



Allocation Approval Procedure (PC-P001)

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

1.0 SCOPE:

- 1.1 This procedure describes the process in which the Business Department approves allocations and codes HR forms; certified and classified new hire, transfer, reassignment, and overage placement forms at the Washoe County School District.

2.0 RESPONSIBILITY:

- 2.1 Chief Financial Officer

3.0 APPROVAL AUTHORITY:

- 3.1 Position Control Analyst

(Approval signature on file)

Signature

Date

4.0 DEFINITIONS:

- 4.1 Allocation approval: Confirm the allocation availability to ensure employee expenditures do not exceed the approved number of allocations per school or department.
- 4.2 Coding: Indicate the account fund coding to be used in Bi-Tech to ensure the appropriate school, department, or grant will be charged on accountability reports.
- 4.3 Staffing Allocations Guidelines: An HR document created and approved by the Executive Cabinet that defines district-staffing ratios for certified and classified employees. The document is refined for internal use by the Human Resource Department under the supervision of the Assistant Superintendent of Human Resources.
- 4.4 Access Allocations Worksheet: Certified allocation/FTE summary produced each year by the Business Department using enrollment and student / teacher ratios as listed in the Staffing Allocation guidelines. "Special Allocations" for certified employees are also listed on this report. "Special Allocations" for classified employees are currently listed on individual school Excel spreadsheets.
- 4.5 School Excel Spreadsheets: refers to a series of 3 Excel spreadsheets, listed as ES Master (elementary school), MS Master (middle school), and HS Master (high school). These spreadsheets contain a list of all certified and classified allocations/FTE by school, including the General Fund, Class Size Reduction, ESL, Special Ed, Title I and grants as well as summary spreadsheets that tie in with budget.
- 4.6 Executive Cabinet Vacancy Review Master Log: Master log maintained by Human Resources, which records department & school Vacancy Review Requests, new FTE requests, and approval notes from Executive Cabinet meetings.
- 4.7 PCREGFTE: Refers to the Bi-Tech Position Control screen which regulates positions by FTE and funding. The PCREGFTE is listed under: IFAS, Human Resources, Primary Tables, F4, and arrow down to PCREGFTE.
- 4.8 PCN: Refers to position grouping used in PCREGFTE; xxx(location)xxxx(job code). Position specific assignments are not included in the PCN.



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- 4.9 **"FTE"**: abbreviation for "Full Time Equivalency" based on 8 hours per day for administrators, protechs, and classified employees, and 7.5 hours per day for certified staff, including teachers, counselors, nurses, etc.
- 4.10 Click Drag & Drill (CDD) Report "PC1000": Bi-tech report that lists and sorts school or department staffing by location (#). This report includes all certified and classified employee names, id#, funding, position, days, hours, FTE equivalency, contract type and assignment.
- 4.11 Certified Forms: Recommendation to Hire is used to hire a new or non-contracted employee into a certified contracted position. Selection Of Voluntary Transfer form is used when selecting a Certified contracted employee from another school. Certified Reassignment Form is used to make changes within a school, i.e.; grade, contract FTE, funding, etc)
- 4.12 Classified Form: Classified Employment Requisition is used for all non-licensed employee requests; new hire, transfer, reassignments
- 4.13 **"Org Key"** refers to the funding account numbers entered in the Bi-Tech employee SCHPAY screen. The 10-digit account number includes: XXX(responsibility center)XXXX(dept)XXX(fund-program-function).
- 4.14 **"Object" Code**: refers to the 5-digit account number used in the general ledger to identify a particular classification or item(s). PC uses 61110-61461 salary series, which distinguish administrators, teachers, counselors, nurses, police, classified employees, etc.

5.0 PROCEDURE:

- 5.1 All documents for new hire or employee changes are received, date stamped and reviewed by Human Resources front office; contract, DOE license, certified & Classified HQ status. They are then forwarded to Position Control for FTE & funding approval and coding.
- 5.2 Position Control reviews document(s) request for department approval, or Executive Cabinet Vacancy Review master log for general fund approval.
 - 5.2.1 ESL, Grant, or Special Education new hires or changes are approved with the "org key" and "object" code by the applicable department, and forwarded to Position Control for processing.
 - 5.2.2 Additional allocation document references; School Excel Spreadsheets, Staffing Allocations Guidelines, and Access Allocation Worksheet.
 - 5.2.3 Exceptions to the standard staffing are, but not limited to, FTE position conversions and "special allocations" indicated in the note section of the School Excel Spreadsheets.
- 5.3 Each document is to be date stamped by Position Control proceeds to PCREGFTE, to verify available/vacant FTE.
 - 5.3.1 F3, select new, enter. Type PCN, enter.



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- 5.3.2 Determine the appropriate position by assignment and "org key/object" code as determined by the school, or department for General Fund and Class Size Reduction positions.
- 5.3.3 Review budgeted verses assigned FTE to verify available FTE.
- 5.4 Complete Position Control section of Human Resources document with the following:
 - 5.4.1 Include: employee id# (unavailable for new employees), reason code, position, location, pay class, days/hours, org key, object.
 - 5.4.2 Funding approval signature; each Human Resources document is to be date stamped and initiated by Position Control for approval.
- 5.5 Forward Human Resources documents to the Human Resources technicians for data entry in Bitech.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Certified Forms: Recommendation To Hire (HR-F034), Selection Of Voluntary Transfer (HR-F037), and Certified Reassignment Form (HR-F047)
- 6.2 Classified Form: Classified Employment Requisition (HR-F105)
- 6.3 Staffing Allocations Guidelines
- 6.4 Access Allocations Worksheet
- 6.5 School Excel Spreadsheets (PC-P003)
- 6.6 Active Employee Assignments CDD "PC1000" report (PC-W001)

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
PC1000 report	Position Control Office File	3 year	Discard as desired	Locked Office
Access Allocations Worksheet	Position Control Office File	5 years	Discard as desired	Locked Office



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8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
11/28/05	A	Initial Release
1/22/08	B	Corrected typographical errors in 4.5 and 5.4.1; updated Record Retention Table.
03/04/10	C	Added Sections 4.6, 4.7 and 4.8; deleted and added new Section 4.10; 4.12 replaced "Request/Authorization" with "Requisition"; 4.13 replaced "XX(fund)XXX(responsibility center)XXX(dept)XX(function)" with "XXX(responsibility center)XXXX(dept)XXX(fund-program-function)."; 4.14 changed "4-digit" to "5-digit" and replaced "6111-6139" with "61110-61461"; 5.1 added "; contract, DOE license, certified & classified HQ status" after "office" and "FTE & funding" after "Control for"; 5.2 deleted "analyst", added "department" before "request for" and "if applicable," deleted rest of sentence and added "or Executive...fund approval"; deleted Sections 5.3 and 5.4; 5.2.1 (formerly 5.4.1) replaced "then sent to Position Control Analyst" with "forwarded to Position Control"; added Sections 5.2.2 and 5.2.3; 5.3 deleted "Analyst...being processed" and inserted "proceeds to...FTE"; added Sections 5.3.1, 5.3.2 and 5.3.3; deleted Sections 5.4 and 5.5 (formerly 5.6 and 5.7); added Sections 5.4, 5.4.1, 5.4.2 and 5.5; 6.1 added "(HR-F034)", "(HR-F037)", "(HR-F047)"; 6.2 added "(HR-F105)"; 6.5 added parentheses to "PC-P003"; 6.6 replaced "WAHRAE" with "CDD 'PC1000'" and added parentheses to "PC-W001"; updated Record Retention Table.

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