



Certificate in Payroll/Personnel

Participant's Handbook

Revised August 2022

What is the Certificate in Payroll/Personnel?

- The Certificate is designed to develop your professional knowledge, understanding, and competence to a level where you will be able to contribute effectively to key areas of school payroll and personnel.
- The program aims to provide you with a framework for developing and improving your own professional payroll/personnel practices within the organization where you work.
- The program encourages you to think about what you do and how you do it within your job.
- The program promotes best practices within educational payroll/personnel administration.

What are the objectives of the program?

The specific objectives of this program are to provide opportunities to:

- To promote the highest professional and ethical standards of school business management practices for Alabama's schools.
- To provide recognized standards of professional competence for school business officials.
- To provide professional growth opportunities in order to carry out effectively the responsibilities of the position.
- To capitalize on the experiences and training of current school business officials to enhance the functions of all school business officials.
- To provide basis for advancing professionalism of payroll/personnel administrators
- To gain additional knowledge and understanding about your current role.
- To strengthen the management of local school system's operations for the ultimate benefit of the students of Alabama Public Schools.
- To provide knowledgeable mentors.

Who is the program for?

- The program is designed for school payroll and personnel directors, supervisors, and clerks with various levels of education and school payroll/personnel experience. It is also available to anyone in school business management or K-12 education. The program is structured to provide access to information and training that is specific to Alabama law and regulation and federal laws.

How will I be supported while undertaking the program?

- It is recommended that the Chief School Financial Officer supports you in all aspects of the program to help develop your role in your job. The program will also provide you with opportunities to meet and discuss issues with colleagues. We believe that **'networking'** can be one of the most valuable aspects of the program and we hope you will take full advantage of the opportunities available.
- The program courses will provide a great deal of information in a short period of time. The courses are intended to cover major points about their respective topics, offer opportunity for questions and discussion, and provide resource information for future use.
- Throughout the program you will be supported by instructors who will meet you at the face-to-face sessions, be in contact with you when you are working through the modules and will assist you as you prepare for assessment.
- AASBO's professional development opportunities are geared toward helping you complete the program and maintain your certificate.
- AASBO also offers a mentor program for new payroll personnel that includes additional workshops and training in a group session for new payroll/personnel staff. These sessions are held on a regular basis to ensure that new payroll staff have the tools and training they need to be successful in their jobs.

How will I be encouraged to learn while working through the program?

You will be given the opportunity to take part in a number of different learning activities as you journey through the program.

- You will have opportunities to work on your own studying the materials.
- There will be times when you may meet with other participants to take part in learning activities.
- You will be able to learn from a range of sources through real time experience.
- You will have discussions with your instructors in order to stimulate your learning.

What if I have difficulties during the program?

We know that you are embarking upon a long journey through the program. You may or may not have studied for some time. There may be times when you experience some difficulties. Wherever possible we want to help and support you throughout your learning journey. Therefore, if you have any concerns, your first point of contact is your Chief School Finance Officer. If your issue is technical or administrative, the point of contact is the program leader who can be contacted through the AASBO by email at www.aasbo.com. A mentor will then be assigned to work with you.

What does the program contain?

The program will contain 10 courses (30 classroom hours).

Employee Leave Laws

An in-depth review of the federal and state leave laws for education employees. Topics to include sick leave, personal leave, catastrophic, and military leave. Review of the requirements under the Family Medical Leave Act and discussion of other types of extended leaves.

Course Content:

- FMLA/Leave of Absence/OJI
- Sick Leave/Catastrophic /Military
- Practitioner- Sick Leave Bank Policies and Procedures

FLSA Wage and Hour

This session will include an in-depth review of the Fair Labor Standards Act and a review of the regulations regarding exempt employees, overtime issues, dual employment and other wage and hour issues related to school boards.

Course Content:

- Major Provisions of the Act
- Exempt Vs. Non-Exempt Status
- Dual Employment
- Determining When to Pay Overtime
- Calculating Overtime
- Recordkeeping Requirements
- Repercussions of FLSA Non-compliance

Accounting System and Personnel Reporting

Course provides an overview of payroll coding and the effect on state funding. A review of the accounting manual with focus on the coding component for personnel, monitoring the personnel budget, and monthly edit checks. Course will also review the reports and controls in the payroll software to streamline the process. Session will also include teacher certification and in-depth review of the LEAPS reporting for school districts. Session will cover all aspects of the reporting requirements and the conversion to funding allocations for the local district through the foundation program, including the importance of proper coding, certification, and experience reporting.

Course Content:

- Accounting Code Components
- Valid Coding Combinations
- Coding Errors
- Foundation Program Funding
- Personnel Reporting - LEAPS

Employment Law (Formerly School Law I)

Session will focus on the legal issues relevant to employment of school district personnel. Course will discuss the Alabama tenure law (Student's First Act), the employment process, to include E-Verify, vacancies and job postings. Session will also cover the federal laws related to employment, including FMLA, HIPPA, FERPA FLSA, sexual harassment, discrimination, Title VII and IX.

Course Content:

- Alabama Tenure Law (Students First Act)
- Employment Process
- Federal Employment Laws
- Family Medical Leave Act
- Fair Labor Standards Act

Benefits and Tax Reporting

This session provides an in-depth overview of what payroll/personnel employees should know about employer benefits program for Alabama school districts. Topics include TRS, PEEHIP, deferred compensation plans, Section 125 programs and other benefit programs. This course will also cover the tax reporting requirements of a school district to include the 941's, W-2's, tax deposit requirements, business expense accounting, and other paperwork related to payroll.

Course Content:

- TRS, PEEHIP and Deferred Compensation Plans
- Section 125 Programs
- Federal and State Tax Reporting Requirements
- Employment Status: Employee vs. Contractor
- IRS Guidelines

Employment Legal Issues

This course is designed for all school business officials including CSFOs, HR managers, payroll personnel and others involved in the employment process. This session will focus on current issues in employment law, both state and federal issues. Topics will include issues related tenure law, salary schedule issues, dual employment, transfers, suspensions, reduction in force policies, and other current issues related to employment.

Course Content:

- Job Descriptions
- Salary Schedules
- Dual Employment
- Terminations and the Tenure Law
- Transfers
- Suspensions
- Reduction in Force
- Worker Misclassifications

Utilizing Technology in the Administration of Payroll/Personnel

This course will focus on the automation of the payroll/personnel process by utilization of technology. Session will focus on effective practices to streamline the business process in payroll/personnel to make the offices more efficient and effective.

Course Content:

- Employee Self Service
- Time Keeping Systems
- Substitute Management Systems
- NextGen Software Features
- Automating Records/Documents

Introduction to Payroll/ Personnel Management

This course will provide an overview of how a payroll/personnel department functions in a school district. Session will focus on the key areas in payroll/personnel management including teacher certification, LEAPS, STI and other state and federal personnel issues.

Course Content:

- The Employment Process/Onboarding
- LEAPS – Process and the Importance of Accurate Data
- Teacher Certification Guidelines and Procedures

Electives - (2) Participants may choose two electives from any of the AASBO courses that are offered to fulfil the certificate requirements.

How will the program work?

AASBO contracts with the University of Alabama to administer the certificate program. There will be three training sessions per year consisting of two days per session. The ten courses will consist of 30 hours of classroom instruction with each course consisting of 3 hours of classroom instruction.

Participants enrolling in the program will be expected to complete the program requirements within a two-year time frame. Participants are required to attend each two-day session in its entirety.

What difference will the program have made to me?

On successful completion of the Certificate in Payroll/Personnel, the graduate will:

- Be able to reflect on their own practices, to contribute to improving performance in relation to systems and resources, and to understand the requirements of their role in payroll/personnel process
- Have developed skills in self and time management, information retrieval and evaluation, written communication, and the use of standard office IT systems and software

Continuing Professional Education (CPE)

Upon completion of the certificate program each certificate holder is required to obtain a minimum of twelve (12) hours of continuing professional education each fiscal year (October–September).

The CPE requirements take effect the fiscal year following the completion year of the certificate. (Certificate is completed in FY 2021-2022; CPE requirements take effect in FY 2022-2023.)

AASBO will accept CPE credits through the following organizations: AASBO, SASBO, International ASBO, AASOP, GFOA, ASCPA, or any organization recognized as CPE by the Alabama State Board of Public Accountancy. One-half of the required hours must be through the AASBO professional development program.

Any certificate holder who does not maintain their CPE requirements is classified as **inactive status**. In order to return to active status, he or she must provide proof of the required annual CPE for that certificate for each year of inactive status. Certificate holders who are on inactive status for three or more years are required to go back through the program.

AASBO recognizes there are unforeseen circumstances where an individual may not be able to complete their annual CPE requirements. In these instances, the certificate holder must apply for an extension of time through the AASBO organization stating the reason for the request. If granted, the certificate holder will have six months from the end of the fiscal year to complete the needed hours.

Upon starting the program, the participant will have five (fiscal) years to complete the program. Participants will not receive credit for courses that were taken in excess of the five-year period years of their appointment.