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OKLAHOMA COOPERATIVE EXTENSION SERVICE
PROCEDURE GUIDE: FIELD OPERATIONS

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Revised October, 2017; Revised February, 2016; Revised July, 2015; Revised May, 2015; Revised June, 2014 Revised May 3, 2011; Revised, July 17, 2002; Revised February, 2018
The Cooperative Extension Service was started in response to public needs. In 1914, the Smith-Lever Act was passed which granted funds from the federal government that could be matched, according to various formulas, at the state and local levels for Extension work. This act set the pattern for financing the Cooperative Extension Service and provided a framework for a state and national system of people-oriented education on the subjects related to the problems of the day.

Over the years, federal statutes, administrative policies, formal agreements, and administrative experience have evolved into a set of basic principles, which have directed the development and expression of the “Extension idea.” Its central elements are as follows.

The Cooperative Extension Service is to be educational; it provides people with the information they need to solve their own problems.

The Cooperative Extension Service is to be research-based addressing people’s problems with relevant information from the most recent investigations of the Land-Grant University System.

Oklahoma Cooperative Extension Service (OCES) is a partnership between Oklahoma State University, Division of Agricultural Sciences & Natural Resources, United States Department of Agriculture and County Government through the Board of County Commissioners.

Oklahoma Cooperative Extension’s primary mission is the dissemination of research proven information to Oklahoma citizens through effective educational programs in Agriculture and Natural Resources, Family and Consumer Science, 4-H Youth Development, and Community and Rural Development. Extension educational programs are carried out in the 77 counties of Oklahoma through the efforts of County Extension Educators, area and district staff, and state specialists.
II. LEGISLATION – COOPERATIVE EXTENSION SERVICE

A. Passage of the Smith-Lever Act May 8, 1914

Principles established by the Smith-Lever Act:

1. Establishes cooperative work between the United States Department of Agriculture and the State Land-Grant College.
2. Provides basis for work with farmers, with boys and girls, and with homemakers.
3. Provides basis for work both in the production and marketing of farm products.
4. Emphasizes the demonstration method of teaching.
5. Provides for cooperative financing by both State and Federal governments.
6. Provides the basis for memorandum of understanding between the State College of Agriculture and the United States Department of Agriculture that sets the method of administering Extension work. In this memorandum, signed by all States, but California and Illinois, in 1914, the State College agrees to organize and maintain an administrative division for management and conduct of Extension work, to administer all Extension funds through this division, and to cooperate with the United States Department of Agriculture in all Extension work authorized in the State. The United States Department of Agriculture agrees to establish and maintain a central office for administration of Extension work in the Department of Agriculture and to conduct all Extension work within a State in cooperation with the Agricultural College.

It was mutually agreed that all work be planned under joint supervision of the State Director and the Director of Extension Service, USDA, all appointees are joint representatives of the College and of the Department and plans are made by the States and after approval by the representative of the Secretary of Agriculture, are executed by the States.

B. Oklahoma Legislation Summary

O.S. 70 – 3418. Agricultural extension work - Farm and home demonstration agents – Cooperative Agreement - The Board of Regents for Oklahoma Agricultural and Mechanical Colleges shall organize and conduct agricultural extension work under the direction of Oklahoma State University, and may accept federal funds for such purposes and comply with federal laws providing for cooperative agricultural extension. Subject to approval of the board of county commissioners' annual estimate of needs by the excise board, the board of county commissioners of the respective counties of the state shall contract and agree with the Department of Agriculture of the United States of America and Oklahoma State University, or with the authorized agent or agents of said Department of Agriculture and said University, to cooperate with the Department of Agriculture and the University in conducting farm demonstration work and home demonstration work including 4-H club work in their respective counties under such rules and regulations as may be prescribed jointly by the Department of Agriculture and Oklahoma State University. Such agreement shall be in
writing, signed by the members of the board of county commissioners and the authorized agent of the United States Department of Agriculture and Oklahoma State University, and may be entered into at any regular or adjourned session of said board, after the 30th day of June of each year. The board of county commissioners shall provide an adequate amount in their annual estimate of needs for the ensuing year to carry out the provisions of such contract.

III. OKLAHOMA COOPERATIVE EXTENSION SERVICE
   POLICY AND PROCEDURE

   A. Introduction
This web-based guide to OSU policy OCES procedures is designed to be a convenient reference for OCES employees. Extension is subject to OSU Policy & Procedure found on the web at:  http://hr.okstate.edu/policy_proced

Given the myriad of circumstances peculiar to the many county, area, and district Extension field offices, personnel and programs, it is occasionally necessary for procedures in addition to those provided by the University. This OCES Procedures Guide is presented for that purpose and shall be considered by all field staff as the basis for administrative decisions regarding programming issues, personnel management, fiscal affairs, and other general management concerns.

   B. Management of OCES Procedures Guide
The office of the Associate Vice President, Oklahoma Cooperative Extension Service, is responsible for management of the OCES Procedures Guide. The OCES Associate Vice President will designate individuals within the system to be responsible for periodic reviews of procedures and to make recommended changes. The content and timeliness of procedure changes are at the discretion of the OCES Associate Vice President. All staff members in the system will be notified of a change(s) by e-mail immediately following completion of the amendments.

   C. Purpose of the Guide
The OCES Procedures Guide will provide all employees a web-based reference to OSU policies and OCES procedures for OCES field operations. The application of policies throughout OCES will be based on prevailing University policies as maintained by OSU Human Resources (http://hr.okstate.edu/policy_proced), with additional appropriate procedures determined by DASNR administration including the OCES Associate Vice President. This guide provides web site links with which relevant OSU policies may be
accessed in their entirety. Also discussed herein are additional guidelines to provide oversight and guidance in those situations peculiar to the characteristics of OCES.

D. Employee Responsibility

OCES Procedures Guide and OSU policies are available to all OCES personnel. Any questions regarding the application of policies and procedures should normally be resolved through consultation with appropriate administrative personnel starting with County Extension Directors and proceeding in sequence to the District Extension Directors, DASNR Human Resource Director and/or the OCES Finance Coordinator, the appropriate Assistant Director, and finally the Associate Vice President. It is the employee’s responsibility to study this guide and to develop a good working knowledge of policies and procedures for the system. Each employee will be held responsible for compliance with all policies and procedures as stated. Questions on interpretation of policies and procedures should be referred to the individual's immediate supervisor. Any employee finding what he/she perceives to be an error in the guide should report their finding in writing to their immediate supervisor.

IV. COMPLIANCE WITH CIVIL RIGHTS, EQUAL OPPORTUNITY, AND AFFIRMATIVE ACTION LAWS, RULES, AND GUIDELINES

A. Introduction

Oklahoma Cooperative Extension Service is committed to full compliance with all applicable laws related to civil rights, equal employment, and affirmative action, including, but not limited to, the following: Titles VI and VII of the 1964 Civil Rights Act (as amended in 1972); Title IX of the 1972 Education Amendments; Section 504 of the Rehabilitation Act of 1973; Age Discrimination in Employment Act of 1967 (amended in 1978); and the Americans With Disabilities Act of 1990. OCES conducts programs which are non-discriminatory with regard to race, color, national origin, religion, gender, age, or disability. The federal Equal Employment Opportunity Commission webpage has additional information on this legislation, EEOC regulations, types of discrimination, and means for filing charges of discrimination. [http://www.eeoc.gov/policy/](http://www.eeoc.gov/policy/)

All OCES employees have a responsibility to assist in the attainment of civil rights, equal employment, and affirmative action goals. The County Extension Director is ultimately responsible for the accomplishments of the office in matters concerning civil rights. 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.
B. Civil Rights and Affirmative Action Legislation and OSU Policy

Applicable OSU policies on Civil Rights may be located at: http://hr.okstate.edu/policy_proced

Specific policies of interest include:

<table>
<thead>
<tr>
<th>OSU Policy #</th>
<th>Policy Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-0101</td>
<td>Equal Opportunity &amp; Affirmative Action</td>
</tr>
<tr>
<td>1-0702</td>
<td>Gender Discrimination and Sexual Harassment Policy and Title IX Grievance Procedure</td>
</tr>
<tr>
<td>3-0745</td>
<td>Nondiscrimination, Equal Opportunity &amp; Affirmative Action for A/P and Classified Staff</td>
</tr>
</tbody>
</table>


District Extension Directors and County Extension Directors are responsible for the appropriate actions required to attain the primary objectives of identifying underserved audiences and their needs, and achieving ‘parity’ goals through ‘all reasonable effort’. Underserved audiences and individuals are to be those identified and protected by legislation on the basis of race, color, national origin, gender, age, religion, disability, or status as a veteran. Though not specifically covered by legislation, socio-economic standing and culture should be considered.

Educational programming, notification efforts, employee management, and hiring practices will include priority concerns for Civil Rights and Affirmative Action legislation and policy. District Extension Directors are to work with county staff to ensure that all measures outlined in these policies will be implemented in order to provide for continued administration of ‘all reasonable effort’.

C. County Civil Rights Compliance Reviews and Resources

District Extension Directors will conduct Civil Rights Reviews of County Extension Offices on a four year rotational cycle or at their discretion to ensure compliance of local Extension personnel with Civil Rights legislation and OCES procedures. County Extension Directors have the responsibility to work with the District Extension Director and other county staff to
compile information required for the review. The purposes of the reviews are to ensure the conduct of practices contributing to the letter and spirit of civil rights legislation; highlight deficiencies that may be addressed in the event of a federal civil rights audit; ensure ‘all reasonable effort’ is applied to the attainment of civil rights goals; correct deficiencies to the technical aspects of compliance; discuss the need for vigilance in this area over time; discuss various aspects of efforts to achieve ‘parity’ in OCES events; and generally determine the extent to which programs are in compliance with civil rights, affirmative action, and equal opportunity laws, regulations, and policies.

The review process will accomplish the following goals: increase the awareness of managerial responsibilities improve understanding of the need for documentation provide a basis for improving personnel and program management compile data to measure progress, prevent investigations & complaints associated with non-compliance enable the county staff to become more knowledgeable of laws, rules, and regulations and how they apply to programming efforts identify areas where the state or district office can strengthen civil rights and affirmative action efforts.

The guiding document for OCES procedures and county reviews is titled Compliance with Civil Rights, Equal Opportunity, and Affirmative Action Laws, Rules, and Guidelines, OCES, April, 1996. Each County & District Extension Office will have a copy. It is the policy of OSU and OCES that all educational programs, hiring practices, and assigned job responsibilities will be nondiscriminatory. Underserved audiences will be identified and relevant educational programs developed for them. It is especially expected that ‘all reasonable effort’ will be afforded with a goal of achieving ‘parity’ in their conduct and impact.

All Extension Educators, Extension Administrative Support Specialists/Assistants, program assistants, and grant personnel are expected to be familiar with this publication and other general requirements of the spirit and letter of Extension obligations to Civil Rights Legislation and moral & programmatic responsibilities. The OCES Associate Vice President will ensure that the practices of those responsible in matters of programming and employment decisions, including all supervisors, are nondiscriminatory.

In addition to the OCES Civil Rights booklet mentioned above, additional information on county civil rights reviews, requirements, and procedures can be found at: http://intranet.okstate.edu/OCES/CRCmplyRvw.pdf.

V. NON-DISCRIMINATION, NON-ENDORSEMENT, AND COST STATEMENTS

Nondiscrimination statements should accompany promotional or educational materials released to the public by OCES personnel. The purpose of these statements is to inform readers, clientele, and members of target audiences that OCES programs and policies do not discriminate toward individuals, population groups, or other nondiscriminatory organizations.
Non-endorsement statements serve to inform clientele that OCES programs do not discriminate against certain brands of consumer products or necessarily endorse the use of certain brands.

Most OCES publications should carry a cost statement that indicates the number of copies made of a certain publication, their cost of production per copy, and the total cost to the public.

These statements may change with the enactment of federal or state laws, or as OSU policy is amended. Currently approved nondiscrimination, non-endorsement, and cost statements may be found in the Administrative Support Specialist & Assistant Guide.

VI. FISCAL MANAGEMENT

A. Introduction
Fiscal management by County, District, and Area offices is required for normal operation. The origin of these funds may be public allocations of county, state, federal funds, and private monies via grant awards, donations, fund raising activities, educational program registrations & sponsorships, or payments for clientele services. Expenditures may include costs of publications, supply purchases, travel costs, educational programs, or wages. These funds may reside in county government accounts, OSU campus accounts, or in local banks as deposits in agency accounts.

By whatever means the money is acquired, wherever it resides, or regardless of its purpose, Extension personnel are obliged to administer the funds according to OSU and OCES procedures and state law. This section of the OCES Procedures Guide affords personnel with generalities of their fiscal responsibilities to management of funds. Full explanations of these policies may be accessed at the following web site:

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

Additional procedural comments follow on the subjects of agency accounts; purchasing, including use of P-cards; grants; inventory; postage; audits; county budgets, contracts and Memorandums of Understanding (MOUs); and employee moving expenses. Links for specific policy and procedure information are provided as appropriate.

B. Agency Accounts
County and District Extension Offices have authority to open and maintain one local checking account for the purpose of handling incidental fiscal affairs related to educational programming and clientele services. The District Extension Director or the County Extension Director has responsibility for oversight of their respective accounts. A discussion of major fiscal management procedures follows; however, the complete guidelines for the management of these accounts should be reviewed under Accounting Policy & Procedures for Agency Funds at: http://intranet.okstate.edu/Fiscal_Affairs/policy.htm
1. **Types of Funds Handled in the Agency Account**
   The agency account is to be used to handle income and expenditures for all funds received and/or disbursed by Extension staff for purposes of educational programming activities and clientele services, including: soils, water, forage, and plant testing services; 4-H funds; sale of University publications; meeting registrations and expenses; and approved grant awards under $2,500.

   All deposits and expenditures from the agency account in county and district offices are the responsibility of the County Extension Director (CED) and the District Extension Director (DED), respectively, who are the only persons authorized to sign checks written on the account. The Extension Administrative Support Specialist/Administrative Assistant, with the aid of additional Extension Administrative Support Assistants and/or others (for the purpose of segregation of duties), has responsibility for receiving funds, accounting duties, and compiling monthly reports. The CED/DED has the responsibility for making the deposit and for reviewing and approving the other various tasks within this process.

2. **Agency Account Categories**
   Deposits and expenditures to the agency account should be correlated to a relevant category. Categories include: Maintenance; Operation of Soils, Water, Forage, and Plant Services; Publications; 4-H Programs; FCS Programs; Horticulture Programs; and Non-credit Educational Programs. Other categories may be carried as appropriate.

   Funds deposited for a specific purpose should be used for that purpose only until it is determined that no further activity, deposits, or expenditures will occur relevant to that purpose. At that time, residual funds may be moved to the maintenance category, unless prohibited by contract whereupon some funders require return of the unused balance to them. Funds in the maintenance category may be later transferred to specific program areas and used for authorized purposes beyond the original reasons for which they were received. The County Extension Director and the District Extension Director retain the authority over those funds following their assignation to a program area or activity.

3. **Procedures**
   The County Extension Director or the District Extension Director will select a local bank to handle the Agency Funds in one bank account only, carried as ‘OSU Extension Center, County/District Agency Fund’. Quicken® computer software is used to record, on a daily basis, every transaction involving the receipt and disbursement of funds. State Law, Statute 62 Okl. St. Ann. § 7.1, requires that all funds received must be deposited within 5 business days of their receipt or by the next business day when cumulative undeposited funds reach $100.00. This is statutory and is current law. The County Extension Director is responsible for making this deposit but may also designate another person to make the deposit. If possible, this should be someone other than the person receiving the funds and preparing the deposit.

   Upon receipt of funds by the Oklahoma Cooperative Extension Service Center, the following procedure must be observed. An official OSU receipt, which is prepared in duplicate, must be issued for all funds at the time of their receipt, except for publications costing less than $1.00. Each receipt will show the date, the name of the person or organization tendering payment, the amount receipted, the identification of the program or purpose for which the funds were received, and must be signed by the person receiving payment. The receipt must be issued to the person remitting the funds. A memo may be
made on the receipt if the funds were paid on behalf of someone else. The receipt should list if the funds received were cash or check. If a check was received, list the check number. The original receipt is given to the individual remitting the funds. The carbon copies of the receipts remain in the receipt book and must not be detached. The original and the copy of voided receipts must remain in the receipt book. Funds received for publications costing less than $1.00 must be receipted in total on a daily basis. The receipt will read “Received from Various Individuals”. The original copy of this receipt may be discarded.

Funds may be taken for soils, water, forage, and plant testing services conducted by the OSU Soil, Water, and Forage Analytical Laboratory (SWFAL). These funds are to cover the cost of those tests and the postage costs to mail the samples. As part of this activity a “Record of Soil, Forage & Water Samples Log Sheet: http://intranet.okstate.edu/Fiscal_Affairs/extfinance.htm must be maintained.

Disbursements will be made using an official Oklahoma State University Extension Center pre-numbered check which has been signed by the County/District Extension Director after he/she has reviewed the supporting documentation. Authorized disbursements include: refunds, reimbursements, travel mileage for volunteers, professional development of Extension employees, professional services provided by individuals and businesses, and for goods connected to programs and workshops. Some disbursements must be approved by additional administrative personnel, require additional documentation, and routing through campus fiscal affairs.

A change fund is authorized in order to have funds available to make change to clients. The County Extension Director may request a nominal change fund via a written requests sent to the District Extension Director. This fund can only be used to make change; no purchases from this fund are authorized. The balance of the fund should be counted at the end of each business day, and the balance on June 30th should be reported annually to the Extension Finance office. Forms for both may be found at exhibit C(2) and C(3) at: http://intranet.okstate.edu/Fiscal_Affairs/policy.htm

The following transactions from the agency account are strictly prohibited:

a. Disbursements directly to Extension personnel or other State employees for travel-related expenses (a county or state travel claim must be filed instead).

b. Registration fees paid in advance of a conference/event. The exception is when the agency account is only transmitting the registration fees of the individual participant(s), which have already been paid-in to the agency account.

c. Direct-payment of lodging from the agency account for OCES or other State employees.

Also, contact Extension Finance before making travel arrangements using agency funds for certified 4-H volunteers and 4-H participants to 4-H events such as regional/out-of-state competitions.
C. Purchasing

All purchases by OCES employees must follow OSU policy, state law, and OCES guidelines regardless of the source of the funding. There may be some variation in procedure dependent on the source.

1. **Purchases with County M&O**

   Purchases with County M&O funds should follow procedure guidelines peculiar to the individual county. Purchases must be approved by the County and/or District Extension Director before items are encumbered. The county will have a purchase requisition form.

   County Expenditure Report Forms are records of purchases, travel reimbursements, contractual services, and temporary wages paid with county funding. Each month’s report is due in the district office by the 15th working day of the subsequent month. The report will reflect disbursements issued by the County Clerk’s office during that month (i.e. January report will include all warrants dated/issued in January).

   Each County Expenditure Report Form should show payments to OSU for part-time and temporary staff. The Expenditure Report Form should also show travel paid to each staff member. Travel vouchers should be attached to the expenditure report form along with the travel purchase order and all travel documentation (receipts, agendas, lodging, etc.)

**Certificate of County Expenditure Sheet**

Download form off the intranet [http://intranet.okstate.edu/Fiscal_Affairs/county.htm](http://intranet.okstate.edu/Fiscal_Affairs/county.htm)

(PRINT ON PINK PAPER)

- **Section E.1.a.&1.b: Salaries, Part-Time Help**
  - List the amount for contractual services and part-time temporary paid staff.
    - All part-time temporary staff must be OSU employees. Part-time temporary individuals cannot be paid directly with county dollars.
    - Tulsa & Oklahoma Counties Only - List any salaries paid to individuals

- **Section E.1.c: Travel**
  - List each educator/administrative support specialist/assistant’s amount of travel paid
  - Attach copy of travel claim on yellow paper with documentation (i.e. all mileage documentation, receipts, agendas, etc.)

- **Section E.2. Maintenance and Operations (Including E.8. Aid to 4-H)**
  - List total amount of expenditures from County M&O Account

- **Section E.3. Capital Outlay**
  - List total amount of expenditures from County Capital Outlay Account

- County Clerk verifies expenditures and signs form
- County Extension Director should review form and initial

- **Due in the District Office by the 15th of each month**

*Revised September, 2017*
2. **Purchases from Agency Accounts**

Guidelines for purchases made with agency money can be found at: [http://intranet.okstate.edu/Fiscal_Affairs/agencyaccts.htm](http://intranet.okstate.edu/Fiscal_Affairs/agencyaccts.htm).

These funds should be categorized for a particular purpose in the account or constitute residual funds from other projects, events, or grants and generally consolidated in M&O. (See above section on Agency Accounts.)

3. **Purchases with State Funds**

The OSU Procurement Card, or p-card, is used in the manner of a standard credit card by approved, trained OSU employees that have state funds available to spend. These employees must request such a card and be approved by the District Extension Director or Department Head. Approved applications are routed through the Extension Finance office. P-card training, applications, and policy can be found at: [https://hr.okstate.edu/purchasing-card-training-pcard](https://hr.okstate.edu/purchasing-card-training-pcard)

Purchases with state funds should be made with an OSU p-card or via the state requisition form. The form should be used for purchases by OSU employees without a p-card, from vendors who do not accept the p-card, or for purchases in excess of $5,000. Those items, or groups of items, costing more than $5,000 should be submitted for bid. Bids and the bidding procedure are initiated and overseen by Extension Finance.

4. **Payments to Individuals**

The forms ‘Determination of Independent Contractor and ‘The Twenty Factor Test’ must be completed prior to making a payment to an individual. In the case where it has been determined that the individual does not meet the requirements for independent contractor status, then wages must be paid. Wages may not be paid directly to the individual from the agency account.

Honorarium payments can be paid to an individual up to the amount of $600 per calendar year. Whenever more than $600 is due to an individual independent contractor or it is expected that more than $600 will be owed, in total, to an individual during a calendar year, the funds must be sent to Extension Finance along with the following: completed ‘Determination of Independent Contractor Status’ and ‘The Twenty Factor Test’ forms; a purchase request to pay the individual; and an agency check, for the amount of the honorarium, made payable to OSU Cooperative Extension Service.

For complete instructions and copies of the Independent Contractor and Twenty Factor Test go to Exhibit D at: [http://intranet.okstate.edu/Fiscal_Affairs/policy.htm](http://intranet.okstate.edu/Fiscal_Affairs/policy.htm).

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**D. Grants, Contracts, and Gifts**

County Educators and Area Specialists are encouraged to seek external sources of funding to enhance programmatic goals, field activities and the development of educational materials. Grant monies, regardless of their source, must still be managed in accordance with state law and OSU/OCES policies and procedures. All funds may be expended only
for purposes as designated by the grant provider. Complete procedures may be found at the DASNR Sponsored Programs website: http://agsp.dasnr.okstate.edu/

Grants for less than $2,500 may be handled in a separate category in the agency bank account with approval of the District Extension Director, as indicated on the County Grant Questionnaire. All federal and state grants must be reviewed by the Ag Grants and Contracts Office to ascertain if any special requirements exist.

Before submission of a proposal to an external grantor, the Principal Investigator (PI) for the grant must have written approval of the County/District Extension Director and the Associate Vice President, OCES as appropriate. Such approval is obtained through completion and submission of the County Grant Questionnaire.

Funding in excess of $2,500 must be deposited in an account assigned by DASNR Sponsored Programs. The questionnaire and all pertinent information and material (request for proposal, the proposal, routing sheet as may be required, budget, etc.) should be mailed to the District Extension Office in advance of the proposal's submission deadline for review and signatures as required.

When appropriate, proposals will be sent to DASNR Sponsored Programs. All grant applications and awards in excess of $2,500 must also be accompanied by the 'Oklahoma State University Routing Sheet'. This form, budget worksheets, and other information may be located at the DASNR Sponsored Programs web site at: http://agsp.dasnr.okstate.edu/

The DASNR Sponsored Programs Office will complete the OSU Routing process and notify the grantee of the grant account number. Questions should be directed to the District Extension Office which will work with DASNR Fiscal Affairs and DASNR Sponsored Programs to determine the correct course of action. There are occasions for differentiation between gifts, grants, and contracts. While there is a complete discussion on this matter at OSU Policy 3-0252, it is best to call the DASNR Sponsored Programs office:

E. Externally Held Funds

All 4-H Funds must be held in the County Agency Account, however, groups affiliated with OCES may have funds in accounts in local banks if they have a 501.c.3 status. These funds must be used for the purpose for which they were collected or raised. If the affiliated group is a 501.c.3 that manages funds on behalf of the county 4-H program, those funds are still under the oversight of the county staff and must be accounted for annually through a financial summary.

All non-profit groups that collect any funds must annually report to the IRS via a 990N or other appropriate form. A copy of the appropriate IRS report should be provided to the County Extension Director or 4-H Educator at the time it is submitted to the IRS. Counties needing assistance with guidelines for handling funds should consult with the Assistant Director for the program area associated the funds.

Revised June, 2014
F. Inventory

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

**Instructions on how to complete each form are included at the top of each form.**

**INVENTORY ADDITIONS**
A ‘Fixed Asset Addition Request’ should be completed for any item purchased that costs more than $500 or is considered a ‘high-profile’ item. Examples of ‘high-profile’ items include but are not limited to laptops, tablets, cameras, fax machines, and printers. ‘High-profile’ items need to be added regardless of the cost of the item.

- Complete a ‘fixed asset addition request’ form and have the County Extension Director sign at the bottom.
- Mail the signed form, along with invoices/receipts, to Extension Finance 258 Agriculture Hall, Stillwater, OK 74078.
- **NOTE:** The form can include more than one item. If there are multiples of the same item (i.e. 10 bows) each item will need to be listed separately.

**INVENTORY DISPOSALS**
A ‘Fixed Asset Disposal Request’ should be completed for any asset that a county no longer uses or if the asset is broken, lost, or stolen. If an asset is stolen, a report must be filed with the police and a copy of the report included with the disposal form. A decommissioning form must be completed for any asset that may have a removable hard-drive/memory — examples include but not limited to desktops, laptops, cameras, tablets, and copiers. If the hard-drive can be removed, it must be removed and given to Extension Finance for destruction for both county-owned and university-owned assets.

- Complete a ‘fixed asset disposal request’ form and have the County Extension Director sign at the bottom.
- If applicable, complete a ‘Computer Decommissioning/Sanitation Form’ and have the County Extension Director sign at the bottom.
- Mail the signed form, along with any documents to Extension Finance 258 Agriculture Hall, Stillwater, OK 74078.
- **NOTE:** The asset tags on county owned items must be removed and returned to OSU. These can be affixed to a separate piece of paper and returned along with the disposal form. Asset tags on university owned equipment must stay on the equipment.

**INVENTORY TRANSFERS**
A ‘Fixed Asset Transfer Request’ should be completed when a county no longer uses an asset but the asset is still in good, working condition and can be used by another county extension office or a university department.
• Complete a ‘fixed asset transfer request’ and the releasing County Extension Director signs at the bottom.
• The receiving County Extension Director signs at the bottom.
• The completed form (with both signatures) should then be mailed to Extension Finance 258 Agriculture Hall, Stillwater, OK 74078.
• NOTE: This form should be completed at the time the asset is transferred between the two counties.

FREQUENTLY ASKED QUESTIONS

Does a lease need to be added to inventory? No, if we are leasing an item it does not need to be added to inventory. If there is a purchase option at the end of the lease and the asset is purchased, it needs to be added to inventory.

We bought a new asset but paid with county funds. Does it still need to be added to the university inventory? Yes. Although the ownership resides with the county, it is being used in the name of the university and needs to be included in the university inventory.

How frequently do we need to update our inventory? Inventory additions should be completed within fourteen days of purchasing a new asset. Inventory disposals and inventory transfers should be completed within fourteen days from the point a county decides to remove an asset. Assets that are stolen should be reported immediately.

Can we add items to inventory that cost less than $500 and are not considered ‘high-profile’? Yes, if your county chooses, we can add items that fall below the price threshold to inventory. It is still the county’s responsibility to account for all items and inventory policies will apply to each item.

How do we know if an asset is county owned or university owned? Contact Extension Finance.

How can I get a list of our office’s inventory? Contact Extension Finance. Additional questions can be directed to Melissa Nugent (melissa.nugent@okstate.edu, 405-744-5514) or Susan Noteware (susan.noteware@okstate.edu, 405-744-5516).

BIENNIAL SHOOTING SPORTS VERIFICATION

The biennial shooting sports verification is sent twice a year to each county with shooting sports equipment listed on their inventory. The email will be sent in June and December to the County Extension Director and the Extension Administrative Assistant. It will contain the most current inventory that Extension Finance has on file along with instructions on how to complete the verification. This verification for Extension Finance is different from the verification sent from the 4H office.

G. Postage

1. Postage Allocations
Postage may be allocated annually by the Extension Finance Office to the District Offices. Allocations are then made to County Extension Offices according to need as determined by the District Extension Director in discussion with County Extension Directors.
Additional postage may be requested in writing by CEDs and submitted to the District Extension Director stating the reason why more postage is needed. A ‘Request to Increase Mail Authorization’ form must accompany the written request. This form is available through the District Office. If approved, the requested increase will be added to the county’s postage account and to the postage machine in the usual manner.

In some circumstances, counties may add money from their agency funds or funds provided by an outside entity for a specific purpose. In this case, a ‘Request to Increase Mail Authorization’ form must be completed and sent to the District Office with an agency account check for the amount of the request. After approval, the requested increase will be added to the county’s postage account.

2. **Stamp Purchases**

County or District Offices may need to purchase stamps for grant activities. All stamps are to be purchased through the Extension Finance Office. If stamps are to be purchased and used, the following procedures are required:

   a. Complete an OSU purchase request. (The form is available on the DASNR Intranet site at [http://intranet.okstate.edu/Fiscal_Affairs/extfinance.htm](http://intranet.okstate.edu/Fiscal_Affairs/extfinance.htm). Explain in detail the reason for the purchase, the denomination of stamp, and the exact amount to be purchased.
   b. Attach a county or agency check to the request.
   c. Mail to the District Extension Office for approval.
   d. After approval, the District Office will mail the request and check to Extension Finance. The stamps will then be purchased and mailed to the requesting office.
   e. A log of the use of the stamps must be kept for future audit.
   f. Stamps shall be kept in a locked cabinet or drawer.

3. **Bulk Mail Fee & Non-Profit Status**

To qualify for bulk mail rates, individual offices should have a bulk mailing permit on file each year with their local USPS office. There is an annual fee associated with the right to mail at the reduced rate. All OSU Extension offices qualifying for the bulk rates are also allowed an additional, reduced rate on bulk mailings due to the nonprofit status of OSU.

4. **Non-Profit Status and Envelope Formatting**

Return address formatting of envelopes must be one of two ways so that County Offices can mail at non-profit rates. Either of the following may be used with the appropriate county or district name. There may be no other variation.

Texas County Cooperative Extension Service
Oklahoma State University
301 N. Main St.
Guymon, OK 73942

-or-

Texas County Cooperative Extension Service
Oklahoma State University
301 N. Main St.
Guymon, OK 73942
Compliance with this address format is essential in order to avoid penalties and other undesired consequences from the United States Postal Service regarding non-profit rules. There are strict guidelines concerning the printing of envelopes using the Extension logo. For current information regarding the printing of envelopes, contact the District Office.

H. Audits

The OCES Senior Financial Coordinator (or his/her qualified designee) will conduct periodic audits of county, district, and state M&O accounts, agency accounts, inventory, and fiscal management procedures. The purpose of these audits is to determine that fiscal management in a particular office is in compliance with OSU and OCES policy and procedure. An audit may be scheduled in advance, conducted without notice, or requested by the County Extension Director, District Extension Director, or Associate Vice President.

Following the audit, a written report of the findings/recommendations from the audit is sent to Associate Vice President, County Extension Director, Assistant V.P. for Fiscal Affairs, District Extension Director, and Internal Audits. The on-site administrator responsible for fiscal affairs of the audited office responds to the report by letter to the Associate Vice President outlining steps to be taken in response to each finding/recommendation. Copies are to be sent to the District Extension Director, Assistant V.P. for Fiscal Affairs, and Auditor.

The Associate Vice President will in turn respond in writing to the County Extension Director either approving the CED’s responses to the audit or disapproving the CED’s response to the audit and directing the CED to strengthen their response actions to the findings/recommendations. If the first response letter to the audit is disapproved, the CED will have to repeat the process until the Associate Vice President approves his/her letter of response to the audit.

1. **Audits which Uncover Criminal Acts**
   It is the policy of the University and the OCES to pursue any audit which uncovers criminal acts to its just and legal end. Policy and procedures governing such audits are available,

2. **Audits of 4-H and Other Affiliated Funds**
   All independent affiliated groups such as county 4-H foundations should have some type of annual financial review. It is recommended that a formal opinion audit should be conducted for the affiliated group at least once every three years or whenever the treasurer changes. County staff may contact the Assistant Director for 4-H or the 4-H Foundation Executive Director for guidance in determining the type of financial review to conduct on an annual basis.
I. Contracts and Memorandums of Understanding (MOUs)

1. **Contracts with County Government**
   Federal and State legislation allows counties and Oklahoma State University to enter into an annual contract to provide Cooperative Extension programs for county citizens. Oklahoma Statutes (70 O.S. 1984 3418) require the Board of County Commissioners of the respective counties to contract with the Oklahoma Cooperative Extension Service of Oklahoma State University for an adequate amount to conduct Extension work. The statute does not specify the amount of money a county must provide for Extension work so annual budgetary negotiations are necessary between county officials (county commissioners) and Oklahoma Cooperative Extension Service to determine services provided as related to appropriated county funds. The County Contract Form and the County Budget Form may be linked at: [http://intranet.okstate.edu/Fiscal_Affairs/county.htm](http://intranet.okstate.edu/Fiscal_Affairs/county.htm)

   The County Extension Director and the appropriate District Extension Director will represent Oklahoma Cooperative Extension Service in contract negotiations with county officials (county commissioners, excise board, budget board as reflected by county budgeting procedures). OCES will provide minimum county funding requirements as related to Extension staffing levels within a county. These county funding requirements will be updated annually to reflect cost of doing business. County and District Extension Directors can expect these annual updates in February of each year.

   The County Extension Director must notify county commissioners annually of their intent to renegotiate their contract and provide commissioners projected changes in budget requirements for the next year. County Extension Directors must complete this notification process by May 1 of each year or earlier as dictated by the county budgeting process. Prior to initiating budget negotiations with the county, the County Extension Director must have the Estimate of Needs approved by the District Extension Director.

   When the annual county appropriations for Oklahoma Cooperative Extension Service have been finalized, the County Extension Director will present a Contract for Services to be signed by the Board of County Commissioners and The Director of Oklahoma Cooperative Extension Service. The contract and budget should then be forwarded to the District Extension Office. No changes or transfers can then be made to the county budget without written approval of the District Extension Director.

2. **Cellular Telephone Contracts and Use**
   County Extension Directors have the authority to enter into contracts for cellular telephones provided their county funds can adequately support the cost for the use and upkeep of the contract. OCES and OSU will not be responsible or liable for payment of monthly service bills or equipment related to cellular telephone use by county educators.
Service contracts for cellular telephones must be acceptable by county government policies and procedures. The County Extension Director must gain county commissioner approval before entering into a contract for a cellular telephone(s) for staff use.

The purpose and intended use of cell phones is for safety and emergency issues regarding staff members, 4-H youth and adults, and other program participants. Limited calls for program development and problem solving are allowable. The County Extension Director is responsible for monitoring the use and operating cost of cellular telephones in his/her county office to ensure that cellular telephones are reserved for the conduct of official business only.

3. Memorandums of Understanding (MOUs)
Throughout the history of OCES, Extension staff members have been instrumental in organizing and assisting in the development of new organizations that have the potential to improve quality of life for county citizens. Agriculture commodity groups, Oklahoma Home and Community Education groups, and others have organized as formal groups or associations to provide educational information, a community presence, social activities and other appropriate activities deemed important to its membership. A fair board may be considered such a group.

County Extension Directors must receive District Extension Director approval before taking on a role to help organize or help maintain any existing or newly formed organization. District Extension Directors are encouraged to request assistance in evaluating unusual or out-of-the-ordinary MOU requests through the DASNR Sponsored Programs office. Extension support to existing and new organizations must fit within the OCES mission and objectives.

Maintenance activities/duties that Extension staff perform in the infancy stage of a new organization should be transferred progressively to leadership within the organization as it matures to a self-sustaining association. Cooperative Extension’s role with the organization should then reflect its mission of providing educational information to the organization and its membership.

Extension staff may work with partnering organizations to develop a Memorandum of Understanding, which identifies appropriate functions for both parties. Guidelines which should be stated openly in such a memorandum, or otherwise recognized and closely followed, include the following:

a. Any relationship between OCES and an affiliated organization should serve to enhance OCES visibility, credibility, and opportunities for the pursuit of the OCES mission.

b. Extension staff should be recognized for their expertise and as a source of professional assistance for the organization and serve in appropriate advisory, facilitating, or educational roles.

c. Extension staff members will provide educational programming and draw from its many resources to meet the educational needs of the organization and its membership. The partnering organization’s by-laws and the memorandum of understanding must reflect that membership is open to all people without regard to race, color, national origin, sex, religion, age, or disability.

d. Fund raising, membership drives, fund expenditures, and financial bookkeeping must be handled by members/leaders of the organization. However, funds can be
received in the County Extension Office. All funds handled through the county office must be deposited in the agency account. Policies and procedures governing the local agency account must be followed.

e. There may be joint sponsorship of educational programs and activities with Cooperative Extension and another organization. Advertisement of these activities, printed agendas and meeting proceedings, and other event information should reflect the support or cooperation of OCES.

f. Letters and notices of educational programs can be mailed by Extension offices to potentially interested clientele but should not be limited to membership of the organization.

g. OCES resources may, in certain instances, be used to assist in the management and operations of partner organizations so long as the specific nature of that support is covered in the MOU and has been approved by the Associate Vice President.

J. Moving Expenses for Employees

Moving expenses may be paid within procedural limitations when a current county educator is transferred from one location to another location at the request of administration and may be paid within procedural limitations for county educators accepting lateral transfers. Moving expenses will not be paid for a county educator's initial or first work assignment.

A moving expense amount may be provided up to $3,000 per move. The amount for the move will be pre-determined by Administration at the time of the offer, not to exceed $3,000. The offer letter will state the following:

“In addition to the above salary and benefits, you will be provided with $X,XXX.XX for moving expenses. This will be paid through the online Exception to Normal Pay (ENP) system and will be subject to applicable tax withholdings. You should contact your tax professional as to the deductibility of moving expenses when you file your annual tax return.”

To initiate the ENP pay, the district office will send a copy of the offer letter to the financial coordinator of Extension Finance stating the moving expense allocation.

Revised July, 2013
VII. TRAVEL RULES AND REGULATIONS

A. Introduction
Extension Educators, Specialists, and Staff who travel as part of their regular duties including for purposes of training and educational programming, will be provided an annual travel budget. The individual employee is responsible for keeping his/her travel costs (in-state and out-of-state) within budget for fiscal year. All employees or individuals filing for travel reimbursement from state, county, grant, or contract funds must follow all rules and regulations as established by Oklahoma Cooperative Extension Service, Oklahoma State University, and the state of Oklahoma. Failure to follow approved reimbursement policies and procedures can result in disciplinary and/or punitive legal action. Questions relating to the travel budget should be directed to the County Extension Director or District Extension Director.

Travel may involve private or public ground, rail, or air travel. Funds for this travel may originate from county, state, or federal appropriations, or private funding. Regardless of type of travel, source of funds, or purpose of travel, the procedures to pay for this travel or claim reimbursement for personal expenditures for Extension-related travel are complex and must be followed precisely. Specific information on policies and procedures regarding travel are discussed in their entirety at the following web site:
http://download.dasnr.okstate.edu/TravelProcedures.doc

Travel at University expense is limited to officials or employees of the State of Oklahoma and to persons who are not State employees but who perform services which are substantial, necessary, and germane to the duties and functions of the University. Generally speaking, most day-to-day in-state travel and out-of-state ground travel costs are paid by the employee or volunteer. That employee must then periodically (usually monthly) file an appropriate travel voucher to be reimbursed for allowable expenses. The source of the funds used for travel will dictate the appropriate claim form.

OSU travel voucher instructions; in-state, out-of-state, and out-of-country travel vouchers; county paid travel claim instructions; county paid travel claim form; non-employee travel voucher:  http://intranet.okstate.edu/Fiscal_Affairs/travel.htm

Some travel expenses may be paid in advance from state funds including airline tickets and meeting registration costs. The procedures for these instances are highly specific. Extension Educators and Specialists should contact their administrative offices.

All travel within the State of Oklahoma is subject to in-state travel rates and regulations. This includes individuals traveling into Oklahoma from another state and claiming reimbursement from University funds. All travel outside the State of Oklahoma is subject to out-of-state rates and regulations. Current travel reimbursement rates (mileage, lodging, & per diem) can be found at: http://intranet.okstate.edu/Fiscal_Affairs/travel.htm.
Per diem rates for other states and countries may be found at:
http://www.gsa.gov/perdiem

Out-of-state travel putting the employee in a per diem travel status and/or airline travel require prior approval via an out-of-state travel request submitted 30 days prior to the start of the trip. An employee may have reason to travel out-of-state at no cost to the University, but if the trip is on official duty for the University prior approval is still required. Out-of-state travel vouchers are processed for reimbursement when the claimant returns from travel status and submits the voucher for payment to the Extension Finance Office.

Out-of-state travel request and airline ticket requisition form:
http://intranet.okstate.edu/Fiscal_Affairs/travelpg3.htm

B. Reimbursement for Mileage
While Judging County Fairs and County Livestock Shows

1. Extension Educators may judge county fairs and county livestock shows in Oklahoma (and adjacent counties in bordering states) while on official time. Mileage reimbursement can be claimed through normal procedures providing the educator does not accept payment from any other source for the judging activity.

2. Extension Educators may judge county fairs and county livestock shows in Oklahoma (and adjacent counties in bordering states) while on official time and claim mileage reimbursement through normal procedures. The inviting fair board or other entity can provide payment for services rendered providing it be made directly to the Cooperative Extension Service Office and it be deposited into the agency account. The educator may then access this money in accordance with the use of other residual fund in the account.

3. The educator may choose to take annual leave during regular working hours and receive monetary payment for judging in lieu of mileage reimbursement.

Revised June, 2014
C. Professional Improvement Travel

1. **In-State Professional Association Meetings**
   On a calendar year basis, Oklahoma Cooperative Extension field staff are authorized official
time to attend and participate in the annual meeting(s) of up to two state associations of
which they are a member. These state associations include the Oklahoma Association of
Extension Agriculture Agents, Oklahoma Extension Association of Family and Consumer
Sciences, Oklahoma Association of Extension 4-H Agents, and Epsilon Sigma Phi. Expense reimbursement for travel, per diem, and registration fees when attending state association meetings may be claimed from budgeted travel funds, subject to the availability of travel funds and the approval of the County and/or District Extension Director. All travel claims must adhere to OSU Travel Policies and Procedures.

2. **Out-of-State Meetings**
   With the approval of their County Extension Director, District Extension Director, and the
Associate Vice President, Cooperative Extension Service field staff members may attend
meetings of their national association or professional meetings relating to their work. Official
time may be claimed for the length of the meeting, plus no more than two travel days.

3. **Board Meetings and Educator/Agent Association Coalition Meetings**
   OCES field staff will be allowed official time for a total of three (3) board meetings and/or
agent association coalition meetings per year. If the meeting is held in conjunction with an
Extension approved district or state meeting, then the meeting will not have to be counted
as one of the three allocated meetings. If staff attend more than a total of three (3) board
meetings and/or agent association coalition meetings in one calendar year, they will be
expected to take annual leave. The only exception to this would be if staff are serving on
more than one (1) association board during the same calendar year. It is the responsibility
of each association’s President to inform the District Extension Director of board or coalition
meetings at least one week prior to the called meeting. Expense reimbursement for travel,
per diem, and registration when attending a board meeting or educator/agent association
coalition meeting may be claimed from budgeted travel funds, subject to the availability of
travel funds and the pre-approval of the County Extension Director and District Extension
Director (or by DED if individual traveling is a CED).
OUT OF STATE TRAVEL REQUESTS

FIRST: DETERMINE SOURCE OF FUNDS
SECOND: WHO IS TRAVELING?

**OVERNIGHT STAY**

Scenario 1: If no funds or expenses to County, Campus, or Extension
* Prepare Request either on Paper or AIRS
* Applies to all travelers

Scenario 2: If ANY Campus funds are used
* Prepare Request in AIRS
* Applies to all travelers

Scenario 3: If Extension Agency Account is used (check sent to Campus)
* Prepare Request in AIRS
* Applies to all travelers

Scenario 4: If ONLY County-Paid Funds are used

**Educator**: Requires CED and DD approval
Prepare Paper Request; Kept at Field Office Level

**CED**: Requires DD and Asst. Director approval.
Prepare Paper or AIRS Request (Paper sent to campus)

**NO OVERNIGHT STAY (SAME-DAY)**

Scenario 1: If ANY Campus funds are used
* No Advance Request
* Prepare Claim on Paper
* Attach Letter

**ALTERNATIVE TO Scenario 1**: If ANY Campus Funds are used
* Prepare Request in AIRS
* Prepare Claim in AIRS

**NOTE**: In order to process an out-of-state AIRS claim, there must be a prior AIRS request approval.

Scenario 2: If Extension Agency Account is used (check sent to Campus)
* No Advance Request
* Prepare Claim on Paper
* Attach Letter

Scenario 3: If ONLY County-Paid Funds
* No Advance Request
* Prepare Request on Paper
* No Letter Required

Need Help? Contact Extension Finance 405-744-9700

Added May, 2015
D. Approved Sources of Travel Funds

Several sources of funds may be used to cover expenses for professional improvement activities. These include state or county allocated M&O, agency account funds, mentoring funds, funds from state professional associations, external support groups, personal funds (not to be reimbursed), and foundation funds. Grant funds will be managed as state M&O funds or through an agency account as appropriate. The use of each of these funding sources is discussed below.

**Some sources may be specifically intended for out-of-state professional association meetings and not for general training or other travel requirements.**

1. State and County M&O

State and County M&O funds allocated for normal travel requirements may be used for approved in-state and out-of-state travel to professional association meetings and training. Use of county funds for association national meetings should be discussed in advance with the County Extension Director and District Extension Director (if it is CED traveling then must discuss with DED) to ensure that the ability of other county staff to fulfill normal in-state travel needs is not jeopardized.

2. County Agency Funds

County Agency Funds may be used for professional development opportunities and approval for use of such funds will be at the discretion of the County Extension Director and/or District Extension Director under the following provisions:

If the County Extension Director is benefiting directly, and the amount is over $500, the County Extension Director needs approval from the District Extension Director (for any single request or accumulative requests over a fiscal year).

If the County Extension Director is not benefiting directly, and the amount is under $1500, then the County Extension Director can make the decision as to whether the intended "professional development" activity qualifies for use of the funds. If the amount is over $1500, then the County Extension Director needs to seek the approval of the District Extension Director (for any single request or accumulative requests over a fiscal year).

County Extension Directors should ensure that funds are taken from appropriate categories, i.e. categories whose purpose corresponds with the professional development activity being funded. Registration fees for professional development meetings should be fully transferable and fully refundable as checks cannot be written directly to staff for reimbursement of travel expenses.

3. **External Support Groups**

The cap on National meeting expenditures from other sources, such as Cattlemen’s Associations, OHCE Groups, Foundations, is limited to $250.
4. **State Professional Associations**
Funds from Association accounts allocated by OCES may be used at the discretion of each association’s leadership. The President of each association must email a list to the Assistant Director for Agriculture, Natural Resources, and Rural Development indicating who will be eligible for use of funds and the upper limit for each person. **Out-of-state travel requests noting use of such funds will not be approved until this list is received.** Must have account name and number from Association President or Treasurer.

5. **Mentor Funds**
Formal OCES mentors will receive a $400 professional development incentive to be used for advanced professional development opportunities. This would include opportunities beyond statewide in-service training sessions and state association meetings and require prior District Extension Director approval. Funds may be drawn on after six months in the mentoring relationship but must be used within 18 months after completion of the mentoring relationship or the funds will be forfeited. These funds may be combined with other funds that may be available to the educator. Travel claims should state – activity eligible for state mentoring funds. For more information, contact the Director of Staff and Program Development.

6. **Personal Funds**
Personal funding sources may be used to cover the costs of travel for professional development purposes at the discretion of the Educator or Specialist. These funds are not eligible for reimbursement except in the context for reimbursement from the other categories mentioned above.

E. Authorization for Travel

Travel at University expense is limited to trips made exclusively on University business, and must be approved in accordance with the following procedures:

1. **State Office Personnel:** All travel must be authorized by the Department or Division Head. No formal written request is necessary for in-state travel unless required by Vice President/Director or Department Head.

2. **County Personnel:** All state travel vouchers must be approved through a pre-route on AIRS by their District Extension Director before submission for payment to the Extension Finance Office. All travel vouchers submitted without such approval will be returned. If County Extension travel vouchers are submitted to the County Commissioners for payment, a copy of each educator’s travel voucher, documentation and County purchase order should be attached to the “Certificate of County Expenditures” and forwarded to their District Extension Director for review and approval.

3. **Modes of Transportation**
Travel may be authorized, under certain approved conditions, by public conveyance, privately-owned vehicle, rental car, privately-owned or chartered airplane, and University-owned vehicle.
Public conveyances include commercial airlines, railways, buses, and other usual means of public transportation.

The employee will be expected to select the most economical mode of transportation, taking into account total elapsed time, per diem (meals), and lodging costs.

a. **Commercial Airlines:** Coach, economy, or tourist fare must be requested and used if available. First class fare will be allowed only on the basis of a certification that coach class was not available. State law requires that airline tickets only be purchased from state approved travel agencies. Exception may include: 1) when air travel services can be secured elsewhere at a cost less than that which can be secured by the State Travel Division; or 2) when the air travel originates from a location outside the state and it would be impractical to arrange for air travel through an approved state travel agency; or 3) when the air travel is necessitated by an emergency and time does not permit utilization of an approved state travel agency; or 4) when the air travel is part of a package arrangement made by the organization scheduling the meeting or conferences. All exceptions must be explained by a letter/memo accompanying the travel voucher.

b. **Railway:** First class fare plus necessary lower berth or roomette is allowable, but reimbursement may not exceed coach airfare.

c. **Privately-Owned Vehicle (in-state):** The State travel law provides that reimbursement for privately-owned vehicles may be allowed for in-state
   1. Personal car usage may be reimbursed at the maximum current mileage rate per mile, determined by the Oklahoma Office of State Finance, not to exceed established mileage distances set forth in the latest State Highway Commission road map. Vicinity travel must be entered on the travel reimbursement voucher as a separate item.
   2. Turnpike and parking fees may be reimbursed on privately-owned vehicles while on official business.
   3. For the purpose of computing mileage eligible for reimbursement, the individual's office, or official duty station is the starting point, except when the individual leaves from his/her home and where home is closer to the destination. In this case, his/her home will be considered the starting point.
   4. If the individual conducts University business on his way to or from his official duty station, he may claim the one-way mileage for the distance between his/her official duty station and the point of business.

d. **Privately-Owned Vehicle (out-of-state):**
   1. Personal cars are to be used for out-of-state only when it is economical or advantageous to the State, and when University Motor Pool vehicles are not available. Such determination will be made by the Department Head or District Extension Director and approved by the Vice President/Director.
   2. For out-of-state travel by one official passenger using a personally-owned vehicle, reimbursement for transportation will be allowed for the lesser amount of coach airfare or at a mileage rate by the most direct route not exceeding the current mileage rate per mile. (This is set by the IRS and will change every January.) If car mileage basis is claimed, per diem (meals), and lodging may not be allowed for any greater length of time than would have been required for travel by air. An airfare comparison stating price of airfare, source of quote...
(state approved travel agency), and date of quote is required on all out-of-state travel where a personal vehicle is used.

3. For out-of-state travel by two or more official passengers in one personal car, mileage reimbursement may be allowed only to the car owner for the current mileage rate per mile by the most direct highway mileage, as long as such amount does not exceed the combined coach airfares by the most direct route for all official passengers. An airfare comparison stating price of airfare for each official passenger, source of quote (state approved travel agency), and date of quote is required on all out-of-state travel where a personal vehicle is used.

4. If a privately-owned vehicle is used for transportation to points of boarding public carriers, such as the airports at Tulsa or Oklahoma City, usage is restricted to one round trip, as directed by the State of Oklahoma Budget Office and conveyed in a memo dated November 18, 1976, from the Vice President for Business and Finance.

5. If transportation for more than one person is approved for a trip, and use of University-owned or privately-owned vehicle is requested and approved, it will be expected that normal full capacity of a car, either University-owned or privately-owned, will be used for official passengers before mileage is claimed or allowed for additional vehicles. Primary responsibility for discretion in this request is placed with the Department Head or District Extension Director and approved by the Vice President/Director.

e. Privately-Owned or Chartered Airplanes: Travel by privately-owned or chartered airplanes, on official business for the State, may be reimbursed in an amount that does not exceed the equivalent mileage allowance for privately-owned vehicles at the current rate per mile. (To be in compliance with the IRS this rate will change every January.)

f. University-Owned Vehicles: Use of a University-owned vehicle for out-of-state trips is encouraged when an automobile is the applicable mode of travel. Primary responsibility as to the use of the University-owned or privately-owned vehicles is placed with the Department Head.

g. Rental Cars: The use of rental cars is intended primarily for travel out-of-state where local public transportation is not feasible. This may require a statement of justification. The actual cost of renting a vehicle outside of Oklahoma is reimbursable. The rental agreement must be included with the travel voucher for reimbursement. The license number of the rental car must appear on the rental agreement. If the rental agreement states that gasoline is not included, the claimant may be reimbursed for gasoline purchased by submitting the gasoline receipts. The license number of the rental car must also appear on the gasoline receipts. Reimbursement for vehicles leased or rented within Oklahoma from car rental agencies or private parties, to be used in lieu of a privately-owned vehicle on official business for the state, will not exceed the rate provided for the use of a privately-owned vehicle.

Insurance for Rentals: If you are in University traveling status and rent a vehicle you should purchase the optional insurance offered by the rental agency. This is because there will be coverage gaps under Oklahoma Tort Law for certain types of damage and in some states Oklahoma liability limits may not be honored.
4. **Required Receipts**  
Receipts are required for all reimbursements claimed for the following expenses and must be attached to the travel voucher for reimbursement.

a. **Commercial Airlines**: The passenger’s duplicate ticket or other airline receipt must accompany the travel voucher for reimbursement. The airline ticket or receipt should include information as to class accommodations, departing flight, and returning flight. If for any reason there is a change in flight plans which require a re-issuing of the airline ticket, the airline usually retains the original ticket and issues a new ticket that shows only the corrected flight information. If the corrected flight is on return trip, then the claimant has lost the departure flight information, which is required in order to process the travel voucher. Therefore, if for any reason there is a change in tickets, the claimant must be sure to retain the customer’s copy of the original ticket and all other tickets. Credit card receipts alone will not be accepted.

b. **Other Public Carriers**: The standard trip ticket receipt for railway, pullman, bus, or other public carrier must be attached to the travel voucher for reimbursement. (Receipts for taxi or limousine charges are not required on amounts less than $25.00, but if you have receipts please include them with your travel voucher).

c. **Leased or Rented Vehicles**: The standard receipt form which indicates miles traveled must be attached to the travel voucher for reimbursement.

d. **Motor Pool Vehicles**: Repairs, fuel, or towing receipts under $35 should be presented to the Motor Pool for reimbursement. If the receipts are over $35, the claimant must submit them with his travel voucher for reimbursement. The department may then prepare a Campus Vendor Invoice to charge Motor Pool for these expenses.

e. **Department-Owned Vehicles**: Repairs, fuel, or towing receipts must be submitted with the travel voucher to obtain reimbursement.

f. **Lodging**: The standard paid statement for lodging costs for hotel, motel, or other housing facility must be attached to the travel voucher. The receipt must include the claimant’s name, date(s) of occupancy, name of the motel, name of the town, and the room rate per night. If sharing a room, make sure receipt is in both names or provide credit card receipt/bill showing charge. Receipts must show the charges paid in full and have a zero balance. (![](NOTE: If hotel is not a designated hotel, reimbursement will be limited to the dollar amount allowed for state rate. If it is a designated hotel, documentation should be attached naming the hotel as such.))

Procedures regarding in-state and out-of-state travel, including forms, instructions, per diem and lodging rates, county claim procedures, and helpful travel hints can be found at the following web link: [http://intranet.okstate.edu/Fiscal_Affairs/travel.htm](http://intranet.okstate.edu/Fiscal_Affairs/travel.htm)

5. **Travel Do’s and Don’ts**

a. Travel vouchers are audited by State Laws made by the Legislature of the State of Oklahoma. This applies to both state-paid and county-paid travel. Therefore, when Extension Finance calls and ask for more information, we are only asking for information the State Finance Office has determined we need.

b. Out-of-state travel requests must be filed if traveling on State time (both with and without travel expenses). Whether from state or county funds. (An out-of-state request is not required from county staff IF you are not out overnight).
c. Out-of-state claims are filed on return of the out-of-state trip. (One out-of-state trip per voucher.) We need proof of meeting (an agenda or program). Something with the name of the meeting, dates, location, and designated hotel.

d. Out-of-state claims must include meeting times the individual attended, not general beginning & ending times of meeting. In-state claims that have overnight stays and/or registration fees must include the meeting times the individual attended.

b. Receipts used for 4-H Roundup, 4-H Leadership Conference, Volunteer Conference, etc. When one check from the county is sent for all attendees, obtain a receipt when you pay the county for the conference. Be sure the receipt has the name of conference, dates of conference, and is signed.

c. If staying overnight and the distance is less than 60 miles, you must attach an approved email from the district director explaining the overnight stay.

d. Addendum sheets - may be used as needed. It is acceptable to list all trips on the addendum, just make sure the totals are brought to the front of the travel voucher.

e. Change in mileage rate will probably occur once a year (usually January 1) to keep in line with the rate allowed by the IRS.

f. Unusual circumstances - Call OCES Extension Finance Office and ask for an OCES travel clerk. If we don’t have the answer we will find out from Whitehurst. It is easier to ask first before doing and taking the chance of not getting paid.

g. Good idea to check claims over before you sign, since you are signing that the claim is correct. Make sure CWID# is correct. Double-check your addition and multiplication.

h. It is important that both professional and clerical staff is knowledgeable in completing travel vouchers correctly.

VIII. PERSONNEL MANAGEMENT

The Oklahoma Cooperative Extension Service (OCES) will follow all University Personnel Management Policy and Procedures. All interpretation of these policies will be the responsibility of OCES Administration and DASNR Human Resources. Any questions regarding these policies and/or procedures should be directed to an employee’s immediate supervisor. Policies are located at: http://hr.okstate.edu/policy_proced and include:

3-0726 Employment and Resignation for Administrative and Professional Staff
3-0713 Attendance and Leave for Staff
3-0710 Resignations for Classified Staff
3-0731 Layoff and Reduction In Work Force for A&P Staff
3-0711 Layoff and Reduction In Work Force for Classified Staff
3-0720 Corrective Actions and Dismissals for Staff
A. Recruiting, Screening, Selecting, and Staffing County Extension Professional Positions

A uniform state-wide system for staffing Oklahoma Cooperative Extension Service professional county positions is necessitated by: (1) the demand for the best qualified staff available for the delivery of effective Extension programs and (2) the need to meet full compliance with Equal Employment Opportunity standards in our Affirmative Action Plan.

The Director for Oklahoma Cooperative Extension is responsible for the implementation of a uniform county staffing system. The Director delegates to the Associate Vice President, District Extension Directors, and DASNR Human Resources the responsibility for implementation of the uniform system and adherence to procedures required in it and the Affirmative Action Plan. The District Extension Director receives from the Associate Vice President the responsibility for interviewing and recommending for approval the best qualified person available to fill vacant positions within their assigned administrative area. Along with the responsibility for recommending persons to fill positions is an equally important responsibility to be able to thoroughly justify every personnel assignment or adjustment recommended within their district. District Extension Directors will involve other Extension staff members in screening and interviewing of applicants for vacant county positions at their discretion.

1. Recruitment
Recruitment is a responsibility shared by every member of the Oklahoma Cooperative Extension Service. Recruitment literature is available to all Extension staff for distribution to persons interested in Extension employment: http://hr.dasnr.okstate.edu.

2. Application for OCES Educator and Specialist Positions
Processing of applications is the first step in screening to determine the qualifications of applicants for Extension employment. Objective screening involves a thorough review and evaluation of the application including analysis of the transcript and reference checks on the applicant. Complete information on the application process and open Extension Educator and Specialist positions is available at the DASNR Human Resources web site: http://hr.dasnr.okstate.edu

3. Advertising New and Vacant Positions
Before any new county position can be advertised, the District Extension Director must e-mail Associate Vice President for approval. With the Associate Vice President’s approval the DASNR Human Resources office will include the vacancy announcement on the OCES Website. All vacancy announcements for county professional positions will list the DASNR Human Resources office as the contact person to receive all applications and letters of interest for new or vacant positions.

District Extension Directors will screen applicants to determine if they meet the qualifications for employment for consideration for the new or vacant position.
ANNOUNCEMENT FROM THE ASSOCIATE VICE PRESIDENT:
(May 23, 2017 in an email message)

Internal Applicants for Vacant County Extension Educator Positions: Effective June 1, 2017, applications will be open to internal applicants only for 60 days. If a suitable internal applicant is not found within 60 days, applications will then be open to external applicants for positions that have funding available.

Section VIII, E.3, of the OCES Procedure Guide: Field Operations states the following with regard to internal transfers:

“Transfer to another position will be granted only after one has served at least two years in their current position. Exceptions may be made when it is clearly shown that the transfer is in the best interest of the Oklahoma Cooperative Extension Service. Internal County Extension Educator applicants who are successful in applying for and receiving a County Extension Educator position in another county should do so under the premise that such a move is a lateral transfer. There is no implied promotion or salary adjustment affixed. The Associate Vice President and respective District Extension Director may determine that it is in the interest of OCES that a particular vacancy be filled with an experienced Extension Educator with a specified set of skills. Under that determination, a one-time stipend may be approved by the Associate Vice President as an incentive to internal applicants. An Educator receiving such a stipend would be eligible for a similar inducement to transfer after five years. Moving expenses may be negotiated by the transferring Educator with the District Extension Director. The guidelines for arrangements and payment of such expenses may be found elsewhere in this guideline manual.” (Guidelines for moving expenses may be found under Section VI., J, page 18.)

As stated in the above guidelines, the 2-Year Rule will be waived if the move is deemed in the best interest of OCES.

Dr. James Trapp, Associate Director
Oklahoma Cooperative Extension Service
Oklahoma State University
Stillwater, OK 74075-6019
405-744-5398

4. Interviews and Selection for County Educator Positions
   a. After receiving the credentials of all interested and qualified internal and external applicants, the District Extension Director will determine which applicants to interview with input from a screening committee of district staff, County Extension Director from the county with the vacancy, and others as determined by the District Extension Director. It is suggested that only the very best qualified applicants be interviewed.
b. For internal applicants, the District Extension Director may request a written assessment of past performance from the appropriate District Extension Director. These performance assessments may be considered before an internal applicant is recommended and approved for either a transfer or promotion.

c. The District Extension Director will arrange for a place and date for the interviews and notify in writing those selected to be interviewed.

d. The District Extension Director should involve one or more of the other district staff in the interview process and receive their recorded evaluations of each applicant interviewed. The County Extension Director from the county in which the vacancy exists and others as determined by the District Extension Director should also be included in the interview process.

e. The District Extension Director will then determine and recommend to the Associate Vice President the best qualified and acceptable applicant for the position and must be prepared to justify the recommendation with both verbal and written objective job-related evidence. Only after approval of the recommendation will a salary offer be made to the candidate of choice.

f. Prior to the time the District Extension Director makes a recommendation to the Associate Vice President for an appointment he/she should obtain from the Director of DASNR Human Resources a salary average and range for other Extension staff with similar qualifications, comparable work experience, and responsibilities. The District Extension Director and the Associate Vice President will then negotiate a salary offer for the applicant of choice. The final salary offer is approved by the Associate Vice President.

g. The District Extension Director contacts the applicant of choice and makes the approved position offer. A formal written employment offer should be made by the District Extension Director to the applicant, signed by the applicant upon acceptance and returned to the District Extension Director.

h. The District Extension Director will complete the personnel action form(s) and send proper documents to the DASNR Human Resources Office.

5. **County Extension Director Assignment**
The County Extension Director (CED) position is an extra duty assignment. The CED role will be assigned by the District Extension Director (DED). The DED may reassign the CED position at any time. CED performance will also be reviewed separately from programmatic performance at the time of the annual Performance Review.

6. **Procedures to Select the CED**
County staff vacancies will be filled based upon program needs. CED administrative responsibilities will be assigned by the DED after all county vacancies are filled. The DED will announce his/her intent to fill the CED position by informing the County Educators of their opportunity to apply for the position. County Educators will be asked to respond in writing declaring their interest in the position.

The DED will proceed with the selection process they feel appropriate. This process may or may not include a selection committee composed of District Program Specialists and others as invited.

The DED will notify the Associate Vice President, DASNR Human Resources and each County Educator of the person selected to fill the CED role.
7. **Length of Assignment of CED Role**
   The CED serves at the discretion of the DED. The term of the assignment is indefinite unless withdrawn by the DED or relinquished by the CED.

8. **Removal of CED Assignment**
   The DED has the right to conduct a review of the CED’s performance at any time. The assignment may be withdrawn at such time as the DED deems necessary. The Associate Vice President must be notified of the removal of the CED assignment. The DED must justify to the Associate Vice President why removal of the CED assignment is necessary. The DED will notify the CED of the reassignment of the CED role.

9. **Monthly Stipend For CED Assignment**
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<th>CED Monthly Stipend</th>
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   Revised March 6, 2013

Effective January 1, 2018 - CED working two counties will receive an additional $100/month.

10. **Interim CED Assignments**
    When the CED role becomes vacant, the DED will assign the Interim CED (ICED) role to an existing staff member or other as deemed necessary. The person assigned the ICED role will receive the monthly CED stipend, beginning with the next pay period, based on the number of funded County Educator positions, for performing this function. The ICED title and stipend will cease when a CED is assigned.

**B. Establishing New/Additional County Extension Educator Positions**
New/additional educator and/or support staff positions can be established to enhance the county Extension program provided county funding is sufficient to meet or exceed OCES requirements for the new/additional position. Funding requirements for county positions will be reviewed and updated on an annual basis.

The Associate Vice President, OCES, must approve all new/additional positions before the position can be advertised and filled.

1. County Extension Director will initiate a letter to the appropriate District Extension Director requesting that a new position be established in that county. Letter should address the following: Type of position requested – educator, program assistant, or Extension administrative support specialist/assistant; permanent or temporary – if temporary state time frame for the position; why the position is needed; relate how
county budget will support the new position – is the county sufficiently above minimum guidelines to fund the new position.

2. District Extension Director will review the County Extension Director’s letter requesting additional support. If the District Extension Director supports the letter for additional support he/she will seek the approval of the Associate Vice President, OCES.

3. Established procedures for filling the positions will be followed for the newly created position.

C. Hiring Classified Staff

The County Extension Director is responsible for the hiring, management, and performance review of all Classified Staff in his/her respective office. These personnel comprise the Extension administrative support specialists/assistants, program assistants, and other support workers in association with grant programs housed or otherwise operating through the County office.

These positions must be advertised, applications screened, and offers extended according to University policy and procedures. CEDs must contact the District office prior to commencing any activity to fill a vacant position.

HIRING PROCESS (CLASSIFIED)

1. CED calls District Office to request permission to begin hiring process.
2. District Admin. Asst. works with DASNR HR to post the job in Cornerstone and emails you an ad to print in local newspaper or post online.
3. Advertise the position and receive applications for 10 working days.
4. Once CED has interviewed and has a candidate of choice, CED will contact District Director.
5. District Director works with DASNR HR to obtain a salary and then contacts the CED with secured salary to prepare offer letter.
6. Once candidate accepts position and signs offer letter, contact District. Admin. Asst. for appointment to E-Verify new employee. Must be within 3 days of start date (includes first day on the job).

Things to think about when hiring:

1. Classified staff is paid bi-weekly. If the employee hire date is prior to the 1st Friday of a pay period, the employee will earn leave for that pay period. Classified staff will accumulate annual and sick leave, but will not be allowed to use annual leave until after 90 days.
2. Benefits for new hires become effective on the first day of the following month they are hired. For example, a hire date on January 1-31 would receive benefits starting February 1st.
3. New-hire must provide an original copy of Social Security card in order for the e-verify process to be completed.
4. New-hire must provide an unexpired driver’s license at the time of e-verify.
5. Send letter of acceptance to applicants. Cornerstone system sends emails of rejection.
6. Contact your district office for benefit and payroll information.

*See Administrative Support Specialist & Assistant Guide for, examples of open-ended interview questions for county support positions, reference check questions, suggested orientation topics for new county support positions, and job descriptions.
D. Performance Review

1. **Purpose**
The performance review system is an integral part of an organization’s capacity to thrive in a continually changing environment. Reviews should be a positive means in assisting staff members to improve job performance. The review system also affords management an opportunity to make known to the staff the objectives and goals of the Oklahoma Cooperative Extension Service and what is expected of the employee toward the attainment of the objectives and goals.

The performance review document(s) for Educators, Specialists, Administrative Support Specialists/Assistants, and Program Assistants are available at your district website.

Staff performance reviews should be conducted on a periodic basis and should not reflect personal prejudice, bias, or favoritism on the part of those conducting the ratings or reviews. The results of such review procedures should be used to assist management in the decision-making process of the following:

   a. Determining staff merit pay increases
   b. Identifying staff for promotion
   c. Identifying and encouraging opportunities and priorities. Informing staff of deficiencies, training needs, and improvement expected
   d. Justifying disciplinary actions
   e. Identifying staff for lay-off during emergency reductions in work force

2. **Frequency**

   a. Annual reviews will be conducted under the following conditions:
      1. Anyone with less than three (3) years Extension tenure
      2. Any staff member who requests an annual review
      3. District Extension Directors can require an annual review of any staff member
   b. Staff with three (3) or more years of service with satisfactory performance would be subject to a formal review every third year.
   c. District Extension Directors will continue to require both monthly and annual summaries of program accomplishments to document that the performance level of the staff member in the three-year rotation has not dropped or declined.
   d. Staff members are encouraged to have informal interaction with District Extension Directors and County Extension Directors on a regular basis regarding program and performance. It is the responsibility of individual Extension Educators to keep DEDs and CEDs informed of their accomplishments and professional growth.

   It should be noted that merit-based salary adjustments typically will significantly depend on the factors and information derived from items 1-4 above.

3. **Procedures for County Educator, Area Specialist, and District Program Specialist Performance Reviews**

   a. District Extension Directors will notify staff members when they are required to participate in a formal performance review.
   b. Instructions for the review process are included with the review document.
   c. District Program Specialists will follow the same instructions as Area Specialists.
4. **Forms for Appraisal of Classified Staff**
The CED should secure the forms for conducting appraisal of classified staff from his/her District Extension Director.

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**E. County Extension Educator, Area Specialist, and District Specialist Compensation, Promotion, and Transfers**

1. **Compensation**
Compensation for OCES employees is a combination of salary and benefits. OCES salaries vary according to the degree held, previous professional experience, and the area of assignment. Salaries are reviewed annually by the appropriate unit head and adjusted according to performance and availability of funds. In addition, for County Extension Educators entering the system with a Bachelor’s degree, attainment of an approved Master’s degree triggers a salary adjustment based on the OCES Bachelor/Masters differential.

Benefits for County Extension Educators, Area Specialists, and District Specialist consist of health, life, and other insurance, flexible health accounts, earned annual and sick leave. These are generally explained at: [http://hr.okstate.edu/benefits](http://hr.okstate.edu/benefits). Employees are eligible for legally mandated programs such as the Family Medical Leave Act, military leave, and others.

2. **Promotion**
The primary means of promotion for County Extension Educators, and Area and District Program Specialists is the OCES Career Ladder. The purpose of the OCES Career Ladder is to provide a system for measuring and documenting the progress of Extension educators in the profession and for rewarding their professional accomplishments. The career ladder system is provided to reward educators who demonstrate sustained professional growth and significant programmatic accomplishment through time in the Oklahoma Cooperative Extension Service. A link to the details of the Career Ladder may be found at [http://intranet.okstate.edu/staff_development/career-ladder-program](http://intranet.okstate.edu/staff_development/career-ladder-program).

County Extension Educators and Area/District Specialists may be eligible for some of the programs though DASNR Incentive Plans located at [http://hr.dasnr.okstate.edu/dasnr-incentive-plans](http://hr.dasnr.okstate.edu/dasnr-incentive-plans). Employees should inquire of Extension administration through their District Extension Director as to their eligibility for incentive before entering a program. Specifically, one incentive available to County Educators hired with a B.S. degree is a $3,000/year salary increase upon obtaining an M.S. degree. To receive this incentive the degree must have been approved in advance by the DASNR Vice President as prescribed by the “DASNR Incentive Plan.” This salary increase will be given within 30 days of the degree attainment as verified through an official transcript from the awarding institution. Approved Doctoral degrees may receive a $1,200/year salary increase. The DASNR Incentive Plan website should be consulted for further details and other incentives.
3. **Transfers**
Transfer to another position will be granted only after one has served at least two years in their current position. Exceptions may be made when it is clearly shown that the transfer is in the best interest of the Oklahoma Cooperative Extension Service.

Internal County Extension Educator applicants who are successful in applying for and receiving a County Extension Educator position in another county should do so under the premise that such a move is a lateral transfer. There is no implied promotion or salary adjustment affixed.

The Associate Vice President and respective District Extension Director may determine that it is in the interest of OCES that a particular vacancy be filled with an experienced Extension Educator with a specified set of skills. Under that determination, a one-time stipend may be approved by the Associate Vice President as an incentive to internal applicants. An Educator receiving such a stipend would be eligible for a similar inducement to transfer after five years.

Moving expenses may be negotiated by the transferring Educator with the District Extension Director. The guidelines for arrangements and payment of such expenses may be found elsewhere in this guideline manual.

**F. Extension Administrative Support Specialist/Assistant Compensation and Promotion**

1. **Compensation**
Compensation for OCES employees is comprised of salary and benefits. The initial salary of a newly-hired Extension Administrative Support Specialist/Assistant is determined by DASNR HR and the District Extension Director following review of comparable salaries surveyed by the County Extension Director. Consideration is given experience and previous training. Future salary adjustments are merit based or through promotion, professional growth, or length of service.

Benefits for OCES employees (given appropriate FTE level) consist of health, life, and other insurance, flexible health accounts, earned annual and sick leave. These are generally explained at [http://hr.okstate.edu/benefits](http://hr.okstate.edu/benefits) employees are eligible for legally mandated programs such as the Family Medical Leave Act, military leave, and others.

2. **Promotion**
Though many Extension Secretaries are initially hired into the position of Extension Administrative Support Specialist, internal applicants may be hired into that position. In those cases, the move is considered a promotion in title, responsibilities, and salary. The salary adjustment is set by the District Extension Director and DASNR HR.

Extension Administrative Support Specialists/Assistants are also eligible for increases in salary dependent on their continued employment with OCES through the OCES Field (County, Area, District) Extension Administrative Support Specialist/Assistant Retention Incentive Program (see next section).

OCES field secretaries may be eligible for some of the programs though DASNR Incentive Plans located at [http://hr.dasnr.okstate.edu/dasnr-incentive-plans](http://hr.dasnr.okstate.edu/dasnr-incentive-plans). Employees should inquire of Extension administration through their District Extension Director as to their eligibility for incentive before entering a program.
G. OCES Field (County, Area, District) Extension Administrative Support Specialist/Assistant Retention Incentive Program (Established May 15, 2007)

All length of service will be based on “OSU continuous service date” information as of January 1 of each year.

Adjustments to salary will be effective June 1, July 1, or August 1 of the same year (at the discretion of OCES Administration).

After five years of service (5.00 years or greater as of January 1), the employee will receive a $1,000 increase added to annual base salary. The employee is only eligible for this increase provided the most recent three years’ performance reviews for the employee were satisfactory or better. If this is not the case, the employee’s eligibility will be restored only when they achieve three consecutive years of satisfactory or better performance reviews.

After six additional years of continuous service (11.00 years or greater as of January 1, unless performance review criteria resulted in the initial five-year salary increase to be delayed), the employee will receive an additional $100 increase to annual base salary. This will continue annually (i.e. after year 12, 13, etc.) until the time of retirement or break in service. The employee is only eligible for this increase provided the most recent year’s performance review for the employee is satisfactory or better.

H. Internships- State and County

The Oklahoma Cooperative Extension Service offers both state and county supported internships. The purpose of the internship program is to provide an intern with a directed, supervised educational experience in the complete activities of the Oklahoma Cooperative Extension Service. The major commitments expected of the supervising educator / county director are the willingness and time to provide such experiences. There should be opportunities for the student to gain experiences in all appropriate program areas and to work closely with the staff responsible for the respective program areas.

All interns must become a certified volunteer and complete training including; online training for New Policy I-0135, Minors Participating in OSU-Related Activities and Programs, as well as, other selected trainings. OSU liability insurance is available to interns, if they are a certified volunteer.

State Funded Internships – The state funded internships will be offered for a period of 8-10 weeks during the months of May, June, and July. State supported interns will be paid an hourly rate and also have some funds available for travel and supplies. Counties must submit a site application form for all state funded and supported internships. Applications for county host sites and internships are due in the Staff and Program Development office during the fall semester with intern interviews held in January or February. Appointed by the Associate Vice President, the state internship committee will review applications and interview candidates, selecting 8-10 interns. Counties who wish to have an intern are required to submit a site application with approval from the County Extension Director and District Director. Intern pay will be based upon bi-weekly pay at an hourly rate, not to exceed 40 hours per week. They will receive a limited amount of funds for travel and supplies to use for programs and activities. Each intern must submit a budget detailing travel and
supply items needed for events. Travel reimbursement will be submitted through the OSU AIRS system and supplies will be ordered for counties using a state purchase request when possible.

**County Supported Internships**- County Supported (funded or non-funded) internships may be available during the summer, fall or spring semesters. If a county is not selected as a state supported internship site, county supported interns can still be selected for the county by the state internship committee or by the county staff with approval from the respective District Director. Counties may also conduct their own process of selecting interns as long as they can be certified as volunteers. It is recommended that the unpaid interns follow the same behavioral and professional guidelines as paid interns. Counties may pay interns with county funds, if available. All travel and supplies for the intern projects and activities will be the responsibility of the county.

To view the Internship applications and additional information go to:  
[http://intranet.okstate.edu/staff_development/internships](http://intranet.okstate.edu/staff_development/internships)

**IX. EMPLOYEE BENEFITS**

**A. Introduction**

The following is a summary of benefits provided to and available to Oklahoma Cooperative Extension Service Employees. Benefits may vary based upon employee classification and years of service. To be eligible for benefits an employee must be .75 FTE or more for an appointment of at least 6 months.

A condensed and concise outline of OSU benefits can be viewed at:  
[http://hr.okstate.edu/benefits](http://hr.okstate.edu/benefits)

More specific information can be found at the following links:  
Retirement:  [http://hr.okstate.edu/benefits/retirement_plan](http://hr.okstate.edu/benefits/retirement_plan)  
Health Care Insurance:  [http://hr.okstate.edu/benefits/medical_coverage](http://hr.okstate.edu/benefits/medical_coverage)  
Other Benefits by Program Area:  [http://hr.okstate.edu/benefits](http://hr.okstate.edu/benefits)

**B. Attendance and Personal Leave for Staff**

1. **Holidays**

Most county extension offices follow county holidays as set by the Board of County Commissioners. However, some county offices and all district and area offices follow the OSU holiday schedule. The OSU holiday schedule can be found at:  
[http://hr.okstate.edu/holidaysch](http://hr.okstate.edu/holidaysch)

2. **General Attendance & Leave**

All County Extension Educators, Area & District Specialists, and Support Staff must be at their office, at a work site or in-service training, or in official travel status during normal office hours. Appropriately approved leave must be used for any exceptions to this requirement.

County Extension staff may be entitled to paid or unpaid time away from work dependent on their job classification, full-time equivalency (FTE) of their employment, time employed with OSU, and other factors. This time may also be accumulated (i.e. annual or sick leave) or be made available based on circumstance (i.e. weather, court leave, funeral leave, etc.).
Types of leave include annual, sick, compensatory (overtime), leave-without-pay, funeral, study, court, administrative, voting, military, disability, catastrophe, and administrative leave. Legal holidays are not necessarily included in the foregoing list. Certain types of leave are accrued at differing rates. Not all leave may be accrued; maximum accruals exist; and some leave must be used or lost dependent on type of leave and the employee’s position. The full policy can be accessed online at: http://hr.okstate.edu/policy_proced

3. **Inclement Weather with the Courthouse Closing**
If the courthouse closes, Administrative Leave will be recorded for those who were scheduled to work during the time of closing. If an employee is scheduled in advance for annual leave or sick leave, the individual will be charged annual leave or sick leave since the inclement weather did not impact the employee’s plans to work. Although not encouraged, an employee choosing to work even though a closing has been announced, will be paid for working as usual, whether or not the employee was aware of the closing.

If the courthouse closes for any other reason, not including planned holidays, the above will be followed.

4. **Overtime**
Extension Educators are hired with the understanding that some evening and weekend work is required and that no compensatory time is granted to Administrative and Professional staff (County Educators, Area & District Specialists, or District Extension Directors). Such staff is considered ‘exempt’ under the Fair Labor Standards Act.

However, Classified staff (Secretaries, Program Assistants, Nutrition Education Assistants, Family Support Workers, etc.) do fall under the guidelines set forth in the Fair Labor Standards Act governing overtime. The policy governing overtime for all staff is detailed at: http://hr.okstate.edu/policy_proced

5. **Family Medical Leave**
The Family and Medical Leave Act of 1993 (FMLA) provides certain job protections to employees balancing work responsibilities with the demands of personal illness or injury or caring for family members. This policy sets forth the essential provisions of the FMLA. In the event that additional clarification is needed, the actual Act and regulations issued by the federal government implementing the Act shall prevail.

The Oklahoma Cooperative Extension Service, as part of Oklahoma State University, fully subscribes to the FMLA program as described in the section of OSU Policy and Procedures governing this program.

Depending on individual circumstances of the leave, faculty and staff may also be concurrently eligible for paid sick leave benefits under OSU Policy and Procedures 3-0716 (Sick Leave for Staff) and Policy and Procedures 2-0113 (Faculty Sick Leave).

Additional information regarding the FMLA, its purpose and implementation can be found at: http://hr.okstate.edu/policy_proced
6. **Long Term Disability**
Oklahoma State University (OSU) is committed to assisting employees when they suffer from a debilitating illness or injury by providing an opportunity for long-term disability (LTD) insurance coverage and related benefits. Information regarding the OSU policy on LTD can be found at:  [http://hr.okstate.edu/benefits/ltd](http://hr.okstate.edu/benefits/ltd)

7. **Worker’s Compensation Insurance**
The Oklahoma Legislature amended the Oklahoma Worker’s Compensation statutes to include coverage of employees of the State of Oklahoma, including all persons employed by Oklahoma State University, with such expanded coverage effective July 1, 1979.

Details concerning the purpose and scope, as well as procedures pertaining to the Oklahoma Worker’s Compensation law can be found at:  [http://hr.okstate.edu/benefits/workcomp](http://hr.okstate.edu/benefits/workcomp)

8. **Employee Liability Insurance**
Employees of the Oklahoma Cooperative Extension Service and Oklahoma State University are insured against claims by third parties for bodily injury, property damage, and personal injury. The coverage is provided under the provisions of the Governmental Tort Claims Act passed by the 1984 Oklahoma Legislature. The Risk Management Division of the State Office of Public Affairs is responsible for administering the program.

The purpose of the Governmental Tort Claims Act is to provide protection against suit or claim for full-time and part-time employees while acting within the scope of their employment. Scope of employment is defined in the Act as follows: "Performance by an employee acting in good faith with the duties of his office or employment or of tasks lawfully assigned by a competent authority, but shall not include corruption or fraud."

Under the provisions of the Act the State agency will be named as defendant in the claim rather than the employee if the employee was acting within the scope of employment.

Further information regarding the provisions of the Act can be secured by calling the Division of Agricultural Sciences and Natural Resources Human Resources Office at 405-744-5524 or University Business Manager's Office Risk Manager at 405-744-5980, or by viewing the following website:  [http://rpm.okstate.edu/](http://rpm.okstate.edu/)
9. **Employee Dependent Child Waiver Benefit**

Beginning fall 2017, dependent children (between the ages of 17 and 25) of OSU employees will be eligible to receive a 100% undergraduate student resident tuition waiver for OSU-Stillwater and OSU-Tulsa courses. This benefit is for employees who work on the Stillwater, Tulsa and Center for Health Sciences campuses.

To apply for the tuition waiver, you will need to complete an [OSU Employee Dependent Waiver Benefit Form](#) (pdf). This form is due in OSU Benefits, 106J Whitehurst. Employees are only required to submit this document once. As long as the employee and dependent meet the qualifications, the waiver will renew for four years.

You may read the detailed [OSU Employee Dependent Child Waiver Benefit Guidelines](#) here. A summary of this new benefit is as follows:

### Dependent Child Waiver Details

- 100% of undergraduate resident tuition*
- Does not include fees and/or housing
- Applies only to courses charged regular tuition rates, excluding outreach exception (OUTE) courses, NOC courses, and audit courses.
- Graduate courses are covered for students with a primary undergraduate matriculation.
- Excludes high school concurrent students
- The dependent waiver can be combined with other institutional tuition waivers not to exceed the amount of qualifying tuition charged. This will include only the tuition portion of the block rate.

### Employee Dependent

- Continuous, full-time, regular employee (0.75 FTE) of OSU-Stillwater, OSU-Tulsa or OSU Center for Health Sciences for at least two years at the time the dependent receives the benefit
- Provide proof of dependency, such as a tax return or birth certificate

### Student Requirements

- Under the age of 26 as of the first day of applicable term
- Full-time (12 hours) for fall and spring semesters
- Primary matriculation must be undergraduate
- Degree-seeking status
- Must maintain a 2.0 graduation/retention GPA
- Cannot be in the Tuition Lock Program
- Maximum award period of 4 academic years
- Deadline for application to OSU is September 1 for the following fall semester and the Friday prior to the beginning of the spring semester

For questions regarding employee eligibility, contact OSU Benefits, 106J Whitehurst, (405) 744-5449. For questions regarding student eligibility, contact the [Office of Scholarships & Financial Aid](#).

*A dependent child who does not qualify for in-state residency will have 100% of the out-of-state portion of tuition waived, but will still be responsible for the remaining in-state portion of tuition.
10. **Educational Leave**

Official educational leave with pay may be granted to full-time (100%) OCES administrative and professional (A&P) field staff for up to three weeks (15 working days) per calendar year to pursue planned professional improvement. Educational leave is subject to satisfactory job performance and administrative approval. Educational leave may be approved for an employee only when it is for the benefit of the Oklahoma Cooperative Extension Service and contributes directly to the professional growth of the employee. Extension professional field staff requesting educational leave must have completed a six-month period of continuous employment prior to leave being granted. Accumulated annual leave may be combined with official educational leave to the extent earned by the individual, subject to the approval of his or her supervisor. Educational leave may be used for in-state or out-of-state credit or non-credit courses as well as other approved professional development opportunities. The “Educational Leave Request Form” is to be used when requesting official educational leave. Employees paid from grant contract monies must have P.I. and administrative approval in order to be eligible for this benefit. Educational leave may be applied to the time required for travel and participation in the approved activity. Educational leave may not be applied to outside assignments or out-of-class preparation.

Educational leave may be applied to the time required to participate in classroom, on-line, and/or other distance education courses provided the courses have been approved on the “Educational Leave Request Form.” Forms are available at: [http://intranet.okstate.edu/staff_development](http://intranet.okstate.edu/staff_development).

11 **Faculty/Staff Fee Waivers**

In order to encourage professional development and professionalism within the Oklahoma Cooperative Extension Service, employees are eligible to participate in tuition reduction and the waiver of certain fees.

To receive any waiver of fees, the 100% time active status employee must submit a completed “Request for Faculty/Staff Fee Waiver” form prior to the beginning of classes. This form must be in the Staff and Program Development Office at least 5 business days before classes start in order to get appropriate signatures. If the form is not on file at the Registrar’s Office prior to the beginning of classes, the employee-student will not be granted the waiver in fees. If you are taking classes at OSU-Oklahoma City, an additional form for Faculty/Staff Tuition Waiver Benefits is required. Please call the Staff and Program Development Office (405-744-7969) for this form.

The most recent Faculty/Staff Fee Waiver Form is available for download from the Office of the Registrar’s website, [http://registrar.okstate.edu/sites/default/files/Documents/Forms/TuitionAndFeeWaivers/fsfee waiverform3.pdf](http://registrar.okstate.edu/sites/default/files/Documents/Forms/TuitionAndFeeWaivers/fsfee waiverform3.pdf).

Scroll down to Faculty/Staff Fee Waiver Form. You can also pick up a blank form from the Office of the Registrar, 322 Student Union, OSU Campus.

For active status 1.0 FTE, continuous, regular staff enrolled in University courses, the following fees will be waived (100%):

a. Student Activity Fees
b. Student Activity Fees – Athletic Fee
c. Health Services Fee  
d. Transportation Fee  
e. Consumable Material Fee  
f. Student Development Initiative Fee  
g. Daily O'Collegian  

Staff members must pay 50% of the general enrollment (tuition). Any additional fees not listed above, as well as any special course charge must be paid in total by the staff member. (Note: Fees and policies change periodically so individuals should check appropriate OSU policies and University catalog.)

University Enrollment for Staff (3-0744)  
http://hr.okstate.edu/policy_proced  

OSU Catalog – Tuition, Fees, and Cost Estimates  
https://registrar.okstate.edu/Faculty-Staff-Tuition-Waiver  

Fee waiver requests for more than one course or more than 5 credit hours is a special request and will require justification from the employee’s supervisor and District Extension Director. Staff members employed at less than a full-time level (under 1.0 FTE), or who are on Leave Without Pay, are not eligible to receive fee waivers.

There is no special discount for books and supplies at the Student Union Bookstore for staff. Some courses taught through correspondence study, extension, distance education, and outreach may be excluded from receiving the fee waiver and/or may incur special fees. For more information, contact the department offering the course to determine whether the tuition fee waiver applies.

12. Auditing Courses  
OCES staff are eligible to audit courses contingent upon available space. Employees auditing classes are eligible for fee waivers. To receive any waiver of fees, the full-time employee must submit a completed “Request for Faculty/Staff Fee Waiver” form at least five (5) days prior to the beginning of classes. Classes at OSU-Oklahoma City require an additional form for Faculty/Staff Tuition Waiver Benefits. Please call the Staff and Program Development Office (405-744-7969) for this form.

As adopted by the State Regents for Higher Education, September 28, 1983, if the employee is age 65 or older the fees for auditing a course are waived, contingent upon space being available in the course.

The audit fee is also waived for faculty and staff who have retired from the University under the OSU Retirement Plan regardless of age at time of retirement.

Distance education courses do have additional fees that are not covered by the fee waiver. The most recent Faculty/Staff Fee Waiver Form is available for download from the Office of the Registrar’s website.
X. GENERAL OFFICE MANAGEMENT

There are certain rules, practices, and expectations in the operations of any OCES office. These may include protections for Extension staff and property or guidelines for behavior of employees in the conduct of their business.

A. Office Hours

County Extension offices will follow the same office hours as the County Courthouse regardless of the location of the Extension Office. The exception to this policy is when the normal office hours of the County Courthouse are less than 40 hours per week. In this case, the County Extension office must be open for business a minimum of eight (8) hours per day in addition to a mandatory minimum 30 minute lunch break. This may require the County Extension office to open prior to the County Courthouse or remain open after it closes, even though the public may not have physical access to the Extension office. The District Extension Director should be contacted regarding any legal issues which may interfere with this policy.

District and Area Extension offices must also be open a minimum of 8 hours per day in addition to a mandatory minimum 30 minute lunch break. These office hours will be determined by the District Extension Director.

B. Office Dress and Grooming

All Extension staff are expected to be well-groomed and dressed appropriately and in good taste for their job assignment. As an educational agency, we should always be conscious of setting a good example for our clientele, especially our youth audiences. It is inappropriate, while on official duty, for staff members to wear clothing, shirts, blouses, hats, caps, etc., that display the name of a business, organization logo, or product name other than Oklahoma State University, Oklahoma Cooperative Extension Service, and/or the 4-H emblem.

C. Outside Activities

Outside activities for which the employee is compensated are a privilege and not a right of employment.

The University expects professional staff members to give their best professional effort to their University assignment. However, professional staff members may devote a reasonable amount of time to outside professional and other activities provided they further the professional development of the individual and do not interfere with their responsibilities to the University nor reflect unfavorably upon the image of the University.

Outside professional activities are defined here to be those consulting or similar non-University activities that are related to the professional expertise and responsibilities of the professional staff member and for which extra compensation is received.
Participation by a professional staff member in outside professional activities may be authorized when such activities add to the development of the professional expertise of the staff member and are in keeping with Extension goals and objectives, and with the applicable laws and opinions of the State Attorney General.

Certain kinds of outside activities are not in the best interest of OCES and will not be approved. These include any outside professional activity that falls within the broad scope of the extension employee’s position description, any activity that might result in or be construed to be a conflict of interest, and any activity that has the clear potential to result in litigation within the state of Oklahoma.

Extension professionals sometimes receive requests to teach at local colleges or universities. The request should be forwarded to the District Extension Director. Approval must be obtained by the District Extension Director and the Associate Vice President. In such instances, OCES will negotiate terms with the requesting institution. Ninety percent of the salary savings will be made available to support the program and professional development of the educator.

When the employee is proposing to engage in an outside professional activity, the employee should submit the Notice of Intent to Engage in a Professional Activity for Extra Compensation form to the District Extension Director. Approval must be obtained by the District Extension Director and the Associate Vice President in advance of the proposed activity.

Under no circumstances can an employee commit to, or undertake, an outside professional activity for compensation without prior approval. Failure to obtain prior approval is grounds for disciplinary action.

**D. Political Activities/Involvement**

OCES employees are expected to follow Oklahoma State University “Political Activities of Employees” policy (1-0705) as it pertains to political activity and involvement. That policy can be found at: [http://hr.okstate.edu/policy_proced](http://hr.okstate.edu/policy_proced)

**E. Personnel Records Management System**

The signing of Presidential Executive Order 11246 on September 24, 1965 might be considered the beginning of a new era which has required all Universities to collect and maintain personnel data never previously needed. Prior to 1965, Oklahoma State University needed little more personnel data than was necessary to ensure issuance of a paycheck. Now all Universities are faced with federal requirements which necessitate detailed information regarding race, gender, age, recruitment, employment, promotions, transfers, pay increases, benefits, and other similar personnel actions and decisions affecting all faculty and staff members, as well as more detailed information regarding students and finances. Faced with these demands, new methods of collecting, maintaining, and retrieving data must be found. Likewise, some procedures must be altered, rules must be developed, and definitions must be established if the University is to comply. This Policy and Procedures Letter is intended to enable Oklahoma State University to collect and maintain accurate personnel data needed to comply with federal requirements while providing improved data for faculty and staff services and management decisions.
More detailed information regarding the Human Resources Information Management Systems can be found at: http://hr.okstate.edu/policy_proced

F. Use of Tobacco
Tobacco use is prohibited within Oklahoma Cooperative Extension Offices. It is unacceptable for a staff member to use tobacco while working with, or in the presence of, youth.

Since County Extension Offices are often located in facilities owned by the county (Courthouses, Annexes, etc.), County Extension Directors should ascertain what additional policies may govern the use of tobacco on county owned property.

G. Drug Free Workplace
Oklahoma State University and the Oklahoma Cooperative Extension Service are committed to maintaining compliance with the Drug-Free Workplace Act. Information concerning the Act and policy and procedures governing it can be found at:
http://hr.okstate.edu/policy_proced

H. Workplace Threats and Violence
It is the goal of Oklahoma State University and the Oklahoma Cooperative Extension Service to provide a safe and secure workplace. The safety of University employees and students is very important both in terms of enhancing the educational environment which OSU strives to provide and in promoting a supportive working atmosphere for employees. However, the University cannot absolutely ensure that unanticipated acts of violence, or serious threats or harassment, will never occur. The purpose of this policy is to establish a framework for responding to situations involving serious threats or harassment, and acts of violence against employees and students in order to increase employee and student protection and minimize the probability of recurrence of dangerous situations.

Information on the policy governing workplace threats and violence as well as procedures for handling such incidents is described in detail at: http://hr.okstate.edu/policy_proced

I. Appropriate Computer Use
*Note: Information Technology Policies are in the process of review and will be updated throughout the year*

Section 1.01 Policy Scope and Applicability

A. As an institution of higher learning, Oklahoma State University encourages, supports, and protects freedom of expression and an open environment to pursue scholarly inquiry and to share information. Access to networked computer information in general and to the Internet, in particular, supports the academic community by providing a link to electronic information in a variety of formats and covering all academic disciplines. Consistent with other University policies, this policy is intended to respect the rights and obligations of academic freedom, while protecting the rights of others. The computing and network facilities of the University are limited and should be used wisely and carefully with consideration for the needs of others. As with any resource, it is possible to misuse computing resources and facilities and to abuse access to the Internet. The
following statements address, in general terms, the University's philosophy about computing use.

B. This policy is applicable to all individuals using University owned or controlled computer and computer communication facilities or equipment, whether such persons are students, staff, faculty, or authorized third-party users of University computing information resources. It is applicable to all University information resources whether individually controlled or shared, stand alone or networked. It applies to all computer and computer communication facilities owned, leased, operated, or contracted by the University. This includes, but is not limited to, word processing equipment, personal computers, workstations, mainframes, minicomputers, and associated peripherals and software, and electronic mail accounts, regardless of whether used for administration, research, teaching, or other purposes. The University policy regarding Access by External Users and any subsequent revisions thereto may apply. In addition, a user must be specifically authorized to use a particular computing or network resource by the campus unit responsible for operating the resource.

C. Individual units within the University may define "conditions of use" for information resources under their control. These statements must be consistent with this overall Policy but may provide additional detail, guidelines and/or restrictions. Such policies may not relax or subtract from, this policy. Where such "conditions of use" exist, enforcement mechanisms defined therein shall apply. These individual units are responsible for publicizing both the regulations they establish and their policies concerning the authorized and appropriate use of the equipment for which they are responsible. In such cases, the unit administrator shall provide the Executive Vice President with a copy of such supplementary policies prior to implementation thereof. Where use of external networks is involved, policies governing such use also are applicable and must be adhered to.

Section 1.02 User Responsibilities and Expectations

A. Access to the information resource infrastructure both within and beyond the University campus, sharing of information, and security of the intellectual products of the community all require that each and every user accept responsibility to protect the rights of the community. Access to the networks and to the information technology resources at Oklahoma State University is a privilege granted to University students, faculty, staff, and third parties who have been granted special permission to use such facilities. Access to University information resources must take into account the following factors: relevant laws and contractual obligations, the requestor's need to know, the information's sensitivity, and the risk of damage to or loss by the University.

B. Anyone who accesses, uses, destroys, alters, or damages University information resources, properties or facilities without authorization, may be guilty of violating state or federal law, infringing upon the privacy of others, injuring or misappropriating the work produced and records maintained by others, and/or threatening the integrity of information kept within these systems. Such conduct is unethical and unacceptable and will subject violators of this Policy to disciplinary action by the University, including possible termination from employment, expulsion as a student, and/or loss of computing systems privileges.

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C. The University requires that members of its community act in accordance with these responsibilities, this Policy, the University's Student or Faculty Handbook, as appropriate, OSU Policies and Procedures, relevant laws and contractual obligations, and the highest standard of ethics. The policies as stated in this Policy are intended to ensure that users of University information resources shall:

- respect software copyrights and licenses,
- respect the integrity of computer-based information resources,
- refrain from seeking to gain unauthorized access,
- respect the privacy of other computer users.

D. The University reserves the right to limit, restrict, or extend computing privileges and access to its information resources. Data owners—whether departments, units, faculty, students, or staff—may allow individuals other than University faculty, staff, and students access to information for which they are responsible, so long as such access does not violate any license or contractual agreement, University policy, or any federal, state, county, or local law or ordinance. However, users are personally responsible for all activities on their user id or computer system and may be subjected to disciplinary action and/or loss of privileges for misuse of computers or computing systems under their control even if not personally engaged in by the person controlling the computer or system.

E. Units and individuals may, with the permission of the appropriate University officials and in consonance with applicable University policies and guidelines, configure computing systems to provide information retrieval services to the public at large. However, in so doing, particular attention must be paid to University policies regarding authorized use (must be consistent with the mission of the University), ownership of intellectual works, responsible use of resources, use of copyrighted information and materials, use of licensed software, and individual and unit responsibilities.

Section 1.03 Authorized User Purposes

A. Use of University computers must comply with Federal and State law and University policies. University computing facilities and accounts are to be used for the University-related activities for which they are assigned. When users cease to be members of the academic community (such as by graduating or ceasing employment), or when persons are assigned to a new position and/or responsibilities within the University, the access authorization of such person will be reviewed and may be altered. Users whose relationships with the University change may not use computers and computing resources, facilities, accounts, access codes, privileges, or information for which they are not authorized in their new relation to the University.

B. Users may use only their own computer accounts. The negligence or naivete of another user in revealing an account name or password is not considered authorized use. Convenience of file or printer sharing is not sufficient reason for sharing a computer account. Users are personally responsible for all use of their computer account(s).

C. Appropriate use of computing and networking resources includes instruction, independent study, authorized research, independent research, communications, and official work of the offices, units, recognized student and campus organizations, and agencies of the University. Computing facilities, services, and networks may not be
used in connection with compensated outside work for the benefit of organizations unrelated to the University except in connection with scholarly pursuits (such as faculty publishing activities) in accordance with the University consulting policy or the policy governing Access by External Entities to University Technology Resources, or in a purely incidental way. State law generally prohibits the use of University computing and network facilities for personal gain or profit, and use of computing resources for unauthorized commercial purposes, unauthorized personal gain, or any illegal activities is prohibited.

Section 1.04 Special User Notifications

A. The University makes available both internal and external computing facilities consisting of hardware and software. The University accepts no responsibility for any damage to or loss of data arising directly or indirectly from the use of these facilities or for any consequential loss or damage. The University makes no warranty, express or implied, regarding the computing services offered, or their fitness for any particular purpose.

B. Liability for any loss or damage shall be limited to a credit for fees and charges paid to the University for use of the computing facilities which resulted in the loss or damage.

C. The University cannot protect individuals against the existence or receipt of material that may be offensive to them. As such, those who make use of electronic communications are warned that they may come across or be the recipients of materials they find offensive. Those who use e-mail and/or make information about themselves available on the Internet should be forewarned that the University cannot protect them from invasions of privacy and other possible dangers that could result from the individual's distribution of personal information.

D. An individual using University computing resources or facilities must do so in the knowledge that he/she is using University resources in support of his/her work. The University owns everything stored in its facilities unless it has agreed otherwise. The University has the right of access to the contents of stored computing information at any time for any purpose for which it has a legitimate "need to know." The University will make reasonable efforts to maintain the confidentiality of computing information storage contents and to safeguard the contents from loss, but is not liable for the inadvertent or unavoidable loss or disclosure of the contents.

E. Any individual using University computing resources and facilities must realize that all mainframe computer systems maintain audit trials logs or file logs within the mainframe computer. Such information as the user identification, date and time of the session, the software used, the files used, the computer time, and storage used, the user account, and other run-related information is normally available for diagnostic, accounting, and load analysis purposes. Under certain circumstances, this information is reviewed by system administrators, either at the request of an academic department, or in situations where it is necessary to determine what has occurred to cause a particular system problem at a particular time. For example, analysis of audit files may indicate why a particular data file is being erased, when it was erased, and what user identification has erased it.

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F. CIS employees and system administrators do not routinely look at individual data files. However, the University reserves the right to view or scan any file or software stored on the computer or passing through the network, and will do so periodically to verify that software and hardware are working correctly, to look for particular kinds of data or software (such as computer viruses), or to audit the use of University resources. Violation of policy that come to the attention of University officials during these and other activities will be acted upon. User data on the mainframe will be periodically copied to backup tapes. The University cannot guarantee confidentiality of stored data. Users should be aware that use of one of the data networks, such as the Internet, and electronic mail and messages, will not necessarily remain confidential from third parties outside the University in transit or on the destination computer system, as those data networks are configured to permit fairly easy access to transmissions.

Section 2.01 Conduct Expectations and Prohibited Actions

A. The well-being of all computer users depends on the availability and integrity of the system. Any defects discovered in the system accounting or system security are to be reported to the appropriate system administrators so that steps can be taken to investigate and solve the problem. The cooperation of all users is needed to ensure prompt action. The integrity of most systems is maintained by password protection of accounts. A computer user who has been authorized to use such a protected account may be subject to both criminal and civil liability, as well as University discipline, if the user discloses a password or otherwise makes the account available to others without the permission of the system administrator.

B. Restrictions on computer security and self-replicating code are to be interpreted in a manner that protects university and individual computing environments, but does not unduly restrict or limit legitimate academic pursuits.

C. The following examples of acts or omissions, though not covering every situation, specify some of the responsibilities that accompany computer use at Oklahoma State University, and outline acts or omissions that are considered unethical and unacceptable, and may result in immediate revocation of privileges to use the University’s computing resources and/or just cause for taking disciplinary action up to and including discharge, dismissal, expulsion, and/or legal action:

1. Violating any software license agreement or copyright, including copying or redistributing copyrighted computer software, data, or reports without proper, recorded authorization. Software protected by copyright shall not be copied except as specifically stipulated by the owner of the copyright. Protected software is not to be copied into, from, or by any University facility or system, except by license. The number and distribution of copies must be handled in such a way that the number of simultaneous users in a department does not exceed the number of original copies purchased by that department, unless otherwise stipulated in the purchase contract.

2. Interfering with the intended use of the information resources or without authorization, destroying, altering, dismantling, disfiguring, preventing rightful access to or otherwise interfering with the integrity of computer-based information and/or information resources.

3. Modifying or removing computer equipment, software, or peripherals without proper authorization.
4. Encroaching on others' use of the University's computers. This includes but is not limited to: the sending of chain-letters or excessive messages, either locally or off-campus; printing excess copies of documents, files, data, or programs; running grossly inefficient programs when efficient alternatives are known to be available; unauthorized modification of system facilities, operating systems, or disk partitions; attempting to crash or tie up a University computer; damaging or vandalizing University computing facilities, equipment, software, or computer files.

5. Developing or using programs which harass other computer users or which access private or restricted portions of the system and/or damage the software or hardware components of the system. Computer users shall use great care to ensure that they do not use programs or utilities which interfere with other computer users or which modify normally protected or restricted portions of the system or user accounts. Computer users shall not use network links for any use other than permitted in network guidelines (e.g., ONENET, Internet, NSFNet, BITNET). The use of any unauthorized or destructive program may result in legal civil action for damages or other punitive action by any injured party, including the university, as well as criminal action.

6. Using University computing resources for commercial purposes or non-University-related activities without written authorization from the University. In these cases, the University will require restitution payment of appropriate fees. This Policy applies equally to all University-owned or University-leased computers.

7. Using University computing resources to generate or access obscene material as defined by Oklahoma or federal law and acceptable community standards or creating a hostile work and/or educational environment.

8. Seeking to gain or gaining unauthorized access to information resources or enabling unauthorized access.

9. Accessing computers, computer software, computer data or information, or networks without proper authorization, or intentionally allowing others to do so, regardless of whether the computer, software, data, information, or network in question is owned by the University. For example, abuse of the networks to which the University belongs or the computers at other sites connected to those networks will be treated as an abuse of Oklahoma State University computing privileges.

10. Without authorization invading the privacy of individuals or entities that are creators, authors, users, or subjects of the information resources.

11. Using University electronic communication facilities to send fraudulent, harassing, obscene, threatening, or other unlawful messages is prohibited. Users shall respect the purpose and charters of computer mailing lists (including local or network news groups and bulletin-boards). It is the responsibility of any user of an electronic mailing list to determine the purpose of the list before sending messages to the list or receiving messages from the list. Persons subscribing to an electronic mailing list will be viewed as having solicited any material delivered by the list as long as that material is consistent with the purpose of the list. Persons sending to a mailing list any materials which are not consistent with the purpose of the mailing list will be viewed as having sent unsolicited material to the mailing list.

12. Transmitting commercial or personal advertisements, solicitations, promotions, or programs intended to harass other computer users or access private or restricted computer or network resources. Some public bulletin boards may be designated for selling items, etc., and must be used appropriately, according to the stated
purpose of the list(s). Vendors may send product information and technical material to specific mailing lists, with the permission of the manager of the mailing list.

13. Seeking to provide information on, obtain copies of, or modify data files, programs, or passwords belonging to other users without the permission of those other users; Using programs or devices to intercept or decode passwords or similar access control information.

14. Attempting to circumvent mechanisms intended to protect private information from unauthorized examination by others in order to gain unauthorized access to the system or to private information; Configuring or running software so as to allow unauthorized use.

15. Using University computers or computing systems in any manner which violates Federal, state, or local laws, or University policies.

16. Using University computing facilities or accounts for other than the University-related activities for which they were assigned and intended.

17. Using computers or the University computing resources to engage in political campaigning or commercial advertisement.

Section 3.01 System Administrator Responsibilities

A. The Board of Regents for Oklahoma State University and the Agricultural and Mechanical Colleges are the legal owners of all University "owned" or controlled computers and networks. The contents of all storage media owned or stored on University computing facilities are the property of Oklahoma State University unless a written contract signed by the suitable contracting authority exists to the contrary. Day-to-day control of any particular system resides with the head of a specific subdivision of the University structure, such as a Dean, Director, department head, or principal investigator.

B. Management of the data which is contained within the various data systems of the University must be administered in a fashion consistent with the mission and efficient operations of the University, applicable state or federal laws, and potentially applicable privacy considerations. In order to do so, functional guidelines regarding who is granted access to the various components of the University's computing information resources have been developed and will be updated from time to time through internal management guidelines developed by the Data Committee chaired by the CIS Manager of Data Administration, and approved by the OSU President's Executive Group. Information about the composition of the Data Committee and its functions can be obtained from CIS.

C. The "University Data Dictionary" maintained by the CIS Manager for Data Administration is the primary resource for resolving questions about internal user access rights. Users and administrators of the various computing system components owned or controlled by the University are required to follow those internal management guidelines. Failure to comply with those guidelines can result in disciplinary and/or legal action.

D. The University official in charge of a particular unit or system may designate another person or persons to manage the system. This person (or persons), or the owner in the
absence of such a designation, is the "system administrator". The system administrator's use of the University's computing resources is governed by the same guidelines that apply to any other user. However, the system administrator has additional responsibilities and authorities with respect to the system under his/her control and its users.

E. The system administrator has certain responsibilities to the University as a whole for the system(s) under his/her control, regardless of the policies of his/her department or group, and the owner has the ultimate responsibility to see that these are carried out by the system administrator. These responsibilities are:

1. To take reasonable precautions against theft of, or damage to, the system components.
2. To faithfully execute all hardware and software licensing agreements applicable to the system.
3. To treat information about, and information stored by, the system's users as confidential (as conditioned in this policy) and to take reasonable precautions to ensure the security of a system or network and the information contained therein.
4. To promulgate information about specific policies and procedures that govern access to and use of the system and services provided to the users or explicitly not provided. This information should describe the data backup services, if any, offered to the users. A written document given to users or messages posted on the computer system itself shall be considered adequate notice.
5. To cooperate with the system administrators of other computer systems or networks, whether within or without Oklahoma State University, to find and correct problems caused on another system by the use of the system under his/her control.

F. The system administrator is authorized to take all reasonable steps and actions to implement and enforce the usage and service policies of the system and to provide for security of the system. System administrators operating computers and networks may routinely monitor and log usage data, such as network session connection times and end-points, CPU and disk utilization for each user, security audit trails, network loading, etc. These units may review this data for evidence of violation of law or policy and for other lawful purposes. System administrators may access computer user' files at any time for maintenance purposes. System administrators may access other files for the maintenance of networks and computer and storage systems, such as to create backup copies of media.

G. When system response, integrity, or security is threatened, a system administrator is authorized to access all files and information necessary to find and correct the problem or otherwise resolve the situation.

H. If an occasion arises when a University officer or supervisor believes that access to an individual's data is required for the conduct of University business (unrelated to the need to investigate possible wrongdoing), the individual is not available, and a system administrator is required to access the individual's account, the following procedure shall be followed:

1. The University official or supervisor shall secure permission to access the data from the Executive Vice President or designee of such officer.
2. An appropriate form with the signature of the Executive Vice President shall be presented to the system administrator allowing the system administrator to proceed to access the data.

3. The individual whose e-mail account has been accessed will be notified as soon as possible by copy of the above referenced form. Where necessary to ensure the integrity of an investigation into the use of University computing resources, such notice, with the approval of the Executive Vice President, may be delayed until such time as such investigation would no longer be compromised.

I. System administrators are required to report suspected unlawful or improper activities to the proper University authorities. Computer users, when requested, have an affirmative duty to cooperate with system administrators in investigations of system abuse. Users are encouraged to report suspected illegal activity or abuse, especially if related to any damage to or problems with their files.

J. If an occasion arises when a University officer or supervisor believes that a user is violating state or federal law, or University policy, and that access to an individual's data is required in order to conduct an internal investigation into such possibility, system administrators may monitor all the activities of and inspect the files of such specific user(s) on their computers and networks. In such cases, and a system administrator is required to access the individual's data, steps (1) and (2) set forth above in Section 3.01(F) shall be followed and the Office of Legal Counsel shall be contacted and informed of the matter.

Section 4.01 Consequences of Misuse of Computing Privileges

A. Users, when requested, are expected to fully cooperate with system administrators in any investigations of system abuse. Failure to cooperate may be grounds for cancellation of access privileges or disciplinary action.

B. Abuse of computing privileges is subject to disciplinary action. If system administrators have strong evidence of misuse of computing resources, and if that evidence points to the computing activities or the computer files of an individual, they have the obligation to pursue any or all of the following steps to protect the user community:
   1. Notify the user's instructor, department or division chair, or supervisor of the investigation.
   2. Suspend or restrict the user's computing privileges during the investigation.
   3. Inspect the user's files, diskettes, tapes, and/or other computer-accessible storage media. System administrators must be certain that the trail of evidence clearly leads to the user's computing activities or computing files before inspecting the user's files.
   4. Refer the matter for possible disciplinary action to the appropriate University department, i.e., the Office of the Vice President for Student Affairs, the unit administrator for staff, and the Dean of the School for faculty.

C. Individuals whose privileges to access University computing resources have been suspended may request that the Executive Vice President, or his/her designee, review the suspension. The Executive Vice President, or designee, in his/her discretion, may reinstate privileges, alter any restrictions that have been imposed, or refuse to interfere with the administrative action taken to that time. There is no right
to a hearing or appearance regarding such issues and the decision made by the Executive Vice President or designee is final.

**Procedure for Reporting Suspected Pornography on University Computers in use by OCES off Campus Personnel**

If an OCES off campus employee believes they have viewed child pornography on an OCES employee’s computer, they should contact local law enforcement per OS Title 21 1021.4.

*Disclosure of obscene materials containing minors. Any commercial film and photographic print processor or commercial computer technician who has knowledge of or observes, within the scope of such person’s professional capacity or employment, any film, photograph, video tape, negative, or slide, or any computer file, recording, CD-Rom, magnetic disk memory, magnetic tape memory, picture, graphic or image that is intentionally saved, transmitted or organized on hardware or any other media including but not limited to, CDs, DVDs and thumb drives, whether digital, analog or other means and whether directly viewable, compressed or enclosed depicting a child under the age of eighteen (18) years engaged in an act of sexual conduct as defined in Section 1024.1 of this title shall immediately or as soon as possible report by telephone such instance of suspected child abuse or child pornography to the law enforcement agency having jurisdiction over the case and shall prepare and send a written report of the incident with an attached copy of such material, within thirty-six (36) hours after receiving the information concerning the incident.*

If an OCES off campus employee believes they have viewed adult pornography on an OCES employee’s computer they should contact their District Director who will make arrangements for DASNR IT to accompany OSU Security to confiscate the machine. An image of the machine’s hard disk drive is taken and an analysis of the image is performed by the Security forensics team. Note that per normal operating procedure the OSU Security Officers subsequently notifies OSU HR when the investigation begins. When finished, the Security team send their report on to OSU HR who completes the process.

*Added June, 2014*

**J. Parking Placards**

Each county and district office is assigned a parking placard. The placard is to be used only by county and district extension employees while they are on official business for OCES at the Stillwater OSU campus. This does not include attending OSU classes, entertainment venues, and other nonofficial activities. These placards are not to be loaned out to friends, students, relatives or others nor are they to be duplicated. Misuse of these placards can and will result in tickets from the OSU parking enforcement office and possible confiscation of the parking placard.
XI. 4-H YOUTH DEVELOPMENT PROGRAM
SPECIAL PROCEDURES

A. Personnel Ethics in Youth Livestock Activities

Unethical or illegal practices and show rule violations jeopardize the youth livestock program. OCES will not tolerate such practices or actions from its employees, volunteer leaders, or 4-H members. The following procedures deal with the 4-H Youth livestock program in Oklahoma.

1. Educators must make it known that livestock shows are only one aspect of a program that is designed to teach technical skills and life skills to 4-H members. Extension staff should focus on providing learning opportunities for youth that teach all aspects of livestock production rather than emphasizing only the show program.

2. Extension Educators should conduct annual programs on ethics awareness and animal care and well-being. Participants should be educated on the dangers involved with illegal drugs, unacceptable management practices, etc.

3. Extension personnel are expected to report unethical or illegal practices that occur, or that are reasonably suspected, to the District Extension Director and appropriate livestock show management.

4. Extension Educators/Specialists selling animals for show must not market their animals to exhibitors within their work unit or sphere of influence:
   a. Educators must not agree to judge a show if they have a family member participating or if they have sold animals to any member that will be a show participant.
   b. Educators should not sell animals in the geographic area where they may play a role in the selection of show judge(s).

5. Extension employees selling animals for show purposes must have on file a completed current and approved “Notice of Intent to Engage in a Professional Activity for Extra Compensation” form in the Associate Vice President’s office.

6. Volunteer 4-H Adult Leaders found guilty of rules violations or participation in unethical practices will have their leader certification revoked.

7. Extension employees who are found guilty of participating in unethical or illegal practices will be disciplined up to and including termination of employment. Examples of unethical practices are:
   a. Knowingly violating youth livestock show rules regarding the preparation or exhibition of projects.
   b. Selling project animals to youth with the agreement of going to shows to groom these animals for the exhibitors.
   c. Using any Oklahoma Cooperative Extension Service resources including equipment, personnel, or supplies to conduct or manage project animal sales, especially where the employee might stand to make a monetary gain.
   d. Purchasing project animals with the intent to resell those project animals for personal monetary gain.
   e. Using any OCES resources, including equipment, personnel, or supplies to conduct or manage livestock shows that do not have approved, printed, circulated, and enforced rules, including the Oklahoma Show Ring Code of Ethics.
B. Use of the 4-H Emblem

The 4-H Name and Emblem are protected under federal statute Title 18, U.S. Code 707. This provides the 4-H Name and Emblem with the level of protection afforded other Federal marks, such as the Seal of the President of the United States. Regulations on the use of the 4-H Name and Emblem state:

Whoever, with intent to defraud, wears or displays the sign or emblem of the 4-H clubs, consisting of a green four-leaf clover with stem, and the letter H in white or gold on each leaflet, or any insignia in colorable imitation thereof, for the purpose of inducing the belief that he is a member of, associated with, or an agent or representative for the 4-H clubs; or

Whoever, whether an individual, partnership, corporation, or association, other than the 4-H clubs and those duly authorized by them, the representatives of the United States Department of Agriculture, the land-grant colleges, and persons authorized by the Secretary of Agriculture, uses, within the United States, such emblem or any sign, insignia, or symbol in colorable imitation thereof, or the words "4-H Club" or "4-H Clubs" or any combination of these or other words or characters in colorable imitation thereof -- Shall be fined not more than $5,000 for individuals and $10,000 for groups, or imprisoned not more than six months, or both.

The use of the 4-H name and emblem in Oklahoma is controlled by the Director, Oklahoma Cooperative Extension Service. The name and emblem may not be used in advertising or promoting shows or sales that do not have approved, printed, circulated, and enforced rules, including the Oklahoma Show Ring Code of Ethics, or those events that are not endorsed by the spirit of these policies. The name and emblem may be used by local, county, district, and state fairs and shows where public dollars are used to help support the show and where unethical practices are forbidden in the show rules. 4-H members and volunteers can use the name and emblem when the purpose is to promote 4-H and there is an educational intent.

Questions regarding the name and emblem should be directed to the Assistant Director, OCES, 4-H Youth Development. Additional information is available at: http://4h.okstate.edu/

C. OSU Policy regarding Contact with Minors

Oklahoma State University expects all members of the university community to adhere to and act in accordance with General University Policy number 1-0135, Minors Participating in OSU-Related Activities and Programs. The policy is in regard to children under the age of 18 (Minors) who participate in activities and programs, taking place on university property and in facilities or under the authority and direction of the university at other locations, including branch campuses/extension facilities/fairgrounds/camp, etc. Failure to comply with the requirements set forth in this policy may lead to disciplinary action and or revocation of the opportunity to use university property and facilities.

In recognition of the absolute necessity of protecting Minors, OSU requires that all adults working with Minors participate in university-approved training annually regarding policies and issues relating to interactions with Minors including the practices and conduct requirements of this policy, on protecting Minors from abusive emotional and physical treatment, on required reporting of incidents of improper conduct, as well as record keeping
and training requirements for volunteers working direction with minors as part of an OCES affiliated program.

The training is housed at the eXtension Campus.

Go to http://campus.extension.org
Click on “4H & Youth”
Click on “<enter your course name here>” (Oklahoma 4-H: Working With Minors)
Click “Continue”
Create a new account and start the course!  

Added June, 2014