WASHTENAW COUNTY
BUSINESS RULES

The purpose of this section is to give the reader a one-stop information source on the way business is done in Washtenaw County. The intention is not to give details on every Support Services function, but to focus on those common, everyday processes that employees complete regularly.

This section includes business rules on the following function areas:

- County Administration, pg. I-1
- Corporation Counsel, pg. I-2
- Facilities Management, pg. I-3
- Budget, pg. I-5
- Finance - Accounting, pg. I-6
- Finance - Payables, pg. I-7
- Finance - Payroll, pg. I-7
- Finance - Purchasing, pg. I-9
- Human Resources, pg. I-10
- Information Technology, pg. I-14
- Risk Management, pg. I-15

In addition to these business rules, the County Administrator established a Help Desk available to answer questions or ensure proper referrals on operational issues relating to conducting business within Washtenaw County Government. The Support Services Help Desk can be contacted at (734) 222-3737.

County Administration

1. Board Action Requests

- Board Action Requests are submitted by the Departments to the Board of Commissioners through the County Administrator's Office.

- Items are forwarded from Working Session, to Ways & Means Committee, to the Board for final adoption.

- <u>Working Session:</u> Items for inclusion on the Working Session agenda include substantive changes in service delivery, staffing or funding, new programs or staffing; modifications to BOC policy Items are due to the Administrator's Office no later than the Wednesday prior to the Working Session meeting.

- <u>Ways & Means Committee:</u> Items for inclusion on the Ways & Means Committee Agenda include all financial and personnel matters including changes to the Board policy. Items are due to Administration by noon the Wednesday, two weeks prior to the meeting.

- <u>Board of Commissioners:</u> Items for inclusion on the Board Agenda include all items brought through the Working Session and Ways & Means Committee. Only those items which have no financial or personnel impact and do not involve a change in the Board policy will be directly submitted to the Board Agenda. Items are due to Administration by noon the Wednesday, two weeks prior to the meeting.

2. Grants

- The Board of Commissioners approves and authorizes all County grant applications, and/or awards except where authority has been delegated to the Administrator.

- Grant Applications and awards are governed by the Board Action Request and Grant Application policies and procedures.

- Departments may apply for grant funding up to the amount of $10,000. Departments will forward letters and/or pre-applications indicating the intent to apply for a grant to the County Administrator for review and comment.

- Departments will coordinate with Information Technology (IT) staff for any purchase of computers, and telecommunications equipment. Departments will coordinate with Facilities Management and Corporation Counsel for the establishment of any leased space.

- In instances where the Board's meeting calendar and grant submission dates do not allow for the timely application, the County Administrator or Chair of the Board may sign the application. Applications then must be ratified at the **first available** Ways & Means Committee meeting for ratification of the signature and authorization to accept the award upon receipt.

- Extensions and adjustments may be handled administratively in amounts not to exceed 10% or $100,000 of the total amount of the grant program.

- Each Department shall include indirect costs in all applications in accordance with the County's Cost Allocation Plan and/or the recovery of indirect costs on any unspent balances of grants.

Corporation Counsel

1. Requests for Legal Research and/or Advice/Opinions

- Requests for informal legal advice may be submitted by calling or e-mailing Corporation Counsel.

- Requests for a formal legal opinion must be in writing (either through an e-mail message or interoffice mail) and should give background facts pertaining to the issue as well as a clear statement of what legal issue the requesting party would like addressed.

2. Contract Negotiation

- Individuals who want help negotiating any County contracts, except for labor related contracts, should call or e-mail Corporation Counsel with the request.

- The contract to be negotiated must be sent to Corporation Counsel.

- The name and telephone number and/or e-mail address of the contact person for the other party to the contract must be given to Corporation Counsel.

- Face to face meetings to discuss the contract may be scheduled through the County's calendaring system or by calling Corporation Counsel.

3. Litigation

- If a department learns of a possible or actual lawsuit or any type of legal claim against the County, it must immediately notify Risk Management and/or Corporation Counsel by phone. The department must then follow up with a written document detailing the facts giving rise to the lawsuit or potential claim.
- All papers pertaining to the lawsuit or potential claim should be saved and kept in a separate file.
- Upon request by Corporation Counsel or Risk Management, all papers pertaining to the lawsuit or potential claim must be copied and sent to Corporation Counsel/Risk Management.
- Department Heads and relevant employees should be available to discuss the lawsuit or potential claim with Corporation Counsel, Risk Management or the County's contract attorneys.

4. Subpoenas

- An individual who receives a subpoena must immediately notify Corporation Counsel of the subpoena, what documents, if any, it seeks and whether any individuals are being asked to testify in a pending legal matter.
- A copy of the subpoena must also be sent to Corporation Counsel as soon as possible.
- If the subpoena calls for testimony from a County employee and the employee would like to meet with Corporation Counsel prior to the testimony, the employee should schedule a meeting with Corporation Counsel prior to the court date to discuss the testimony.

Facilities Management

1. Transportation

- County vehicles shall only be used for official County business. The use of a County vehicle for personal business is prohibited. County vehicles shall not be driven home, except when specifically authorized. County vehicles kept at home overnight shall be stored in a garage or driveway and shall not be parked overnight on the street.
- Employees shall have and maintain a valid Michigan license in order to drive County owned vehicles. An annual check shall be performed to verify that such employees continue to maintain a valid driver's license. Employees shall be responsible for all parking and moving violations incurred while driving County vehicles and must report all violations committed while operating County owned vehicles to their Department Head and the Risk Manager within one work day of the citation.
- Employees shall return all temporarily assigned County owned vehicles to their designated parking locations at the end of each working day. Permanently assigned vehicles may have specific restrictions.

2. Building Maintenance

- For all maintenance requests, departments shall enter a request by contacting the helpdesk via email at helpdeck@ewashtenaw.org or phone at 222-3737. After hours emergency service can be obtained by contacting the helpdesk at 222-3737.
- Requests that cannot be entered this way shall be submitted on departmental letterhead to the Facilities Management Director with as much detail as possible.

3. Building - use outside of normal working hours

- Use of County buildings outside normal working hours shall be restricted to County departments, boards, committees and commissions except as approved by the County Controller.

- Employees who arrive after normal business hours shall ensure that the main entry door is locked behind them. All sign-in sheets and work rules shall be observed by any employee(s) occupying County buildings after normal business hours.

- Whenever possible, meetings outside normal working hours shall be scheduled in advance through the appropriate office. Meetings in the Administration Building shall be scheduled through the County Administrator's Office; meetings in other buildings shall be scheduled through the respective department.

- The employee(s) authorized to use the building shall be responsible for the security and condition of the building while it is in use.

4. Energy Management

- Employees shall turn lights off whenever the office will be vacant for even a short period of time.

- Employees shall turn off all appliances (i.e. fans, coffee pots) whenever an office is vacant and at the end of the business day.

- Employees shall not prop open doors or windows for fresh air or ventilation. Fresh air shall be provided by mechanical systems.

- Employees who share large office spaces shall switch off unused lights when several people are gone from the office space.

- Employees shall not use electric heaters or other heating devices to amplify the heat at their workspace. Such heaters are not safe to operate and cause an imbalance in the heating system.

5. Preparation of County Mail

The proper preparation of County mail that is sent to the Facilities central mailroom saves your department time and money. By 3:30 p.m. every day, the majority of the County's outgoing first class mail is metered and mailed at the first class <u>pre-sort</u> rate. This results in significant savings from the regular first class rate of 32 cents per piece. All outgoing mail, received by 4:30 p.m., is mailed the same day. Likewise, all incoming mail is delivered the same day. In order to achieve these economies of scale, of both time and money, please use the following procedure when sending mail to the County's central mailroom.

- You may send mail in either sealed or unsealed envelopes. Arrange all <u>unsealed</u> envelopes together with the <u>flaps out</u>, so that the mail machine will seal them as it applies the postage.

- Arrange all envelopes with the addresses facing in the same direction.

- Separate into individual stacks: certified mail, post cards, foreign mail, thick envelopes, interoffice envelopes, and any pre-stamped mail. It is especially important that all pre-stamped envelopes and cards are kept separate from the mail that is to be metered.

- Rubberband all stacks of mail, so that the mail stays together.
  (Facilities will furnish departments with rubber bands upon request.)

If you have a mailing that includes mail **to other County (or City of Ann Arbor) employees or departments**, place that mail into interoffice envelopes, so that it will be delivered by a County mail courier the next day. Including such mail in with the regular outgoing first class mail, not only costs your department the postage, but delays delivery. Please take the time to separate out this mail.

- *Note: Facilities does not deliver to the Washtenaw County Road Commission (Zeeb Road). Send mail to that agency via U.S. Mail.*

- Write the 4-digit LGFS organization (ORG) number to which the postage is to be charged above the return address. This is especially important if the postage is to be charged to a different ORG number than that represented by the return address.

- If several sheets of paper are to be mailed, and a business-size (No.10) envelope is used, be sure to crease the contents well and seal the envelope. It is better to use a larger manila envelope, without a clasp, to mail several sheets. THE EXPOSED METAL CLASP ENVELOPES WILL DAMAGE THE POSTAGE MACHINE. When using up your supply of clasp envelopes, please be sure to seal the envelope flap over the clasp or place a piece of tape over the clasp; and type or write on these large envelopes the postage class rate at which you want to send the envelope(e.g. FIRST CLASS)..

- When addressing interoffice envelopes, please address as specifically as possible. Include full name, department name, and building location on the lines provided. Any “mystery mail”, insufficiently addressed, will be returned to the sender.

Budget

All budget policies are governed in accordance with the biennial budget process and can be found in the yellow section of the Budget Summary publication.

1. Budget Transfers

- Departments are authorized to make budget transfers within categories of up to $10,000 without additional approval being required. Once the Budget Journal Entry is completed, the department should notify their Budget Analyst who will then post the journal entry in the financial system.
- To do a budget transfer involving a dollar amount of more than $10,000 but less than $100,000 or 10% of the total budget departments should notify their Business Analyst who will then work to receive Administrative authority for the adjustment.
- Typically, budget adjustments are only allowed between the operating budget categories, which include Supplies and Other Services & Charges. The same authorizing dollar amounts apply as outlined above.
- Budget adjustments transferring money within and out of the Personal Services category are permitted only as outlined in #5 below.
- Adjustments involving any other category will be authorized on a case-by-case basis. Departments wishing to do such a budget adjustment should contact their Business Analyst for approval.

2. Creation of Grant Budgets

- All grants with a total budget of $10,000 or more must go before the Board of Commissioners for approval. No grant budget will be set up prior to BOC approval and notification from the funding agency showing the grant has been awarded and the amount that is funded.
- Once notification of funding has been received, whether in the form of a Grant Award Notice or a signed agreement from both parties, a Grant Action/Award Form must be filled out by the department and submitted to the department Business Analyst.

3. Technology Purchases

- All technology related purchases should be made as a part of the Tech Plan. This includes all county computers, printers, fax machines, software, etc. See additional information in the Business Rules for the IT department.

4. Transportation Purchases

- All county vehicles are purchased and maintained through the Facilities Management – Fleet Division. Requests for new vehicles must be made through the budget process, or prior to submitting a grant application for which the vehicle is needed.
- If the cost of the vehicle or cost of maintenance increases beyond the budgeted amount, the increased cost must be absorbed within the department's operating budget.

5. Use of Personal Services Budgets for General Fund Supported Departments

(Note: Non-General Fund Supported Departments and the Trial Court have unique characteristics and personal services budget issues for those departments should be discussed with the department's Business Analyst.)

- Personal Services budgets are typically not allowed to be transferred to other areas of the budget. Salary Projections are done each year to determine the funding levels for Salaried Permanent and Fringe Benefits. These funding levels are set using an attrition rate which is calculated from the past five years of history of actual expenditures vs. budget.
- It is possible to hold positions vacant to fund projected deficits or special projects. Departments wanting to hold positions vacant must submit a detailed plan to their Business Analyst prior to making any personnel changes. Each request will be evaluated based on the business and financial impact on county operations.
- If there is an overage in either Salaried Permanent or Fringe Benefit line items (70200 and 71520) due to changes in permanent County employees' pay or due to an authorized position modification in the department, the Budget Office will cover the deficit since these line item budgets are established by the Budget Office's salary projections. Overages in Fringe Benefits due to increased Overtime or Part Time Temporary usage must be absorbed within the department's operating budget.

6. Payment of Temporary Services

- The Part Time Temporary line item (70300) should be used to pay for all temporary County employees. All temporary services provided through a temporary agency such as Adecco should be paid out of the department's operating budget in the Consultants & Contracts line item (80800).

Finance - Accounting

1. Journal entries

- Documentation. All journal entries must be submitted with documentation explaining the nature and purpose of the entry. Attach documentation or write an appropriate explanation at the bottom of the document.
- Authorized signature. All journal entries must be signed by the person initiating the transaction and approved by a person having authority in the department.
- Deadline. Accounting closes the general ledger each month at the end of the fifth working day of the new month. Journal entries must be received by Finance Accounting well before this deadline in order to be approved and posted in the general ledger and included in the financial reports for that month.

2. **Fixed Assets** - The Finance office must be notified of any purchase of equipment with a value of $5,000 or more so that the equipment can be tagged and information entered in the Fixed Asset Inventory System. The information should be communicated to the Finance Office the day the equipment is received.

Finance - Payables

1. **Travel** - Travel will be processed as explained in Washtenaw County Policy and Procedure Manual I.T.2

2. **Payment Voucher Submission -** Checks are generated weekly on Tuesday, Thursday and Friday: unless a holiday falls on any of these days, checks will then be generated one day prior to the Holiday. (i.e. Holiday falls on Tuesday, checks will be generated on Monday)

3. **Check Distribution** - All checks will be mailed via US mail by the Payables Office unless prior agreement with the Department Head and the Payable Manager has been made. Checks will be mailed within 48 hours of being printed.

4. **Payment Voucher Deadline** - Invoices must reach the Payables Office by 4:00 pm the day before the check run.

5. **Scheduled Claims** - Claims will be processed as explained in Washtenaw County and Procedure Manual I.B2 (g).11

6. **Voids** - complete Stop Payment/Void Check Request and forward to the Accounts Payable office. The check will be reissued within 10 days of receipt of the completed form.

7. **Exception Checks** - The department will complete the payment process as normal and forward the appropriate paperwork to the Payable office. The communication from the Department Head or his/her designated representative (on file in the Payable office) is needed by 10:00 a.m. via the technology available. The check will be available for department liaison pickup at 4:00 p.m.

8. **Early Release** - The Payable office MUST have notifications by 10:00a.m. for release to the department liaison at 4:00 p.m.

9. **1099** - Re-issue fee will be $5.00 per request.

Finance - Payroll

1. **Timesheets -** All paper timesheets shall be submitted and received into the Payroll Dept by 4:00 p.m. on Monday prior to the payday. If the Monday is a holiday, the deadline shall become Tuesday 4:00 p.m. prior to payday.

2. **Vacation/Sick/Comp accruals corrections -** All corrections must be received in the Payroll Dept by 5:00 p.m. Thursday of time entry week.

3. **Modification of W-4s -** All requested changes need to be received into the Payroll Dept by 5:00 p.m. on the Thursday of time entry week. The new change will take effect on the next payday.

4. **Voluntary deductions -** All Add/Change/Delete will be need to be in the Payroll Dept by 5:00 p.m. on ~~the~~ Thursday of time entry week. The new change will take effect on the next payday.

5. **Time and Attendance input -** All data must be inputted on Friday of time entry week by 12:00 noon. When a holiday falls on Friday, the deadline shall become Thursday of time entry week by 12:00 noon.

6. Direct Deposit

a. All Add/Change/Delete will need to be in the Payroll Dept by 5:00 p.m. on the Thursday of time entry week. The new change will take effect on the next payday.

b. With the availability of viewing your direct deposit statements online through EZ, all printing and mailing of direct deposit statements will be discontinued as of 1-13-06.

c. Direct Deposit is a mandatory condition of employment for all Regular & Temporary employees hired after June 2nd 2005. Regular &Temporary employees shall be paid by means of either a direct deposit into an account at a financial institution designated by the employee, or have the direct deposit loaded onto a CompCARD MasterCard. Regular & Temporary Employees attending the orientation provided by HR will receive the Regular & Temporary Employee Orientation form. This form is used for the employee to make their selection for either a bank direct deposit or Compcard deposit. Supervisors providing their own orientation will need to provide this same form to their Regular & Temporary Employees.

7. Step Increases

a. Effective 6/22/97, the Department will no longer be required to submit a PAR for the processing of an employee merit increase. Human Resources will update each employee's wage as their anniversary date arrives. The new wage will be changed on the first full pay period within the anniversary date.

b. Employee evaluations continue to be an integral part of the annual step increase evaluation process. They will still be required for each employee in accordance with Union and Non Union due dates (see E-Central) . If, for valid reason, your evaluation of any employee will preclude a step increase, Human Resources must be notified in the pay period prior to the anniversary date of that employee. Failure to provide the employee with a timely evaluation and notify Human Resources will negate your ability to revoke the step increase. All bargaining units have been consulted regarding this.

8. Beginning unpaid leave of absence - If an employee begins their unpaid LOA prior to the first day of a full pay cycle, their timesheet shall reflect these days in the "Non-Paid Hours" column. This has no effect on an employee's ability to go on leave of absence at their requested time.

9. Worker's Compensation - the department must notify Human Resources within 24 hours of the accident:

a. Employee can utilize sick, vacation, & comp balances prior to eligibility of workers Compensation claim.

b. Monies equivalent to hours utilized by employee will be deducted from the first pay check and hours the hours will be reinstated to the employee's appropriate bank upon eligibility.

c. Employee will receive supplemental retro for days 1 thru 7 if out of work 14 consecutive days or more.

Note: a & b are based on eligibility.

10. Terminations of Employment - It is the department's responsibility to process a Termination PAR ten (10) days prior to last working day. If employment is terminated prior to the first day of a full pay cycle, the time sheet shall reflect these days in the "Non-Paid Hours" column. It is the departments' responsibility to validate all wages paid to an employee who has separated from County employment prior to releasing the check. Failure to provide this validation will result in the loss of departmental and County funds.

11. Distribution of Pay Checks - Payroll began sending out checks in the U.S. Mail as of 7-1-04.

12. **Exception checks**
    a. Missing hours-A minimum of 7.5 hours. Upon receiving a payroll correction form, a check will be available after 3:00 p.m. on payday
    b. No check issued – Upon receiving a payroll correction form, a check will be available after 3:00 p.m. on payday

    (Payroll liaisons need to submit a payroll correction form to the Payroll Dept no later than 10:00 a.m. on payday, in order to assure the exception checks will be available after 3:00 p.m. on payday)

13. **Vacation Pay advance:** It is the responsibility of the employee and the department payroll liaison to submit the timesheet(s) for the period covering the advance to the Payroll Dept by 5:00 p.m. on the Thursday of time entry week.

14. **W-2'S -** The employee shall fill out a W-2 Request Form and pay $10.00 for the previous year if requested after July, or $15.00 for all prior years. The form and payment will be sent to the Payroll Dept.

15. **Transfers**
    a. Transfers without salary increase shall occur at the beginning of a pay cycle if the employee begins her/his transfer prior to the first day of the pay cycle the departments would be responsible to process the necessary journal entry to adjust the appropriate budgets.
    b. Transfers with salary decrease would be begin on the first full pay cycle following notification of her/his transfer.

16. **Temporary to Regular Status -** the employee's status change shall occur on the first day of a full pay period.

17. **Reissued Paychecks -** the employee shall be charged $10.00 per check for each stale dated, damaged or lost paycheck voided. The employee may pay by cash or a check made payable to the Washtenaw County Treasurer. The reissued check shall be ready at the next exception run. The $10.00 fee can be waived by going 100% direct deposit.

Finance - Purchasing

1. **Purchase Orders**

- Purchase orders are required for the procurement of goods and services for the county. The only exceptions are items per attachment C of the Procurement - Purchase, Payment and Vendor Selection Procedure (I.P2[b/c.2].12.

- Purchase orders (PC's) are generated by the Purchasing Division via requisitions (RX's) from departments of by departments via departmental orders (OD's)

- Departmental orders (OD's) are limited to $5000 and are used when the purchase does not require a contract, blanket order or lease of equipment or property.

- Purchase orders shall be reviewed on a quarterly basis to determine if they are still valid and should remain open.

- Year end closings and deadlines for ordering goods and services to be charged to current year budgets are established via Department Head memorandum from the Finance /Facilities Departments in the 3rd quarter of the current year.

- Purchase orders may be rolled over from one budget year to the next only if part of a multi- year budget or if the goods and services were ordered in the current year but payment is due in the following year.

- Bids/Quotes are required for purchase orders that exceed $5000.00

- Purchase orders are distributed as follows:

  Copy 1 (VENDOR COPY) is mailed to the vendor.
  Copy 2 (FILE COPY) is kept in Purchasing (PO Files)

2. Bids/Quotes

- If the procurement exceeds $5,000 but does not exceed $25,000 a minimum of three (3) quotes are required in the form of email, fax, or written from each bidder.

- If the procurement exceeds $25,000 then the formal written bid process must be adhered to.

- A bid/quote summary shall be prepared and forwarded to purchasing for final review, and inclusion in the procurement file.

- Bids and quotes must be awarded to the most responsive and responsible vendor as defined in Procurement - Purchase, Payment and Vendor Selection Procedure (I.P2[b/c.2].6).

3. Contracts

- Contracts are required for the following:

  - Purchase of services of an individual or a company.

  - Purchase of goods that includes other services of the company such as installation or monitoring of equipment or some other ongoing relationship with the County.

- Contracts require valid insurance certificates.

- Contracts can only be amended by the originator of the contract and cannot be amended after their expiration date.

- Contract packets must contain the following:

  - Proper signatures on contract
  - Approved contract format
  - Insurance certificates
  - Approved requisition (CR)
  - Model Log in JDE
  - Contract saved in shared G: Drive

Human Resources

PERSONNEL PROCESSING

1. **Submission of *Personnel Action Requests* (PAR) -** *PARs* shall be completed and submitted to HR via the on-line employee intranet website address, http://employee.washtenaw.org for the following activities:

A. New Hires (departments are advised to utilize the offer letter form found on the HR website)
B. Change of Address
C. Change of Account Numbers
D. Beginning and Ending Leaves of Absence
E. Termination
F. Beginning and Ending Temporary Assignments
G. Promotions / Demotions
H. Lateral Transfers

2. Orientation

New employee orientation is conducted on each **Monday of a pay week.**. If a holiday falls on the Monday, orientation will be held on Tuesday. Orientation begins at 8:30 am in the Administration Building, 200 N. Main, Lower Level Conference Room. In order to assist in prompt processing of benefits, employees should bring the following items to orientation:

A. Acceptable & original documentation for completing the Form I-9.
B. Birthdates and social security numbers of dependents the employee will cover under County medical and dental benefit plans.
C. Birthdates, social security numbers, and addresses of individuals the employee might nominate as beneficiaries of retirement plans and/or life insurance policies.
D. Savings and checking account numbers for direct deposit of their paycheck.

3. Requests for Job Postings

Requests to have positions posted, temporary or regular, shall be made to Human Resources utilizing the **Selection Plan** (on-line form which replaces the green sheet found at http://employee.washtenaw.org/em/hr/rh). In accordance with collective bargaining agreements, positions are posted every Monday for seven (7) working days. Requests shall be received in Human Resources by the Wednesday prior to posting. More information on the posting policies can be found in Volume II, Article IV, Section found on the website noted above.

4. Application Procedures

Once the job posting filing deadline has closed, applications are reviewed in the Human Resources Department to determine minimum qualifications and union preference. Applications meeting minimum qualifications are then forwarded to the hiring department with union preference identified, if applicable. Departments are expected to comply with the appropriate collective bargaining agreements when making hiring decisions.

5. Step Increases

Annual step increases are a method by which satisfactory performance is rewarded. Step increases are implemented on the first day of the pay period in which the employee anniversary date falls. Non-Union pay-for-performance is implemented annually in December. Departments should contact Human Resources at least two (2) weeks prior to an employee's anniversary date in the event that a step increase should be held due to less than satisfactory performance. Performance evaluations are due for AFSCME Local 2733 employees on the second Monday of November (on-line evaluations can be found on E-Central). Performance evaluations may be completed at any time during the performance year should there be a need for corrective action.

6. Tiered Progressions/Career Movement

Department Heads must notify Human Resources via an on-line Personnel Action Request (PAR) when an employee has been designated to receive a Career Movement increase (from one grade to another within a position) due to completion of specified requirements (education, years of experience).

7. Request for Reclassification

The intent of the classification system is to provide for proper job descriptions and levels of pay for all positions comparable with present market conditions and currently accepted personnel practices.

Requests for reclassification should only be submitted as part of the Budget process, a departmental realignment, and/or during contract negotiations. All requests should be accompanied by a ***Position Description Questionnaire (PDQ)***.

HEALTH & LIFE INSURANCE BENEFITS

1. **Blue Cross / Blue Shield (BC/BS) / Delta Dental Questions**
   Questions concerning BC/BS coverage and/or claims should be initially addressed to the following health care providers:

Provider	Telephone #
Blue Cross / Blue Shield (01334)	1-800-258-8000
Delta Dental (1637-0001)	1-800-482-8915
M-Care	1-800-658-8878
Care Choices	1-800-852-9780
Vision Service Plan	1-800-877-7195

2. **Addition or Removal of Dependents from Medical and/or Dental Benefits**
   Additions and/or removal of dependents from medical and dental insurance benefits must be made within 30 days of the qualifying event (e.g., marriage, birth, divorce, death). To request such changes, a ***Blue Cross / Blue Shield Group Subscriber Application*** and/or ***Delta Dental Eligibility Enrollment/Update Form*** should be completed and submitted to Human Resources. Insurance coverage changes become effective the first day of the following month. Benefit cards will be issued and sent to the employee's home.

3. **Changing Beneficiaries -- Life Insurance**
   To request a change in your life insurance beneficiary, a ***UNUM Group Enrollment Form*** should be completed and submitted to Human Resources. If more than one beneficiary is requested, please submit additional names and relationship and attach to the ***UNUM Group Enrollment Form***.

4. **Enrollment Timeframes -** Open enrollment for Flexible Benefits, Blue Cross/Blue Shield, Sponsored Dependents, Family Continuation and Reimbursement Accounts occurs in October with changes to take effect January 1.

RETIREMENT

1. **Changing Beneficiaries**
   (WCERS)-To request a change in your primary and/or contingent beneficiaries, a ***Washtenaw County Employee's Beneficiary Designation Form*** should be completed and submitted to Human Resources.

   (MPPP)- To request a change in your primary and/or contingent beneficiaries, you should contact Prudential Retirement Services directly at 1-800-833-5761. They will update your beneficiary designation directly.

   (MERS)- To request a change in your primary and/or contingent beneficiaries, you should contact MERS at 1-800-767-6377. You may also download a beneficiary change form directly from the MERS website (http://www.mersofmich.com). Complete the form and send it directly to MERS at the address indicated on the form.

2. **Washtenaw County Employees' Retirement System (WCERS)—Retirement Process**
   When a participant in the WCERS has met the eligibility under the plan to retire, and has made the decision to do so, the employee needs to schedule an appointment with the Retirement Office a minimum of 30 days before the last day of employment in order to effectuate their retirement. . The Board of Trustees meets monthly (generally the fourth Wednesday each month) and must approves all retirement applications prior to processing a member's first pension check; thus employees should review the Board's annual calendar for coordination purposes. If the Retirement Board has not approved your retirement application before your intended retirement date, your retirement paychecks could be delayed until the month following retirement board approval.

3. **Municipal Employees Retirement System (MERS)—Retirement Process**
   The Washtenaw County Human Resources/Retirement Office does not process retirement benefit estimates in-house. All benefit estimates are conducted from the MERS office in Lansing, MI. As such, any employee that is approaching retirement eligibility should request a benefit estimate from the MERS office at least 6 months to 1 year in advance of their anticipated retirement date. After receiving this estimate, employees should make an appointment with the Washtenaw County Retirement Office to complete remaining paperwork. An original birth certificate for the employee, as well as any potential beneficiaries, may be required. MERS also requires all retirees to setup a bank account to receive pension checks via direct deposit, so please bring this information to your appointment with the retirement office.

4. **Money Purchase Pension Plan (MPPP) Fund Distribution**
   When a participant in the MPPP has separated from employment with Washtenaw County, the employee should contact Prudential directly at 1-800-833-5761.-MPPP Distribution Requests are executed as soon as possible following receipt of the distribution request from the Retirement Office. Please note that due to the timing of the pay cycles, it can take between three and five weeks after the actual date of termination of employment for a person to receive their final paychecks. An individual's MPPP account cannot be closed and distributed until after the final paycheck has been received.

WORKERS COMPENSATION

Workers' Disability Compensation is an employee benefit established in 1912 by the Michigan Legislature. Compensation is provided for disability or death as a result of a work-related injury or disease, without regard to who may be at fault.

A ***Washtenaw County Supervisor's Report of Accident*** form should be completed and submitted to Human Resources for any accident or injury resulting out of and in the course of employment Employees should be instructed to go to **Business Health Services** if medical attention is needed or to the nearest hospital for life threatening conditions. A Supervisor's Report of Injusry available on E-Central should be completed and forwarded to Human Resources within 24 hours of the accident.

PROFESSIONAL DEVELOPMENT

1. **Professional Development Program -** In alignment with the Business Improvement Process, Washtenaw County provides a premiere, Professional Development Program for all employees. The program provides for classroom and on-line training, a Leadership Academy for all supervisors and managers, comprehensive orientation, books, mini-grants, departmental grants, meeting space and a host of other services. To qualify for participation in the program all employee are required to submit a professional development plan to the Library Learning Resources Center via the employee website found under the HR/Professional Development Program.

2. **Tuition Reimbursement Program -** Tuition reimbursement is a benefit providing financial assistance to all regular, full-time employees to encourage their continuing education and participation in an accredited higher education program for the attainment of an undergraduate or higher degree. The reimbursement rate is 50% of tuition costs upon receiving a "C" or better grade. Application to this program can be made via the employee website under the Professional Development Program.

Any employee having employment status as a regular, full-time employee of Washtenaw County for a period of no less than twelve (12) consecutive months on the date of starting an approved course shall be eligible for financial assistance under the Tuition Reimbursement Program.

Interested employees should submit a completed ***Tuition Reimbursement Application*** to the Professional Development Program at the Library Learning Resource Center (LLRC) to determine eligibility **<u>prior</u>** to the start of classes.

EMPLOYEE ASSISTANCE PROGRAM
The *employee assistance program*, *LifeBalance*, is a special benefit service provided to all Washtenaw County employees. The EAP offers confidential professional assistance to employees and their family members for problems, which could adversely affect their work and/or personal life. For more information regarding the Washtenaw County Employee Assistance Program, contact **1-800-234-5151 En espanol, 888-732-9020 (TDD: 1-800-999-3004)**.

Information Technology

1. **Computer Equipment**

   - The purchase of all computer equipment, hardware, software, and services are coordinated through the Department of Information Technology. Standards for desktop computers, laptop computers, PDA's, etc. have been established and are published on E-Central.

   - Repairs to existing computer equipment are reported to the Support Services Help Desk (222-3737) and are responded to within one business day.

2. **Telephones**

   - Requests for any moves, adds or changes to existing telephone equipment will be completed in 10-14 business days. In most cases these will be completed in 5-7 business days. More time is necessary if new equipment must be ordered or if the move/change is extensive.

   - Requests for repair to existing telephone equipment are reported to the Support Services Help Desk (222-3737) and are responded to within one business day.

3. **Availability**

   - The Support Services Help Desk (222-3737) is staffed Monday through Friday from 7:30 a.m. to 5:00 p.m. Emergency coverage and voicemail is available through the same number after hours.

   - All County Computer applications, including the Local and Wide Area Networks, are available during the County's normal hours of operations, Monday through Fridays from 8:30 a.m. to 5:00 p.m. Most are actually available all day every day but this availability is not guaranteed due to the need to perform maintenance on them and support is not offered outside these scheduled hours. **Arrangements can be made to support outside posted hours by contacting the Support Services Help Desk at 222-3737.**

   - The AS/400 located at the Sheriff's Department that runs the New World System is available 7 days 24 hours, except for a quarterly backup.

4. **Project Lifecycle and Methodology**

   - A process review will be completed before any new IT projects are approved.

   - A Return on Investment (ROI) Assessment will be completed before any new IT projects are approved.

   - The development of computer application software, including purchased software, is a partnership between the customer department and Information Technology (IT). IT uses a standard methodology to guide this process with the goal of providing cost-effective and beneficial technology solutions.

Risk Management

1. **Freedom of Information Act Requests**

- All requests for public records under the Freedom of Information Act ("FOIA") must be in writing. If a department receives a written request seeking public records and the department will comply with the request within the statutory period (5 business days), it may proceed to fulfill the request. The department must then keep a copy of the request on file for one year after which time it may be destroyed.

- If a department would like to extend the time to respond to the request by an additional 10 business days as permitted by FOIA, or the department would like to deny all or part of the request, the request must immediately be sent to Risk Management for handling. If the department receives an extension, it must notify Risk Management of the date when it fulfills the request. Risk Management will keep a copy of the request on file for one year. Those requests when an extension is given or that are ultimately denied will be kept on file by Risk Management for one year.

- Department personnel who know where to find the requested information must be available to assist Risk Management in compiling public records in response to the request.

- Face to face meetings to discuss the request may be scheduled through the County's calendaring system or by calling Risk Management.

2. **Litigation Management**

- If a department learns of a possible or actual lawsuit or any type of legal claim against the County, it must immediately notify Risk Management. The department must then follow up with a written document detailing the facts giving rise to the lawsuit or potential claim.

- All papers pertaining to the lawsuit or potential claim should be saved and kept in a separate file.

- Upon request by Risk Management or Corporation Counsel, any papers pertaining to the lawsuit or potential claim must be copied and sent to Risk Management/Corporation Counsel.

- Department Heads and relevant employees should be available to discuss the lawsuit or potential claim with Risk Management, Corporation Counsel and/or the County's contract attorneys.

3. **Automobile Accidents with County owned vehicles**

- If an employee is involved in an automobile accident with a County owned vehicle, he or she, must call the police and an ambulance if needed.

- Contact your supervisor.

- Do not admit fault and do not discuss the accident with anyone, other than law enforcement and Washtenaw County representatives.

- The employee must complete all of the forms kept in the glove compartment of the vehicle. The Driver Report of Vehicle Damage must be completed and submitted to both Risk Management and the Garage with 24 hours. This form is now available on E-Central, under Employee Safety. Obtain a copy of the police report and submit to Risk Management as soon as possible.

- If you are an employee in a safety sensitive position as outlined in the Washtenaw County Drug Testing Program, and you meet the criteria in the “Post-Accident Testing” portion of the policy, drug/alcohol testing must be conducted pursuant to the policy. Specific questions regarding the program can be directed to Rebecca Curry in the Human Resources Department.

4. Claims

- If an employee is involved in or a witness to an incident which results in any type of an injury to the public or property damage, he or she, must report this incident within 24 hours to Risk Management. You can us the Risk Management Incident Report Form located on the Employee Safety website.

- If the incident involves injury to the public, contact the Designated First Aid Responder for your building and call 911. If the injured party is able, they should make their own medical decisions.

- Do not admit fault for the incident and do not offer to pay for any medical expenses.

- Do not discuss the incident with anyone, other than law enforcement and Washtenaw County representatives.

- Cooperate with Risk Management in any investigation surrounding the incident.

5. Requesting a County Insurance Certificate

- If you need to obtain proof of the County’s insurance for a contract in which the County is a vendor, you must contact Risk Management in writing and provide the following information: Certificate Holder’s name and address; and, the specific insurance that is being requested.

- The certificate will be requested from the insurance agent and the original will be sent directly to the certificate holder with a copy being retained by Risk Management.

6. Waiver of Insurance Requirements for Contracts

- If an insurance waiver is need for a contract because a vendor is unable to comply with the requirements, the employee must request a waiver in writing from Risk Management.

- The request must provide the following information: Vendor’s name; scope of services; a list of which insurance coverages the vendor is unable to comply with and a detailed reason as to why they are unable to comply.

- The request will be reviewed and a decision will be made by Risk Management whether a waiver is appropriate. If approved, a waiver will be sent to the employee so that it can be attached to the contract. If the request is denied, Risk Management will work with the employee in an attempt to obtain the insurance from the vendor.

7. Loss Prevention/Safety

- If an employee has a safety concern, the employee needs to work with his or her supervisor/department head to attempt to resolve the issue. If assistance is needed from Risk Management, the employee should contact Risk Management in writing detailing his/her safety concern with complete details of why it is a safety concern, what has been done to date to correct it, and suggestions on how to proceed with correction.

- Risk Management has distributed a Safety Manual to all of the departments and there is an Employee Safety Website. Employees need to be familiar with and follow all of the policies and procedures established by the County.

- Risk Management will work with the Department and the Employee to correct the situation.

- If MiOSHA visits any Washtenaw County worksite, before an inspection is started, you must notify your supervisor, department head, Risk Management and a union representative. All parties will be present and will take part in the inspection. Risk Management will work with MiOSHA, employees and the department throughout the process until completion.