



MOUNTAIN BROOK SCHOOLS

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EMPLOYEE HANDBOOK

**PERSONNEL AND PAYROLL
POLICIES AND PROCEDURES**

July, 2012

**32 Vine Street
Mountain Brook, Alabama 35213
205-871-4608
www.mtnbrook.k12.al.us**

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INTRODUCTION

The Mountain Brook Schools' Employee Procedure Manual for Personnel and Payroll Policies addresses procedures that are referenced in the policy manual. These procedures are subject to change based on policy revisions, employee law updates, and recommendations from the Superintendent. The purpose of this manual is to provide clarification on appropriate procedures that address a variety of Personnel or Payroll/Benefit issues. All forms associated with Personnel or Payroll/Benefits information can be found online at: www.mtnbrook.k12.al.us or with your local bookkeeper.

Personnel related questions must be addressed to the Personnel Department. Payroll questions must be addressed to the Finance Department. To contact either department, call 871-4608.

Statement of Nondiscrimination

The Mountain Brook School system does not discriminate on the basis of race, color, religion, national origin, sex, disability or age in any of its programs and activities and provides equal access to the Boy Scouts and other designated youth groups. The following persons have been designated to handle inquiries regarding nondiscrimination policies:

Dr. Dale Wisely—Director of Student Services (Title VI)
(wiselyd@mtnbrook.k12.al.us)

Mrs. Sylvia Harper—Personnel Director (Title IX)
(harpers@mtnbrook.k12.al.us)

Dr. Missy Brooks—Director of Instruction (Title II)
(wildman-brooksm@mtnbrook.k12.al.us)

Mrs. Shannon Mundy—Special Education Director (Section 504)
(mundyl@mtnbrook.k12.al.us)

Contact Information:
32 Vine Street
Mountain Brook, AL 35213
205-871-4608

PERSONNEL INFORMATION & PROCEDURES

EQUAL OPPORTUNITY EMPLOYER

The Mountain Brook Board of Education is an equal opportunity employer. Personnel and payroll decisions will be made without regard to factors or considerations prohibited by federal or state law (as such laws may from time to time be amended), including but not limited to race, gender, age, disability, national origin, citizenship, genetic makeup and religious preference. Subject to the limitations set forth in Policy G-12, the general complaint policy may be used to present any complaint alleging unlawful discrimination or harassment. Inquiries regarding compliance and complaint procedures can be directed to:

Sylvia Harper, Director of Personnel
Mountain Brook Schools
32 Vine Street
Mountain Brook, Alabama 35213
205-414-3833 OR 205-871-4608

EMPLOYMENT REQUIREMENTS

All employees must submit an application, resume, three letters of reference and a copy of their diploma unless it is a certified position. An official transcript and a teaching certificate must also be submitted, if applying for a certified position. Upon recommendation to hire, all employees of the Mountain Brook Board of Education are subject to a background check through the State Department of Education and are required to be e-verified through the Department of Homeland Security.

PROFESSIONAL CERTIFICATION AND PROCEDURES

In addition to requirements established by the State Board of Education and the pertinent job description, professional employees must hold a degree from an accredited college or university and hold a current, valid and properly endorsed Alabama Teacher's Certificate, which will be maintained in their personnel file.

A teacher who has completed the certification process, but has not received the certificate, may be employed pending verification of the initiation of the certification process from the State Department of Education. The Personnel Department will work closely with each teacher to expedite the process to obtain the certificate as soon as possible.

If a teacher earns a higher degree from a regionally accredited institution recognized by the State Department, that merits increased compensation under the approved salary schedule, the salary increase will become effective following verification of the new degree or additional hours with an official transcript presented to the Personnel office.

Professional Certification Reminders:

- All Alternative Baccalaureate Level Certificates (ABC) & Career & Technical ABC Level applications must be received in the Teacher Certification Office at the Alabama Department of Education by October 1st of the application year. To request the 1st ABC, the teacher must have already passed the Praxis II and APTTP by September 1st.
- All first year Special Alternative Certificate (SAC) and Preliminary Certificate (PRE) applications for the current school year must be received in the Teacher Certification Office at the Alabama Department of Education no later than October 1st of the application year.
- An individual may not be employed more than three years while holding an ABC, SAC, PRE or any combination thereof.
- If an employee is renewing an instructional leader/administrative certificate that expires on or after June 30, 2009, he or she must earn PLU's (Professional Learning Units) regardless of his or her position or role in which they serve.
- If an employee is renewing a teaching certificate that expires at the end of the five year period, he or she must earn 5 CEU's (50 hours of professional development).
- Teachers will be reminded, but it is ultimately the teacher or staff member's responsibility to maintain and renew their certificates so that they remain current and do not expire.

SUBSTITUTES

Substitute teachers are required to follow policies and procedures outlined in the Mountain Brook Training Materials for Substitute Teachers. Upon completion of attending the Substitute Training and reading the policies and procedures for substitute teaching in Mountain Brook Schools, each substitute must sign the Substitute Agreement Form and Confidentiality Notice prior to being recommended for hire.

Substitute teachers are paid at a rate of \$70.00 per day. Long term substitutes (substitutes hired for more than three weeks) are to be recommended by the building administrator to the Director of Personnel for payroll purposes. When possible, core academic long term substitutes should meet "highly qualified" status as outlined in the No Child Left Behind Act. After 15 consecutive days, long term substitutes will be paid at the Bachelors' level Step 1 rate with a current or expired teacher's certificate, upon confirmation from the State Department. Non-certified substitutes will be paid at the rate of \$75 per day after working 15 consecutive working days. Long term substitutes for classified positions will be paid at Step 1 of the appropriate salary schedule, unless otherwise specified.

WORK VERIFICATION PROCEDURES

Verification of prior work experience must be obtained through the interview and hiring process. Official verification of prior work experience for certified employees must be obtained from previous employers and must be received within six months of an employee's hire date in order to remain on the recommended salary schedule. All submission of official verification of prior work experience must meet the Mountain Brook guidelines in order to receive credit.

EMPLOYEE ABSENCES – AESOP (Automated Educational Substitute Operator Program) PROCEDURES

When an employee needs to be absent from work, some are required to enter absences in AESOP and all other employees must notify their immediate supervisor and building administrator. Please verify with the building administrator/supervisor which employee groups must utilize the AESOP service. It is the employee's responsibility to register an absence when he/she will not be reporting to work or notify the building administrator/supervisor of the absence. Additional questions can be addressed to AESOP at 1-800-942-3767 or call the Personnel Office at the Mountain Brook Board of Education at 414-3833. In the event an employee must leave work in the middle of the day, he or she must notify an administrator who will arrange coverage.

DRUG AND ALCOHOL TESTING PROCEDURES

It is the policy of the Mountain Brook Board of Education that the use of alcohol and other drugs and the unlawful manufacture, distribution, dispensation, possession or use of illicit drugs is prohibited. The Board also requires that all employees report to work without any alcohol or illegal or mind altering substances in their system.

All transportation personnel under the regulations of the United States Department of Transportation will be randomly drug tested as designated by the Superintendent. If an employee holding a Commercial Drivers License tests positively during a random drug screening, he/she may be subject to immediate termination or enrollment and treatment in an appropriate Substance Abuse Program. If termination is not recommended by the Superintendent, the employee must meet requirements specified by federal law and the Substance Abuse evaluator to be eligible to return to duty. The employee will be placed on administrative leave until the Substance Abuse evaluator reinstates eligibility to return to work and all other DOT requirements are met to return to work.

All employees of the Mountain Brook Board of Education are subject to drug and alcohol testing if there is reasonable suspicion to believe an employee has violated the Alcohol and Drug Policy. (See the Employee Drug Testing Policy, G-36) If an employee tests positive, he/she may be subject to termination, counseling sessions through the Employee Assistance Program, or enrollment and treatment in an appropriate Substance Abuse Program. If termination is not recommended, the employee will be placed on Administrative leave and must meet the requirements set forth by the Substance Abuse evaluator to be eligible to return to work.

TECHNOLOGY

The primary goal of the technology environment is to support the educational and instructional endeavors of students and employees of Mountain Brook Schools. Use of any and all technology resources is a privilege and not a right.

To ensure that students receive a quality education and that employees are able to work in a professional and intellectually stimulating environment, it is the policy of the Mountain Brook Schools to provide all students and employees with access to a variety of technology resources. All Mountain Brook students and staff must acknowledge and adhere to the technology policy found under Quick Links on the district technology page. The creation of a large and varied technology environment demands that technology usage be conducted in legally and ethically appropriate ways, consistent with the Mission Statement and instructional goals of the Mountain Brook Schools. We recognize that the use of technology always requires attempts to balance the benefits against the possibilities of danger, security problems, and abuse. Rapid changes in technology and growth in the range of content available makes this a constant challenge. Thus, it is the intention of the Mountain Brook Schools that all technology resources will be used in accordance with any and all school system policies and procedures as well as local, state, and federal laws and/or guidelines governing the usage of technology and its component parts. Additionally, it is implied that all students and employees of the Mountain Brook Schools will use the provided technology resources so as not to waste them, abuse them, interfere with or cause harm to other individuals, institutions, or companies.

The administrators of each school are responsible for establishing specific practices to enforce this policy at individual schools. Some of the sections of the policy pertain to technology equipment personally owned by school employees and students and brought into school facilities. All personal technologies used on any Mountain Brook campus are subject to this policy and may be used only if such usage is in compliance with all school system policies, procedures, and guidelines as well as local, state, and federal laws. All electronic content stored on any external storage medium or personal off-site storage location that is brought to or accessed from a Mountain Brook Schools campus is subject to all school system policies and guidelines, as well as local, state, and federal laws. Employees are prohibited from emailing outside the school system or storing/saving on external storage devices or portable devices that do not remain on campus, electronic copies of student or staff personal information. This information includes, but is not limited to data containing social security numbers, information protected by FERPA, and any other sensitive and/or protected information. In the event that this type of information is stored on a portable or external device and said device is lost or stolen, the Technology

Director should be notified immediately. Any questions about this policy, its interpretation, or specific circumstances shall be directed to the Technology Director before proceeding.

Director of Technology:

Donna Williamson

Phone: (205) 871-4608

Email: wild@mtnbrook.k12.al.us

EMPLOYEE ASSISTANCE PROGRAM

The Employee Assistance Program is voluntary and confidential. Through this free program, employees and their immediate family members may receive confidential personal counseling, marital counseling, counseling regarding alcohol and drug difficulties, and other services from a program called American Behavioral. The employee may enter the program through self-referral or may be referred by his or her supervisor. The services are offered at no cost to the employee and are confidential. School officials are not made aware of which employees have used the service. At the employee's request, sick leave may be granted for treatment or rehabilitation on the same basis as is granted for ordinary health problems. Although the services offered by the Employee Assistance Program are free, if those services lead to referral by the program for services that exceed those covered by the program, those costs will be the responsibility of the employee. It shall be the employee's discretion whether to comply with the referral from the Employee Assistance Program to other services. To take advantage of this employee benefit, employees may call **American Behavioral at 871-7814**.

INFORMATION REGARDING SUBSTANCE ABUSE

The school system maintains a list of resources for employees who want to learn more about substance abuse and resources for employees who may need diagnostic or treatment services related to substance abuse. In addition, the school system makes available a self-study PowerPoint presentation with information about substance abuse. To make use of these resources, employees may visit the school system website, Personnel section, and click on the appropriate link.

INFORMATION REGARDING VIOLENCE PREVENTION

The school system maintains a self-study training program on violence prevention, consisting of a PowerPoint presentation that may be viewed on the Internet. To make use of this resource, employees may visit the school system website, Personnel section, and click on the appropriate link.

SEXUAL HARASSMENT

It is the policy of the Mountain Brook Board of Education that no employee, student, or volunteer in the Mountain Brook Schools shall engage in conduct constituting sexual harassment (Policy G-32). Sexual Harassment is illegal and will not be tolerated. All employees are required to participate in "Sexual Harassment" training every year and document this training. Sanctions against employees for violation of this policy may include verbal or written warning, transfer, suspension, or termination of employment.

Since sexual harassment is clearly an act of sexual discrimination and a violation of civil rights, grievance procedures intended to support the school system's non-discrimination policy may be followed. Any principal or supervisor who is aware of a sexual harassment complaint must immediately report the complaint to the Superintendent or Director of Personnel. Any staff member who is aware of a sexual harassment complaint by a student must report the complaint to his or her principal or supervisor.

The “Sexual Harassment” training behavior program is available on-line on the system web site throughout the year for all employees to review the contents.

SICK LEAVE

The sick leave plan for all employees shall be in accordance with the rules and regulations established by the State of Alabama and the Board of Education and are outlined as follows:

- A. All employees shall be allowed sick leave at the rate of one day per contracted month and shall be permitted to accumulate these days to the maximum the state allows.
- B. Full pay for sick leave shall be allowed only if the absences fall within the definition of sick leave established by the State Board of Education and outlined below:
 - 1. Personal illness.
 - 2. Bodily injury which incapacitates the employee.
 - 3. Attendance upon an ill member of the employee’s immediate family, i.e., husband, wife, father, mother, son, daughter, brother, sister, grandchildren, or a person standing in loco parentis.
 - 4. Death in the employee’s immediate family, i.e., husband, wife, father, mother, son, daughter, brother, sister, in-laws, grandparents, grandchildren, or a person standing in loco parentis.
 - 5. Where unusually strong personal ties exist, due to an employee having been supported or educated by a person of some relationship other than those listed, this relationship may be recognized for leave purposes. In each of such cases, the employee shall file with the Superintendent a written statement of the circumstances which justify an exception to the general rule.
- C. If an employee of the Board of Education is absent from his or her job due to personal illness or illness in the immediate family as described above, he or she shall notify his or her supervisor as soon as possible so that arrangements for substitutes can be made. If after a period of five (5) consecutive working days of absence an employee has failed to notify his or her supervisor, then the Mountain Brook Board of Education will consider such absences as a resignation, unless circumstances beyond the control of the employee prevent the employee from giving notice.

Note: Employees who are absent from work without personal leave or sick leave may be terminated depending on the circumstances.

- D. If an employee of the Board of Education is absent from his or her job due to personal illness or illness in the immediate family as described above for more than ten (10) consecutive working days (or more than 5 days for food service employees), a physician’s certificate may be required, stating the nature of the illness and the approximate date the employee should be able to return to his/her job, and such statement

should be attached to the proper payroll form for the Finance/Payroll Department. Documentation may also be required if sick leave is used in an unusual manner. Sick leave is not transferable to another individual unless specifically allowed by state statute.

FAMILY AND MEDICAL LEAVE

Employees who are eligible under the Family and Medical Leave Act of 1993 (FMLA) may take leave for up to 12 work weeks during a calendar year for any one or more of the following reasons:

1. The birth of the employee's child, and to care for the newborn child during the first year after the birth;
2. The placement with the employee of a child for adoption or foster care, and to care for the newly placed child during the first year after the placement;
3. To care for the employee's spouse, son, daughter, or parent (but not for parent-in-law), who has a serious health condition; or
4. Because of a serious health condition that makes the employee unable to perform one or more of the essential functions of his/her job.

From the inception of the qualifying event, the 12-week FMLA leave entitlement is to be charged concurrently with accumulated sick leave, annual leave or leave without pay. Any FMLA leave taken for a single condition should be taken all at one time. An employee may take FMLA leave intermittently or by reducing his/her work schedule to care for a family member with a serious health condition or for the employee's own serious health condition, only if medically necessary and with proper medical certification. Any intermittent leave schedule must be approved by his or her supervisor and the superintendent.

The Board may require the employee to provide medical certification of the serious health condition from the attending health care provider. The certification must be submitted within 15 calendar days after the Board requests it. Failure to provide the certification in a timely manner according to policy may result in denial of taking leave and/or discipline up to and including termination. The Board may require, at its discretion and expense, a second medical opinion. If the first and second opinions differ, the Board, at its own expense, may require the binding opinion of a third health care provider approved jointly by the employee and the Board. The Board may require periodic recertification on a reasonable basis. The Board may also require, as a condition of reinstatement, certification from a health care provider that the employee is able to resume work.

Spouses who are both employed by the Board are entitled to a maximum of twelve (12) weeks of leave combined (rather than twelve (12) weeks each) for the birth or placement of a child for adoption or foster care. However, if an employee's child or spouse is seriously-ill, both the employee and his or her spouse are each entitled to twelve (12) weeks of leave. Leave may begin prior to birth or placement, as circumstances dictate. An employee's FMLA entitlement to leave for the birth or placement of a child for adoption or foster care shall expire at the end of the twelve (12) month period beginning on the date of such birth or placement.

During FMLA leave, the Board will maintain the employee's individual group insurance benefits at the same level and under the same conditions as if the employee had been working. Dependent insurance coverage must be paid by the employee. If an employee fails to return to work at the conclusion of the approved leave, he/she may be required to reimburse the Board for the employer's portion of the premium paid on their behalf during the leave.

Should an employee request FMLA-qualifying leave, the employee must give the Board at least thirty (30) days' advance notice of the need for leave when it is foreseeable, such as a birth, placement of a child for adoption or foster care, or planned medical treatment for a serious health condition of the employee or of a family member, and must set forth:

1. The reasons for the requested leave;
2. The anticipated duration of the leave; and
3. The anticipated start of the leave.

If 30 days' notice is not practicable, such as a medical emergency, notice must be given as soon as practicable (which ordinarily means at least verbal notification to the employee's supervisor within 1 or 2 business days of when the need for leave becomes known to the employee). Reasonable efforts must also be made to schedule foreseeable leave so as not to unduly disrupt work operations, subject to the doctor's approval. Failure to give the required notice may delay the taking of FMLA leave until at least 30 days after the date the employee provides notice to the Board of the need for FMLA leave.

To be eligible for the leave, an employee must:

1. Have been employed by the Board for a least one year as of the date leave commences, and
2. Have worked for the Board at least 1,250 hours in the past 12 months.

Upon timely return from FMLA-qualifying leave and proper certification, an eligible employee who has not been designated a key employee by the Board, will be restored to his/her last position or an equivalent position with equal pay, benefits, and other conditions and terms of employment.

Employees involved in disciplinary actions from management will still be under those actions after returning to work from FMLA leave of absence.

It is the policy of the Board not to unlawfully interfere with, restrain, or deny the exercise of any right provided under the Family and Medical Leave Act (FMLA). It is not the intent of the Board to discharge or discriminate against any person for enforcing the FMLA or opposing practices made unlawful by FMLA; nor is it the Board's intent to discharge or discriminate against any person because of involvement in any proceeding under or related to FMLA. FMLA's enforcement procedures parallel those of the federal Fair Labor Standards Act. The FMLA will be enforced by the U.S. Department of Labor's Wage and Hour Division. If an eligible employee has a complaint regarding an FMLA violation, he or she should discuss it with his/her supervisor, following the chain of command leading to the Board of Education Personnel Office.

MATERNITY/PATERNITY LEAVE

Maternity/Paternity leave requests must be made in writing to the principal/supervisor at least 30 days before the beginning of leave or delivery due date. Up to 12 weeks of unpaid maternity leave under the Family Medical Leave Act (FMLA) is available if an employee meets eligibility under the regulations of the law.

If an employee has available sick leave, vacation leave, or other applicable leave, the employee must utilize those forms of leave before taking unpaid leave under FMLA. The paid leave and FMLA leave will run concurrently from the first absence. Accumulated sick leave will be used during the duration of the leave of absence.

At the employee's request, maternity leave may be granted without pay. The employee and the administrator will agree upon the length of the leave, taking into consideration the welfare of students for whom the teacher is responsible.

Up to 12 weeks of unpaid leave may be requested for paternity leave for eligible employees under FMLA. If needed, the employee may request to borrow days from the Sick Bank if he/she is a member.

Spouses Employed by the Mountain Brook Board of Education Requesting Maternity and Paternity Leave - Under the FMLA, a combined total of twelve (12) weeks of unpaid leave (or applicable paid leave described previously) for a husband and wife employed by the same board of education is allowed.

Catastrophic Leave for Maternity Leave Requests -If an employee does not have accumulated sick leave to cover the amount of time the physician certifies the employee will not be able to perform regular job duties, and she is a member of the sick bank, a request in writing for catastrophic leave may be submitted to the Director of Personnel to cover the amount of time the physician states the employee must remain off work for recovery.

One Year Leave of Absence – Full-time, tenured employees may be granted a leave of absence without pay, for one entire academic year (August through May which may not include portions of two separate academic years), for the birth and first year care of a newborn child or adoption of a child. This leave would not count towards experience in the determination of placement on the salary schedule.

- An employee returning from a year's leave of absence is not guaranteed their original position, but is subject to transfer and reassignment to another vacant position in the school district. He/she will be re-employed in the first vacant position for which he/she is qualified and certified.
- Benefits are continued through FMLA leave, but employees must contact the Finance/Payroll Department if the leave exceeds this time frame to verify continued benefits coverage, specifically PEEHIP.

EMERGENCY LEAVE

On the basis of a written request approved by the Superintendent, emergency leave may be authorized in the case of extreme emergency when the year's personal leave days have been expended. For each day of approved emergency leave there shall be a full salary deduction equal to the employee's daily rate of pay.

VACATION LEAVE

Vacation for All Twelve Month Employees: Twelve-month employees will be granted .8333 days vacation leave per month (10 days per year). After ten (10) years of service with the Mountain Brook Board of Education, they will earn 1-1/4 (1.25) days per month (15 days per year). All twelve month employees shall be permitted to accumulate vacation for a maximum of 20 days for less than 10 years of service and 30 days for greater than 10 years of service. At the beginning of his or her contract period (July – June for 12-month employees), if an employee's vacation balance exceeds the accumulated limit, he or she will lose the difference, unless specific authorization is given by the Superintendent. Taking unearned vacation shall not be allowed without permission of the Superintendent.

Twelve-month employees can use all their vacation prior to either retirement or resignation. In the event that an employee is terminated he or she will be reimbursed for any unused vacation days at his or her current daily rate. Vacation should be requested in writing at least 5 working days prior to the requested date, and may be granted by the administrator. Employees will not be reimbursed for earned vacation prior to the end of their employment with the school system.

PERSONAL LEAVE

Each employee shall be allowed three (3) days of personal leave with full pay for any annual contract period. After 15 years of service with the Mountain Brook Board of Education another personal leave day is awarded making a total of four (4) personal days. Personal leave is non-cumulative.

Personal leave should be requested in writing at least 3 days in advance. In granting personal leave to employees, each school may have a daily limit of one per ten teachers or any fraction thereof. For example, if a school has 21 teachers, as many as three teachers may be away on personal leave on any one day. No personal leave shall be granted within the 10-day period beginning with Institute Day, nor during the last 10 days of the scholastic year, except in emergencies. At the end of a contract period any unused personal leave days will automatically convert to sick leave for future use.

PROFESSIONAL LEAVE

Upon written request by the employee and approval by the principal, professional leave may be granted for the purpose of attending national, regional, state or local meetings. The Board of Education will provide financial assistance on an equitable basis and to the extent that it is feasible.

OTHER EXTENDED LEAVE- One Year Leave of Absence

Upon written request by the employee, the Board may grant leaves of absence without pay, for one entire academic year (August through May which may not include portions of two separate academic years), for the birth and first year care of a newborn child or adoption of a child. Other reasons for requesting a year's leave of absence are for study, personal improvement, travel, sabbatical, family obligations, wellness or illness; with the stipulation that the employee will be re-employed in the first vacant position for which he or she is qualified and certified. Such requests should be submitted no later than March 15 prior to the next scholastic year.

SABBATICAL LEAVE

A full time certified teaching staff member with at least 15 years of service in the Mountain Brook School System shall be permitted to take a one-time, one-year sabbatical without pay and benefits; with the assurance that the teacher will be re-employed in the first available vacancy for which he or she is qualified and certified. Such requests must be submitted no later than March 15 prior to the next scholastic year. If the staff member taking sabbatical leave does not intend to return to his or her position, he or she should notify the Superintendent on or before March 1 of the sabbatical year.

MILITARY LEAVE

Military leave is available to all eligible employees in accordance with state and federal law. Military paid leave will be utilized for the specific number of days, according to the specific type of military leave, after verification has been provided to the Payroll/Benefits Department.

COURT LEAVE

Permanent and full-time employees are entitled to regular compensation while performing jury duty (ALA. CODE § 12-8-25), or when the employee is summoned under subpoena or other legal requirement to testify at trial in a court of law, or in administrative proceedings constituted under the statutory authority of the agency conducting the proceeding. Paid leave is not authorized for employees to meet with attorneys, to attend depositions, or to otherwise prepare for legal proceedings unless the presence of the employee is requested or required by the Board.

An employee must submit the summons for jury duty prior to the date to appear for this service. A copy of the jury certificate that an employee receives from the court at the completion of their jury service must also be submitted. These documents must be given to the payroll bookkeeper at the employee's work location. Failure to provide this documentation will result in utilizing the employee's accumulated personal or vacation to cover the absence. In the event the employee has no accumulated days, a pay deduction equivalent to their daily rate will be docked for each day.

CATASTROPHIC LEAVE

To apply for Catastrophic Leave, a written request must be submitted to the Director of Personnel to verify eligibility. The employee must first use all sick leave, vacation days (if applicable), and personal days. The employee then requests to borrow days from the sick bank. If more days are needed, members of the sick leave bank may request donated days from other Alabama public school employees to cover absences. For additional information regarding catastrophic illness procedures, please refer to the section in this handbook under Sick Bank procedures or visit the district website.

INTERMITTENT MEDICAL LEAVE

Intermittent medical leave is available for individuals with certain medical conditions that may not require an employee to be absent 10 consecutive days or longer, but frequent absences may result from the condition. An employee may also apply for Intermittent Catastrophic Leave.

MISCELLANEOUS LEAVE

A full-salary deduction shall be made for an absence from duty for reasons other than those covered by the above leave provisions. The salary deduction for each day of such absence shall be at the daily rate of pay.

ON THE JOB INJURY LEAVE PROCEDURES

On the job injury includes an accident or injury to an employee that occurs in the course of performing job duties for the Board, or when the employee is directed or requested by the employer to be on the property of the employer and the injury is such that it prevents the employee from working or returning to the job. The principal or supervisor must submit an **Incident Report** to the Chief Financial Officer stating the details of the on the job injury.

Upon a determination that the employee has been injured on the job and cannot return to work, the Board may maintain the employee's salary and benefits for the period of incapacity caused by the injury, up to ninety (90) working days. Such continuance is subject to the following requirements:

- Employee salaries may be continued during their absence due to job-related injury upon presentation to the Superintendent of satisfactory evidence which demonstrates that the absence was due to a job-related injury.
- Payments to the employee shall equal 100% of that employee's regular daily salary for each day absent due to the job-related injury.
- Salary continuation may be made only for temporary disability where there is a reasonable expectation that the employee will return to work and the salary continuation will not exceed ninety (90) days.

- Absence due to job-related injury shall be treated as sick leave for purposes of claiming reimbursement for substitutes and no deduction from employees' accumulated sick leave shall be required for paid absence due to job related injury. However, this does not preclude an employee who is absent due to job related injury from using sick leave.

An employee who is injured on the job may file a claim to receive unreimbursed medical expenses and costs with the State Board of Adjustment up to one year following the injury. Failure to file a claim within one year will waive the employee's rights. The Board will provide such reasonable assistance to the employee in filing the Board of Adjustment Claim as required by law, but assumes and will have no responsibility or liability for processing the claim or directly reimbursing the employee any unreimbursed medical expenses and costs. On the job injury leave will be administered in accordance with and subject to the requirements and limitations imposed by state law regarding such leave.

SICK LEAVE BANK

I. Purpose

The School System Sick Leave Banks (hereinafter referred to as SLBs) are established to provide a loan of leave days for participating members after their accumulated sick leave days have been exhausted and to provide catastrophic sick leave. This action is authorized by The Code of Alabama and the Board of Education. In accordance with The Code of Alabama, the decision to have a joint or separate SLB(s) for certified and support staff is to be made by each group, utilizing a secret balloting process. The accounting of the SLB(s) shall be the responsibility of the Board.

II. The Sick Leave Bank Committee

- A. Each SLB committee shall consist of five (5) members. At the beginning of each scholastic year, four (4) shall be selected by a secret ballot election held among the sick leave bank members. One (1) member shall be appointed as the system's representative by the superintendent, subject to board approval. The superintendent will be responsible for conducting the election in a fair and equitable manner, ensuring the confidentiality of the secret balloting process.
- B. Members of the SLB committee will serve a term of one year. Terms shall be for the scholastic year. Vacancies shall be filled by the respective parties. No representative on the committee shall serve for a term longer than five consecutive years.
- C. It shall be the exclusive responsibility of the sick leave bank committee to write the guidelines and administrative procedures of the sick leave bank, including the catastrophic leave provisions. It shall also be the committee's duty to develop all necessary forms for the orderly operation and administration of the sick leave bank and catastrophic leave provisions. A uniform state form provided by the State Department of Education shall be used to transfer and receive catastrophic sick leave days from one sick

leave bank to another. Guidelines shall be approved by a secret ballot vote of the participating members of the sick leave bank.

D. Duties of the SLB Committee

Each SLB(s) guidelines shall include the regulations of this section. Additional guidelines shall be adopted by the SLB committee as may be deemed appropriate and beneficial. No Board or SLB committee shall adopt any regulation which conflicts with the following general regulations:

1. No employee shall be allowed to owe more than 15 days to the SLB, unless over 50 percent of the members of the bank vote to extend the limit.
2. Appropriate administrative forms for administering the SLB shall be developed by the SLB committee.
3. Sick leave days shall be repaid to the SLB monthly as re-earned by the member. Upon the resignation or other termination of an employee who has an outstanding loan of sick leave days, the value of the loan shall be deducted from the final paycheck at the employee's prevailing rate of pay.
4. A member of the SLB shall not be allowed to accumulate more days than allowed in Section 16-1-18-1, (Code of Alabama), including days in the SLB.
5. Employee membership in the SLB shall be voluntary.
6. Any alleged abuse of the SLB shall be investigated by the SLB committee. On the finding of wrongdoing, the member shall repay all of the sick leave credits drawn from the SLB and be subject to other appropriate disciplinary action as determined by the local Board.
7. Upon retirement or transfer of the SLB members, days on deposit with the SLB shall be withdrawn and transferred with the employee or made accessible for retirement credit, as applicable.
8. Before being eligible to use catastrophic sick leave days, the member of the SLB shall first borrow and utilize days from the SLB, up to a maximum of 15 days. However, if the member later qualifies for catastrophic sick leave, donated catastrophic sick leave days may be used to repay days owed to the SLB to the credit of the affected member.
9. At the beginning of the scholastic year, or upon employment of a new employee, as the case may be, the appropriate number of sick leave days shall, upon application of the employee, be credited to the employee's account to enable the employee to join the SLB if the employee does not have the minimum number of sick days to enable him or her to join the bank. The SLB committee shall develop in its guidelines a provision whether or not to allow other employees who have previously failed or refused to join the SLB the option to join upon deposit of the prerequisite number of sick leave days. Any policy developed by the SLB committee shall be uniformly applied to all employees.

III. Eligibility and Participation in the Sick Leave Bank

- A. Any full-time or part-time employee of the Board who has completed a Sick Leave Bank Authorization Form depositing or committing the required days to the SLB is eligible to borrow up to fifteen (15) days from the SLB.

- B. The deposit of leave days into the SLB must conform to the SLB guidelines set up by the SLB committee.
- C. No employee shall be allowed to borrow or owe a number of days which is in excess of fifteen (15) days unless 50% of the participating members of the SLB vote to extend said limit.
- D. To be eligible for a loan from the SLB, a participating member must have exhausted all accumulated sick leave in his/her personal account.
- E. The Board Payroll Department shall maintain records of all member deposits to the SLBs, withdrawals from the SLBs, and the status of the SLBs. Reports shall be provided on a timely basis and at the request of the SLB committee, Superintendent, or Board.
- F. The number of days loaned to an applicant shall be determined by the SLB committee. Factors to be considered include, but are not limited to, (1) the applicant's need, (2) the circumstances of the illness or disability, (3) years of service to the system, and (4) the availability of days in the SLB.

IV. Procedures for Sick Leave Due to Catastrophic Illness

- A. Employees participating in an SLB, at their discretion, may donate a maximum of thirty (30) days to the sick leave bank to be designated for a specific employee for use against a catastrophic illness. Any illness, injury, or pregnancy or medical condition related to childbirth certified by a licensed physician which causes the employee to be absent from work for an extended period of time is defined as catastrophic illness.
- B. The employee who is to receive sick leave days for a catastrophic illness shall be a member of the SLB and shall have no sick leave and personal leave available (i.e. the member will have exhausted all accumulated days of leave and have no days that can be borrowed from the bank).
- C. The ill employee may use the donated days but shall not be required to repay the days. Also, donated days may be used to repay the SLB.
- D. The employee who donates sick leave days to the sick leave bank for a particular employee for use against a catastrophic illness shall not be able to recover such donated days. However, if the particular employee does not require all the days donated to him/her, the days shall revert to the credit of those employees who donated the days in accordance with the guidelines adopted by the sick leave bank committee. Sick leave days may be donated to a beneficiary employee to be used for the same reasons that regular sick leave may be used according to law (Code of Alabama, Section 16-1-18.1).
- E. No employee may donate more than 30 sick leave days, exclusive of the minimum deposit to the sick leave bank for the catastrophic sick leave of any one employee.

- F. The SLBs are authorized to donate sick leave days to another SLB, including SLBs of other Alabama school systems, for use by a particular employee who is suffering a catastrophic illness.

LEGAL REF: The Code of Alabama, Section 16-22-9 and supporting provisions in Section 16-1-18.1.

AMERICANS WITH DISABILITIES COMPLAINT PROCEDURES

Persons who believe that they have been discriminated against on the basis of disability in the provision of services, activities, programs, or benefits covered by the Title II of the Americans with Disabilities Act may file a written complaint with their supervisor/principal and this written complaint should be sent to the Director of Personnel. The process for filing grievance procedures is outlined in this Procedure Manual and in the Mountain Brook School System Policy Handbook (G-34).

COMPLAINTS AND GRIEVANCE PROCEDURES

No person shall be denied employment, be excluded from participation in, be denied the benefits of, or be subjected to discrimination in any program or activity on the basis of handicap, gender, race, religious belief, national origin or ethnic group, color, or age.

Purpose: To resolve at the lowest possible administrative level, differences and issues related to alleged discrimination against employees within the meaning of the Vocational Rehabilitation Act, the Americans with Disabilities Act or the Federal Education Amendment, and any other applicable state or federal statute or regulation. These proceedings will be kept as informal and confidential as may be appropriate at all levels of procedure.

Definitions: A "grievance" is a complaint by any professional or support staff member specifically asserting a possible violation of any of the above-referenced statutes or regulations. A grievance procedure is the method by which a person may seek to resolve such a complaint.

Level One (Informal Procedures)

The aggrieved employee must first discuss his or her grievance with the immediate supervisor with the objective of resolving the matter informally. (The principal should be considered the immediate supervisor for all building employees.) If the person against whom the complaint is being made is the aggrieved employee's immediate supervisor, the employee may take the complaint to the appropriate coordinator.

The aggrieved employee and his/her immediate supervisor should confer on the grievance with a view toward arriving at a mutually satisfactory resolution of the complaint. At the conference, the employee

may appear alone or be accompanied by a representative of his or her choice. The supervisor may have such other persons present as he or she deems appropriate.

If the grievance arises from the actions of a specific person or persons, the supervisor should inform such persons of the nature of the grievance and attempt to ascertain the facts of the case from their perspective. If it is agreeable to all parties, a conference will be held which includes the aggrieved employee, the supervisor, and the person(s) against whom the grievance has been made. Each of these parties may appear alone or be represented, and the discussion should be directed at reaching a mutually satisfactory resolution of the complaint.

Level Two (Formal Procedures)

Step 1

If as a result of the discussion between the complainant, supervisor and possible other parties, the matter is not resolved to the satisfaction of the complainant, then within five (5) school days of such conference, unless an exception is granted by the supervisor in his or her sole discretion, he or she shall set forth his or her grievance in writing to the supervisor specifying:

1. the nature of the grievance.
2. the nature or extent of the alleged injury, loss or inconvenience.
3. the corrective action sought.
4. the results of previous discussion(s) and conference(s), and
5. the basis of and reasons for his or her dissatisfaction with decision previously rendered.

The complainant shall be informed that if he or she so requests, assistance will be provided in developing a written statement of the grievances. The supervisor should communicate his or her decision in writing to the complainant upon the written presentation of the grievance in as soon as practicable, preferable within 10 school days. If a grievance is pursued beyond this level, written records should be forwarded to the next level of procedure by the complainant.

Step 2

If the complainant is not satisfied with the disposition of his or her grievance at Level Two, Step 1, he or she may present his or her grievance to the superintendent within five (5) school days of receipt of the supervisors written decision unless an exception is granted by the superintendent. The superintendent may consult with or refer the matter to the appropriate coordinator, in the superintendent's sole discretion.

The superintendent or coordinator, as the case may be, should review the written record, counsel with the complainant, hear witnesses as he or she deems necessary, and render a decision in writing as soon as practicable.

Level Three (Formal Procedures)

Step 1

In the event the employee is not satisfied with the disposition of his or her grievance at Level Two, Step 2, he or she may file the grievance in writing with the Board of Education through the office of the superintendent within five (5) school days after receipt of the decision from Level Two, Step 2, unless an exception is granted by the superintendent.

He or she may request a private hearing before the Board of Education by providing a written request to the superintendent within the same time frame. In that event, the superintendent will submit to the Board of Education copies of the written record. The aggrieved employee as well as the superintendent and school system staff may be represented or accompanied by legal counsel at this hearing, and minutes of the proceeding will be made. The Board of Education may call witnesses as it deems appropriate. The aggrieved employee shall be given a written decision by the Board of Education as soon as practicable, preferably within 10 school days.

TRANSFER PROCEDURES

Voluntary - The Principal/Supervisor may consider granting a voluntary transfer if the employee so requesting possesses the required qualifications for the desired position and if a vacancy in such position exists. All requests for voluntary transfers should be in writing on the Internal Transfer Form located on the Personnel website. This Transfer Form should be submitted to the following:

1. Current building administrator/supervisor
2. Building administrator/supervisor of the school in which transfer is requested or known vacancy exists
3. Department of Personnel

All requests for voluntary transfers shall be carefully considered and reviewed in accordance with Board policies concerning prohibited discrimination practices. Hiring recommendations will be submitted from the building administrators or to the Superintendent for consideration.

Involuntary - The Board may transfer any teacher, including personnel employed as principals and supervisors, upon the recommendation of the Superintendent, for any succeeding year, from one position, school or grade to another by giving written notice to the teacher of such intention to transfer. Such transfer shall be without loss of status or violation of contract and shall not be for political or personal reasons.

- In accordance with **The Students First Act of 2011**, tenured or non-tenured teachers can be reassigned one time per year to any position for which they are qualified on their school campus within the first 20 days of school. This reassignment is not subject to review and Board approval is not required.
- Tenured or non-tenured teachers can be transferred to another school to a position for which they are certified within the first 20 days of school. Written notice must be given to the teacher and the teacher is afforded the opportunity for a conference with the Board. Once the Board votes, this reassignment is not subject for review.
- In accordance with **The Students First Act of 2011**, probationary and non-probationary classified employees may be reassigned to a new position for which they are qualified without loss in pay. This reassignment is not subject for review and Board approval is not required.

- Probationary and non-probationary classified employees may be transferred to a different location for which they are qualified. For probationary classified employees, this transfer is not subject to review. For non-probationary classified employees, a written notice is provided to the employee, but this transfer is not subject for review and the employee has no rights before the board. The transfer is effective 15 days after the vote.
- If there is a transfer to another position and the teacher or classified employee would receive reduced pay, the employee must receive advance notice and has rights before the Board, according to **The Students First Act of 2011**.

SUSPENSION/TERMINATION

The Board may suspend or dismiss any person's employment as outlined in **The Students First Act of 2011** in the Code of Alabama for the following reasons: (1) incompetency, (2) insubordination, (3) neglect of duty, (4) immorality, (5) justifiable decrease in the number of positions, (6) failure to perform duties in a satisfactory manner, or (7) any other good and just cause. An employee who contests the suspension or termination must follow the procedures outlined in **The Students First Act of 2011**.

END OF YEAR STAFFING PROCEDURES

Tenure - In accordance with **The Students First Act of 2011**, all personnel remain on probationary status until continuing service status (tenure) is attained. Teachers and classified employees who have worked in the Mountain Brook School System for three complete, consecutive school years and are thereafter employed by the Mountain Brook Board of Education for the next succeeding school year shall attain continuing service status (tenure). For the school year to count as a complete school year, the teacher or classified employee must be hired prior to the October 1st and work to the end of the school year. During the probationary period, employees may be dismissed at any time at the discretion of the Mountain Brook Board of Education, upon written recommendation of the Superintendent and issuance of written notice to the employee. All terminations of probationary (non-tenured) and non-probationary (tenured) employees shall follow the procedures outlined in **The Students First Act of 2011**, effective July 1, 2011.

Retirement – If considering retirement at the end of the current school year, an employee must contact the Teacher Retirement System (TRS) to verify eligibility. The employee must contact the Finance/Payroll Department to complete necessary paperwork by the deadlines specified by TRS in order to avoid missing a paycheck. A letter indicating the decision to retire must be submitted to the Principal, Director of Personnel or Superintendent.

One Year Leave of Absence Request – If a tenured employee plans to request a leave of absence for the following full academic year, he/she must submit a written request to the principal no later than March 15th prior to the next scholastic year, if at all possible.

Resignation – In the event an employee does not plan to return to Mountain Brook Schools in the following school year, the principal or supervisor must be notified in writing thirty (30) days prior to the first instructional day students are scheduled to report to school. After this date state law provides that Mountain Brook Schools is not required to release an employee. Timely notifications of these intentions are encouraged in order to assist the school district in finding quality replacements.

CONTACTS FOR THE PERSONNEL OFFICE

Director of Personnel

Sylvia Harper

32 Vine Street

Mountain Brook, AL 35213

Phone: (205) 414-3833

Fax: (205) 877-8303

Email: harpers@mtnbrook.k12.al.us

Administrative Assistant

Pat Quinn

Phone: (205) 414-3833 or (205) 871-4608

Email: quinnp@mtnbrook.k12.al.us

PAYROLL INFORMATION & PROCEDURES

The mission of the Finance Department is to secure financial resources necessary to achieve the goals of the Mountain Brook Schools and use the best management information practices to ensure fiscal responsibility. The payroll section of this handbook will seek to answer questions employees may have concerning paychecks, health benefits, insurance and other financially related matters.

When do I get my first Paycheck?

- **Nine month employees**
– ***September 30****

- **Ten & Eleven month employees**
– ***August 31****

- **Twelve month employees**
– ***July 31****

Payroll cutoff is approximately mid-month. For example the September check will be based on working days from August 6th until September 9th. September 10th through October 14th will fall in the October check. If an employee is hired late in the contract year their annual amount will be calculated on the number of days actually worked the remainder of the contract year.

*Checks are always issued on the last business day of the calendar month.

Below is an example of take home pay based on mandatory deductions. Actual deductions may vary depending on the employee's individual needs.

| | |
|------------------|----------------|
| Wages | \$ 1,953.33 |
| Soc Sec | -83.43 |
| Medicare | -28.80 |
| Federal | -119.73 |
| State | -58.14 |
| Jeff Co | -.59 |
| Retirement 7.25% | <u>-141.62</u> |
| Take Home | \$ 1,521.02 |

Some examples of non-mandatory deductions could include health insurance, disability insurance, dental insurance, savings accounts, deferred compensation plans and flexible spending accounts.

Wages & Employer Taxes Paid – For every dollar that an employee pays on social security and medicare tax the Board is required to match that amount on the employee's behalf. State unemployment insurance is also paid by the Board for the employee.

Employees have 7.25% of their gross pay withheld for their retirement account at the Teachers' Retirement System in Montgomery. Starting October 1, 2012 the employee's portion will increase to 7.5%. Currently, the board pays 10% to the retirement system on behalf of each employee; this will increase to 10.08% on October 1, 2012.

TEACHER SALARY SCHEDULES CAN BE FOUND ON THE PERSONNEL WEBSITE

DIRECT DEPOSIT - All new employees are required to have direct deposit for receiving their monthly earnings. Below are some of the highlights of utilizing this feature:

- **Improved security**
- **No waiting in lines at the bank**
- **Money available the morning of payday**
- **Choose your own bank**
- **E-mail notification received on payday**
 - **The first month a pre-note transaction test is performed and employee receives a check. The second month funds are direct deposited.**

Notify Payroll Department immediately if you change banks and/or your account is closed. Also, it is important that the payroll department be notified if your account number changes.

SUBSTITUTES ARE ENCOURAGED TO USE DIRECT DEPOSIT

HEALTH BENEFITS -2012-2013

Blue Cross/Blue Shield

**Basic Major Medical
No Referrals
Monthly Premium**
\$15 Single
\$177 Family

VIVA Health Plan –HMO

**Major Medical, Vision, Dental HMO
Monthly Premium**
\$15 Single
\$177 Family

Southland Supplemental Insurance Coverage-

Cancer Program \$ 38 per month*
Dental Coverage \$ 45 per month*
Hospital Indemnity \$ 38 per month*
Vision Coverage \$ 38 per month*

***Single or Family Coverage**

- You can Purchase supplements for an additional amount @ \$38/\$45 ea. / month
- OR**
- Refuse major medical coverage and apply allocation to the supplements for coverage at no charge.

PEEHIP Insurance Allocation - “3 – 1” Rule

An employee will earn one additional insurance allocation for every three months the employee has worked at least one half of the work days in the months worked.

- Work nine months and receive three summer allocations.
- Employees working less than nine months will not earn all months and will owe an additional amount for insurance.

Copayment & Deductible Changes

Copayments- Deductibles

Prescription Drugs (30 day supply)

| | |
|---------------------------|----------------|
| Generic Co-pay | \$ 6.00 |
| Preferred Drug Co-pay | \$40.00 |
| Non Preferred Drug Co-pay | \$60.00 |

Prescription Maintenance Drugs (90 day supply)

| | |
|---------------------------|-----------------|
| Generic Co-pay | \$12.00 |
| Preferred Drug Co-pay | \$80.00 |
| Non-Preferred Drug Co-pay | \$120.00 |

Dental Plan

Active & Retired Members

| | |
|-------------------------------|----------------|
| Family | \$45.00 |
| Single (no change in premium) | \$38.00 |

Note: No change in premiums, single or family, for the Cancer, Indemnity and Vision plans.

THE WELLNESS AND WEIGHT WATCHERS PROGRAM:

The PEEHIP Board voted to reinstate the Wellness and Weight Watchers program. Members and covered dependents will be eligible to once again participate in free health screenings provided by the Public Health Department nurses. The school system will schedule the annual flu shot and wellness screenings on an annual basis in cooperation with the Alabama Department of Health. The PEEHIP Wellness Program includes a smoking cessation toll-free Quit line at 1-800-784-8669, available 24 hours a day and for live counseling from 8:00 A.M. to 8:00 P.M. PEEHIP also offers the Weight Watchers Program at Work to allow eligible members to participate in a 15 week program who meet the current criteria and are eligible to participate. Members may refer to the PEEHIP handbook or go to the Alabama Department of Health Website at www.adph.org for more information. There must be at least 15 participants and a member must attend 12 out of 15 sessions to get any reimbursement.

FEDERAL HEALTH CARE REFORM:

Adult Children – PEEHIP is required to offer and extend dependent hospital medical coverage (at the member's option) to adult children up to age 26 only if the child is not eligible for other employer sponsored group coverage.

Pre-existing Conditions- PEEHIP is prohibited from imposing a waiting period for enrollees under age 19 who have pre-existing conditions.

Lifetime Dollar Limits – PEEHIP is prohibited from having lifetime dollar limits on essential health benefits covered under major medical.

Life Insurance: Life insurance is provided to employees by the Board based on level of employment. Coverage starts of the first day of employment. The Board of Education pays the premium for this coverage. Additional insurance can be purchased for yourself or dependents. Death benefits are also provided through the Teacher Retirement Program and depend on years of service and age. For example persons under 60 years of age with from 1 to 25 years of service will receive death benefits consisting of their total retirement contributions and total earned interest plus an amount equal to the previous year's salary.

Additional information on life insurance can be found at www.rsa.state.al.us

TEACHER RETIREMENT SYSTEM

All full-time employees are eligible, and required, to participate in the State Retirement Program. For employees hired prior to January 1, 2013, seven and a quarter percent of the employee's salary is deducted each month for retirement and all contributions belong to the employee.

Ten years of creditable service are required for an employee to become "vested" or eligible for benefits. Persons terminating their employment with less than 10 years of service must withdraw their retirement funds.

A person hired prior to January 1, 2013 may retire after 25 years of service or at the age of 60 (if vested) and may use accumulated sick leave in determining the amount of creditable service. Retirement benefits will be calculated on the annual salary of the highest 3 of the last 10 years of service.

Employees hired January 1, 2013, or later, will pay 6% to the retirement system and their retirement benefits will be calculated at a lower percentage than current employees. Benefits will be calculated on the annual salary of the highest 3 of the last 5 years of service.

The retirement age requirement for employees hired January 1, 2013, or later will be 62 (if vested) or 30 years of service. An employee may not use accumulated sick leave in determining the amount of creditable service.

DEFERRED COMPENSATION PLANS

403B - Under this plan, employees may contribute as much as \$16,500 (2012) of pre-tax income to an annuity each year. The contribution is automatically deducted from their paychecks.

By investing money in this way before taxes are paid, employees can reduce their current income tax burden. It is permissible to transfer accumulated funds, with no dollar limit, to other qualified IRA annuity plans.

Once such an investment is made, the interest or dividends earned are only taxed as funds are withdrawn. Since the withdrawals are usually made after retirement when the participant is likely to be in a lower tax bracket, less tax is paid and funds accumulate faster.

There are currently over 25 such investment options through four agencies: NEA, VALIC, Lincoln Life, or American Fidelity.

RSA-1 - Using this plan, employees may elect to delay receiving a portion of their salary (may not exceed--if more than one 457 plan, combined deferrals must not exceed--\$16,500 (2012) or \$22,000 (2012) for employees age 50 or over) until some later determined date, usually after retirement.

The deferred income, which accumulates interest in a special fund, is not subject to federal income tax until distributed to the employee.

RSA-1 funds will be invested in the same type of investments and are subject to the same guidelines and limitations as applicable to investments made by the Teacher Retirement System.

FLEXIBLE SPENDING PLAN:

A flexible spending plan is a way to provide employees valuable benefits and tax savings. Benefits under an eligible plan may include reimbursement of dependent care expenses and medical expenses such as co-payments and deductibles.

Also, most importantly, you always pay insurance premiums with pre-tax dollars. All full-time employees are eligible to participate in this plan which gives them the opportunity to recognize additional monthly income through pre-tax savings.

■ OPEN ENROLLMENT

- The open enrollment deadline for the Flexible Spending Accounts is September 30th, for an effective date of October 1st.
- Plan deductions start on the October payroll check. Deductions end with the September payroll check of the following year.

All deductions are processed over 12 months.

The Flexible Spending Account is administered through PEEHIP that is offered through BC/BS of Alabama. Below is the website address:

<http://www.rsa.state.al.us/PEEHIP/flex.htm>

Reimbursement of over-the-counter drugs from the Health Care FSA will be prohibited due to the Federal Reform Act unless you have a doctor's prescription for the drug.

Starting with the 2012/2013 plan year, PEEHIP will offer a Preferred Flexible Spending Card as well as the auto bump and manual reimbursement used in the past.

Document Services: Document services can be found on our website to provide valuable information on your personal earnings at any point in time. At the end of each month you will receive an e-mail notification of your monthly direct deposit receipt. This service will house your monthly earnings information as well as your W-2 statements for future reference. Below are instructions to assist with setting up your login and password information.

1. Visit www.mtnbrook.k12.al.us Select [Finance](#) / [Forms & Processes](#) / [Document Services](#)
2. The following statement will be included on all email from payroll@mtnbrook.k12.al.us
"View your stored documents **online:** [Document Services Viewer](#)"

Step #1 - Click on [Document Services Viewer](#) link in your payroll@mtnbrook email, *or* the link on the Finance page of the Mountain Brook Schools website.



On your first visit you will be prompted to install MS Silverlight 2.

Follow the onscreen instructions for installation.

Document Services Sign In – On your first visit you will create an account.

- Enter your User Identification number.
- Type a Logon Name.
- Type a Password.

User Identification Number - this is your Social Security number. Enter the number in the format shown. (123-45-6789)

Logon Name - Create any logon name you want. Be sure it is something you will remember.

Password - Use at least five (5) numbers and letters to create a password.

Click Create

CAUTION: Write down your Logon Name & Password in case you forget it.

Document Services Sign In –view and/or print your stored records.

Note: Payroll checks and/or direct deposit statements issued since January 2009 are available. W-2's are available from 2008 and forward.

- Enter your Logon Name
- Enter your Password (use this same password to open your stored documents)
- Click “Sign-In”
- Select “ Sign Out” in the upper right corner when you are finished

Stored Documents

▶ 1099 - No Data Found.

▶ Checks

▶ Contracts - Not Yet Impl

▶ Letters - Not Yet Implemented

▶ Purchase Orders - No Data Found.

▶ W2's

Checks - select this option to view your stored checks. A list of available documents will appear.

- Click on the ITEM you want to view.
- Click on DOWNLOAD. You may need to scroll down on the screen
- A Pop-Up window will appear - Click OPEN.
- Type your PASSWORD
 - **This file is password protected using the password you created for this site.**

W-2's - select this option to view your stored W-2. A list of available documents will appear.

- Click on the ITEM you want to view.
- Click on DOWNLOAD. You may need to scroll down on the screen
- A Pop-Up window will appear - Click OPEN.
- Type your PASSWORD
 - **This file is password protected using the password you created for this site.**

Contacts for the Accounting Office

Chief Financial Officer/Director of Finance

Karen Lusk-Smith
32 Vine Street
Mountain Brook, AL 35213
Phone: (205) 871-4608
Fax: (205) 877-8327

Accounting Specialist - Lois Stephenson - Ext. 7813

Payroll Specialist - Tena Loveless - Ext. 7806

Central Office Bookkeepers

Rachel Parker - Ext 7814
Adam Craiger – Ext 7815
Angela Caldwell - Ext 7816
Bernice Price – Ext 7817

Local School Bookkeepers

BWF –Tonya Calloway - (205) 414-3700 Ext. 7143
CBE – Cheryl Bowman - (205) 871-3595 Ext. 7251
CRE – Denise Henry - (205) 871-8126 Ext. 7304
MBE – Katrina Cook - (205) 871-8191 Ext. 7412
MBJH – JoAnn Gates. - (205) 871-3516 Ext. 7550
MBHS – Margaret Weems, Head Bookkeeper - (205) 414-3800 Ext. 7612
Amy Schmidt- Assistant Bookkeeper - Ext. 7691
Michelle O'Connor- Athletics - (205) 414-3823 - Ext. 7746