This guide is a convenient summary reference to information on policies and procedures often used by administrative support specialists and assistants in Extension offices.

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ACCOUNTING PROCEDURES

Certificate of County Expenditure Sheet

Download form off the intranet 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's/support staff amount of travel paid
  ▪ Attach copy of travel claim on yellow paper with documentation (i.e. all receipts, agendas, documentation)

• 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**

Bank Reconciliations

• Assemble in this order
  1. Copy of Bank Statement
  2. Two-page reconciliation report
  3. Category report (make sure there are no “uncategorized” amounts)
• CED must initial or sign reconciliation report
• **Due to the District Office 10 days after you receive your statement**
Deposit Regulations

- State Law, Statute 62 Okl.St.Ann § 7.1 requires all funds received to be deposited within 5 business days of their receipt or by the next business day when the cumulative un-deposited funds at any time reach $100. NOTE – Your office may be required to deposit twice per week (as a result of previous audit findings) instead of within the 5 business days. This is in addition to having to deposit by the next business day any time cumulative un-deposited funds reach $100.
- Effective February 17, 1984, the OSU Board of Regents approved Policy 3.0331, Section 1.03: “All personnel receiving cash, depositing cash over the counter, through the mail, and/or recording or accounting for cash transactions shall be required, without exception, to take annual leave each year….in a manner that at least five continuous working days be taken at one time.” Days off cannot be leave of choice, i.e. sick leave, holiday leave, leave without pay, administrative leave.
- Two people should be involved in the deposit process; one to prepare and another to make the deposit.

General Money Management

- All funds received by/at the office must be receipted and deposited to a category in the Agency Account.
- The County/District Director will establish one bank account, for which he/she is the only authorized signer, which will be used for all income and disbursements by the Oklahoma Cooperative Extension Service Center.
- Funds that are collected for an association/organization may be disbursed to an association/organization representative on a regular schedule or as funds are accumulated.
- All checks written must have original receipt documentation. (Even when reimbursing volunteers or employees.)
- Need Determination of Independent Contractor & 20 Factor Test when reimbursing for a service.
- Proposal and Receipt of Awards Questionnaire must be routed to District Director if donation/grant is over $500
- Do NOT purchase gift cards
- NO AMMUNITION – Must be on requisition through Extension Finance
- No sales tax (unless reimbursing someone)
- If paying someone over $600, send through Extension Finance so that a 1099 can be sent. This includes multiple payments that will add up to $600 or more a year.

Link to County Contract and Budget Sheets
http://intranet.okstate.edu/Fiscal_Affairs/county.htm

Link to Accounting Manual for Agency Bank Accounts & Quicken Samples
http://intranet.okstate.edu/Fiscal_Affairs/agencyaccts.htm

Link to Accounting Policies and Procedures for Extension Center Agency Funds
http://intranet.okstate.edu/Fiscal_Affairs/policy.htm
TO VIEW OR ADD RECORDS TO OCES CALENDAR OF EVENTS

Go To:
http://calendars.nces.okstate.edu/

When submitting an event, choose Login, you will then be prompted for a user name and password. User name is OCES; contact your district office for the password.

Sample web page shown below:
Introduction

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

Support Staff Responsibilities

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

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

Required Records

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

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

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

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

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

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

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

The following pages provide more specific information on non-discrimination clauses, attendance rolls and event summaries, public notification, etc.
Affirmative Action & Civil Rights Compliance

Each county office should have a book (light gray cover, spiral bound) entitled Oklahoma Cooperative Extension Service, Compliance with Civil Rights, Equal Opportunity, and Affirmative Action Laws, Rules, and Guidelines – A Working Document, April 1996. This is an excellent reference source. Each county office should have a file entitled Civil Rights that contains all documents listed on Appendix 1.

Non-discrimination Statements

The current non-discrimination clause is as follows (for use on letterhead):

Oklahoma State University, U.S. Department of Agriculture, State and Local governments cooperating. In compliance with Title VI and VII of the Civil Rights Act of 1964, Executive Order 11246 as amended, Title IX of the Education Amendments of 1972, the American with Disabilities Act of 1990, and other federal and state laws and regulations, does not discriminate on the basis of age, race, color, religion, sex, sexual orientation, genetic information, gender identity, national origin, disability, marital or veteran status, or any other legally protected status in any of its policies, practices or procedures.

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

The current non-endorsement clause is as follows:

Reference to commercial products or trade names is made with the understanding that no discrimination is intended and no endorsement by the Oklahoma Cooperative Extension Service is implied.

For program materials, announcements, news releases, etc. (non-employment related):

Oklahoma State University, in compliance with Title VI and VII of the Civil Rights Act of 1964, Executive Order 11246 as amended, and Title IX of the Education Amendments of 1972 (Higher Education Act), the Americans with Disabilities Act of 1990, and other federal and state laws and regulations, does not discriminate on the basis of race, color, national origin, genetic information, sex, age, sexual orientation, gender identity, religion, disability, or status as a veteran, in any of its policies, practices or procedures. This provision includes, but is not limited to admissions, employment, financial aid, and educational services. The Director of Equal Opportunity, 408 Whitehurst, OSU, Stillwater, OK 74078-1035; Phone 405-744-5371; email: eeo@okstate.edu has been designated to handle inquiries regarding non-discrimination policies: Any person (student, faculty, or staff) who believes that discriminatory practices have been engaged in based on gender may discuss his or her concerns and file informal or formal complaints of possible violations of Title IX with OSU’s Title IX Coordinator 405-744-9154.

For specific meetings (such as Co-Parenting, etc.), programs, brochures, use the following:

The Oklahoma Cooperative Extension Service is an equal opportunity/equal access/affirmative action institution. If you require a reasonable accommodation to participate or need materials in another format, please contact your County Extension Office (or other appropriate office) as soon as possible. (Use only if needed. This is not a required statement)

For employment related materials when running an ad in the newspaper:

"Oklahoma State University is an Affirmative Action/Equal Opportunity/E-verify employer committed to diversity and all qualified applicants will receive consideration for employment and will not be discriminated against based on age, race, color, religion, sex, sexual orientation, genetic information, gender identity, national origin, disability, protected veteran status, or other protected category. OSU is a VEVRAA Federal Contractor and desires priority referrals of protected veterans for its openings. OSU will not discharge or in any other manner discriminate against employees or applicants because they have inquired about, discussed, or disclosed their own pay or the pay of another employee or applicant. However, employees who have access to the compensation information of other employees or applicants as a part of their essential job functions cannot disclose the pay of other employees or applicants to individuals who do not otherwise have access to compensation information, unless the disclosure is (a) in response to a formal complaint or charge, (b) in
If cost is an issue, use this employment statement: OSU is an AA/EEO/E-Verify Employer.

**Cost Statement**

All newsletters must include the following cost statement if printed by Agricultural Communications Services or a professional outside source:

Oklahoma State University, in compliance with Title VI and VII of the Civil Rights Act of 1964, Executive Order 11246 as amended, and Title IX of the Education Amendments of 1972 (Higher Education Act), the Americans with Disabilities Act of 1990, and other federal and state laws and regulations, does not discriminate on the basis of age, race, color, national origin, genetic information, sex, sexual orientation, gender identity, religion, disability, or status as a veteran, in any of its policies, practices or procedures. This provision includes, but is not limited to admissions, employment, financial aid, and educational services. The Director of Equal Opportunity, 408 Whitehurst, OSU, Stillwater, OK 74078-1035; Phone 405-744-5371; email: eeo@okstate.edu has been designated to handle inquiries regarding non-discrimination policies: Any person (student, faculty, or staff) who believes that discriminatory practices have been engaged in based on gender may discuss his or her concerns and file informal or formal complaints of possible violations of Title IX with OSU’s Title IX Coordinator 405-744-9154.

Issued in furtherance of Cooperative Extension work, acts of May 8 and June 30, 1914, in cooperation with the U.S. Department of Agriculture, Director of Cooperative Extension Service, Oklahoma State University, Stillwater, Oklahoma. This publication is printed and issued by Oklahoma State University as authorized by the Vice President, Dean and Director of the Division of Agricultural Sciences and Natural Resources and has been prepared and distributed at a cost of XXX cents per copy.

**OCES Civil Rights Compliance Card:**

COOPERATIVE EXTENSION WORK IN AGRICULTURE, FAMILY CONSUMER SCIENCE, RURAL DEVELOPMENT AND 4-H YOUTH DEVELOPMENT

Oklahoma State University
U.S. Department of Agriculture & Land-Grant College cooperating

This is to certify that:

______________________________________________
(Name of Organization, Club or Group)

Does not discriminate in its membership, programs or activities on grounds of age, race, color, religion, sex, sexual orientation, genetic information, gender identity, national origin, disability, marital or veteran status, or any other legally protected status in any of its policies, practices or procedures.

__________________________________  ______________________  ____________
Signature                        Title                        Date

*Use OCES Civil Rights Compliance Card with any organization that is not government related, that can possibly exclude someone from their membership. Card is used when speaking on a regular basis, such as with Civic groups. It is not necessary if it is a one-time meeting. Card is good for two years.*
Civil Rights/Affirmative Action
County Implementation Plan Files

Affirmative Action/Civil Rights files – Fiscal year runs January 1 through December 31.

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

**Attendance Rolls** – Sign-in sheets from all meetings
Each sign-in sheet should have the following information in the heading
- OSU logo and county office address
- Event name
- Location
- Date & time
- Educator responsible for event

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

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

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

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

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

Published articles should be clipped from papers, magazines, etc., and attached to hardcopy in file as proof of publication – also proof that it was sent with appropriate statement.
Public Notification (Correspondence) – Includes fliers, agendas, newsletters, letters to three or more individuals.

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

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

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

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

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

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

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

Advisory Council and/or PAC -
This file will contain all documents (invitation, agenda, all reports) relating to Program Advisory Committees and District Advisory Committees.
Appendix 1.

COUNTY CIVIL RIGHTS FILE
Content Summary

5. Supplemental Instructions for Administration of Title VI of the Civil Rights Act of 1964, in the Cooperative Extension Service (July 2, 1965).
6. Amendment of Section B, II, B, 2 of Supplemental Instructions for Administration of Title VI of the Civil Rights Act of 1964, dated July 2, 1965 (October 6, 1965).
19. “And Justice for All” poster - Secretary of Agriculture.
## Event Summary Record

(Excel file available from your district office)

**Program Area:**

### Racial-Ethnic Composition By Sex

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*This information is requested solely for the purpose of determining compliance with federal civil rights law, and your response will not affect your eligibility to participate in Extension programs. By providing the information, you will assist us in assuring that this program is administered in a nondiscriminatory manner.

The Oklahoma Cooperative Extension Service offers its programs to all eligible persons regardless of race, color, national origin, religion, sex, sexual orientation, genetic information, gender identity, national origin, disability, marital or veteran status, or any other legally protected status. OCES provides equal opportunities in programs and employment.
HIRING PROCESS (CLASSIFIED)

1. CED must call District Office to request permission to begin hiring process.

2. Advertise the position and receive applications using Cornerstone. Positions must be open for 5 calendar days. (Sample ads provided on next page.) Your district office will work with Ag HR to post the job in Cornerstone.

3. Cornerstone will automatically send rejection letters. Once preferred applicants have been selected for an interview, please provide a list of all applicants designating interview or no interview.

4. Once your candidate of choice is selected, please provide your choice to the district office. The District Director will contact CED when salary is secured from Sue.

5. Send offer letter to your candidate. (Provided in guide)

6. Once offer has been accepted, let the district office know, and rejection letters will be sent to remaining applicants.

7. Contact District Office 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 be completed.

4. New-hire must provide an unexpired driver’s license at the time of e-verify.
Examples of Open-Ended Interview Questions for County Support Positions

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

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

What interests you most about this position?

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

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

What were your most important accomplishments in that job?

What do you believe you can contribute to this position?

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

What would your last supervisor tell someone about your work?

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

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

What does “service” mean to you?

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

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

How do you like to be supervised?

How do you react when someone critiques your work?

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

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

Describe your experiences in handling multiple priorities.

What haven’t I asked you that you’d like to know more about (employment related)?
Examples

Reference Check Questions for Support Positions

RE: ____________________________________________

Person Contacted: _____________________________ Phone: _____________

Relationship: _________________________________

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

Why did he/she leave the job?

What are his/her strong points?

What are his/her weak points?

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

Please comment briefly on the applicant’s:

   Attendance
   Attitude, in general, and relating to “customer service”
   Ability to manage multiple priorities and timely follow-through on commitments
   Quality of work
   Degree of supervision needed
   Ability to get along with/supervise others

Would you re-employ the applicant? _____ yes   ___ no

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

Completed by: _________________________________ Date: ________________
Suggested Orientation
Topics for New County Support Positions

Administrative Topics:
Office hours
Bi-weekly time cards and due dates
Payday – Paycheck distribution
Fringe benefits
Probationary/Orientation period
Supervisor’s name and other key individuals in county, area, district, and state offices
Cooperative Extension Background
How to apply for sick or annual leave
Name tag
Keys
Position description
Performance appraisal and development – copies of form and policy
Attendance and Leave – copy of OSU’s policy
Equipment and supplies
Telephone – what to say when answering; personal calls, etc.
Computer skills – access training needs

Social Topics:
Introduction to other staff & overview of their responsibilities
Specific responsibilities & obligations to individual extension personnel
Break/lunch periods
Location of restrooms
Appropriate work attire
JOB DESCRIPTION

Position
Extension Administrative Support Specialist ~ County/Area

Organization/Employer
Oklahoma Cooperative Extension Service/Oklahoma State University

Job Summary & Purpose
The Extension Administrative Support Specialist must perform clerical work for the professional staff within assigned unit and carry out other special assignments related to the position.

Extension work is performed under general supervision with considerable latitude for discretion in office management matters. Coordination of the office work may be exercised over the other clerical and support staff.

Job Responsibilities
• Responsible for maintaining accurate and updated agency accounts, including the filing system for agency receipts and disbursements, county funds, and restricted accounts; make timely and precise deposits into proper accounts.
• Perform and/or delegate database management and data entry activities as required for consistent office function.
• Possess knowledge and keyboarding skills of Microsoft Office and other computer software and webpage design.
• Provide support to other staff members in answering and directing incoming telephone calls.
• Assemble materials necessary for preparation of monthly activity reports, plans of work, annual reports, budgets, and expense accounts; complete and submit work in sufficient time to meet deadline dates; with assistance of other staff members, make sure that reports are submitted properly and accurately.
• Responsible for initiating personnel-related forms, wage personnel actions, funding letters, recruitment reports, etc. at the county level.
• Receive and review all incoming mail unless marked personal/confidential; assemble and separate mail according to importance; attach previous correspondence and other data which will be helpful in replying; handle routine correspondence for which there are standard replies; bring urgent matters to the attention of the appropriate staff member and if that appropriate staff member is absent, route request to the person best qualified to handle the matter.
• Compose correspondence when necessary; use initiative as to priority for correspondence or reports to be done, giving particular attention to correspondence that should be handled immediately.
• Maintain a uniform filing system to comply with civil rights; keep the files clear of obsolete and surplus material.
• Display courteous and effective communication with all staff in the Extension Office and greet office/telephone callers in a friendly manner.
• Understand various regulations, policies, and office procedures to make for a smooth functioning office; maintain efficient office management.
• Keep updated mailing lists and an inventory of fact sheets, bulletins, leaflets, office supplies, equipment, and other material needed for operation of the Extension Office.

• Assume responsibility and carry out special assignments as they arise or as delegated; accept and assume responsibility to coordinate the work of other support staff when assigned this role.

• Attend office meetings to take notes on plans for educational activities, itinerary, and travel.

• Make arrangements for conferences including facility, time, and availability; responsible for informing conference participants of the topics to be discussed.

• Assist in preparing OSU personnel forms and interpreting personnel policies and benefits to employees.

• Keep leave records for all professional and classified staff members in the administrative unit.

• Constantly strive to improve work-related skills; improvement should be shown through attendance of workshops, conferences, and self-initiated study; remain alert to new office equipment and techniques that could be relevant for more efficient office operation.

• Compose correspondence when necessary.

**Immediate Administrative Supervisor**

- County/District Extension Director

**Non-Supervisory Relationships**

- Maintain good working relationship with professional staff, other co-workers, and the public.

**Minimum Job Requirements**

- High school diploma or GED.
- Four years of previous clerical/customer service experience.
- Successful completion of clerical or business courses beyond the high school level may be substituted for the required experience at a rate of 30 semester hours per year.

05/10
JOB DESCRIPTION

Position
Extension Administrative Support Assistant ~ County/Area

Organization/Employer
Oklahoma Cooperative Extension Service/Oklahoma State University

Job Summary & Purpose
The Extension Administrative Support Assistant must perform clerical work for the professional staff within assigned county/area and carry out other special assignments related to the position. Individual must gain a thorough knowledge and understanding of the operations and procedures of the Oklahoma Cooperative Extension Service. Extension work is performed under general supervision and only projects involving technical or confidential matters are given close attention by the educators. Supervision is not exercised over the other employees. Major responsibilities may vary depending upon the number of clerical staff in the assigned county/area. The end result of the decisions made will be subject to the County Extension Director’s review.

Job Responsibilities
• Display courteous and effective communication with all staff in the Extension Office and greet office/telephone callers in a friendly manner.
• Understand office procedures, policies and regulations relevant to proper office functioning and maintain efficient office management skills.
• Possess knowledge and keyboarding skills of Microsoft Office and other computer software and webpage design.
• Develop materials (charts, visuals, handouts, etc.) for educator’s use in meetings and educational programs.
• Prepare county/state travel claims properly and accurately.
• Receive and review all incoming mail unless marked personal/confidential; handle routing correspondence; bring urgent matters to the attention of appropriate educator and if that educator is not reachable, route request to the person best qualified to handle the matter and document efforts.
• Assemble materials necessary for reports and plans of work; complete and submit work in sufficient time to meet deadline dates; with assistance of other educators, make sure reports are submitted accurately and on time.
• Maintain a uniform filing system to comply with civil rights; keep the files clear of obsolete and surplus material.
• Understand various regulations, policies, and office procedures to make for a smooth functioning office; maintain efficient office management.
• Keep updated mailing lists and an inventory of fact sheets, bulletins, leaflets, office supplies, equipment, and other material needed for operation of the Extension Office.
• Strive to improve work-related skills; improvement should be shown through attendance of workshops, conferences, and self-initiated study; remain alert to new office equipment and techniques that could be relevant for more efficient office operation.
• Assume responsibility and carry out special assignments as they arise or as delegated.
• Compose correspondence when necessary.

**Immediate Administrative Supervisor**

• County/District Extension Director

**Non-Supervisory Relationships**

• Maintain good working relationship with professional staff, other co-workers, and the public.

**Minimum Job Requirements**

• High school diploma or GED.
• Two year of previous clerical/customer service experience.
• Successful completion of clerical or business courses beyond the high school level may be substituted for the required experience at a rate of 30 semester hours per year.

05/10
ADDENDUM TO SUPPORT STAFF DUTIES

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

August 13, 2001

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

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

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

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

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

C: District Extension Directors
INVENTORY PROCEDURES

Complete instructions and forms available at web site:
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.
LEAVE POLICY OVERVIEW

Eligibility: Staff with .50 FTE and above

Classified Staff

<table>
<thead>
<tr>
<th>Leave Accrual Rate Table</th>
<th>1-5yrs (1-60 months)</th>
<th>6-10 yrs (61-120 months)</th>
<th>11yrs &amp; over (121 months &amp; over)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Leave</td>
<td>9.33 hrs/month</td>
<td>13.33 hrs/month</td>
<td>14.67 hrs/month</td>
</tr>
<tr>
<td></td>
<td>4.31 hrs/bi-weekly</td>
<td>6.15 hrs/bi-weekly</td>
<td>6.77 hrs/bi-weekly</td>
</tr>
<tr>
<td>Sick Leave</td>
<td>14.67 hrs/month</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

Professional Staff - (Based on 1.0 FTE)

- Maximum Annual Leave accumulation: 352 hours
- Maximum Sick Leave accumulation: 1600 hours
- Accrual rate for both annual and sick leave: 14.67 hrs/month
- Accumulated annual/sick leave immediately available
- Maximum amount of annual leave payable at retirement or resignation: 176.00 hours

Leave Policies 3-0705 & 3-0716 can be read in full on the following web site:
http://www.okstate.edu/osu_per/policy_proced.htm

Leave Balances are available at: http://my.okstate.edu
- Click on Self Service
- Click on the Employee Tab
- Click on Leave Balances

Five Mandatory Annual Leave Days: All affected staff must print their "Approved" Time Sheet or Leave Report each year that reflects the five mandatory leave days taken and put in file for Financial Audit/Reviews.
DIRECTORIES & GROUP EMAIL

Directories and Group Email

- **OSU Online Directory** - [https://app.it.okstate.edu/directory/](https://app.it.okstate.edu/directory/)

- **DASNR Personnel Directory** - [https://apps.dasnr.okstate.edu/directory/print_directory/directory.html](https://apps.dasnr.okstate.edu/directory/print_directory/directory.html)
  The date of the last update will appear within the document.

- **OCES County, Area, and District Office Directory** - [http://countyext2.okstate.edu/](http://countyext2.okstate.edu/)

- **DASNR Email Directory** - [http://intranet.okstate.edu/acl_users/credentials_cookie_auth/require_login?came_from=http%3A//intranet.okstate.edu/email2grp/dasnr-email-group](http://intranet.okstate.edu/acl_users/credentials_cookie_auth/require_login?came_from=http%3A//intranet.okstate.edu/email2grp/dasnr-email-group)
  The DASNR Email Directory is updated biweekly; after employee paperwork has been processed by OSU Central Administration.
  Questions? Contact Amy Phipps by email: amy.phipps@okstate.edu

- **Send e-mail to specific groups within DASNR** - [http://intranet.okstate.edu/acl_users/credentials_cookie_auth/require_login?came_from=http%3A//intranet.okstate.edu/email2grp/dasnr-group-email-addresses](http://intranet.okstate.edu/acl_users/credentials_cookie_auth/require_login?came_from=http%3A//intranet.okstate.edu/email2grp/dasnr-group-email-addresses)
  DASNR staff without an OSU Email Address will not receive messages sent to a group they belong to. Use the DASNR Email Directory’ link above to see who does/doesn’t have an OSU Email Address.

  Use the dropdown arrow on the ‘DASNR Email Directory’ page to view a list of DASNR staff included in a specific email group.

  If you receive any **Delivery Failure** reports, in response to sending a group email message, forward them to Lee Freeman, lee.freeman@okstate.edu.
# RECORDS RETENTION TIMETABLE

**Accounting & Fiscal**

<table>
<thead>
<tr>
<th>Item</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audit Reports</td>
<td>10 years</td>
</tr>
<tr>
<td>Bank Deposits</td>
<td>Keep 3 years after audit</td>
</tr>
<tr>
<td>Bank Statements</td>
<td>Keep 3 years after audit</td>
</tr>
<tr>
<td>Budgets</td>
<td>Keep at least 3 years (more if so desired)</td>
</tr>
<tr>
<td>Check Registers</td>
<td>Do not have to keep</td>
</tr>
<tr>
<td>Expenditure Reports</td>
<td>Keep 3 years after audit</td>
</tr>
<tr>
<td>General Ledger Records</td>
<td>Keep 3 years after audit</td>
</tr>
<tr>
<td>Postal Records</td>
<td>Keep 3 years after audit</td>
</tr>
<tr>
<td>Travel Claims - County</td>
<td>3 years</td>
</tr>
<tr>
<td>- Airs</td>
<td>7 years</td>
</tr>
</tbody>
</table>

**Administrative Records**

<table>
<thead>
<tr>
<th>Item</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inventory Reports</td>
<td>Until obsolete**</td>
</tr>
</tbody>
</table>

**Personnel**

Old Personnel Files (for those no longer employed) - 5 years

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

**Review/Audits**

Items checked during Reviews/Audits (include all items since the previous review/audit):  

- Agency Bank Account Disbursement File  
- Agency Bank Reconciliations (including Quicken Summary Report)  
- Agency Fund Bank Statements  
- Agency Fund Checkbook and Checkbook Stubs  
- Agency Fund Deposit Registers  
- Agency Fund Receipt Books  
- Office Change Fund (if applicable)  
- County Fund Records  
- Leave Records (print approved leave report/time sheet each year showing mandatory five (5) day leave)  
- AIRS Trip Records  
- Inventory Records (any updates since last reconciled with OCES records)  
- Shooting Sports Semi-Annual Inventory Observation Listings  
- Soils Lab Logs  
- Fair Board Records of Extension agents paid to judge (date judged and amount paid)  
- Mail records and Logs
Risk Management

PLEASE KEEP A COPY OF ATTACHMENTS 1, 2 & 3 IN ANY VEHICLE YOU DRIVE FOR OSU BUSINESS

If you are involved in an accident while on OSU business:

- Call 911
- Assist the injured
- When the police arrive, give him/her your own insurance verification card and the “In Case of Accident Card”. Make the police aware you are on official business and you are insured by the State of Oklahoma.
- Fill out the Tri-Fold Accident Form. *(Fax form to (405) 522-4442 & (405) 744-7888 as soon as possible.)*
- Notify your supervisor. The supervisor will then fill out the “Scope of Employment” form and fax it in.
- Notify the SW District OSU Extension Office (580) 255-3674.

The “Certificate of Self Insurance” from the Risk Management Division is a **liability policy only**.

OSU Risk Management

618 N. Monroe

Stillwater, OK 74078-1022

(405) 744-8504 ~ Fax: (405) 744-7888

Oklahoma Risk Management Division

P.O. Box 53364

Oklahoma City, OK 73152

(405) 521-4999 ~ Fax: (405) 522-4442

If you are involved in an accident (while you are on official business) that is **NOT your fault**:  
- The other parties’ insurance will be responsible for repairing your vehicle.
- If medical treatment is/was needed, the other parties’ insurance will be responsible for all medical bills.

If you are involved in an accident (while you are on official business) that is **NOT your fault and the other party does NOT have insurance**:  
- Your own personal insurance is responsible for repairing your vehicle
- If medical treatment is/was needed, the district office will report to worker’s comp and you will be assigned a case number along with an address to send all medical bills.
Personal Vehicle Usage on University Business

Although it may often seem more convenient or less expensive for employees to use a personally owned vehicle while conducting official Oklahoma State University (OSU) business, there are several topics that should be considered and reviewed by employees prior to using a personal vehicle for OSU business.

Reimbursement for Personal Vehicle Usage

Mileage is reimbursed at the State of Oklahoma reimbursement rate only for those miles driven on University business, and may be limited by other factors. Prior to driving a personal vehicle, travelers may want to contact University Accounting to determine if the expense would be reimbursable. Employees using their own vehicle for University business would need to submit a travel claim for reimbursement.

It is important to realize there are expenses the University will not reimburse for personal vehicle usage. The University cannot:

- Pay for any physical damage to a personal vehicle, or for any deductible, or for any increase in premium rate due to accidents while on official University business;
- Reimburse an employee for any liability claim paid by the employee's automobile insurance policy;
- Reimburse an employee for increased premiums due to the vehicle being used for business purposes, or be responsible for cancellation of insurance coverage due to the vehicle being used for business purposes;
- Reimburse the employee for the cost of any repairs to a personal vehicle, rental car costs during the repairs, traffic or parking tickets or fines incurred, or theft of the personal vehicle or contents.

REMEMBER—many standard personal auto insurance policies exclude coverage when using your personal vehicle for business use.

Insurance Coverage and Requirements

It is the responsibility of the owner of the vehicle being used for business purposes to carry adequate insurance coverage (meet state mandatory insurance requirements at a minimum) for their protection and the protection of any passengers. The University insurance coverage would be considered the primary insurance with respect to liability only.

Accident Reporting Information

In the event you are involved in an accident in any vehicle, whether personal or University owned while working within the course and scope of your employment duties, report the accident immediately to both the OSU Risk Management office and the State Risk Management office. This is a critical step to ensuring protection under the Oklahoma Tmi Claims Act, as well as putting the State of Oklahoma Risk Management Office on notice of a potential claim if coverage is needed for protection. Employees will be provided, upon request, with information necessary to contact both parties. It is suggested that all employees using a personal vehicle while conducting official state business carry a copy of the information cards in the vehicle at all times.

An employee, while using a personal vehicle, is responsible for following all state of Oklahoma law and University policies regarding motor vehicle usage, including a prohibition against "texting," speed limitations, and driver license restrictions, or the state may deny coverage, forcing personal liability to the driver.
State of Oklahoma
Department of Central Services
Risk Management Division

CERTIFICATE OF SELF-INSURANCE

Name of Insured: State of Oklahoma

Name & Address of Certificate Holder: Certificate# 010

OSU- OKLA STATE UNIVERSITY
618 N MONROE
STILLWATER, OK  74078-1022

The State of Oklahoma is self-insured for the following coverage to the limits indicated pursuant to the “Governmental Tort Claims Act” (Title 51 § 151, et. seq.).

<table>
<thead>
<tr>
<th>TYPES OF COVERAGE</th>
<th>LIABILITY LIMITS</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Tort Liability</td>
<td>$ 175,000 per person, any loss other than property</td>
</tr>
<tr>
<td>Vehicle Liability</td>
<td>$ 25,000 per person, property damage</td>
</tr>
<tr>
<td>Water Craft Liability</td>
<td>$1,000,000 per occurrence, all claimants and coverage</td>
</tr>
</tbody>
</table>

Should any of the above-described coverages be withdrawn, the State will attempt to mail 30 days written notice to the Certificate Holder. If you have any questions or need to report an incident, call Risk Management at (405)521-4999.

COVERAGE PERIOD: Perpetual unless coverage is changed by statute

In the event of a change in statute, State Risk Management will notify each certificate holder.

RISK MANAGEMENT DIVISION
P.O. BOX 53364
OKLAHOMA CITY, OK 73152-3364
STEP #8
Get Witnesses (if available)
Attach additional page, if necessary

Name
Phone no.

Address

STEP #9
Record facts about other property damage
(Non-Vehicular)

Owner’s Name
Phone No.

Address

Property Damaged

Nature of Damage (be brief)

STATE OF OKLAHOMA
Risk Management Division
P.O. Box 53364
Oklahoma City, OK 73152-3364
405-521-4999

TRI-FOLD
ACCIDENT INFORMATION
FORM

THIS FORM IS NOT TO BE GIVEN TO THE OTHER DRIVER

STATE WIDE TOLL FREE
(Agency use only)

1-888-521-RISK (7475)

RM CARD IS TO BE GIVEN TO THE OTHER DRIVER

FORMS CAN BE FOUND ON THE RISK MANAGEMENT WEBSITE
www.ok.gov/DCS/Risk_Management/index.html

Signature of Employee
Date

Keep Tri-fold and RM card in the glove compartment of all state and personal vehicles.

DCS/RISK MGMT - FORM 009 (10/2011)
**STEP #1**
Assist the injured

- Do not move injured individuals unless absolutely necessary.
- Do not tell the injured party the state will accept responsibility for medical expenses.

**Do Not Comment**

- Do not admit any fault.
- Only give information required by authorities.
- Do not sign any statement except from an authorized representative of the Risk Management Division or your agency’s authorized legal counsel.

**STEP #2**
Call the police or 911

Give exact location and advise if medical help is needed. Write down the name(s) and badge number(s) of police officer(s) who assist you.

**Name:**__________________________

**Badge #:**__________________________

**Traffic Citation issued to:**

D State Employee  D OtherDriver

**STEP #3**
Call your Supervisor and/or Risk Coordinator

Contact your supervisor immediately. Complete a Standard Liability Incident report and a Scope of Employment form and send to your agency Risk Coordinator upon return your office.

Risk Coordinators will contact State Risk Management immediately.

**STEP #4**
Record the facts of the incident

**DATE OF INCIDENT:**__________________________

**TIME:**__________________________ A.M. or P.M.

**LOCATION OF INCIDENT:**__________________________

Describe the incident:

__________________________________________

__________________________________________

**STEP #5**
Facts about your vehicle

<table>
<thead>
<tr>
<th>Agency</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Driver’s Name**

**Department Phone #**

**Make/Year**

**Tag No.**

**What part of vehicle is damaged?**

**STEP #6**
Obtain facts about other vehicle

<table>
<thead>
<tr>
<th>Name</th>
<th>Phone No.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Address</th>
<th>Make/Year</th>
<th>Tag No.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Driver’s License No.</th>
<th>Insurance Co.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Policy Number</th>
<th>What part of vehicle is damaged?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**STEP #7**
Obtain facts about injured person(s)

Attach additional page if necessary

<table>
<thead>
<tr>
<th>Name</th>
<th>Age</th>
<th>Injured Party:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td>DIn State Vehicle  DOtherDriver</td>
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<td>DIn Other Vehicle  DIn Other Vehicle</td>
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(CONTINUE TO STEP #8)
HOW TO USE THE CARDS

A card should be placed in every vehicle that is driven on state business (state or privately owned). Recommendation: Keep this *In Case of Accident Card* with the *Tri-Fold Accident Form* in the glove box.

If involved in an accident:
- Call 9-1-1 or local police
- Assist the injured
- Fill out the *Tri-Fold Accident Form*
- Fill in your agency name and your name on the back of the card
- Give the card to the other driver
- Only give the *Tri-Fold Accident Form* to your supervisor
- Do not admit fault
- Notify your supervisor

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Date: 3 October 2011

Verification of Liability Insurance:

This is to confirm that all Agencies, Colleges, and Universities of the State of Oklahoma are provided with liability coverage through the State of Oklahoma Risk Management Division Program which administers a self-insurance pool for all State entities under authority of 74 O.S. § 85.58 A.

The State of Oklahoma enjoys sovereign immunity and waives its immunity only to the extent of the Governmental Tort Claims Act (GTCA) (51 O.S. § 151, et seq.) or any other statute if such statute legally raises the limits of liability above those stated in the GTCA.

Coverage under the Risk Management Program is perpetual until otherwise notified.

You should contact the Risk Management Division of the Department of Central Services if you have any questions.

[Signature]

Gene B. Lidyard
Administrator
Risk Management Division
Department of Central Services
TRAVEL HINTS

Mileage & Lodging Reimbursement Rates – Refer to your District Office.

Registrations – Educators must determine how many meals were included in registrations. If meals were included, you must deduct ¼ day of per diem for each meal even if the meals were provided to you at no cost. Use the per diem calculator to determine the amount of per diem to be claimed.

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

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


Sharing Rooms – When sharing a room with another state employee, indicate with whom. If paid by county funds, name and county is sufficient.

Travel Vouchers – Are to be signed by claimant and county extension director. If you have county travel, follow your county rules. Make sure hotel receipt is in both names or you have credit card receipt/bill reflecting the charge.

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

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

Tips on Filling Out Claims
1. Designate AM or PM on travel status hour.
2. Use Google Maps, Mapquest, Bing, etc., to figure miles traveled. Must show addresses for each point of travel, plus turn-by-turn directions in map or in driving directions.
3. Nature of Official Business must be provided for each destination.
4. You cannot anticipate trips in advance.
5. Show point of origination, each point visited, and point travel status ended. (ex. Duncan-OKC-Duncan)

Receipts
1. OSU requires that receipts must be kept for lodging, registration, plus expenses over $25.
2. Check with individual county for other required receipts.

Official Regulations and Forms: [http://intranet.okstate.edu/Fiscal_Affairs/travel.htm](http://intranet.okstate.edu/Fiscal_Affairs/travel.htm)

Out of State Travel Request: [https://airs.okstate.edu/DW/AIRS/Login.aspx](https://airs.okstate.edu/DW/AIRS/Login.aspx)

Use [www.concursolutions.com](http://www.concursolutions.com) to acquire quotes. Must use the cheapest mode of transportation.

Rate changes for Per Diem and Lodging are updated October 1st of each year. Mileage rate changes are updated January 1st of each year.
COUNTY TRAVEL CLAIM CHECKLIST
ATTACH TO COUNTY TRAVEL

Name ____________________ County _____________________ Date _______________

☐ Claimant’s Job Title, Name & CWID.
☐ Nature of Official Business, Car Tag & Date
☐ Travel Status Points and Month and Days of each trip
☐ Correct Mileage and attached “Map or Directions” (map & or directions with address to address and reason for travel for each destination.) (Only round total mileage, not individual trips)

☐ REGISTRATION
  ☐ Attached Registration Receipts
  ☐ Attached Agenda for each Registration

☐ OVERNIGHT STAY
  ☐ Nature of Official Business for Out of State Trip
  ☐ Attached Lodging Receipt
  ☐ Attached Documentation for Lodging for Overnight Stay if Designated Conference Site
  ☐ Attached Agenda for each Overnight Stay
  ☐ Allowable days/hours for Overnight Stay
  ☐ Correct Per Diem Rate www.gsa.gov/perdiem.htm if Overnight Stay
    ☐ Minus provided meals
  ☐ Correct Lodging Rate www.gsa.gov/perdiem.htm if Overnight Stay
  ☐ Correct transportation Costs on Out of State Trips
  ☐ Attached Letter from DD if Travel is Less than 60 Miles

☐ Meeting Times Listed
☐ Correct Mileage Rate (mileage rate will change periodically)
☐ Correct Itemized Miscellaneous Costs
☐ Comments and Justifications listed – (claiming less, meals provided, riding with others, stayed with family)

☐ Correct TOTAL AMOUNT
☐ Correct Previous Claims Amount for Over and Under Payments
☐ Claimant Signature
☐ County Extension Director Approval and Signature

Reviewer ____________________

8/2017
MISCELLANEOUS WEB LINKS

Agriculture Communications Services
http://www.dasnr.okstate.edu/acs
- Photo Archives
- OCES Calendar of Events
- Oklahoma 4-H templates
- FCS templates

DASNR Intranet Site
http://intranet.okstate.edu/

Human Resources (Personnel) Web Site
http://www.okstate.edu/osu_per/

OSU Online Directory
https://app.it.okstate.edu/directory/

DASNR Information Technology
http://support.dasnr.okstate.edu/
- Contact Information
- Technical Resources
- Cooperative Conversations
- DASNR IT Articles
- Helpful Links

Self-Service Banner
http://my.okstate.edu

Okey Account Services
https://app.it.okstate.edu/okey

Nametag
Order through Gayle Hiner in Agricultural Communications
http://www.toolbox.okstate.edu/name-tags

Official University Printers
Ordering letterhead, envelopes, business cards and general purpose printing
https://universitymarketing.okstate.edu/content/university-printers

OSU Marketing Toolbox
Ordering printed, promotional and Extension signage
http://www.toolbox.okstate.edu

Approved vendors for OSU Promotional Items:
https://universitymarketing.okstate.edu/content/promotional-products
WORKERS’ COMPENSATION

Before reporting any claim, an *Employee Injury Report Form* must be completed. This form must be completed by the employee and the supervisor for every workers’ compensation injury or illness, regardless of whether medical attention is required. If medical attention is necessary, the form is taken to the medical provider, who will complete his/her portion of the form. At the close of the visit, the medical provider will return the form to the employee, who will return it to the supervisor. A copy is to be faxed immediately to Agriculture Human Resources at (405) 744-8863 or emailed to amy.phipps@okstate.edu as well as to the district office. Ag HR will contact the district office, or the supervisor, with further instructions if necessary. **Forms must be turned in within 5 days.**

For a complete listing of procedures, and for a copy of the *Employee Injury Report Form*, **go to the following website:**

https://hr.okstate.edu/benefits/workcomp