUL-6529.0, dated June 26, 2015, on the same subject and issued by the Office of the General Counsel. This revised bulletin reflects change necessitated by the July 2015, amendment to the Healthy Workplaces, Healthy Families Act of 2014, and includes an updated related resources. The amendment excludes a retired annuitant of a public agency from the definition of employees eligible for mandatory paid sick leave.

BACKGROUND: The Healthy Workplaces, Healthy Families Act (“Act”) of 2014 (commencing with Section 245 the Labor Code), provides mandatory paid sick days for specific eligible employees who currently do not have paid sick days. Effective July 1, 2015, eligible employees are entitled to up to three (3) protected paid sick days or 24 hours in a 12-month period, for the diagnosis, care or treatment of a health condition, or for preventative care for an employee or an employee’s family member. The new law does not provide additional sick days to District employees who already receive paid sick days. The Act also provides paid sick days to an employee for certain purposes related to being a victim of domestic violence, sexual assault or stalking. The Act defines employee eligibility, prescribes use of mandatory paid sick days, eligible family members, notice requirements and contains non-retaliation provisions.

The legislative intent of the Healthy Workplaces, Healthy Families Act is to ensure workers in California can address their own health needs and the health needs of their families by requiring employers to provide a minimum level of paid sick days, including time for family care. The Act is also intended to decrease public and private health care costs by enabling workers to seek early and routine medical care for themselves and their family members, and to address domestic violence or sexual assault; to provide economic security to those who take time off from work for reasons related to domestic violence or



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sexual assault; and, safeguard the welfare, health, safety and prosperity of the people of California.

The provisions of the Act are in addition to and independent of any other rights, remedies or procedures available under any other law and do not diminish, alter or negate any other legal rights, remedies or procedures available to an aggrieved person.

GUIDELINES: The following guidelines apply:

I. Definitions

1. "Employee" does not include the following:
 - a) an employee covered by a valid collective bargaining agreement if the agreement expressly provides for the wages, hours of work, and working conditions of employees, and expressly provides for paid sick days or a paid leave or paid time off policy that permits the use of sick days for those employees, final and binding arbitration of disputes concerning the application of its paid sick days provisions, premium wage rates for all overtime hours worked, and regular hourly rate of pay not less than 30 percent more than the state minimum wage rate.
 - b) an employee who is a recipient of a retirement allowance and employed without reinstatement into the Public Employees' Retirement System.
2. "Employer" means any person employing another under any appointment or contract of hire and includes the state, political subdivisions of the state, and municipalities.
3. "Family member" means any of the following:
 - a) Child – biological, adopted, foster child, stepchild, legal ward or a child to whom the employee stands *in loco parentis*. This definition of child is applicable regardless of age or dependency status;
 - b) Parent – biological, adoptive, foster parent, stepparent or legal guardian of an employee or the employee's spouse or registered domestic partner or a person who stood *in loco parentis* when the employee was a minor child;
 - c) Spouse;
 - d) Registered domestic partner;
 - e) Grandparent;



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- f) Grandchild; or,
 - g) Sibling.
4. "Health care provider" means:
- a) An individual holding either a physician's or surgeon's certificate issued, an osteopathic physician's and surgeon's certificate issued pursuant to specified sections of the Business and Professions Code, or an individual duly licensed as a physician, surgeon, or osteopathic physician or surgeon in another state or jurisdiction, who directly treats or supervises the treatment of the serious health condition; or,
 - b) Any other person determined by the United States Secretary of Labor to be capable of providing health care services under the FMLA.
5. "Paid sick days" means time that is compensated at the same wage as the employee normally earns during regular work hours and is provided by an employer to an employee for the purpose of mandatory paid sick days.

II. Eligibility

1. District employees who did not previously earn illness time or personal necessity, including substitutes, professional experts, return retirees, paid interns, paid student workers and temporary workers, who work for 30 or more days within a year of the first day worked, are entitled to mandatory paid sick days.
2. Mandatory paid sick days are not in addition to sick days granted to certain employees under the Education Code or bargaining unit agreements.
3. The District is not required to, and does not provide additional paid sick days under the Act to employees who already earn an illness bank.
4. This bulletin applies to employees who are eligible to receive mandatory paid sick days under the Act. All further references to employees refer to employees eligible to receive mandatory paid sick days.

III. Mandatory Paid Sick Days

1. The District has elected to "front load", or advance, the annual allotment of mandatory paid sick days. With respect to eligible employees (see Eligibility, Section II above) who worked before July 1, 2015, the full annual allotment of 24 hours will be available on July 1, 2015. The employment year for purposes of mandatory paid sick days, for these employees will start on July 1, 2015.



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2. An employee who starts work on or after July 1, 2015, is entitled to use mandatory paid sick days beginning on the 90th day of employment. The District is using a “rolling” employment year for employees hired on or after July 1, 2015. The employment year will start on the employee’s first day of work.
3. Eligible employees will receive a new annual allotment of mandatory paid sick days every July 1, or on the first day of their anniversary month of their hire date, depending on the start of their employment year.
4. Mandatory paid sick days do not carry over to the next employment year and do not accrue. Unused paid sick days remaining at the end of the employment year are forfeited.
5. The maximum entitlement to mandatory paid sick days is 3 days or 24 hours, per employment year.
6. The maximum number of paid illness hours an employee can use per absence day is based on the employee’s assignment hours per day on the day the employee will receive mandatory paid sick time.
7. Mandatory paid sick days may only be used on days the employee is scheduled to work or offered an assignment.
8. The District will not lend or advance mandatory paid sick days/hours to an employee prior to the employee’s eligibility to receive the days.

IV. Purpose of Mandatory Paid Sick Days

Upon oral or written request, an employee can use mandatory paid sick days for the following purposes:

1. Diagnosis, care or treatment of an existing health condition, or preventative care for an employee or an employee’s family member (See Family Member, section I above).
2. For an employee who is a victim of domestic violence, sexual assault or stalking.

V. Notice

1. An employee must make an oral or written request to use mandatory paid sick days for a purpose consistent with the Act (see Purpose, section IV).
2. An oral or written request for mandatory paid sick days must be documented on the “Certification/Request of Absence for Illness, Family Illness, New Child, Form No. 60.ILL (Certification of Absence form).
3. If the need for the use of mandatory paid sick days is foreseeable, an employee must provide reasonable advance notice.



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4. If the need for mandatory paid sick days is not foreseeable, the employee must give notice as soon as practicable.
5. An employee request to use mandatory paid sick leave for a prescribed purpose, as outlined in this bulletin, cannot be denied.

VI. Notice of Available Sick Leave

Paycheck stubs will indicate an employee's unused sick leave balance.

VII. Protected Time Off – Anti-Retaliation

Time taken off work for mandatory paid sick days is job protected. The District shall not deny an employee the right to use the 3 mandatory paid sick days or 24 hours, discharge, threaten to discharge, demote, suspend or in any manner discriminate against an employee for using the accrued mandatory sick days, attempting to exercise the right to use the mandatory accrued sick days, filing a complaint with the department or alleging a violation of the Healthy Workplaces, Healthy Families Act of 2014. This does not mean that employees with excessive absenteeism outside of the job protected absences are exempt from discipline. Employees with excessive absenteeism beyond the job protected absences are still subject to discipline, up to and including dismissal.

RECORDKEEPING:

The District requires that records substantiating the time reported to the Payroll Administration Branch for payments must be kept on file and retained at the location for a period of five years for audit purposes.

SEPARATION/ REINSTATEMENT:

The District will not provide compensation to an employee for unused mandatory paid sick days received under the Healthy Workplaces, Healthy Families Act, upon termination, resignation, retirement, or other separation from District employment.

If an employee separates from the District and is rehired by the District within one year from the date of separation, previously unused mandatory paid sick days will be reinstated upon rehiring. The rehired employee will be able to use those previously unused mandatory paid sick days.

POSTERS:

Every District worksite must post in an area frequented by employees the "Healthy Workplaces/ Healthy Families Act of 2014 Paid Sick Leave" poster. This poster is included in the District's "Mandatory Employment Notices," 3-part poster revised January 2015.



LOS ANGELES UNIFIED SCHOOL DISTRICT POLICY BULLETIN

AUTHORITY: This is a policy of the Superintendent of Schools. This policy is established in accordance with the Healthy Workplaces, Healthy Families Act of 2014.

RELATED

RESOURCES: Family and Medical Leave Act/California Family Rights Act – Supervisors’ FMLA/CFRA Reference Guide, REF-6022.0, March 25, 2013, Division of Risk Management and Insurance Services.

Mandatory Posting of Regulatory Notices Relating to Federal and State Employment Laws, BUL-4991.3, February 18, 2015, Division of Risk Management and Insurance Services.

New Certification of Absence Forms, BUL-6307.1, Office of the Superintendent, July 8, 2015.

Reporting Paid Sick Leave for Substitute/Temp Eligible Employees, REF-6528.0, Accounting and Disbursements Division.

Uniform Complaint Procedures (UCP), BUL-5159.3, Office of the General Counsel, dated May 15, 2014.

ASSISTANCE:

Adult Education Unit at (213) 241-4953.

Beyond the Bell at (213) 633-3535.

California Department of Industrial Relations –
<http://www.dir.ca.gov/dlse/resource.html>

Certificated Substitute Unit at (213) 241-6117.

Certificated Early Childhood Education Unit at (213) 241-2204.

Classified Personnel at (213) 241-6337, Monday through Friday, 8:00 a.m. – 5:00 p.m., for assistance or questions regarding the Certification/Request of Absence form.

Equal Opportunity Section of the Office of General Counsel at (213) 241-7685 for assistance with alleged discrimination.

SubFinder User Guide for Certificated Substitutes –
<http://achieve.lausd.net/Page/4747>

Employee Service Center at (213) 241-6670 or via email at employeeservices@lausd.net for assistance with payroll related issues.



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POLICY BULLETIN**

Integrated Disability Management at (213) 241-3954 for information and assistance regarding protected leaves.

Office of the General Counsel (213) 241-7600 for administrator assistance regarding legal issues.

Appendix U: Extra Duty Pay for Certificated Administrators Policy (BUL-101500)



LOS ANGELES UNIFIED SCHOOL DISTRICT POLICY BULLETIN

<p>TITLE: Extra Duty Pay for Certificated Administrators Policy</p> <p>NUMBER: BUL-101500</p> <p>ISSUER: Linda Del Cueto, Chief Human Resources Officer</p> <p>DATE: November 9, 2020</p> <p>POLICY: The policy of the District is to provide extra duty pay for school site and non-school site salaried certificated administrators to address emergency and exigent circumstances in accordance with the guidelines set forth below.</p> <p>MAJOR CHANGES: This Policy Bulletin replaces Human Resources Division Interoffice Correspondence, <i>Guidelines and Request for Extra Duty Pay for Certificated Administrators</i> issued June 27, 2013.</p> <p>PURPOSE: School site and non-school site administrators are expected to perform all duties in their job description. The Collective Bargaining Agreement (CBA) between LAUSD and AALA recognizes that the District can require hours which are reasonable. District administration has determined that an eight-hour day is reasonable to provide necessary services to the students we serve and in order to provide adequate supervision to hourly employees the majority of which are assigned to eight-hour days. Duties performed by administrators do not always fall within their prescribed eight-hour day and as such, it is a District expectation and practice that all administrators (school site and school support administrators) devote the sufficient time necessary to perform their duties and complete assignments. Supervisors should consider the use of extra duty pay only when adjustments to work hours and/or flex time options are not practical to address emergency, exigent circumstances, and/or special circumstances.</p> <p>GUIDELINES: I. <u>Extra Duty Pay Guidelines</u></p> <p style="padding-left: 40px;">A. Extra Duty Pay shall only be utilized for:</p> <ol style="list-style-type: none"> 1. Emergency/exigent circumstances which include unforeseen occurrences that can immediately affect the health and safety of students, employees, parents and/or the school community; 2. Unforeseen circumstances that may cause a substantive detrimental impact to the instructional program and/or academic success of students; and/or 	<p>ROUTING All Administrators Time Reporters</p>
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LOS ANGELES UNIFIED SCHOOL DISTRICT
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3. Under special circumstances, when principals/administrators are requested to perform special projects outside the scope of their regularly assigned duties by their immediate supervisor and/or other Division head, they may be compensated with extra duty pay.

An employee shall not be eligible for extra duty pay for additional work resulting from the employee's inefficiencies or inattention to their duties nor shall it be authorized by the Local District Superintendent/Division Head. Extra duty pay is not to be approved or reported for any extended work hours in which regular time pay hours are reported unless administrators are explicitly requested to complete the emergency/exigent or unforeseen work (as defined above) by their supervisors.

- B. In advance of performing any extra duty work as a result of an emergency/exigent or unforeseen circumstances, the request and pre-approval form must be obtained from the immediate supervisor. The Local District Superintendent/Division Head will then review and determine whether or not to authorize and approve before service commences and time reporting takes place. This authorization is not to be delegated to a designee unless the Local District Superintendent/Division Head is utilizing benefitted time and is unavailable because he/she is out of the office. As part of the approval process, appropriate funding must be identified and readily available in the school or office budget. There shall be no after-the-fact approval for extra duty pay.

II. Limits on Additional Assignments for Certificated Employees

Certificated employees are limited to additional assignments in which regular time pay hours and additional assignment(s) hours do not exceed 200 hours in any pay period for employees who work an assignment (i.e., no more than 40 hours of extra duty pay per pay period as specified in Policy Guide A7 – Assignment Multiple-Attachment B).

- A. The maximum per pay period limit applies to all certificated assignments.
- B. The signature of a Local District Superintendent or Division Head on HR Form 9051 – *Request for Extra Duty Pay for Certificated Administrators* is considered by the Human Resources Division as verification that the assignment will not exceed the maximum per pay period limit.



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- C. In emergency situations where an assignment will cause the certificated employee to exceed the maximum per pay period limit, the requesting school/office **must** obtain written pre-approval from the Superintendent or respective Deputy Superintendent on HR Form 9051A – *Request for Extra Duty Pay for Certificated Administrators in Excess of Stated Limits*.
- D. A copy of the written approval (HR Form 9051A) by the Superintendent or respective Deputy Superintendent to exceed the maximum per pay period limit is to be provided to the applicable time reporter and kept on file at the school/time reporting location as part of the required payroll support documentation for audit purposes for five years.
- E. Employees who submit requests and/or supervisors who approve requests that do not adhere to the above rules and limits may be subject to discipline up to and including dismissal.

III. Exception(s): E/B Basis Employees

- A. Work performed during an administrator’s off-basis time is exempt from the 40-hour maximum (for employees on E or B-basis) but must adhere to all other guidelines contained herein.
- B. Summer School, Extended Learning Opportunity Summer (ELOS), Summer Term, and other summer programs are paid as part of an approved additional assignment that occurs during an administrator’s off-basis time and are not considered extra duty pay. However, any extra duty pay for which an administrator is paid during Summer School, ELOS, and/or Summer Term, must adhere to the guidelines set forth in this policy bulletin.
- C. Professional Development that takes place during an administrator’s unassigned time is not considered extra duty pay. Administrators will be compensated as follows for professional development only after authorized by the appropriate Local District Superintendent/Division Head:
 - 1. Participant – Training that takes place outside of the administrator’s regularly scheduled work calendar.
 - 2. Presenter – Professional development delivery that takes place outside of the administrators’ regularly scheduled workday and/or outside of their regular duties and/or sponsored by an office other than their regularly assigned office.



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IV. Process to Request Extra Duty Pay for Certificated Administrators

- A. Before commencing service and time reporting, prior written approval (HR Form 9051 – *Request for Extra Duty Pay for Certificated Administrators*) for all extra duty pay must be pre-approved by the Community of School Administrator/Supervisor with the final approval obtained expressly from the applicable Local District Superintendent/Division Head. This approval form is not to be authorized and/or signed by a designee unless the Local District Superintendent/Division Head is utilizing benefitted time and is unavailable because he/she is out of the office.
- B. The completed HR Form 9051 must be sent by the principal/site administrator to the respective Community of Schools Administrator (CoSA)/Supervisor for pre-approval and the Local District Superintendent/Division Head for final approval.
- C. All extra duty work performed in a pay period shall be included on the same HR Form 9051 for that pay period. All approved extra duty work performed in a pay period shall be time reported/approved before the time-reporting cutoff and no later than five calendar days after the pay period.
- D. The approved HR Form 9051 should be returned to the requesting principal/site administrator, with a copy retained by the applicable Local District Superintendent/Division Head.
- E. A copy of the approved HR Form 9051 is to be provided to the time reporter and kept on file at the school/time reporting location as part of the required payroll support documentation for audit purposes for five years.

V. Funding

- A. Appropriate funding must be identified and readily available in the school or office budget as certified by the Local District Superintendent/Division Head.
- B. Imprest Funds or the P-Card cannot be used to pay any extra duty pay, salary payment, or professional services of any kind.
- C. Please refer to Attachment C: “Extra Duty Pay Guidelines for the Use of State and/or Federal Categorical Funds” for guidelines for extra duty pay for certificated administrators funded with state and/or federal categorical funds.



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VI. Monitoring

- A. Principals/Administrators will monitor and keep track of their extra duty pay hours to ensure they are not exceeding extra duty pay limits as specified in Section II. Work performed for another school/division must be cleared with the administrator's immediate supervisor before it is initiated.
- B. Local District Superintendents/Division Heads will implement a monthly monitoring system for ensuring that employees do not exceed extra duty pay limits as specified in Section II.
- C. On a quarterly basis, Fiscal Services will send Local District Superintendents/Division Heads an Interoffice Correspondence notifying them of any employees who have exceeded extra duty limits. In addition, this correspondence will include a reminder to ensure that all extra duty pay hours have been approved, are in compliance with the policy bulletin, and that all documents showing approvals are kept on file for audit purposes.

AUTHORITY: Legal Mandates, Collective Bargaining Agreement, Board Policies, and the Chief Human Resources Officer, Human Resources Division.

RELATED RESOURCES:

- LAUSD/AALA Collective Bargaining Agreement
- Attachment A: Request for Extra Duty Pay for Certificated Administrators – HR Form 9051 (Updated)
- Attachment B: Request for Extra Duty Pay for Certificated Administrators in Excess of Stated Limits – HR Form 9051A (New)
- Attachment C: LAUSD HR Policy Guide A7 (Updated)
- Attachment D: Extra Duty Pay Guidelines for the Use of State and/or Federal Categorical Funds
- Attachment E: Fiscal Services Payroll Monitoring Form (Sample)

ASSISTANCE: For assistance, please contact:

- Lydia Acosta-Stephens, Executive Director, Multilingual and Multicultural Education, at (213) 241-5582 or at lstephen@lausd.net
- Karen Ryback, Executive Director, Federal and State Education Programs, at (213) 241-6990 or at karen.ryback@lausd.net
- Frank J. Serrato, Ed.D., Assistant Chief Human Resources Officer, at 213-241-6056 or at fserrato@lausd.net
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