

Secretarial Guide



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Kelli Barnett, SW District Administrative Assistant, Duncan
Clara Green, Grady County Senior Secretary
Veda Harper, Canadian County Senior Secretary
Angie Hines, Oklahoma County Senior Secretary

David Foster, Associate Director, OCES, and District Extension Directors gratefully acknowledge the efforts of those named above to the compilation of this Secretarial Guide. This guide is a convenient summary reference to information on policies and procedures often used by secretaries in Extension offices and would not have been written without the talents of those mentioned. Additional contributions, review and editing were provided by:

Doris Barrick, SE District Administrative Assistant, Ada
Shari Monsees, NW District Administrative Assistant, Enid
Tammy Mullen, NE District Administrative Assistant, Muskogee

Accounting Procedures

Certificate of County Expenditure Sheet

- Download form off the intranet
- County Clerk signs form
- Print on **pink** paper
- Due in the District Office by the 15th of each month



Reconciliation Statements

- Due 10 days after you receive your statement
- Send to the District Office

Deposit Regulations

- A deposit **must** be made once a week or when you have accumulated \$100.00, whichever comes first.

General Money Management

- All funds received by/at the office **must be receipted** and deposited to a category in the Agency Account.
- The County/District Director will establish one bank account, for which he/she is the only authorized signer, which will be used for all income and disbursements by the Oklahoma Cooperative Extension Service Center.
- Funds that are collected for an association/organization may be disbursed to an association/organization representative on a regular schedule or as funds are accumulated.

Link to County Expenditure Form

<http://download.dasnr.okstate.edu/certcexp.xls>

Link to County Contract and Budget Sheets

http://intranet.okstate.edu/Fiscal_Affairs/county.htm

Link to Accounting Manual for Agency Bank Accounts & Quicken Samples

http://intranet.okstate.edu/Fiscal_Affairs/quicken.htm

Link to Accounting Policies and Procedures for Extension Center Agency Funds

<http://download.dasnr.okstate.edu/acctproc.doc>

If you have questions, call the District Office, or Suzanne McNatt @ 405-744-9697 or reach her by e-mail, mcnats@okstate.edu

TO VIEW OR ADD RECORDS TO OCES CALENDAR OF EVENTS

Go To:

<http://139.78.53.203/calendar/calendar.htm>

To Add Event:

Click on "View Calendar"

User Name – leave blank

Password – events

Sample web page shown below:



OCES Calendar of Events



[View Calendar](#)



[New Record](#)

OKLAHOMA COOPERATIVE
EXTENSION SERVICE

CIVIL RIGHTS EFFORTS: FROM THE SECRETARIES' PERSPECTIVE



Introduction

The Oklahoma Cooperative Extension Service is committed to full compliance with all applicable laws related to civil rights, equal employment and affirmative action. All OCES employees have a responsibility to assist in the attainment of this goal. The County Extension Director is ultimately responsible for the accomplishments of the office in matters concerning civil rights. However, secretaries also have a defined role. OCES activities in pursuit of the goals of civil rights legislation are not confined to the attainment of the letter of the law, but must also guarantee its spirit.

Secretarial Responsibilities

It is the responsibility of the extension educators to integrate the principles of civil rights legislation into educational programming. Consideration of OCES obligations to civil rights is a conscious forethought in the planning, implementation and evaluation of extension activities. Documentation of these activities once they have been conducted provides the base upon which compliance with civil rights legislation is proven.

The secretaries' main role is to oversee the tools and methods that assist the collection of data to be used as documentation of effort. Secretaries also monitor extension outputs such as news articles, newsletters, and other written and electronic information to ensure compliance. Additionally they should remain conscious to the spirit and letter of the laws by contributing to civil rights efforts of individual educators and the office as a whole.

Required Records

- Gender and racial profile information should be maintained on all mailing lists, advisory clientele, collected at all educational events, retained on all advisory groups and include geographical distribution.
- All data should be summarized for reviews and audits.
- Event summaries should be calculated on past educational events.
- All data should be kept at least 5 years.

Civil Rights Review

A civil rights review is to be conducted by the district office at least every four years. The purpose of this review is to ensure the conduct of practices contributing to the letter and spirit of the civil rights legislation. It is also the purpose of this review to highlight deficiencies that may be addressed in the event of a federal civil rights audit. The review is not so much a "gradable" event as it is an effort to ensure "all reasonable effort" is applied to the attainment of civil rights goals.

The civil rights review is opportunity to correct deficiencies to the technical aspects of compliance. It is also opportunity to discuss the need for vigilance in this area over time and to discuss various aspects of efforts to achieve parity in OCES events. General information requested during the course of a review includes:

- Presence and placement of civil rights, affirmative action and equal opportunity posters.
- Accessibility of facilities for handicapped persons.
- Organization and completeness of civil rights file.
- Collection and assimilation of gender and racial data regarding clientele, advisory groups, 4-H and FCS clubs, event audiences.
- County census data relevant to specific program areas.
- Inclusion of civil rights pursuits in plans of work.
- Certification of leaders/volunteers.
- Nondiscrimination certification of organized groups.
- Event summaries.
- Tabular parity calculations of extension clientele profile.
- Compliance with requirements regarding the inclusion of nondiscrimination statements on written and electronic mass distributions.

Extension secretaries should manage most of the above listed information with the following work objectives in mind:

- Work with and remind educators to consider civil rights compliance in the design of educational activities and settings, including the extension office.
- Provide educators the data collection instruments to ascertain gender and racial makeup of extension event audiences.
- Summarize and collate collected data into a format necessary for review by educators in the interest of program adjustment.
- Maintain vigilance to ensure the application of written compliance language to extension correspondence.

In summary, civil rights, affirmative action and equal opportunity legislation present extension with challenging, worthwhile goals. Extension personnel have a legal and moral obligation to their pursuit and attainment. Secretaries have a specific role to play in this regard and the above information should be of assistance. Should there be further inquiry regarding the role of an extension secretary in the context of civil rights, or a need for more civil rights information, the district office is eager to help.

The following pages provide more specific information on non-discrimination clauses, attendance rolls and event summaries, public notification, etc.

Affirmative Action & Civil Rights Compliance

Contact person at state level – Mary Anne Gularte, 405-744-5398, e-mail gularte@okstate.edu

Each county office should have a book (light gray cover, spiral bound) entitled Oklahoma Cooperative Extension Service, Compliance with Civil Rights, Equal Opportunity, and Affirmative Action Laws, Rules, and Guidelines – A Working Document, April 1996. This is an excellent reference source.

Each county office should have a file entitled Civil Rights that contains **all documents** listed on Appendix 1.

The current **non-discrimination** clause is as follows:

Oklahoma State University, U.S. Department of Agriculture, State and Local Governments Cooperating. The Oklahoma Cooperative Extension Service offers its programs to all eligible persons regardless of race, color, national origin, gender, age, religion, disability, or status as a veteran, and is an equal opportunity employer.

The non-discrimination clause should be included on every document, flyer, news release, newsletter, agenda, (basically everything) that is distributed or displayed to the public.

If any reference is made to an effort to reach a culturally diverse audience this should be noted in office conference minutes and in some way (either bolded or highlighted) made to draw attention. This facilitates pulling out affirmative action efforts for audit purposes.

The current **non-endorsement** clause is as follows:

The information given herein is for educational purposes only. Reference to commercial products or trade names is made with the understanding that no discrimination is intended and no endorsement by the Oklahoma Cooperative Extension Service is implied.

Minimum statement for position advertisements in a newspaper or other publications is as follows:

OSU is an AA/EEO employer committed to multicultural diversity.

Civil Rights/Affirmative Action County Implementation Plan Files

Affirmative Action/Civil Rights files – Fiscal year runs October 1 through September 30.

Each area (ie, Agriculture, Community Development, 4-H Youth Development, FCS) should have its own section entitled Documentation of Program Implementation filed under County Implementation Plan. Each section should be made up of files of the following:

Attendance Rolls – Sign-in sheets from all meetings

Each sign-in sheet should have the following information in the heading

OSU logo and county office address

Event name

Location

Date & time

Educator responsible for event

Somewhere on the sign-in sheets, (upper right-hand corner) attendees should be broken down by gender and race (do not put this information by anyone's name). Stickers may be used with the following information or some counties print this on the sign-in sheets. Keep in mind Extension staff cannot ask any person regarding their race - a "best guess" is all that is allowed.

	Males	Females
AI	_____	_____
PI/A	_____	_____
B	_____	_____
H	_____	_____
W	_____	_____
Total	_____	_____

A summary of all sign in sheets should be completed for each fiscal year. See example Appendix 2.

Public Notification (News Releases) – News releases as sent to papers, radio/television stations, etc. –

Every item should have a non-discrimination/equal opportunity employer statement on it. If there are any specific brand/trade names as part of document the disclaimer clause should also be included. Very rarely do the papers, etc., use this statement - but by including it you are documenting that these clauses were a part of the original that was submitted.

It should be noted on news releases the media to which the information was sent (i.e., Daily Oklahoman, El Reno Tribune, Mustang News, KOCO TV, KXY Radio)

Published articles should be clipped from papers, magazines, etc., and attached to hardcopy in file as proof of publication – also proof that it was sent with appropriate statement.

Public Notification (Correspondence) – Includes fliers, agendas, newsletters, letters to three or more individuals.

This file will contain every piece of correspondence/public notification that is distributed, displayed, mailed to the public, etc. (Basically everything that is not a news release) All correspondence has to have non-discrimination/equal opportunity employer statement on it. If there are any specific brand/trade names as part of document the disclaimer clause should also be included.

Gender and race for individuals to whom the letter is mailed should be broken down the same as on sign-in sheets. Copies of mailing labels may be attached for reference, but gender/race should not be written by any names.

Constitution & By-laws – Current constitution/by-laws for organizations (ie, HCE, 4-H Clubs, Cattlemen's Association, County Mineral Owners, etc)

This file will contain a copy of by-laws/constitution for organizations that are under the leadership of the county extension office. This document **must include** non-discrimination/equal opportunity employer statement.

Certification of Extension Groups -

This file will contain documentation stating that the club/group (HCE, 4-H) does not discriminate and be signed by the group president/chairperson.

Certification of Non-Extension Groups -

This file will contain documentation stating that each organization under the leadership of the county extension office does not discriminate and is signed by the group president/chairperson (Cattlemen's Association, Mineral Owners).

Mailing List -

This file will contain mailing lists, enrollment information. These lists should also be broken down and totaled by gender and race – no handwritten information by names. Again, do not ask anyone their race or gender.

Advisory Council and/or PAC -

This file will contain all documents (invitation, agenda, all reports) relating to Program Advisory Committees and District Advisory Committees.

Appendix 1.

COUNTY CIVIL RIGHTS FILE

Content Summary

1. Public Law 88-352, 88th Congress, H.R. 7152. July 2, 1964.
2. Public Law 92-261. 92nd Congress, H.R. 1746. March 24, 1972.
3. Rules and Regulations as amended, Title 7 - Agriculture, Part 15, Nondiscrimination (as in effect January 30, 1975).
4. Title 7-Agriculture. Part 18, Equal Employment Opportunities in the State Cooperative Extension Services, August 29, 1968.
5. Supplemental Instructions for Administration of Title VI of the Civil Rights Act of 1964, in the Cooperative Extension Service (July 2, 1965).
6. Amendment of Section B, II, B, 2 of Supplemental Instructions for Administration of Title VI of the Civil Rights Act of 1964, dated July 2, 1965 (October 6, 1965).
7. Secretary's Memorandum No. 1662, USDA Policy on Civil Rights, September 23, 1969.
8. Secretary's Memorandum No. 1662, Supplement 3, Revised USDA Policy on Civil Rights, July 27, 1973.
9. Director's letter dated November 8, 1973.
10. Director's letter dated November 13, 1972.
11. Director of Personnel letter, November 9, 1973.
12. State Affirmative Action Plan, August 30, 1973.
13. Program for Equal Employment Opportunity in the Oklahoma Cooperative Extension Service, Oklahoma State University Cooperating with the U.S. Department of Agriculture and County Governments, November 26, 1971 (See OCES Policy and Procedures Handbook).
14. Public Notification Plan of Action to Insure Minorities and the Underprivileged Equal Access to Programs. Extension Service, USDA and Oklahoma Cooperative Extension Service (See OCES Policy and Procedures Handbook).
15. Oklahoma State University Extension, Civil Rights Compliance Review Training, Feb., 1974.
16. USDA Administrative Regulations - Title 9 - Equal Opportunity, November 18, 1976.
17. Department of Agriculture - Nondiscrimination on the Basis of Handicap, January 22, 1979.
18. Department of Agriculture - Nondiscrimination on the Basis of Sex, April 11, 1979.
19. "And Justice for All" poster - Secretary of Agriculture.
20. Director's letter dated June 27, 1997.
21. OCES - Compliance with Civil Rights, Equal Opportunity, and Affirmative Action Laws, Rules, and Guidelines. A Working Document, April 1996

Appendix 2.

Event Summary Record

County

Events

Year _____

District

_____, Extension Educator, _____/4-H Youth Development

[illegible]

Hiring Process (Classified)



1. CED must call District Office to alert Director of situation.
2. Order "New Employee Packet" from Division Personnel / 405-744-5523.
3. Advertise the position. (Sample ads provided on next page.)
4. Leave position open for 10 working days.
5. If salary range is desired for interview process, CED will acquire three to four salary comparisons from area positions similar to that being filled. Send salary comparisons to District Office. District Director will work with Sue Bonner to reach a desired range.
6. After the interview process and a decision has been made, fax application and resume to the District Office. Be prepared to provide the following: How many applied; How many were interviewed; Were references checked; and a short justification statement (from CED) as to why this person was chosen. Again, District Director will work with Sue Bonner to achieve a salary amount.
7. District Director will contact CED when salary is secured from Sue.
8. Have "new employee" fill out the employee packet ASAP. Mail packet to District Office.

Paperwork Tips

1. Recruitment Report: Make sure totals equal number interviewed in Applicant Summary section.
2. Provide list of applicants' names, rankings and gender and race along with Recruitment Report.
3. Provide copy of advertisement.
4. W-4 – Make sure employee signs form.
5. US Dept. Of Justice (Form I-9) – Sections 1 and 2 must be completed. Place Driver's License info in 'List B' column. Place Social Security Card info in 'List C' column. CED must sign beneath "Certification" section.
6. Provide copy of Driver's License and Social Security Card.

Things to think about when hiring:

1. OSU has until the 5th working day of the month to get new information into the system so that the new person can be paid on time. **Leave time for all paperwork to make its way through the District Office and Division Personnel on campus!**
2. If the employee hire date is in the middle of the month, working more than half of the month would allow them to accumulate leave. (i.e. If there are 22 working days, work 12 days and leave is earned for the entire month.)

3. If a new hire begins on the first day of the month, benefits will not be effective until the following month. A hire date on the last day of the month would provide benefits the following day.

Examples

Newspaper Ads for County Extension Secretary Positions

Oklahoma Cooperative Extension Service Secretary Position

Immediate opening for Extension Secretary position in the *(insert county name)* County Extension Office. Requires high school diploma or equivalent; one year of related work experience; typing 45+ cwpm preferred; knowledge of computer spreadsheet applications and word processing software. Apply in person at: Oklahoma Cooperative Extension Service, *(insert address)* by *(insert date)*.

OSU is an AA/EOE committed to multicultural diversity.

Oklahoma Cooperative Extension Service Senior Secretary Position

Person responsible for maintaining accurate and updated agency accounts; data base management and entry; word processing; support answering and directing incoming calls and assisting office guests; composing correspondence; scheduling appointments; finalizing arrangements for meetings; ordering/maintaining office supplies. Requires high school diploma or equivalent; two or more years related experience; typing at 45+ cwpm preferred. Computer/word processing and spreadsheet applications required. Prefer experience/training with Microsoft Word for Windows and Quicken. Apply with: *(insert County Employment Office information)*, located at *(insert address)*, by *(insert date)*.

OSU is an AA/EOE committed to multicultural diversity.

**Examples of Open-Ended Interview Questions
for
County Support Positions**

What do you think the responsibilities of this position are? (Educator – Follow with your response)

What are the functions of an Extension Office/Educator? (Educator – Follow with your response)

What interests you most about this position?

Why are you looking for a change in your current employment situation?

What did you like best/least about your previous job?

What were your most important accomplishments in that job?

What do you believe you can contribute to this position?

What kind of circumstances do you feel bring out the best in your work?

What would your last supervisor tell someone about your work?

When were you last responsible for doing this kind of work?

How were you able to demonstrate teamwork in your last position?

What does “service” mean to you?

What qualities do you have that are important to working successfully in this job?

What do you consider to be your major strengths as an employee? Areas to improve?

How do you like to be supervised?

How do you react when someone critiques your work?

What steps do you take when you need to make an important decision?

Computer training – courses or self-taught? In what software programs are you proficient?

Describe your experiences in handling multiple priorities.

What haven't I asked you about that you'd like me to know (employment related)?

Examples

Reference Check Questions for Support Positions

RE: _____

Person Contacted: _____ Phone: _____

Relationship: _____

How many years have you known or worked with the applicant?

Why did he/she leave the job?

What are his/her strong points?

What are his/her weak points?

What professional or personal characteristics does he/she possess which would best, or poorly, represent the office?

Please comment briefly on the applicant's:

Attendance

Attitude, in general, and relating to "customer service"

Ability to manage multiple priorities and timely follow-through on commitments

Quality of work

Degree of supervision needed

Ability to get along with/supervise others

Would you re-employ the applicant? ____ yes ____ no

Is there anything you would like to add regarding the applicant's work or job performance?

Completed by: _____ Date: _____

Sample Offer Letter

Dear _____:

I am pleased to offer you the position of *(insert title)* located in the *(insert county, area, or district office)*. The initial salary will be *(insert monthly salary)*, with an *(insert month, day, year)* effective date. This is a full-time position and your office hours will be 8 a.m. to 5 p.m., with one hour for lunch, Monday through Friday.

Specific responsibilities for this position are listed in the enclosed document *(attach a copy of the position description)*. The county extension director will conduct an annual review of your job performance in accordance with University and OCES policies. Continuation of this position is subject to the need for the position, performance, and availability of funding.

The county extension director and the district office will provide orientation information and training to assist you in meeting job expectations. According to University policy, all new clerical staff will be required to serve a three month or 90 day probationary/orientation period. You may not use accrued annual leave during this time period. An employee within this initial orientation period may be dismissed from employment if he/she fails to furnish satisfactory service or performance.

If you have questions regarding the terms of this offer, please discuss them with me. If the terms of this offer are acceptable, please indicate by signing below and returning the original to me. A response by *(insert date)* would be appreciated.

We look forward to your association with the Oklahoma Cooperative Extension Service.

Sincerely,

Letter signed by CED

I accept the terms of this offer.

(type name of individual)

Date

enclosure: position description
xc: District Director

Suggested Orientation Topics for New County Support Positions

Administrative Topics:

Office hours

Time sheet/time card

Payday – Paycheck distribution

Fringe benefits

Probationary/Orientation period

Supervisor's name and other key individuals in county, area, district, and state offices

Cooperative Extension Background

How to apply for sick or annual leave

Name tag

Keys

Position description

Performance appraisal and development – copies of form and policy

Attendance and Leave – copy of OSU's policy

Equipment and supplies

Telephone – what to say when answering; personal calls, etc.

Computer skills – access training needs

Social Topics:

Introduction to other staff & overview of their responsibilities

Specific responsibilities & obligations to individual extension personnel

Break/lunch periods

Location of restrooms

Appropriate work attire

Extension Senior Secretary Job Description

Job Summary & Purpose

The Extension Senior Secretary must perform secretarial and clerical work for the professional staff within the assigned unit of the Oklahoma Cooperative Extension Service and carry out other special assignments related to the position.

Work is performed under very general supervision with considerable latitude for discretion in office management matters. Coordination of office work may be exercised among other secretaries and support staff.

Job Responsibilities

- Receive clientele with a pleasant and professional attitude. Provide service and information to the best of your knowledge. (You are the frontline of your office.)
- Display courteous and effective communication with all staff in the Extension office.
- Maintain accurate and updated agency account and county fund records; make timely and precise deposits if delegated by the County Extension Director (otherwise, under the 'Rule of Separation of Duties', a second party, usually the CED, should make the deposit).
- Perform and/or delegate all database management and data entry activities as required for consistent office function.
- Possess knowledge of computer spreadsheet applications and word processing software.
- Provide support to other staff members in answering and directing incoming telephone calls.
- Assist educators with preparation of monthly activity reports, plans of work, annual reports, budgets, and expense accounts; complete and submit work in sufficient time to meet deadline dates; with assistance of other staff members, make sure that reports are submitted properly and accurately.
- Receive and review all incoming mail unless marked personal/confidential; assemble and separate mail according to importance; attach previous correspondence and other data which will be helpful in replying; handle routine correspondence for which there are standard replies; bring urgent matters to the attention of the appropriate staff member and if that appropriate staff member is absent, route request to the person best qualified to handle the matter.
- Compose correspondence when necessary; use initiative as to priority for correspondence or reports to be done, giving particular attention to correspondence that should be handled immediately.
- Maintain a uniform filing system; keep the files clear of obsolete and surplus material.
- Understand various regulations, policies, and office procedures to make for a smooth functioning office; maintain efficient office management.
- Keep updated mailing lists and an inventory of fact sheets, bulletins, leaflets, office supplies, equipment, and other material needed for operation of the Extension office.
- Assume responsibility and carry out special assignments as they arise or as delegated; accept and assume responsibility to coordinate the work of other secretaries when assigned this role.
- Attend office meetings to take notes on plans for educational activities, itinerary, and travel.

- Make arrangements for conferences including facility, time and availability; responsible for informing conference participants of the topics to be discussed.
- Assist in preparing OSU personnel forms such as recruitment reports and leave applications, and interpreting personnel policies and benefits to employees.
- Keep leave records for all professional and classified staff members in the administrative unit.
- Constantly strive to improve work-related skills; improvement should be shown through attendance of workshops, conferences, and self-initiated study; remain alert to new office equipment and techniques that could be relevant for more efficient office operation.

Extension Secretary Job Description

Job Summary & Purpose

The Extension Secretary must perform secretarial and clerical work for the professional staff within the assigned unit and carry out other special assignments related to the position.

Extension work is performed under general supervision and only projects involving technical or confidential matters are given close attention by the educators. Supervision is not exercised over the other employees. Major responsibilities may vary depending upon the number of clerical staff in the assigned unit.

Job Responsibilities

- Receive clientele with a pleasant and professional attitude. Provide service and information to the best of your knowledge. (You are the frontline of your office.)
- Display courteous and effective communication with all staff in the Extension office.
- Answer and direct incoming telephones calls.
- Perform database management and data entry activities as required for consistent office function.
- Possess knowledge of computer spreadsheet applications and word processing software.
- Receive and review all incoming mail unless marked personal/confidential; assemble and separate mail according to importance; attach previous correspondence and other data which will be helpful in replying; handle routine correspondence for which there are standard replies; bring urgent matters to the attention of the appropriate staff member and if that appropriate staff member is absent, route request to the person best qualified to handle the matter.
- Assist educators with preparation of monthly activity reports, plans of work, annual reports, budgets, and expense accounts; complete and submit work in sufficient time to meet deadline dates; with assistance of other staff members, make sure that reports are submitted properly and accurately.
- Compose correspondence when necessary.
- Maintain a uniform filing system; keep the files clear of obsolete and surplus material.
- Understand various regulations, policies, and office procedures to make for a smooth functioning office; maintain efficient office management.
- Keep updated mailing lists and an inventory of fact sheets, bulletins, leaflets, office supplies, equipment, and other material needed for operation of the Extension office.
- Assume responsibility and carry out special assignments as they arise or as delegated.

ADDENDUM TO SECRETARIAL DUTIES

The following is a copy of a memorandum from Dr. David Foster concerning nitrate testing, making nitrate recommendations, or testing pressure cooker gauges.

August 13, 2001

*TO: County Extension Directors
FROM: David Foster, Associate Director
SUBJECT: Secretarial Duties*

On occasion secretaries in county offices have been asked to perform tasks that are clearly outside the realm of their position descriptions, e.g. administering nitrate tests, making nitrate recommendations, or testing pressure cooking gauges.

While some of these tasks seem relatively simple, they carry a certain element of risk for the individual who performs them as well as a clear risk to the client should the results be incorrect or misapplied. Thus, there are clearly liability implications for the Oklahoma Cooperative Extension Service.

Effective immediately, activities such as administering nitrate or pressure cooker gauge tests are to be performed by the Extension educators responsible for the corresponding program area. Secretaries and paraprofessionals may assist in such activities, but only when under the direct supervision of a professional. Moreover, you may miss an opportunity to do some teaching when your support staff handle these responsibilities.

Should you have questions regarding this policy statement please contact your District Extension Director.

C: District Extension Directors

INVENTORY



Complete instructions and forms available at web site:
http://intranet.okstate.edu/Fiscal_Affairs/inventory.htm

Fixed Asset Addition Request Form Directions

Custodian Name: Fill in your county name, i.e. Adair County Extension Center.

Custodian Number: Usually found on an inventory report from Stillwater.

Department Code: Fill in C2 then 4 if your county is in the NW District, 5 if your county is in the NE District, 6 if your county is in the SW District, 7 if your county is in the SE District, followed by your county number, i.e. C2626 for Grady County, C2655 for Oklahoma County.

MEI Form Number: Leave blank, Ag Fiscal Affairs will complete this box.

Prepared by: Fill in your name.

Address/Extension: Fill in your address and phone number.

Qty: Fill in the quantity.

Date Acquired: Fill in the date the item was acquired.

AC: Fill in the appropriate AC Code, choosing from those listed on the form. A purchase made with county money or agency funds is A4.

Serial No. Item Description, Mfg/Model: Describe the item.

Cost each: Fill in the purchase price or value if a gift.

Bldg: Each county is considered a bldg and the number is 090 followed by the county number, i.e. 09005 for Beckham County, 09075 for Washita County

Room: Leave blank.

Source Code: Fill in the appropriate source code, 20 if county funds, 1 if agency funds.

Owner Code: Fill in the appropriate owner code, X if county purchased, U if agency funds.

Comments: Use this section as needed.

Sign and mail the form to Ag Fiscal Affairs, 137 Ag Hall.

An inventory number and an asset sheet will be mailed to you.

Fixed Asset Disposal Request Form Directions

Custodian Name: Fill in your county name, i.e. Caddo County Extension Center.

Custodian Number: Found on an Inventory Report from Stillwater.

Department Code: Fill in C2 then 4 if your county is in the NW District, 5 if your county is in the NE District, 6 if your county is in the SW District, 7 if your county is in the SE District, followed by your county number, i.e. C2626 for Grady County, C2655 for Oklahoma County.

MEI Form Number: Leave blank, Ag Fiscal Affairs will complete this box.

Disposal Prepared by: Fill in your name.

Address/Extension: Fill in your address and phone number.

Asset Number: Fill in the inventory number that is on the item. If the item doesn't have a number, leave blank.

RC: Fill in the appropriate removal code, choosing from those listed on the form.

Serial No. Item Description, Mfg/Model: Fill in the original description of the item.

Hazardous Materials: Answer yes or no, if yes contact the inventory section at 4-8499.

Current Location: Each county is considered a location and the number is 090 followed by the county number, i.e. 09005 for Caddo County.

Curr. Cond.: Fill in the appropriate condition code, choosing from those listed on the form.

Reason for Disposal: State your reason.

Original Value: Fill in purchase price or original value if gift.

Current Value: Fill in an estimated current value.

Custodian Requests Disposal by: Check 'County Will Bring to Campus'. It is the county's responsibility to call inventory at 4-8499, after they have been notified that approval to dispose of the property has been granted, to arrange delivery.

If a campus-based employee is bringing the item(s) to campus, check 'PP Pickup and Surplus Auction' and state in the comments section where PP should pick it up.

Comments: Use this section as needed.

Sign and fax the form to Ag Fiscal Affairs, 405/744-5339

Fixed Asset Transfer Request Form Directions

Receiving Custodian Name: Fill in the name of the county that is getting the item(s), i.e. Caddo County Extension Center.

Custodian Number: Fill in 863 and the receiving county number, i.e. 86326 for Grady County.

Department Code: Fill in the code for the receiving county. The number is C2 then 4 if your county is in the NW District, 5 if your county is in the NE District, 6 if your county is in the SW District, 7 if your county is in the SE District, followed by your county number, i.e. C2628 for Greer County.

MEI Form Number: Leave blank, Ag Fiscal Affairs will complete this box.

Transfer Prepared by: Fill in your name.

Address/Extension: Fill in your address and phone number.

Asset Number: Fill in the inventory number that is on the item.

Qty: Fill in the quantity.

Serial No. Item Description, Mfg/Model: Fill in the original description of the item.

Cost Each: Fill in the original cost or value when received, if a gift.

Bldg: Each county is considered a 'building' and the number is 090 followed by the county number, i.e. 09005 for Caddo County. Fill in the receiving county's number.

Room: Leave blank.

Owner Code: Choose from the following codes: U for OSU owned, H for gift, unrestricted title, F for federal surplus. County owned property cannot be transferred.

Comments: Use this section as needed.

Releasing Custodian Number: Fill in 863 and the releasing county number, i.e. 86333 for Jackson County.

The receiving and releasing county/dept/district should sign.

Mail completed forms to Ag Fiscal Affairs, 137 Ag Hall

LEAVE POLICY OVERVIEW



Eligibility: Staff with .50 FTE and above

Classified Staff

Leave Accrual Rate Table (Based on full time status)			
Annual Leave	1-5yrs (1-60months)	6-10yrs (61-120 months)	11yrs & over (121months & over)
	9.33 hrs/month	13.33 hrs/month	14.67 hrs/month
Sick Leave	14.67 hrs/month		

- Maximum annual leave accumulation: Two years @ rate of earning
- Maximum sick leave accumulation: 200 working days (Based on 1.0 FTE)
- New Classified Staff cannot take **annual** leave for 90 days from start date
- **Sick** leave can be taken as soon as accumulated
- One year's accumulation of annual leave is payable at retirement or resignation

Professional Staff - (Based on 1.0 FTE)

- Maximum Annual Leave accumulation: 366.67 hours
- Maximum Sick Leave accumulation: 1614.67 hours
- Accrual rate for both annual and sick leave: 14.67 hrs/month
- Accumulated annual/sick leave immediately available
- Maximum amount of annual leave payable at retirement or resignation: 176.00 hours

Funeral Leave

Employees shall be granted upon request up to three working days of funeral leave with pay upon the death of a related person in the immediate family; or for one day upon request of funeral leave with pay upon the death of a related person not in the immediate family. For the purpose of this policy, the immediate family is defined as the father, mother, brother, sister, husband, wife, son, daughter, grandfather, grandmother, grandson, granddaughter, or corresponding in-law relationships.

Leave slips are due in district office as soon as signed by CED!

***Forms to order leave slips, if applicable, located at internet address (print & mail):**

<http://download.dasnr.okstate.edu/agdupmailextfm.xls>

Leave Policies 3-0705 & 3-0716 read in full on following web site:

http://www.okstate.edu/osu_per/policy_proced.htm

Phone Tip:

Suggested verbiage to use when educator is on leave.

- Out of office today
- Back in office _____
- Will talk to them (when)
- **Do not say educator is on leave**

ONLINE PERSONNEL & E-MAIL DIRECTORY

The Extension Personnel & E-mail Directory (sample web page below) is available at the following Web address.

http://intranet.okstate.edu/personnel/personnel_directory.htm



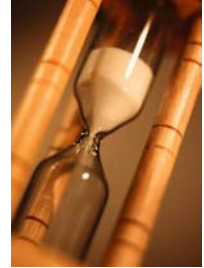
Administration CASNR Departments OCES OAES International Programs

Staff Development Employee Directory FAQs Search Fiscal Affairs Support Service

1. Online Personnel Directory (E-mail Updates/Corrections to Sue Bonner, agslb@okstate.edu)
2. DASNR E-mail Directory
3. View DASNR employee list by e-mail group
4. Send e-mail to specific groups within DASNR - click here to open a printable group email address table.
DASNR staff without an OSU Email Address will not receive messages sent to a group they belong to. Use item #3 to see who does/doesn't have an OSU Email Address. If you receive any **Delivery Failure** reports, in response to sending a group message, forward them to Lee Freeman, lfreemn@okstate.edu.
5. Where is your e-mail going?
Messages sent to your OSU E-Mail Address are routed to the e-mail account shown in the 'Forwarding Address' column in this list. E-mail corrections to Lee Freeman, lfreemn@okstate.edu. [list may take 15+ seconds to load]. List is updated biweekly.
6. Check your OSU e-mail address

The E-mail Directory is updated biweekly; after employee paperwork has been processed by OSU Central Administration. Questions? Contact Gina Conneywerdy at 405.744.4081 or by e-mail at gc@okstate.edu.

RECORDS RETENTION TIMETABLE



Accounting & Fiscal

Audit Reports	-	<i>10 years</i>
Bank Deposits	-	<i>Keep 3 years after audit</i>
Bank Statements	-	<i>Keep 3 years after audit</i>
Budgets	-	<i>Keep at least 3 years (more if so desired)</i>
Check Registers	-	<i>Permanent</i>
Expenditure Reports	-	<i>Keep 3 years after audit</i>
General Ledger Records	-	<i>Keep 3 years after audit</i>
Petty Cash Records	-	<i>Keep 3 years after audit</i>
Postal Records	-	<i>Keep 3 years after audit</i>
Travel Claims	-	<i>3 years, or until no longer needed</i>

Administrative Records

Inventory Reports	-	<i>Until obsolete**</i>
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Personnel

Correspondence	-	<i>5 years</i>
Employee Leave Records	-	<i>5 years</i>

**Inventory items can be kept for long periods of time. Do not dispose of inventory reports if any inventoried items are still in your possession.

These are general guidelines for records retention; however, records may to be kept for longer periods of time if so desired. Before final disposal, approval must be given by CED.

SOIL, WATER & FORAGE ANALYTICAL LABORATORY

Contact person – Barbara McCray – Phone 405-744-6630 (she is the “all-knowing” of the soils lab!) Her e-mail is soils_lab@mail.pss.okstate.edu.



In each office there should be a copy of OSU County Extension Office SECRETARY'S S*W*F*A*L HANDBOOK – This was distributed to all county offices in 1998. The cover sheets of each section are printed on hot pink cardstock. If you are unable to locate a copy contact Barbara and she will get a copy to you. At this time the plans are to update the handbook and distribute to all county offices in the future.

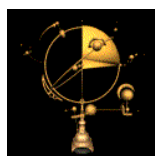
Some tips to avoid common mistakes:

- ⊖ **Never** put plastic bags **inside** a sample bag – the lab bakes these samples and the melted plastic is bad news! If moisture is important to the test being requested, put the sample in the sample bag, fill out the tag and then place the sample bag in a plastic bag.
- ⊖ Samples should be dried and mixed prior to shipping to soils lab - wet or muddy soil samples will not give representative results because they're not mixed well.
- ★ Make sure tags are clearly marked with pencil. The tags are no longer returned so the sample location should be entered in your soils log. The following information is required on sample tags:
 - County and sender numbers
 - Test(s) requested
 - Crop
 - Yield goal (If a producer is unsure of this information – a good way to determine a yield goal is to average the high 3 of the last 4 crop year's yields)
- ★ The only barcode necessary at this time is the Customer Code + Sender Number (these should also be written in pencil on both parts of the tag). You can use the other barcodes if you would like to, but they are no longer required. Be sure you clearly mark your test(s) requested, crop code, yield goal with pencil on the tag.
- ⊖ Do not send rocks in samples – they can damage grinding equipment.
- ★ Supplies can be ordered by mail, by fax, or by e-mail.
- ★ Use the correct postage when mailing samples! You can mail soil, water, or forage samples via first class or parcel post.
- ★ How much? At least 1 to 2 cups of soil. Make sure the sample bag is tied securely so soil is not lost during transit.
- ★ One full bag of soil is sufficient for a routine fertility and salinity management – two bags of soil are required for routine and comprehensive salinity.
- ★ Submitting water samples – use plastic bottles supplied by lab – no glass. County and sample number should be written on the bottle with a permanent marker. Do not tape the lids on.
- ★ Forage samples – write the customer code and sample number on both halves of the sample tag in pencil. This is necessary even with barcodes. Mark the test(s) to be run on the small portion of the tag; mark the crop to identify the type of forage or feed – if there are several types of forage in the sample, mark the main crop. Apply customer code + sender number barcode. Send a full bag of correctly sampled forage or feed. Refer to FS 2589 for proper sampling procedures. Nitrate results are called to the county extension office the day testing is completed so information can be shared with producer(s) immediately.

SOIL, WATER & FORAGE ANALYTICAL LABORATORY WEB SITE

<http://clay.agr.okstate.edu/extensio/swfal/intro.htm>

Soil, Water & Forage Analytical Laboratory




**ACCURATE,
TIMELY
&
UNBIASED**

Laboratory
Contacts

- [General Lab Information](#)
- [Services and Price List](#)
- [Benefits of Testing](#)
- [Test Results](#) (PW Required)
- [Soil Test Interpretation](#)
- [Order Supplies](#) (PW Required)
- [Extension Fact Sheets](#)
- [Other Useful Links](#)
- [People and Facilities](#)
- [Frequently Asked Questions](#)
- [Sensor-Based N Rate Calculator](#)
- [A Sweatless Soil Sampler](#)



	<u>Department of Plant & Soil Sciences</u>
	<u>Oklahoma Cooperative Extension Service</u>
	<u>County Extension Office Link</u>
	<u>OK CCA Information Center</u>

048 Agricultural Hall, Stillwater, OK 74078,
405-744-6630 405-744-9575 (fax) soils_lab@mail.pss.okstate.edu

Instructions- County Sample Log Sheet

This form replaces the form provided by the Soils Lab.

This form is in addition to the form that tracks 'penalty mail postage' used for sample activity.

The purpose of this form is to track sample activity, from when the sample is received to when the Extension Office has paid OSU.

The columns 'Date' through 'Receipt Number' are completed when the sample is received in the Extension Office.

The columns 'Lab ID through Date Pd' pertain to the invoice from the soils lab and are completed later.

This log sheet enables the Extension Office to verify that they have been paid by the producers and that they have paid OSU.

This log sheet is kept in the Extension Office and is not mailed to any other office.

This log sheet is kept in the Extension Office and is not mailed to any other office.

[illegible]

Time & Attendance

Due in the district office by the **5th working day** of the month (for previous work month).

Form available on intranet – http://intranet.okstate.edu/Fiscal_Affairs/leave.htm

Sample web page shown below – **CED must sign before sending to district.**

Oklahoma State University TIME & ATTENDANCE REPORT											
Name: _____						SS Number _____					
Dept. _____						Month _____		Year _____			
Day of Wk	Day of Mo	AM		PM		Hours Worked	Vacation Leave	Sick Leave	Other Leave	Holiday Leave	
		in	out	in	out						
	1										
	2										
	3										
	4										
	5										
	6										
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	23										
	24										
	25										
	26										
	27										
	28										
	29										
	30										
	31										
Total Hours						0.00	0.00	0.00	0.00	0.00	
Employee Signature _____						Title _____		Date _____			
Supervisor's Signature _____						Title _____		Date _____			

TRAVEL HINTS



Mileage & Lodging Reimbursement Rates – See Intranet
http://intranet.okstate.edu/Fiscal_Affairs/travel.htm

Registrations – Educators must determine if meals were included in registrations. If so, you must deduct ¼ day of per diem for each meal. If meals were provided at no cost, you must deduct ¼ day per meal. You must have an overnight stay to claim meals.

Registration Receipts

1. Need name of event, date of event, city where event was held, and how many meals were included in registration.
2. When sending one check for more than one registration on events such as 4-H Roundup, 4-H Leadership Conference, etc., make sure that you obtain a receipt from the person you paid.

Designated Hotels – Documentation is required. Room rates should be shown on the documentation. Your best documentation is probably what the educator received announcing the meeting.

Lodging Tax – Taxes allowed on lodging fees. Check intranet for rates.

Sharing Rooms – When sharing a room with another state employee, indicate with whom and the Requisition T# of the other employee's travel claim. If paid by county funds, name and county is sufficient.

Travel Vouchers – Are to be signed by claimant, county extension director, and sent to district director for approval. State travel does not have to be notarized, but must be signed and dated. If you have county travel, follow your county rules.

Travel Days – In-State travel claims are usually filed once a month, not to exceed **31 travel days** per claim.

Distance Rule – If staying overnight and the distance is less than 60 miles, you must attach an approved/signed letter from the district director explaining the overnight stay.

Tips on Filling Out Claims

1. Designate AM or PM on travel status hour.
2. Use official State Highway Road Map when determining mileage.
3. You **cannot** anticipate trips in advance.
4. Show point of origination, each point visited, and point travel status ended. (ex. Duncan-OKC-ret.)

Receipts

1. OSU requires that receipts must be kept for lodging, parking and registrations.
2. Check with individual county for other required receipts.

Official Regulations and Forms: http://intranet.okstate.edu/Fiscal_Affairs/travel.htm

Out of State Travel Request Regulations:
http://intranet.okstate.edu/Fiscal_Affairs/travelpg2.htm

Questions regarding travel, contact: Cecilia Herrmann (Ext. 5517) or Starry Clark (Ext. 9700).

Check intranet periodically for rate changes.

MISCELLANEOUS WEB LINKS

Agriculture Communications (fact sheets)

<http://agweb.okstate.edu/agcom/>

Computer & Technical Support Request Form

<http://www.dasnr.okstate.edu/support/>

Human Resources (Personnel) Web Site

http://www.okstate.edu/osu_per/

Supply Order Forms

http://intranet.okstate.edu/Fiscal_Affairs/agdup.htm

Support Services Download Web Site

<http://www.dasnr.okstate.edu/support/download.htm>

Support Services FAQ (good information!)

<http://www.dasnr.okstate.edu/support/faq.htm>

DASNR Intranet Site

<http://intranet.okstate.edu/>



Reporting Workers' Compensation Claims

To report incident: **1-800-560-8850**

To check on status of claim: **Cunningham-Lindsey Call Center**
1-800-890-8975
Contact Person: LaShawna Sears



When calling to report a new claim, the following information is required:

Department number – AC-C2605 (Beckham County), AC-C2761 (Pittsburg County)

Name of person injured

Social Security Number

Date of Birth

Hire Date

Marital Status

Number of Dependents

Rate of pay

Home Address

Home Telephone Number

Name of Supervisor

Work Address & Phone Number

Explanation of accident

Time of accident

Location of accident

Name and address of hospital

Name of attending physician

What could have been done to prevent accident

A claim number will be assigned.

Report incident to both District Director and Division Personnel (X5524).

Official OSU Policy and Procedure 3-0770, Workers' Compensation Insurance, is available at the following website: http://www.okstate.edu/osu_policies/3-0770.html