



BUSINESS SERVICES MANUAL



BEVERLY HILLS
UNIFIED SCHOOL DISTRICT




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Conference and Workshops Procedures

To get approval for conference/workshops fill out the [Conference/Workshop/School Visitation Request](#) form.

1. Once completed, submit form to Principal/Supervisor for approval prior to date of travel
2. Form should be sent to the sites' corresponding Administrator.
3. Cost that exceeds the limits indicated on the form must be borne by the participant.
4. A requisition must be entered into BEST and attach a vendor registration form. 5. A separate form should be prepared by each participant.

Note: If the conference/workshop vendor accepts purchase orders, do not pay in advance; go through the requisition-purchase order procedures, and the Purchasing Department will register you in advance.

After the conference/workshop, fill out the [Request for Reimbursement of Travel Expense](#) form within 15 days.

List all reimbursable items such as registration, mileage, lodging, meals, etc.

- Include original itemized receipts, map/directions (map quest or google map) for mileage reimbursement and other supporting documents as needed.
- Submit Certificate of completion or conference agenda to verify attendance. Create a Requisition in BEST and upload attachments.
- Each participant should have their own individual receipts.
- **All physical original receipt copies shall be submitted to Accounts Payable after a copy has been uploaded to the digital form**

Conference and Workshops Procedures

Account strings **must** be included on your form. Please contact your Admin/Secretary if you need further assistance.

Please submit the completed form with receipt attachments to the site Secretary who will then route it for any and all necessary approvals. Once approved, it will be routed to Accounts Payable who will process payment and mail the check to the employee

Note: Costs such as registration and lodging should be paid by the District directly to the vendor using the Requisition/Purchase Order Process.

- If prepayment of credit card registration is needed, notify the Purchasing Department.
- Reimbursements **cannot be paid prior** to the Travel/Conference event.
- Receipts that are not itemized are unacceptable.
- Alcoholic beverages will **not** be reimbursed.
- All expenses should be broken down into appropriate categories i.e breakfast, lunch, dinner for the appropriate day not lumped into one total, unless you are claiming dinner only. Per board policy, the per diem per meal is as follows:

PER DIEM RATES/DAY	
Breakfast Only	\$22.00
Lunch Only	\$23.00
Dinner Only	\$36.00
Total	\$81.00

PER DIEM RATES/OVERNIGHT ONLY	
Total Daily Limit	\$81.00

Conference and Workshops Procedures

For more information regarding allowable expenses please see the Board Policies below: [Regulation 3350: Travel Expenses Policy 3350: Travel Expenses](#)

Other Reimbursement Procedures

- All purchases should be made through the Purchasing Department. Any purchases made not using the Purchasing department should have prior Administrator approval
- Original Receipts should be forwarded to the proper Administrator for signature
- If expenses are deemed approved, the employee or Site Secretary is responsible for creating a Requisition to reimburse the expense. Please contact your Admin/Secretary for assistance in creating a Requisition
- Once the Requisition is approved and converted into a Purchase Order, Accounts Payable will process the reimbursement and mail the check to the employee

Mileage Reimbursement Procedures

- Employees are responsible for completing the [Beverly Hills Mileage Reimbursement Form](#) which can be found by going to <https://www.bhusd.org/> > Select Staff > K-12 Online Docs
- A map printout between the destination points traveled must be attached to the form when submitting for approval. Any forms submitted without a mileage map shall be returned to the employee. A brief description must be provided when submitting the reimbursement form, along with the date of travel and account number to be charged. Please work with your Site Secretary for further information regarding account strings.
- Once the form has been submitted and approved Accounts Payable will process the reimbursement and mail the check to the employee



Conference and Workshops Procedures

Both of these are examples of unacceptable receipts. The receipt on the left is not itemized. The receipt on the right includes alcohol.

ALCOHOL MAY NOT BE PURCHASED!!!

Receipts – MUST be Itemized

FRONT PAGE
(202)296-6500

PLEASE LEAVE THIS COPY FOR SERVER

Date: 02/22/2012 Time: 07:18:35 PM
Status: Approved

Card Number:XXXXXXXXXX
Expiration Date: **/**
Swipe/Manual: Swipe
Server: 196 CHUCK
Check Number: 510324
Table Number: 3952
Persons: 1

AMOUNT 15.95

I AGREE TO COMPLY WITH
THE CARDHOLDER AGREEMENT

X 

Customer Signature

Please leave this copy for server!!

Welcome to Mel's

Check #: 0001 12/20/11
Server: Josh F 4:38 PM
Table: 7/1 Guests: 2

2 Beef Burgr (@9.95/ea)	19.90
SIDE: Fries	
1 Bud Light	3.79
1 Bud	4.50

Sub-total	28.19
Sales Tax	2.50
TOTAL	30.69

Balance Due 30.69

Thank you for your patronage!

Guidelines for Cash Collections

Handling Funds at the Schools

Purpose

This manual outlines the proper procedures for handling cash collections at BHUSD. The objective is to minimize losses, ensure accountability, and promote efficient record-keeping. Adherence to these guidelines is essential for maintaining a transparent and auditable system.

Authorization and Receipts

1. All school employees authorized to receive money must use a receipt book issued by the Fiscal Services Department. Receipt forms are provided in triplicate and should be serially numbered.
2. Upon receiving any amount of money, the employee must provide a receipt to the payer. The original receipt goes to the payer, and the second copy, along with the **Summary of Receipt Form**, should be submitted to the Fiscal Services Department with the collected funds.
3. Every receipt must contain sufficient detail about the purpose of the payment, facilitating proper accounting for shop materials, lost books, vandalism damage, etc.

Reporting Income

All fees collected for lost or damaged textbooks, library fines, faculty personal telephone calls, vandalism, and other categories should be reported using the appropriate forms. Each category requires a separate **Summary of Receipt Form**.

Timelines and Security

1. Cash collections should be sent to the Fiscal Services Department by the 20th of each month or sooner if volume is high by the site's office manager/secretary. Schools should not accumulate more than \$200.00 in cash at any time.
2. For security reasons, money should not be left overnight in schools, except in safes or vaults designed for safeguarding valuables. Amounts exceeding a few dollars should not be stored in desks or file drawers.
3. For amounts up to \$50.00, use the intra-district mail system. For amounts over \$50.00, the site's office manager/secretary should hand-deliver the funds to the district's delivery driver to be hand delivered to the Fiscal Services Department.

Guidelines for Cash Collections

Record-Keeping and Compliance

The Business Office must keep track of all receipt numbers, including voided receipts, to maintain accurate records. Any bookkeeping system used must have prior written approval from the Assistant Superintendent of Business Services.

By following these guidelines, BHUSD aims to ensure responsible cash handling, accurate accounting, and the protection of public interests. If there are any questions or concerns, please consult the Accounting Department for assistance.

Gifts, Grants, and Bequests

Procedure for Acceptance

Administrative Regulation AR 3290

To ensure a transparent and organized process for handling gifts, grants, and bequests, the following procedure shall be followed:

1. Notification and Documentation: All gifts, grants, and bequests exceeding \$400, whether designated for a specific school or the entire school district, must be officially documented by submitting a "Notice of Donation" form to the Business Services Department. The Business Services Department will then prepare the necessary Board of Education acceptance action motion for all accepted items.
2. Evaluation and Approval: Gifts, grants, and bequests made to the District will undergo thorough evaluation by the Business Services Department, in collaboration with relevant departments and the Superintendent.
3. Evaluation at School Site Level
 - a. The Principal or their designated representative will work closely with the donor or grant writer to determine the school's specific needs, project timelines, and budget requirements.
 - b. The Principal or their representative will handle the proper documentation of the gift, grant, or bequest and submit it to the Business Services Department.
 - c. For PTA and BHEF funded projects, billing will be processed on a monthly basis. The received funds will be deposited into restricted resources for enhanced accountability.

By adhering to this procedure, the Beverly Hills Unified School District aims to efficiently manage and acknowledge gifts, grants, and bequests for the betterment of our educational programs and initiatives. Should you have any inquiries or require further clarification, please reach out to the Business Services Department.

Gifts, Grants, and Bequests

The Board of Education may accept any bequest or gift of money or property on behalf of the District. While greatly appreciating suitable donations, the Board discourages any gifts which may directly or indirectly impair its commitment to providing equal educational opportunities for all district students.

Before accepting a gift, the Board shall consider whether the gift:

1. Has a purpose consistent with the district's vision and philosophy
2. Begins a program which the Board would be unable to continue when the donated funds are exhausted
3. Entails undesirable or excessive costs
4. Implies endorsement of any business, product, candidate for public office or Measure
5. Adds to the staff's workload

The Board shall carefully evaluate any conditions or restrictions imposed by the donor in light of district philosophy and operations. If the Board feels the district will be unable to fully satisfy the donor's conditions, the gift shall not be accepted. Gift books and instructional materials shall be accepted only if they meet regular district criteria.

All gifts, grants and bequests shall become district property. Donors are encouraged to donate all gifts to the district rather than to a particular school. At the Superintendent or designee discretion, a gift may be used at a particular school.

Legal References

EDUCATION CODE 1834 Acquisition of materials and apparatus 35162 Power to sue, be sued, hold and convey property 41030 School district may invest surplus monies from bequest or gifts 41032 Authority of school board to accept gift or bequest: investments: gift of land requirements. 41035 Advisory committee 41036 Function of advisory committee 41037 Rules and regulations



TO: Assistant Superintendent, Business Services

Date Donated _____ School _____

Amount Donated \$ _____

Type of item _____ Brand _____

Model No. and Serial No. _____

Estimated/actual value \$ _____. Attach applicable documentation (IF UNDER \$400, DO NOT SEND IN THIS FORM)

Donated By:

PTA__

BHEF__

BHAAA__

Name and Address of donor:

Donor designation, if applicable _____

Date

Submitted by

For technology equipment, please send it to the technology department for approval.

Date sent _____

OK to accept

Signature technology

For personnel requests, please complete personnel action forms and send to the HR Department

Standardized Account Code Structure

01.0 - 00010.0 - 11100 - 10000 - 4310 - 0000000
Fund Resource Goal Function Object Location

Code Classifications

Fund

A fund identifies specific activities or defines certain objectives of BHUSD in accordance with CDE. Most activity occurs in Fund 01, our general fund.

Resource

The resource code is used to classify revenue and expenditures that have special accounting or reporting requirements or that are legally restricted. This code explains what restricted/unrestricted funding source is being used.

Goal

The goal identifies the instructional goals and objectives. It groups costs by population, setting, and/or educational mode. Examples include regular education K-12, continuation schools, migrant education, and special education. This code explains who is being served.

Function

The function identifies activities or services performed to support or accomplish one or more goals or objectives. Examples include instruction, school administration, and transportation. This code explains what you are doing with the funds.

Object

The object code classifies expenditures by type of commodity or service. (e.g. - certificated salaries, benefits, instructional supplies, travel & conference)

Location

The site code designates a specific, school or department structure or group of structures that form a campus or department under an administrator's responsibility.

Standardized Account Code Structure

01.0 - 00010.0 - 11100 - 10000 - 4310 - 0000000
Fund Resource Goal Function Object Location

Commonly Used Account Strings	
Description	Account Code
A teacher provides hourly after school Title I intervention.	01.0-30100.0-11100-10000-1130-xxx0000
A teacher facilitates a PTA-funded after school enrichment program (unit pay funneled through BHEF)	01.0-90335.0-11100-41000-1972-xxx0000
A custodian works overtime to support a one-time PTA event	01.1-900xx.0-00000-82000-2240-xxx0000
A principal purchases a stapler for a teacher to use in the classroom	01.0-00010.0-11100-10000-4310-xxx0000
A principal purchases a BrainPop subscription renewal for the new school year for teachers to use in the classroom	01.0-00010.0-11100-10000-4340-xxx0000

Note: Please refer to the budget for your site/department to identify account strings that have been built into your budget. If you do not have the codes that you need, please contact Denise Witherspoon or Araceli Alvarez and work with them to add lines to your budget and transfer funds as appropriate.



BEVERLY HILLS
UNIFIED SCHOOL DISTRICT
EDUCATION REIMAGINED



Employee Benefits Guide 2025

January 2025- December 2025

IMPORTANT INFORMATION



Welcome to Beverly Hills Unified School District's 2025 Employee Benefits!

This guide provides a summary of your benefit options and is designed to help you make choices and enroll for coverage. If you would like more information about any of the benefits described here, please refer to the District website. From the homepage, click on Departments and go to Business Services to locate 2025 Open Enrollment information.

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The Affordable Care Act and You

The Affordable Care Act (ACA)'s penalty for not having health coverage (known as the individual mandate) has been eliminated. However, if you are a taxpayer in California, Massachusetts, New Jersey, Rhode Island, Vermont, or the District of Columbia, you will be required to have health coverage (unless you qualify for an exemption) or pay a penalty for the 2025 tax year – these states have an individual mandate requirement. You may consider these options below to satisfy this requirement:

- Enroll in a medical plan offered by Beverly Hills Unified School District or another group medical plan meeting the requirements for minimum essential coverage;
- Purchase coverage through a health insurance marketplace;
- Enroll in coverage through a government-sponsored program if eligible.
-

However, if you choose to purchase coverage through the marketplace, because Beverly Hills Unified School District's medical plans are considered affordable and meet minimum value under the Affordable Care Act, you may not be eligible for a subsidy, and you may not see lower premiums or out-of-pocket costs through the marketplace. In addition, employer contributions to your medical benefits will be lost and your portion of medical premiums will no longer be paid via payroll deductions on a pre-tax basis.



For More Information on the Affordable Care Act

To learn more about the Affordable Care Act, visit www.healthcare.gov.

Annual Notices

Various state and federal laws require that employers provide disclosure and annual notices to their plan participants. Beverly Hills Unified School District has posted all federally required annual notices on our intranet for you to download and read at your convenience. Beverly Hills Unified School District will distribute all federally required annual notices upon hire and during each annual open enrollment period.

Annual notices include the following:

- Medicare Part D Notice of Creditable Coverage
- Women's Health and Cancer Rights Act (WHCRA)
- Newborns' and Mothers' Health Protection Act
- Medicaid & Children's Health Insurance Program
- HIPAA Notice of Privacy Practices
- Special Enrollment Rights

Click [here](#) or scan the QR code to the right to download our



ENROLLMENT INFORMATION



Who May Enroll

If you are a regular full-time employee working more than 19.5 hours a week on your primary assignment, you and your eligible dependents may participate in Beverly Hills Unified School District's benefits program. Your eligible dependents include:

- Legally married spouse
- Registered domestic partner
- Natural, adopted, step or domestic partner's children up to age 26, regardless of student or marital status, for medical coverage and up to age 25 for dental and vision coverage
- Certified disabled children of any age, if enrolled prior to age 26

NOTE: If enrolling eligible dependents, marriage license and birth certificate are required to certify relationships

When You Can Enroll

As an eligible employee, you may enroll at the following times:

- As a new hire, you may participate in the company's benefits program on the first day of the month following your hire date pending receipt of your enrollment forms*. ***Enrollment forms must be submitted to the Payroll/Benefits department within 60 days of employment.**
- Each year, during open enrollment
- Within 30 days of a qualifying event as defined by the IRS (see Changes To Enrollment below)

Paying For Your Coverage

You and Beverly Hills Unified School District may share in the cost of the medical, dental, and vision benefits you elect. The cost sharing, if any, will depend on your medical, dental and vision plan selections. Any voluntary benefits you elect will be paid by you at discounted group rates. Your medical, dental, and vision contributions are deducted before taxes which saves you tax dollars. Paying for benefits before tax means that your share of the costs are deducted before taxes, resulting in more take home pay for you. As a result, the IRS requires that your elections remain in effect for the entire year. You cannot drop or change coverage unless you experience a qualifying event.

Changes To Enrollment

Our benefit plans are effective January 1st through December 31st of each year. There is an annual open enrollment period each year, during which you can make new benefit elections for the following January 1st effective date. Once you make your benefit elections, you cannot change them during the year unless you experience a qualifying event as defined by the IRS. Examples include, but are not limited to the following:

- Marriage, divorce, legal separation or annulment
- Birth or adoption of a child
- A qualified medical child support order
- Death of a spouse or child
- A change in your dependent's eligibility status
- Change in your residence or workplace (if your benefit options change)
- Loss of coverage through Medicaid or Children's Health Insurance Program (CHIP)
- Becoming eligible for a state's premium assistance program

Coverage for a new dependent is not automatic. If you experience a qualifying event, you have 30 days to update your coverage. Please contact the Payroll/Benefits Department immediately following a qualifying event to complete the appropriate election forms as needed. If you do not update your coverage within 30 days from the qualifying event, you must wait until the next annual open enrollment period to update your coverage.

IMPORTANT REMINDER - Name, Address, SSN, and Enrollment Changes

- Contact the Benefits Department if you move or change your name or contact information for any reason. Changes are not automatic. Additional documentation may be required before the change is approved.
- If you make Open Enrollment changes online through your myCalPERS account, you must also contact the Benefits Department and inform them of the changes. You are also required to log in Ease and make the change.

ONLINE BENEFITS ENROLLMENT



With Ease, you and your family can access your benefits information whenever you want, from home or anywhere you have Internet access. Use Ease to make your benefit elections, update your personal information, and to locate important benefits documents.

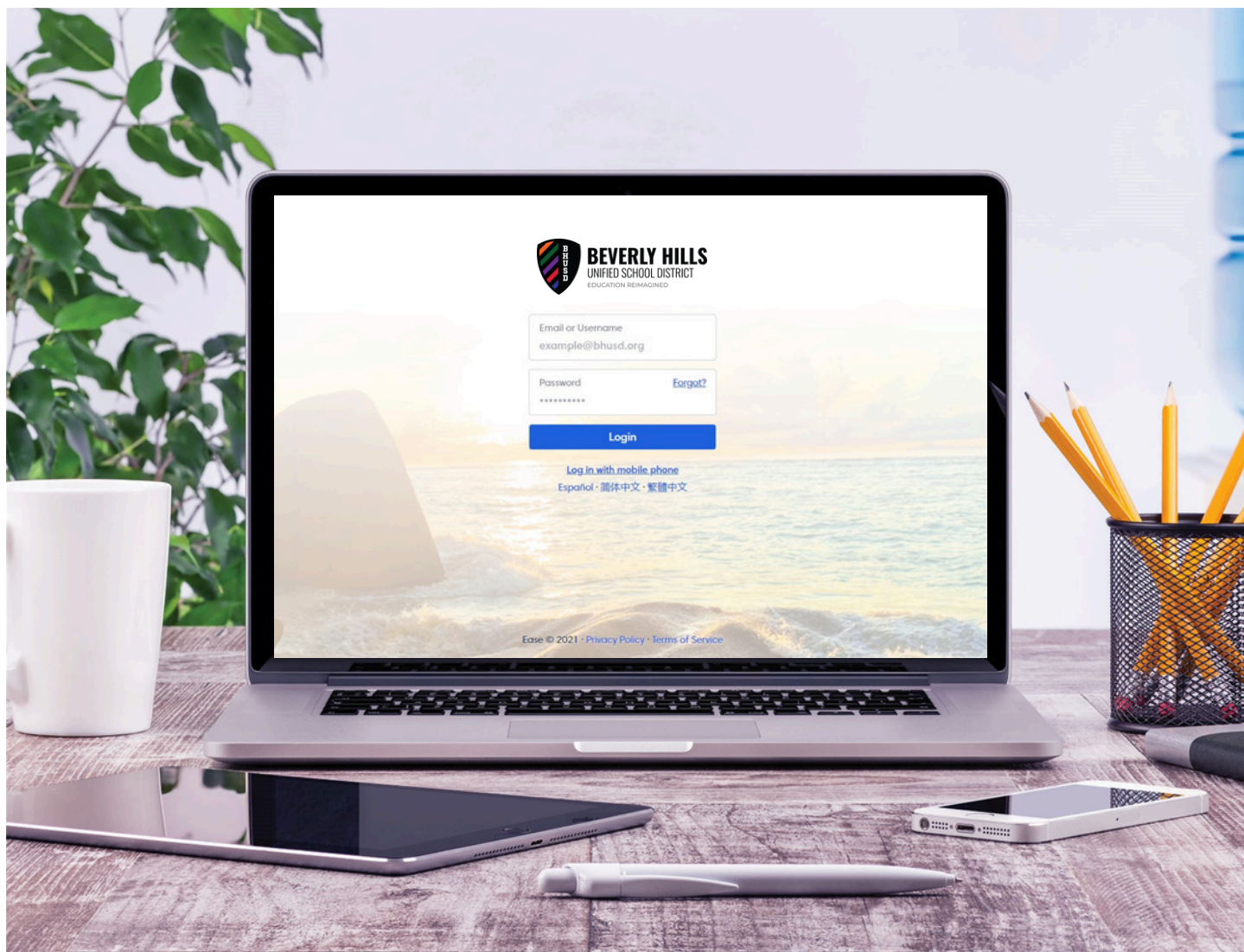


To Enroll or Make Changes to Your Benefits

Log in to <https://bhUSD.ease.com> using your District email address, you'll be asked to enter your username and your password:

- User Name: For first time users, your User Name is your email address.
- Password: For first time users, you will automatically be prompted to create your password.
- If you forgot your password, click on Forgot? Link and request login assistance.

Once you are logged into the website, follow the prompts on each page to complete your benefits enrollment. You will be asked to verify that your personal information is correct and enter in any of your dependent information. It is very important that you login to Ease and verify your personal information, elect or decline coverage for you and your dependents.





Enrollment Guide At A Glance (<http://bhusd.ease.com>)



Login to EASE by clicking on the link you receive in your email from BHUSD Benefits Dept. For optimal performance, it is recommended that you use one of the following browsers:



Chrome

or



Firefox



Click the **Start Enrollment** button to begin your enrollment.

Start Enrollment



Follow the prompts on each page to complete your benefit enrollment.
Click the **Continue** button to proceed to the next section.

Continue



Please select your benefit by choosing to **Enroll** or **Waive** for each plan.

Please select ✓

Enrolled

Waived ✓ ☐

Continue



You will then be prompted to provide any missing data. Once you have done this, you will be able to review and sign your forms using your mouse or mobile device.

Sign Form



Before you review your forms



type your name.



Sign your signature



and follow prompts to finish.



If you have any questions, contact the Benefits Department at benefits@bhusd.org

BENEFITS ENROLLMENT — EASE

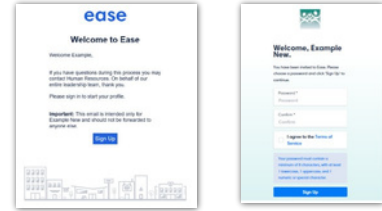


Step 1

Welcome Email Create a Password and Sign In

Online Benefits Enrollment

WelcomeEmail +
CreateaPasswordand SignIn

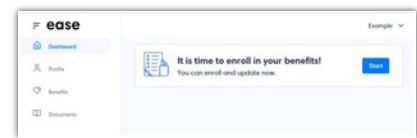


Step 2

Getting Started

Online Benefits Enrollment

Getting started

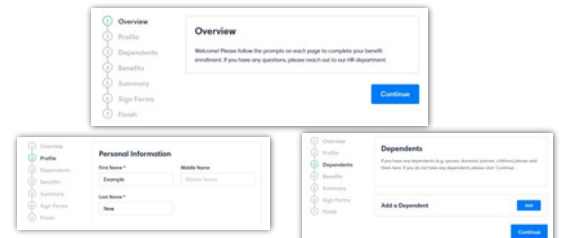


Step 3

Overview and Profile Information

Online Benefits Enrollment

Overview and Profile Information

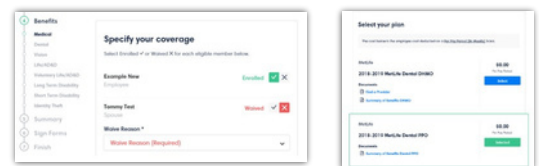


Step 4

Select Benefit Options

Online Benefits Enrollment

Select Benefit Options

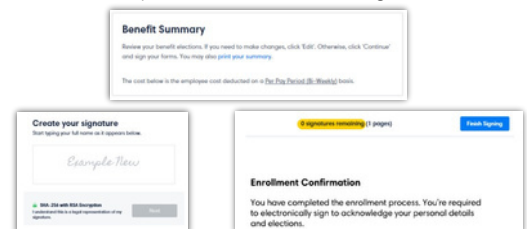


Step 5

Review your Benefit Elections and Sign Forms

Online Benefits Enrollment

Review your Benefit Elections and Sign Forms



FLEXIBLE SPENDING ACCOUNTS



American Fidelity | Flexible Spending Accounts

You can set aside money in Flexible Spending Accounts (FSA) before taxes are deducted to pay for certain health and dependent care expenses, lowering your taxable income and increasing your take-home pay. Only expenses for services incurred during the plan year are eligible for reimbursement from your accounts. Please remember that if you are using your debit card, you must save your receipts, just in case American Fidelity needs a copy for verification. Also, all receipts should be itemized to reflect what product or service was purchased. Credit card receipts are not sufficient per IRS guidelines.

Health Care Flexible Spending Account (HCFSA)

This plan is used to pay for expenses not covered under your health plans, such as deductibles, coinsurance, copays, prescriptions, and more. Employees may defer up to \$3,200 pre-tax per year. FSAs offer sizable tax advantages. The trade-off is that these accounts are subject to strict IRS regulations. With the Health Care FSA, up to \$640 of any unspent funds remaining in your account at the end of the plan year will carry-over to the next plan year, and unspent funds above \$640 will be forfeited.

Dependent Care Account (DCA)

A Dependent Care Account (DCA) allows you to set aside pre-tax dollars to reimburse yourself for eligible dependent care expenses. Because your money goes into the account before income tax is withheld, you pay less in tax and have more disposable income. You may allocate up to \$5,000 per tax year for reimbursement of eligible dependent care services (or \$2,500 if you are married and file a separate tax return).

Ready to Enroll?

The Flexible Spending Accounts (FSAs) for Health Care and Dependent Care expenses are managed by American Fidelity. All employees who wish to enroll, continue, or make changes to these accounts must meet with an American Fidelity Representative. They will have their open enrollment in the month of November.

American Fidelity can be contacted at 1 (800) 365-9180 or www.americanfidelity.com.



Video – Learn How Flexible Spending Accounts Can Help Save You Money

For a better understanding of how Flexible Spending Accounts work, watch this quick video at:
<http://video.burnhambenefits.com/fsa>

Example: How You Can Save Money With an FSA

	Without the HealthCare FSA	With the HealthCare FSA
Gross Annual Pay	\$45,000	\$45,000
Pre-Tax Health Care FSA	Not Elected	\$1,200
Taxable Gross Income	\$45,000	\$43,800
Payroll Taxes (at 30%)	\$13,500	\$13,140
Health Care Cost	\$1,200	\$0
Net Pay	\$30,300	\$30,660
Annual Net Pay Increase	\$0	\$360

Important Note: Your FSA elections will expire each year on December 31st. If you plan to participate in the FSA for the upcoming plan year, you are required to re-enroll.



Medical Plan Options

Beverly Hills Unified School District provides eligible employees with eleven medical plans to choose from, including two Anthem Blue Cross HMO Plans, two Blue Shield of California HMO Plans, two Health Net HMO Plans, one Kaiser HMO Plan, two United Healthcare HMO Plans, and two Blue Shield of California PPO plans. See the following pages for highlights of each plan. Employees are eligible to enroll on the first of the month following their hire date upon receipt of their enrollment forms. Employees have 60 days from their date of hire in which to enroll.

About the HMO Plans

With these plans you must select a Primary Care Physician (PCP) who coordinates and manages your health care services. Your PCP provides routine care and refers you to specialists when necessary. You may choose a different PCP for each family member. Non-PCP referred services are not eligible for coverage under this plan, except in emergency situations.

About the Blue Shield of California PPO Plans

The Blue Shield of California Providers Organization (PPO) plans utilize a PPO network through Blue Shield of California through CalPERS. A PPO plan offers both in-network and out-of-network benefits. Employees and their dependents can choose, at time of care, whether to use in-network or out-of-network providers. [Included Health](#) will be your point of contact for PPO plan information.

Blue Shield of California PPO Plans and Included Health

CalPERS is partnering with [Blue Shield of California](#) and [IncludedHealth](#) starting January 1, 2025. Blue Shield will be the new administrator for the PPO plans and [IncludedHealth](#) will help you find the personalized care you need.

[IncludedHealth](#) is available by phone, online, or mobile app to help you navigate your healthcare and CalPERS health benefits.



The Benefits of Using In-Network Providers for PPO Plans

There are significant advantages to using in-network providers for your medical care, such as negotiated rates (up to 30%-40% discounts), no balance billing, self-referrals to in-network specialists and no claim forms required.

If you choose to elect one of these plans, we encourage all employees to locate an in-network provider for you and for your family members. Establishing a relationship with your provider through routine annual check-ups assists your doctor in managing your overall care and well-being. We also encourage you to locate the nearest urgent care facilities to your home. Knowing where to access the most convenient and cost effective care before a situation arises can save you both time and money.

OptumRX — Select90

OptumRx and Walgreens make it easy for you to get your maintenance medications and may save you money. The OptumRx Select90 program allows you to get 90-day supplies of your medications at nearly 8,200 Walgreens pharmacies or through OptumRx home delivery. For OptumRx home delivery you can register online at optumrx.com/calpers or call (855) 505-8110. If you choose a Walgreens pharmacy you can call the number listed on the back of your ID card or visit their website www.walgreens.com.



Finding In-Network Medical Providers

CalPERS Plans: Use the links to find providers.

- [Find Anthem Blue Cross Select Providers](#)
- [Find Anthem Blue Cross Trad Providers](#)
- [Find Blue Shield Trio Providers](#)
- [Find Blue Shield Access+ HMO Providers](#)

- [Find Health Net Salud y Mas Providers](#)
- [Find Kaiser Permanente Providers](#)
- [Find UHC Alliance Providers](#)
- [Find UHC Harmony Providers](#)
- [Find PERS Gold PPO Providers](#)
- [Find PERS Platinum PPO Providers](#)



Video — Learn About Medical Plan Terms

Medical plan terms, such as deductibles, copays, coinsurance and out-of-pocket maximums, can sometimes be confusing. For a quick video that shows how these work, visit: <http://video.burnhambenefits.com/terms>

MEDICAL HMO BENEFITS



	Anthem Select HMO (Anthem Select HMO Network) OR Anthem Traditional HMO (Anthem CA Care HMO Network) In-Network Only	Blue Shield HMO Trio3 (Blue Shield TRIO Network3) OR Blue Shield Access+ HMO (Blue Shield Access+ Network) In-Network Only
Medical Benefits		
Calendar Year Deductible	None	None
Out-of-Pocket Max — Individual / Family	<i>(excluding pharmacy)</i> \$1,500 / \$3,000	<i>(excluding pharmacy)</i> \$1,500 / \$3,000
Coinsurance (Plan Pays)	100%	100%
Lifetime Maximum	Unlimited	Unlimited
Office Visit Copay — Primary Care Physician — Specialist Office Visit — Access+ Specialist	\$15 Copay \$15 Copay n/a	\$15 Copay \$15 Copay \$30 (Access+)
Hospitalization — Inpatient — Outpatient	No Charge No Charge	No Charge No Charge
Lab and X-Ray	No Charge	No Charge
Emergency Services <i>(waived if admitted)</i>	\$50 Copay	\$50 Copay
Urgent Care	\$15 Copay	\$15 Copay
Preventive Care	No Charge	No Charge
Chiropractic/Acupuncture	\$15 Copay Max 20 Visits/Year	\$15 Copay Max 20 Visits/Year
Pharmacy Benefits		
Out-of-Pocket Max - Individual / Family - Pharmacy Home Delivery	\$7,700 / \$15,400 \$1,000 / per person	\$7,700 / \$15,400 \$1,000 / per person
Retail Pharmacy - Tier 1 <i>Typically Generic</i> - Tier 2 <i>Typically Preferred Brand</i> - Tier 3 <i>Typically Non-preferred</i> - Tier 4 <i>Typically Specialty (Brand & Generic)</i> - Supply Limit	\$5 Copay \$20 Copay \$50 Copay See tier structure above 30 Days	\$5 Copay \$20 Copay \$50 Copay \$30 Copay 30 Days
Retail/Pharmacy Home Delivery - Tier 1 <i>Typically Generic</i> - Tier 2 <i>Typically Preferred Brand</i> - Tier 3 <i>Typically Non-preferred</i> - Tier 4 <i>Typically Specialty (Brand & Generic)</i> - Supply Limit <i>(most are 90-day)</i>	\$10 Copay \$40 Copay \$100 Copay See tier structure above 90 Days	\$10 Copay \$40 Copay \$100 Copay \$60 Copay 90 Days

¹ Office visit copays waived for maternity care.

² Mail service is mandatory after the second fill of a prescription drug at a retail pharmacy, or you will be charged the appropriate mail service copay for a one-month supply at a retail pharmacy.

³ Blue Shield Trio HMO plan available in these counties for 2024: Butte, El Dorado, Kern, Kings, Los Angeles, Monterey, Nevada, Orange, Placer, Riverside, Sacramento, San Bernardino, San Luis Obispo, Santa Barbara, Santa Cruz, Stanislaus, Tulare, Ventura and Yolo.

MEDICAL HMO BENEFITS



	Health Net SaludHMO (Health Net Salud y MásNetwork)	Kaiser Permanente HMO (KaiserNetwork)	UnitedHealthcare HMO (SV Alliance Network) OR UnitedHealthcare HMO (SV Harmony Network)
	In-Network Only	Kaiser Facilities Only	In-NetworkOnly
Medical Benefits			
Calendar Year Deductible	None	None	None
Out-of-Pocket Max - Individual / Family	(excluding pharmacy) \$1,500 / \$3,000	(excluding pharmacy) \$1,500 / \$3,000	(excluding pharmacy) \$1,500 / \$3,000
Coinsurance (Plan Pays)	100%	100%	100%
Lifetime Maximum	Unlimited	Unlimited	Unlimited
Office Visit Copay - Primary Care Physician - Specialist Office Visit - Access+ Specialist	\$15Copay \$15Copay n/a	\$15Copay \$15Copay	\$15Copay \$15Copay
Hospitalization - Inpatient - Outpatient	NoCharge NoCharge	NoCharge \$15Copay	NoCharge NoCharge
Lab and X-Ray	NoCharge	NoCharge	NoCharge
Emergency Services (waived if admitted)	\$50Copay	\$50Copay	\$50Copay
Urgent Care	\$15Copay	\$15Copay	\$15Copay
Preventive Care	NoCharge	NoCharge	NoCharge
Chiropractic/Acupuncture	\$15Copay	\$15Copay	\$15Copay
	20 Visits/Year	20 Visits/Year	20 Visits/Year
Pharmacy Benefits			
Out-of-Pocket Max - Individual / Family - Pharmacy Home Delivery			
Retail Pharmacy	\$7,700/\$15,400 \$1,000/per person	\$7,700/\$15,400 n/a	\$7,700/\$15,400 \$1,000/per person
- Tier 1 Typically Generic - Tier 2 Typically Preferred Brand - Tier 3 Typically Non-preferred - Tier 4 Typically Specialty (Generic & Generic) - Supply Limit	\$5Copay \$20Copay \$50Copay n/a 30Days \$10Copay	\$5Copay \$20Copay \$20Copay n/a 30Days \$10Copay	\$5Copay \$20Copay \$50Copay n/a 30Days \$10Copay
Retail/PharmacyHomeDelivery - Tier 1 Typically Generic - Tier 2 Typically Preferred Brand - Tier 3 Typically Non-preferred - Tier 4 Typically Specialty (Generic & Generic) - Supply Limit (most are 90-day)	\$40Copay \$100Copay n/a 90Days	\$40Copay \$40Copay n/a 100Days	\$40Copay \$100Copay n/a 90Days

¹ Office visit copays waived for maternity care.

² Mail service is mandatory after the second fill of a prescription drug at a retail pharmacy, or you will be charged the appropriate mail service copay for a one-month supply at a retail pharmacy.

MEDICAL PPO BENEFITS

Carrier
Change

SUBJECT TO CHANGE.
PENDING RELEASE OF
FINAL PLAN DOCUMENTS.

Blue Shield
PERS Gold PPO
(Blue Shield Tandem PPO Network)

In-Network

Non-Network

Medical Benefits

Lifetime Maximum Benefit

Deductible (Annual)

- Individual
- Family

Coinsurance (Plan Pays)

Office Visit Copay

- Primary Care Physician
- Specialist Office Visit

Out-of-Pocket Max

- Coinsurance: Individual / Family
- Medical: Individual / Family

Hospitalization

- Inpatient
- Outpatient

Lab and X-Ray

Emergency Room

Emergency Services

Urgent Care

Preventive Care

Chiropractic/Acupuncture

Pharmacy Benefits

Out-of-Pocket Max

- Individual / Family
- Home Delivery Pharmacy

Retail Pharmacy

- Tier 1 Typically Generic
- Tier 2 Typically Preferred Brand
- Tier 3 Typically Non-preferred
- Tier 4 Typically Specialty (Brand & Generic)
- Supply Limit

Retail/Pharmacy Home Delivery

- Tier 1 Typically Generic
- Tier 2 Typically Preferred Brand
- Tier 3 Typically Non-preferred
- Tier 4 Typically Specialty (Brand & Generic)
- Supply Limit (most are 90-day)

Unlimited

\$1,000⁽¹⁾
\$2,000⁽¹⁾

\$2,500⁽¹⁾
\$5,000⁽¹⁾

80%

60%

\$35 / \$10 Copay⁽³⁾
\$35 Copay

Ded, 40%
Ded, 40%

(excluding pharmacy)
\$3,000 / \$6,000
\$7,450 / \$14,900

Unlimited
Unlimited

Ded, 20%⁽²⁾
Ded, 20%⁽²⁾

Ded, 40%⁽⁴⁾
Ded, 40%⁽⁴⁾

Ded, 20%

Ded, 40%⁽⁴⁾

\$50 Copay (waived if admitted)
Ded, 20%

\$35 Copay

Ded, 40%⁽⁴⁾

No Charge

Ded, 40%⁽⁴⁾

\$15 Copay

Ded, 40%⁽⁴⁾

Combined Max 20 Visits/Year

\$2,000 / \$4,000
\$1,000 / person
\$5 Copay
\$20 Copay
\$50 Copay
See tier structure above
30 Days
\$10 Copay
\$40 Copay
\$100 Copay

Unlimited

100% up front; may submit paper claim to request partial reimbursement

See tier structure above
90 Days

Not covered

¹Incentives available to reduce individual deductibles (max. \$500) or family deductible (max \$1,000) include: getting a biometric screening (\$100 credit); receiving a flu shot (\$100 credit); getting non-smoking certification (\$100 credit); getting a virtual second opinion (\$100 credit); and getting a condition care certification (\$100 credit).

²Coinurance waived for deliveries if enrolled in Future Moms Program.

³Reduced to \$10 if enrolled with personal doctor.

⁴Subject to deductible. Out-of-Network benefits are paid based on an allowed amount.

MEDICAL PPO BENEFITS

Carrier
Change

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FINAL PLAN DOCUMENTS.

Blue Shield
PERS Platinum PPO
(BlueShieldPPONetwork)

In-Network

Non-Network

Medical Benefits

Lifetime Maximum Benefit

Deductible (Annual)

- Individual
- Family

Coinsurance (Plan Pays)

Office Visit Copay

- Primary Care Physician
- Specialist Office Visit

Out-of-Pocket Max

- Coinsurance: Individual / Family
- Medical: Individual / Family

Hospitalization

- Deductible
- Inpatient
- Outpatient

Lab and X-Ray

Emergency Room

Emergency Services

Urgent Care

Preventive Care

Chiropractic/Acupuncture

Pharmacy Benefits

Out-of-Pocket Max

- Individual /Family
- Home Delivery Pharmacy

Retail Pharmacy

- Tier 1 Typically Generic
- Tier 2 Typically Preferred Brand
- Tier 3 Typically Non-preferred
- Tier 4 Typically Specialty (Brand & Generic)
- Supply Limit

Retail/Pharmacy Home Delivery

- Tier 1 Typically Generic
- Tier 2 Typically Preferred Brand
- Tier 3 Typically Non-preferred
- Tier 4 Typically Specialty (Brand & Generic)
- Supply Limit (most are 90-day)

Unlimited

\$500
\$1,000

\$2,000
\$4,000

90%

60%

\$20 Copay
\$35 Copay
(excluding pharmacy)

Ded, 40%
Ded, 40%

\$2,000 / \$4,000
\$7,450 / \$14,900

None

\$250 per admission
Ded, 10%
Ded, 10%

\$250 per admission
Ded, 40%
Ded, 40%

Ded, 10%

Ded, 40%

\$50 Copay (waived if admitted)
Ded, 10%

\$35 Copay

Ded, 40%

No Charge

Ded, 40%

\$15 Copay

Ded, 40%

Combined Max 20 Visits/Year

\$2,000 / \$4,000
\$1,000 / person
\$5 Copay

n/a

\$20 Copay

\$50 Copay
See tier structure above
30 Days

Notcovered

\$10 Copay
\$40 Copay
\$100 Copay
See tier structure above
90 Days

Notcovered

This is only a summary. If you want more detail about your coverage and costs, you can get the complete terms in the policy or plan document by contacting the carrier noted on page 17 under Resources and Contacts. Please see page 18 for Employee Contributions.

PERS GOLD & PLATINUM PPO PLANS - INCLUDED HEALTH



Blue Shield will be the new administrator for the PPO plans and Included Health will help you find the personalized care you need, using Blue Shield's network of doctors and hospitals and Included Health's network of virtual providers. Included Health is available by phone, online, or mobile app to help you navigate your healthcare and CalPERS health benefits. Whether you need a new primary care doctor, have questions about a medical bill, or want an easy way to keep track of your insurance information, use Included Health as your first stop for comprehensive, personalized healthcare.



Virtual Care

Primary, urgent and mental healthcare. See a board-certified doctor in person or virtually with best-in-class care

available 24/7.



24/7 Care Team

On-call care team answers your healthcare questions and can connect you to providers.



Billing & Claims Advocacy

For billing or claims issues, Included

Health works directly with your insurance to resolve problems for you.



Provider Search Tool

Search by condition, procedure, or specialty to find in-network doctors, specialists, or clinics.



Mental Health Care

Search for local and in-network mental health providers. Or, have a care coordinator match you with a provider who best meets your needs. Get a second opinion or help exploring treatment options and types or therapy.



Condition Support: Maternity & Family Planning, Heart Health, Cancer, & Diabetes

Support with finding quality providers, accessing condition specific programs through your health plan, second opinions and cost planning.

Accessing Included Health

Call 855-633-4436 or visit

<https://includedhealth.com/microsite/calpers/>

PERS GOLD PPO SAVING OPPORTUNITIES

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FINAL PLAN DOCUMENTS.



Opportunity to Lower Deductible for PERS Gold PPO Plan

With the CalPERS Gold PPO plan, members have the ability to "earn back" up to \$500 per adult covered on the plan through Deductible Credits. Think of it as a discount on your deductible. You may lower your deductible by up to \$500 by completing the following:



\$100

Flu Shot

To receive a \$100 credit to your deductible, simply get your annual flu shot at your doctor's office or an in-network pharmacy. You may also be eligible to receive this \$100 credit if you obtain your flu shot at a County sponsored flu clinic. Certain verification/ documentation will be required.



\$100 Smoking

If you are a non-smoker, this is an easy \$100 in your pocket. Members will be given access to a Health Risk Assessment through Anthem's mobile app. During the Health Risk Assessment, you will be asked if you currently smoke. By checking "no", you automatically knock \$100 off your deductible. If you are a smoker and have a desire to quit, you can earn a \$100 credit toward your deductible by enrolling (and completing) in a smoking cessation program through Anthem.



\$100

Biometric Screening Virtual Second Opinion

Another \$100 deductible credit can be earned by obtaining your biometric results. This can be done at your primary care physician's office during your annual routine physical or at one of 2,200 Quest Diagnostic facilities across the U.S. If you live too far away from a Quest facility, you may qualify for an "at home" test kit.



\$100

Members have the opportunity to obtain a second opinion through Anthem's virtual second opinion program or a Select plan doctor for non-urgent or non-emergency surgeries. Call 1-888-361-3944 (Monday through Friday, 5:30 PM to 8:00 PM, PST) if you are having to you to participate in their nonurgent and nonemergency scheduled surgery in 2024. They will see if you need a second opinion.



\$100

Condition Care Certification

Take part in the Condition Care Program if you have Asthma, Diabetes, Chronic Obstructive Pulmonary Disease (COPD), Heart Failure or Coronary Artery or Vascular Disease. If you are diagnosed with any of these conditions throughout the year, Anthem will reach out to you to participate in their Condition Care program. You can earn a \$100 credit towards your deductible if you earn a condition care certification.

Opportunity to Lower Office Visit Copay

With the CalPERS Gold PPO plan, when you visit an in-network doctor, your copay is \$35. However, when you select an in-network Personal Doctor, your doctor's office visit copay is just \$10 when visiting that physician, a \$25 savings per doctor's visit.






PPO—Maximum Calendar Year Medical & Pharmacy Financial Responsibility

There is a Maximum Calendar Year Financial Responsibility of \$9,450 per Member and \$18,900 per family. This maximum financial responsibility is broken down into a maximum medical responsibility (\$7,450 per Member and \$14,900 per family) and maximum Pharmacy responsibility (\$2,000 per Member and \$4,000 per family).

ACCESSING CARE



It's important to know where to go when an illness or injury occurs. Below is a quick overview to help you better understand when to use the different options available to you as a member of our medical insurance through CalPERS: Anthem Blue Cross, Blue Shield of CA, Health Net, Kaiser Permanente, Sharp Health Plan, or United Healthcare.

				
24-Hour Nurseline	Telemedicine	Doctor Visit	Urgent Care	Emergency Room
Free	Cost varies	\$	\$\$	\$\$\$
<ul style="list-style-type: none"> • Available 24/7 • Registered nurses can help you decide where to go for care when you or a family member has a health concern 	<ul style="list-style-type: none"> • Available 24/7/365 • U.S. board-certified doctors are available to resolve many of your non-emergency medical issues through phone or video consults through Teladoc, LiveHealth Online, American Well, or Doctor on Demand 	<ul style="list-style-type: none"> • Office hours vary • Generally, the best place to go for non-emergency care as a relationship is established and your doctor is able to treat you based on knowledge and medical history 	<ul style="list-style-type: none"> • Generally open one evening, weekends and holidays • Often used when your doctor's office is closed and there is no true emergency • Urgent care does not replace your primary care physician 	<ul style="list-style-type: none"> • Open 24/7 • Use for true emergencies such as any accident or injury that may lead to loss of life or limb, serious medical complication, or permanent disability

Medical Plan Contacts and Provider Finders

Medical – CalPERS HMO Plans

- Anthem Blue Cross Select HMO & Traditional HMO
- Blue Shield of CA Trio HMO and Access+ HMO
- Health Net Salud y Mas HMO
- Kaiser Permanente HMO
- Sharp Health Plan HMO (San Diego only)
- United Healthcare SV Harmony and SV Alliance HMO

855-839-4524	www.anthem.com/ca/calpers
800-334-5847	www.blueshieldca.com/calpers
888-926-4921	www.healthnet.com/calpers
800-464-4000	www.kp.org/calpers
855-955-5004	www.sharphealthplan.com/calpers
877-359-3714	www.uhc.com/calpers

Medical – Blue Shield CalPERS PPO Plans

- PERS Gold PPO
- PERS Platinum PPO

877-737-7776	https://includedhealth.com/microsite/calpers/
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Pharmacy – CVS Caremark/OptumRx/Kaiser Permanente

- Blue Shield Pharmacy (Blue Shield HMO plans only)
- Kaiser Permanente (Kaiser HMO plan only)
- OptumRx (all other HMO and PPO plans)

866-346-7200	Blue Shield Pharmacy Benefits
800-464-4000	www.kp.org/calpers
855-505-8110	www.optumrx.com/calpers

Other Resources

CalPERS Carrier Resources – click [here](#)

www.calpers.ca.gov/page/home
www.calpers.ca.gov/page/active-members/health-benefits/plans-and-rates/

DENTAL INSURANCE



DeltaCare | DentalHMOPlan (Classified Employees Only)

With the Dental Health Maintenance Organization (DHMO) plan through Delta Dental, you are required to select a general dentist to provide your dental care. You will contact your general dentist for all of your dental needs, such as routine check-ups and emergency situations. If specialty care is needed, your general dentist will provide the necessary referral. For covered procedures, you'll pay the pre-set copay or coinsurance fee described in your DHMO plan booklet. Please keep a copy of your booklet to refer to when utilizing your dental care. This will show the applicable copays that apply to all of the dental services that are covered under this plan.

	Delta CareDental DMO Plan
	DeltaCare

Dental Benefits

Calendar Year Maximum	Unlimited
Deductible (Annual)	\$0
- Individual	\$0
- Family	100% for Most Services
Preventive (Plan Pays)	See Copay Schedule
- Exams, X-Rays, Cleanings	See Copay Schedule
Basic Services (Plan Pays)	
- Fillings, Oral Surgery, Endodontics, Periodontics	
Major Services (Plan Pays)	
- Crowns, Prosthetics	
Orthodontia	
- Covered Members	
- Copay	Children & Adults \$1,600 Child / \$1,800 Adult



Finding In-Network Dental Providers

Go to <http://www1.deltadentalins.com> or call (800) 422-4234 for a DeltaCare USA HMO provider. Dental HMO participants should refer to the DeltaCare USA Network.

Note: With the Dental HMO plan, you must visit your selected network dentist for treatment. If you visit another dentist, even if that dentist participates in the network, your visit won't be covered. Under the PPO plan, you have the flexibility to visit any licensed dentist in the network, however, contracted network providers have a rate agreement with the insurance company for services rendered. If you use a non-network provider, your out-of-pocket expenses will be higher and you may be subject to balance billing.

DENTAL INSURANCE



Delta Care | Dental PPO Plan

With the Delta Dental Preferred Provider Organization (PPO) dental plan, you may visit a PPO dentist and benefit from the negotiated rate or visit a non-network dentist. When you utilize a PPO dentist, your out-of-pocket expenses will be less. You may also obtain services using a non-network dentist; however, you will be responsible for the difference between the covered amount and the actual charges and you may be responsible for filing claims.

	Delta Dental PPO	
	Delta Dental Dentists ¹	Non-Delta Dental PPO Dentists ¹
Calendar Year Maximum	\$1,500 per person each calendar year	
Deductible (Annual)		
- Individual / Family	\$0	\$0
Preventive (Plan Pays)		
- Exams, X-Rays, (2) Cleanings	100%	100%
Basic Services (Plan Pays)	100%	100%
- Fillings, Oral Surgery, Endodontics, Periodontics		
Major Services (Plan Pays)		
- Crowns, Inlays, Onlays, Cast Restorations	100%	100%
Prosthodontics (Plan Pays)	70%	50%
- Bridges, Dentures & Implants		
Dental Accident Benefits (Plan Pays)	100% (separate \$1,000 maximum per person each calendar year)	
Orthodontia	Not Covered	

¹ Reimbursement is based on PPO contracted fees for PPO dentists, Premier contracted fees for Premier dentists, and the program allowance for non-Delta Dental dentists.



Finding In-Network Dental Providers

Go to <http://www.deltadentalins.com> or call (800) 499-3001 for a Delta Dental PPO provider. Dental PPO participants should refer to the Delta Dental network when prompted.

Tips for Using Your Dental Benefits

- ☐ **Understand your plan.** Understanding your dental plan's benefits, including how copays, deductibles, and calendar year maximum benefits work, is key to getting the most value from your plan and avoiding surprises.
- ☐ **Ask for a predetermination of benefits.** We strongly recommend you ask your dentist for a predetermination if total charges are expected to exceed \$300. Predetermination enables you and your dentist to know in advance what the payment will be for any service that may be in question.
- ☐ **Check in without an ID card.** You don't need a Delta Dental ID card when you visit with your Dentist. Just provide your name, birth date and enrollee ID and/or Social Security Number. If your family members are covered under your plan they will need your information. Prefer to take a paper or electronic ID card with you? Simply sign in to Online Services, where you can view or print your card with the click of a button.



Vision Service Plan (VSP) | PPO Vision Plan

The MES vision plan provides professional vision care and high quality lenses and frames through a broad network of optical specialists. You will receive richer benefits if you utilize a network provider. If you utilize a non-network provider, charges will be paid, but not to exceed amounts on the non-participating provider's schedule of allowances.

	Vision Service Plan (VSP) PPO
	VSP Signature
Vision Benefits	
Copay	
- Examination	\$10 Copay
- Materials	\$10 Copay
Examination (Every 12 Months)	100%
Lenses (Every 12 Months)	100%
- Single Vision	100%
- Bifocal	100%
- Trifocal	100%
Frames (Every 12 Months)	\$140 Allowance
- Featured Frame Brands	\$160 Allowance
- Additional Savings	20% savings on the amount over your allowance
Contact Lenses (Every 12 Months)	In Lieu of Frames and Lenses
- Cosmetic / Elective	\$105 Allowance
- Medically Necessary	100%
Laser Vision Correction	Discounts Apply



Using your VSP benefit is easy!

- **Create an account at www.vsp.com. Once your plan is effective, review your benefit information**
- **Need to find a provider?** Search at www.vsp.com or call (800) 877-7195. Refer to the VSP Signature network when prompted
- **At your appointment, tell them you have VSP.** There's no ID card necessary. Just provide your name, birth date and enrollee ID and/or Social Security Number. If your family members are covered under your plan they will need your information. Prefer to take a paper or electronic ID card with you? Simply sign in to Online Services, where you can view or print your card with the click of a button.

SUPPLEMENTAL BENEFITS



You may purchase individual policies from different voluntary benefit carriers. Your premiums are paid through payroll deductions. These policies all offer direct-to-the-policyholder cash payouts to help cover what other insurance doesn't. These are individual policies that are portable, which means that you can keep them should you change jobs or retire, with no increase in premiums.

Voluntary Life and AD&D | Unum

In addition to the District provided Basic Life and AD&D benefits, you may elect to purchase additional Term Life and AD&D insurance at discounted group rates provided by Unum. You pay for this coverage with after-tax dollars through convenient payroll deductions.

Disability Income Insurance | Pacific Educators, The Standard, AFLAC, American Fidelity

Disability Income Insurance helps protect your income. When you are unable to work due to a covered Injury or Sickness, your disability benefit will be paid up to the benefit period for which premium has been paid. Your disability benefit can help pay for necessities.

Cancer Protection | Pacific Educators, The Standard, AFLAC, American Fidelity

A cancer diagnosis can be expensive. Benefit payments from a Cancer Insurance Plan can be used however you'd like, including house payments, utilities, and meals/lodging expenses.

Supplemental Life Insurance | Pacific Educators, The Standard, AFLAC, American Fidelity

Ensuring your family is financially covered in the event of a loss is important. There are various plans available to you, including both Term and Whole Life. Term Life Insurance provides short-term coverage at a competitive price, while Whole Life insurance provides lifelong protection.

Life Insurance

Basic Life and AD&D | Unum

Life insurance protects your family or other beneficiaries in the event of your death while you are still actively employed with the company. Beverly Hills Unified School District pays for coverage, offered through Unum, in the amount of:

- All benefits eligible employees — flat \$25,000 benefit

If your death is due to a covered accident or injury, your beneficiary will receive an additional amount through Accidental Death and Dismemberment (AD&D) coverage.

Voluntary Life and AD&D | Unum

In addition to the District provided Basic Life and AD&D benefits, you may elect to purchase additional Term Life and AD&D insurance at discounted group rates provided by Unum. You pay for this coverage with after-tax dollars through convenient payroll deductions.

RESOURCES AND CONTACTS



	Phone Number	Website
Medical - HMO Plans <ul style="list-style-type: none"> - Anthem Blue Cross - Blue Shield of CA - Health Net - Kaiser Permanente - United Healthcare 	(855) 839-4524 (800) 334-5847 (888) 926-4921 (800) 464-4000 (877) 359-3714	www.anthem.com/ca/calpers www.blueshieldca.com/calpers www.healthnet.com/calpers www.kp.org/calpers www.uhc.com/calpers
Medical - PPO Plans <ul style="list-style-type: none"> - PERS Gold (Blue Shield) - PERS Platinum (Blue Shield) 	(855) 633-4436 (855) 633-4436	https://includedhealth.com/microsite/calpers/ https://includedhealth.com/microsite/calpers/
Pharmacy <ul style="list-style-type: none"> - OptumRx Select90 	(855) 505-8110	www.optumrx.com/calpers
Dental <ul style="list-style-type: none"> - Delta Dental HMO (Classified Employees Only) - Delta Dental PPO 	(800) 422-4234 (866) 499-3001	www1.deltadentalins.com www.deltadentalins.com
Vision <ul style="list-style-type: none"> - VSP Vision PPO 		
Life & AD&D <ul style="list-style-type: none"> - Unum Basic Life/ AD&D & Vol Life/AD&D 	(800) 877-7195	www.vsp.com
American Fidelity Flexible Spending Accounts <ul style="list-style-type: none"> - Health Care and Dependent Care FSAs 	(800) 421-0344	www.unum.com
	(800) 365-9180	www.americanfidelity.com
Supplemental Benefits Contacts <ul style="list-style-type: none"> - AFLAC - American Fidelity - Pacific Educators - The Standard 	(626) 388-1530, ext. 101 (800) 365-9180 (800) 722-3365 (800) 522-0406	www.aflac.com www.americanfidelity.com www.PEinsurance.com www.standard.com/cta www.schoolsfirstfcu.org
SchoolsFirst Federal Credit Union	(800) 462-8328	www.mycalpers.ca.gov
CalPERS CalSTRS	(888) 225-7377 (800) 365-9180	www.calstrs.com

EMPLOYEE CONTRIBUTIONS



HealthBenefitContributions

This chart compares the **tenthly** and per paycheck contributions (deducted **ten times** per year), **before** District paid share of \$1,325 is applied for our Employee Benefit plans. Your cost for coverage will vary depending on the option and level of coverage you choose. Employee contributions for Medical, Dental, and Vision are deducted from your paycheck with pre-tax dollars unless specified by the Employee. This means that contributions are taken from your earnings before taxes, resulting in lower taxes and increased take home pay.

Medical — HMO	Code	Tenthly rates
Anthem Blue Cross HMO Select	ASH	\$1,100.26
- Employee Only		\$2,200.51
- Employee + 1		\$2,860.67
- Employee + Family	ANT	\$1,278.55
Anthem Blue Cross HMO Traditional		\$2,557.10
- Employee Only		\$3,324.24
- Employee + 1	BSA	\$994.18
- Employee + Family		\$1,988.35
Blue Shield Access + HMO		\$2,584.86
- Employee Only	BST	\$885.73
- Employee + 1		\$1,771.46
- Employee + Family		\$2,302.91
Blue Shield Trio HMO	HNM	\$857.28
- Employee Only		\$1,714.56
- Employee + 1		\$2,228.93
- Employee + Family	KAI	\$1,111.82
Health Net Salud y Mas		\$2,223.65
- Employee Only		\$2,890.74
- Employee + 1	UHA	\$1,039.68
- Employee + Family		\$2,079.36
Kaiser Permanente HMO		\$2,703.17
- Employee Only	UHH	\$907.54
- Employee + 1		\$1,815.07
- Employee + Family		\$2,359.60
United Healthcare HMO - Alliance		
- Employee Only		
- Employee + 1		
- Employee + Family		
United Healthcare HMO - Harmony		
- Employee Only		
- Employee + 1		
- Employee + Family		

EMPLOYEE CONTRIBUTIONS



Health Benefit Contributions

This chart compares the **tenthly** and per paycheck contributions (deducted **ten times** per year), **before** District paid share of \$1,325 is applied for our Employee Benefit plans. Your cost for coverage will vary depending on the option and level of coverage you choose. Employee contributions for Medical, Dental, and Vision are deducted from your paycheck with pre-tax dollars unless specified by the Employee. This means that contributions are taken from your earnings before taxes, resulting in lower taxes and increased take home pay.

Medical — PPO	Code	Tenthly rates
PERS Gold PPO (Blue Shield) - Employee Only - Employee + 1 Dependent - Employee + 2 or more	GLD	\$1,041.78 \$2,083.56 \$2,708.63
PERS Platinum PPO (Blue Shield) 90/10 Plan - Employee Only - Employee + 1 Dependent - Employee + 2 or more	PLA	\$1,516.48 \$3,032.95 \$3,942.84
Dental	Code	Tenthly rates
Delta Care Dental HMO (Classified Employees ONLY) - Employee Only - Employee + 1 - Employee + Family	PMI	\$49.39 \$49.39 \$49.39
Delta Dental PPO - Employee Only - Employee + 1 - Employee + Family	DEL	\$61.82 \$126.88 \$182.90
Vision	Code	Tenthly rates
Vision Service Plan (VSP) - Employee Only - Employee + 1 - Employee + Family	VSP	\$8.83 \$16.60 \$24.52

TIMESHEETS

New Beverly Hills Monthly Certificated Timesheet

This timesheet is used to report absences and paid leaves for certificated employees. All absence forms must be attached to the timesheet. Due date: 20th of every month.

New Classified First Semi-Monthly Timesheet

This timesheet is used to report absences and paid leaves for Semi-Monthly classified employees from the 1st to the 15th of the month. All absence forms must be attached to the timesheet. **Due date: 15th of every month.**

New Classified Second Semi-Monthly Timesheet

This timesheet is used to report absences and paid leaves for Semi-Monthly classified employees from the 16th to the end of the month. All absence forms must be attached to the timesheet. Due date: the end of every month.

New Classified Hourly Timesheet

This timesheet is used to report the hours worked by classified hourly employees. It is also used to report absences and paid leaves. All absence forms must be attached to the timesheet. Due date: the end of every month.

New Hourly Supplemental Timesheet

This timesheet is used to pay extra assignments for certificated and classified employees. Such assignments include but are not limited to Lunch Connections, Home Teacher, and Training hours. Timesheets should only be submitted once the extra assignment has been Board Approved. Due date: for certificated employees 20th of every month and for classified employees at the end of every month.

Overtime 1st Semi-Monthly Timesheet

This timesheet is used to report Overtime hours for classified employees from the 1st to the 15th of the month. Overtime must be preapproved and the Request for Overtime Approval Timesheet must be attached. Due date: 15th of every month

Overtime 2nd Semi-Monthly Timesheet

This timesheet is used to report Overtime hours for classified employees from the 16th to the end of the month. Overtime must be preapproved and the Request for Overtime Approval Timesheet must be attached. Due date: the end of every month.

Beverly Hills Day-to-Day Substitute Teacher Timesheet

This timesheet is used to pay substitute teachers. **Due date: 18th of every month.**

TIMESHEETS

Request for Overtime Approval

This timesheet is used for overtime requests by classified employees. All overtime must be approved by a supervisor prior to being worked. Employees have the option to get paid or receive compensatory time for their overtime. Due date: This timesheet must be attached to either the Overtime 1st or 2nd Semi-Monthly timesheets.

Beverly Hills Long Term Substitute Teacher Timesheet

This timesheet is used to pay Long term substitute teachers. A long term substitute teacher is considered a substitute who has been in the same teaching position for more than 15 consecutive days. **Due date: 18th of every month.**

Beverly Hills Classified Substitute Timesheet

This timesheet is used to pay classified substitute employees. Examples: custodian, security and secretaries. **Due date: the end of every month.**

Student Clerk Timesheet

This timesheet is used to pay student clerks. **Due date: the end of every month.**

Beverly Hills Extra Mod Timesheet

This timesheet is used to pay certificated employees for extra mods. **Due date: the 20th of every month.**

Beverly Hills R-Factor Timesheet

This timesheet is used to pay certificated employees for R-Factors. **Due date: The end of each semester (December 20th and May 20th)**

Beverly Hills Extra Units Timesheet

This timesheet is used to pay certificated employees for Extra Units. **Due date: The end of each semester (December 20th and May 20th)**

Beverly Hills USD Stipend Timesheet

This timesheet is used to pay certificated and classified employees for stipends. Stipends may be entered as a lump sum or as hours. **Due date: for certificated employees 20th of every month and for classified employees at the end of every month.**

Employee Absence Form

This form is used to report any absences for both certificated and classified employees. If employees are requesting vacation time then it must be approved by their supervisor in advance. If a form is submitted for Industrial Accident then it must also be approved by Business. In HCM everything is in hours and minutes. It is recommended that employees enter hours and minutes for their time.



Quick Guide to
ESS

Welcome to Employee Self-Service (ESS)!

A New Secure Website to Access your Paystubs!

What is Employee Self-Service (ESS)?

Your District/Agency is, or will be, using a new Human Resources and Payroll system provided by the Los Angeles County Office of Education. This new system gives employees easy, secure on-line access view and download their paystubs & W2s, view their leave balances and other various parts of their employee profile.

 **Employee Self-Service (ESS)**

How Do I Get My Log-In Information?

All employees will be receiving an ESS welcome email with their username and password. If you have not received this email, please reach out to your district/agency Human Resources/Payroll Department. Once you receive your login information, write your username and password below for easy access in the future. You will have the option to change your password upon login.





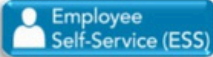
Username

_____@bestlogin.net

Password

[Click Here to view video instructions.](#)

How Do I Log In?

- 1 Navigate to the BEST Portal Website by entering the URL bestportal.lacoe.edu in your internet browser (e.g., Google Chrome), and press Go.
- 2 Select the "Log in to Production" Button 
- 3 Enter your Username provided in your ESS welcome email and click the "Next" button. 
- 4 Enter the password provided in your ESS welcome email and click the "Sign in" button. When signing in for the first time, you will be required to answer some additional security questions to help reset your password in the future, in case you forget it. 
- 5 Click the "No" button when asked if you want to stay logged in; this will keep your password safe.
- 6 You have now successfully authenticated. Click the "Here" button to continue. 
- 7 Click on the ESS icon to explore your employee profile and pay stub! 

If you need further assistance, contact your District/Agency Human Resources/Payroll Department.



FREQUENTLY ASKED QUESTIONS

WHAT ARE THE DIFFERENCES IN REDUCTIONS, DEDUCTIONS AND CONTRIBUTIONS INDICATED ON MY CHECK?

Reductions are amounts deducted from your gross pay before taxes are deducted; these may include retirement (STRS, PERS, TRUST); medical premiums; 125 plans for medical reimbursement or child care; TSA and 457 reductions; and retirement adjustment or buyback. Deductions may include all taxes (Federal, State, Medicare, OASDI); dues; non-medical insurance, garnishments, bargaining unit dues, and optional insurance payments. These are not pre-tax. Contributions include anything that the district contributes toward your taxes, retirement, insurance, etc. These do not affect your total pay in any way.

WHAT DO I DO IF I THINK MY SALARY RATE IS INCORRECT?

You should contact Human Resources to make sure that you are on the proper salary range and step. There are many things that factor into your placement on the salary schedule and these should be discussed with the Human Resources department.

WHAT DO I DO IF I FEEL I WAS PAID FOR AN INCORRECT NUMBER OF HOURS/DAYS?

Check first with the timekeeper at your job site to make sure that the proper number of hours was submitted. If the hours reported are not correct, have your timekeeper contact Payroll to make any corrections.

HOW DO I CHANGE MY WITHHOLDING TAXES?

W4 forms are available from the payroll office for changing withholding amounts and on the district website.

Purchasing

Purpose

The following Policies and Procedures are published in compliance with:

California Government Code Section 54202 Every local agency shall adopt policies and procedures, including bidding regulations governing purchases of supplies and equipment by the local agency. Purchases of supplies and equipment by the local agency shall be in accordance with said duly adopted local policies and in accordance with all provisions of law governing the same. No policy, procedure, or regulation shall be adopted which is inconsistent or in conflict with statute.

54204 If the local agency is other than a city, county, or city and county, the policies provided for in Section

54202 shall be adopted by means of a written rule or regulation, copies of which shall be available for public distribution.

Board Policy 3300 The Board of Education recognizes its fiduciary responsibility to oversee the prudent expenditure of district funds. In order to best serve district interests, the Superintendent or designee shall develop and maintain effective purchasing procedures that are consistent with sound financial controls and that ensure the district receives maximum value for items purchased. He/she shall ensure that records of expenditures and purchases are maintained in accordance with law.

Purchasing

General Procedures

All requests for goods and/or services shall be submitted by requisition in BEST by the site or department requesting the purchase order.

The requisition shall be electronically approved by the site administrator, IT Department (if technology related item is purchased), and the Business Fiscal Services Department. A requisition must include the following information:

- Document Description-this section appears on the Purchase Order Report which is ratified by the Board. Please type with all caps and put the specific information about the purchase
- Actual vendor in database. If vendor is not found, please request a W-9 and contact Purchasing. You will not be able to create a requisition until a W-9 is on file.

Commodity

- **Commodity Code**
 - Additional Commodity Information – complete description of item being ordered, including stock number and ISBN numbers, if available, the end users name. If the requisition is for a contract/purchase that was Board approved, please add the date of the Board approval.

Line Type–Item or Service

- **If Item** – fill out quantity, UOM, Unit Price, Tax. The District must pay tax for purchases of all goods. This is paid on merchandise and sometimes shipping, even if the order is an out of state order. If it's out of state order and that particular state does not charge tax, then the District needs to pay California tax called use tax.
- **If Service** – Contract Amount, Contract start and end dates, tax is 0%

Shipping

Create a separate commodity line for shipping charges. For this line, the commodity code is 78121603 for freight fee, and line type is service.

Budget Account String

If you are unsure, please communicate with your site administrator or contact the Business Office for support

Purchasing

Ship to Location

Please ensure you are entering the correct location if goods are being shipped other than your homesite

Attachments

All backup to the requisitions (conference registration forms, list of supplies, quotes, reimbursement receipts, contracts, Board approval, etc.) must be attached to the requisition in BEST. If there are no attachments, the requisition will be rejected. Open purchases (i.e. Amazon, Office Depot) are not subject to this requirement.

Once a requisition has been completed, it will be sent through workflow for administrators to approve electronically. A copy of the approved purchase order will be uploaded in a shared Google Drive with each respective department/site.

Verification Procedures

All orders will be shipped to the site at which time they will be forwarded to the originator, who will check off each item matches the order placed with the Purchase Order.

If there is a problem with any item(s) received or with the balance of items, check off the items on the packing slip that were received, sign and date and call the Purchasing Department to report any discrepancy or defects.

Note: Some items cannot be returned to the vendor or there may be a restocking fee. Choose your items carefully. Be aware of the vendor return policy.

When all items ordered are received and an invoice is received, the site administrator must sign off for payment and forward the invoice to Accounts Payable.

Purchasing

RESPONSIBILITIES OF THE PURCHASING DEPARTMENT

In so far as possible, goods and services purchased shall meet the needs of the person or department ordering them, at the lowest price, consistent with standard purchasing practices. Maintenance costs, replacement costs, and trade-in values shall be considered when determining the most economical purchase price. When price, fitness, and quality are equal, recycled products shall be preferred when procuring materials for use in district schools and buildings.

The purchasing of services and supplies shall be centralized in the Purchasing Department.

The Purchasing Department shall strive constantly to increase its knowledge of new materials, services, sources, and prices and shall keep other departments informed. Sales persons and supplier representatives shall be requested to conduct their business with the Purchasing Department and shall have opportunities to discuss their procedures. Selection of material needed is the prerogative of each using department.

However, the Purchasing Department shall have the authority to question the quality and kind of material requested, to make recommendations relative to safety, health, and economy or substitute materials. Where necessary, disagreements regarding selection of materials between the Purchasing Department and the requisitioner will be reconciled by the Assistant Superintendent Business Services.

The Purchasing Department shall be responsible for securing quotations and bids and for making recommendations of award. Specifications shall be clear, complete, descriptive of materials desired, sufficiently broad to promote competitive bidding, and inclusive of all conditions necessary to bid.

Advertised bids for services, supplies and equipment will be opened in public meetings at a designated time and place under the supervision of the Purchasing Agent. After bids have been opened and tabulated, they will be available to interested people for review. However, they shall not be removed from the Purchasing Department. The Purchasing Department shall provide the Assistant Superintendent Business Services with a recap document showing the requirements, vendors, successful vendors, firm prices, and discounts. Purchase orders shall be issued for all purchases and the Purchasing Department shall expedite such orders to ensure delivery as specified.

Purchasing

PURCHASING ETHICS

To regard public service as sacred trust, giving primary consideration to the interests of the school district by which we are employed.

To purchase without prejudice, seeking to obtain the maximum benefit for each dollar expended.

To avoid unfair practices, give all qualified vendors an equal opportunity.

To accord vendor representatives the same courteous and respectful treatment we would like to receive.

To strive constantly for improvement of purchasing methods and of the materials we buy.

To conduct ourselves with fairness and dignity and to demand honesty and truth in buying and selling.

To cooperate with all organizations and individuals engaged in enhancing the development and standing of the purchasing profession.

To remember that everything we do reflects on the school district, and to govern our every action accordingly.

To decline personal gifts or gratuities.

To regard each transaction on its own merits; to foster and promote fair, ethical, and legal trade practiced.

Purchasing

TOXIC ART SUPPLIES

Education Code 32060-32066

The law prohibits the purchase of toxic art supplies for use in K-6 inclusive, and restricts their purchase for use in grades 7-12, inclusive. This law ensured that school children are not sufficiently protected from art and craft materials that may be seriously harmful.

School districts are prohibited from purchasing products containing toxic or carcinogenic substances for use in grades K-6. The law also restricts the purchase of such products in grades 7-12, allowing their use only if they bear ingredients, the potential health effects, and instructions for safe use for the art or craft products.

The law also mandated periodic revisions and updated of the list of approved products when new products appear on the market or new products specifications are submitted to the California Department of Health Services for approval.

You can access the certified product list compiled by The Art & Creative Materials Institute, Inc. got www.acminet.org – Art Material Safety – Certified Product Search Tool.

Purchasing

HOW TO REQUEST NEW VENDOR FOR BEST

If there is a new vendor, the following procedure should be followed.

1. Ask the vendor if their company accepts purchase orders. Fill out a vendor information form in Informed K12, including the vendor phone number, email address, and contact person.
2. Request a W-9 form from the vendor. The vendor will also need to sign a Conflict of Interest form. (Purchasing Department will request the Conflict Form from the vendor)
3. Attach the W-9 to the Informed K12 form. (Purchasing cannot enter a vendor in the system without a W-9.)
4. The site will be notified when the vendor is entered in the system; the site may then proceed with entering the requisition.

Note: The same procedures (#2-4) apply if you know the vendor has requested an address change.

Purchasing

UNIFORMS | PERSONAL REIMBURSEMENTS

Personal reimbursements are intended for travel, mileage, and other emergency purchases only with prior approval given by the Assistant Superintendent Business Services.

In order to be fully reimbursed all original itemized receipts must be submitted when requesting a reimbursement. Please ensure the proper Informed K-12 form is submitted.

For more information please contact the Purchasing Department.

CSEA contract article XV (15.7) states employees will be provided uniforms in the performance of their job.

Arrangements will be made for the purchase of shoes as part of the uniforms provided by the District.

Limits are as follows:

SHOES Food Service Personnel - \$150

Maintenance & Operations & Security -\$150

Purchasing

UNAUTHORIZED PURCHASES

Only authorized individuals appointed by the Board of Education may financially obligate the District. The District requires the issuance of a signed purchase order prior to a vendor furnishing services or shipping materials.

Education Code 42631: All payments from the funds of a school district shall be made by written order of the governing board of the district. Orders shall be on forms prescribed by the county superintendent of schools unless the warrants are processed by an on-line data processing system. Forms may be printed and furnished by the board of supervisors or the county superintendent of schools.

Education Code 42632: Each order drawn on the funds of a school district shall be signed by at least a majority of the members of the governing board of the district, or by a person or persons authorized by the governing board to sign orders in its name. No person other than an officer or employee of the district shall be authorized to sign orders.

DO NOT place orders with a vendor using a requisition number. Any orders placed without authorization will be the responsibility of the originator. The Purchasing Department will place all orders with a valid purchase order. If you don't follow this procedure, you take a risk of duplicating the order.

Purchasing

OPEN PURCHASE ORDERS

Open purchase orders may be requested for supply items and should include:

- A “not to exceed” amount.
- Type of items that can be purchased under this purchase.
- A specific time period, not to exceed the end of the current fiscal year. (June 30th)
- Authorized names of employees who will call in the orders.

All invoices and receipts should be signed by the person ordering the item(s) and the site/department administrator that the shipment has been received and is approved for payment. The purchase order number must be indicated on all invoices or receipts and must be forwarded to the Accounts Payable Department.

All purchases shall be made by formal contract or purchase order or shall be accompanied by an original detailed receipt. In order to eliminate the processing of numerous small purchase orders, the Superintendent or designee may create a "blanket" or "open" purchase order system for the purchase of minor items as needed from the same vendor.

No item over \$500 can be purchased using an open PO. A separate PO must be created in order to place that order. Open PO's are for materials and supplies only.

Purchasing

URGENT/RUSH PURCHASE ORDERS

Sometimes there is a need for a rush, urgent order. If this occurs, create the requisition and email the approvers and Purchasing Department to keep an eye on it and process as soon as it is approved. If the Purchasing Department receives urgent requests from your site/department on an ongoing basis, the problem will be addressed to the Principal and the Assistant Superintendent Business Services.

It will be the responsibility of the site/department to enter the requisition and make sure everyone responsible has signed off on the requisition electronically. At that point the Purchasing Department can turn the requisition into a purchase order, obtain the administrative signature and send the PO to the vendor.

Purchasing

EMERGENCY RESOLUTION REQUEST

Definition of Emergency:

Public Contract Code Section 1102 describes emergencies as a sudden, unexpected occurrence that poses a clear and imminent danger, requiring immediate action to prevent or mitigate the loss or impairment of life, health, property, or essential public services. Sometimes there is a need for a rush, urgent order. If this occurs, create the requisition and email the approvers and Purchasing Department to keep an eye on it and process as soon as it is approved. If the Purchasing Department receives urgent requests from your site/department on an ongoing basis, the problem will be addressed to the Principal and the Assistant Superintendent Business Services.

An Emergency Resolution is used when there is an emergency situation that permits public agency to enter into contracts for public work projects without competitive bidding when the total cost exceeds \$15,000. Public Contract Code Section 20113 (school districts).

In an emergency when any repairs, alterations, work, or improvement is necessary to any facility of public schools to permit the continuance of existing school classes, or to avoid danger to life or property, the board may, by unanimous vote, with the approval of county superintendent of schools, do either of the following:

- Make a contract in writing or otherwise on behalf of the district for the performance of labor and furnishing of materials or supplies for the purpose without advertising for or inviting bids.
- Notwithstanding PCCSection20114, authorize the use of day labor or force account for the purpose.

Approval by the Board of Trustees and Los Angeles County Office of Education is required.

Purchasing

GUIDELINES FOR USING PTA ACCOUNTS

All purchases made through the District must go through the District purchasing process and require pre-approval by the PTA BEFORE the purchase is made.

Before placing an order using PTA funds, the following process should be followed:

- Request a quote- ensure the quote outlines a detailed itemized list of the item or items being purchased. Be sure you have the rational for the purchase as well as whom you are purchasing it for.
- Request PTA approval- Please ensure you are completing the [Donation Approval Authorization](#) Form located on the Informed K12 website. This will then be routed to your PTA for approval.
- Create a requisition – Once the form has been completed and PTA has approved, you may now create a requisition. Ensure your requisition has all vendor information, items, quantities and all backup. The vendor obtained quote along with the PTA Donation Approval Authorization form must be attached to your requisition in order for a purchase order to be created. Failure to attach necessary backup can lead to ordering delays.

Payment Process

Once an order has been placed and all goods or services have been received, the vendor will send an invoice. All invoices must be signed off by the site Administrator and sent to Accounts payable.

District Invoices PTA

If PTA has approved to pay for an expense already incurred, please ensure you send the following to the Business Office:

- Purchase Order used to place the order
- Approved Donation Form signed by PTA
- Copies of the paid invoices/timesheets/etc.

Purchasing

GUIDELINES FOR USING PTA ACCOUNTS

Many purchases may be ordered and paid directly by the PTA such as:

- Office supplies
- Materials for students and teachers
- Reimbursements to teachers/staff

Forward PTA approval to the Business Office for the following purchases as these items need to be approved prior to creating a requisition:

- Personnel Costs
- Contracted Services
- Bus Trips
- Staff Conference/Travel
- Computers and other large ticket items

Purchasing

FISCAL YEAR END

The fiscal year ends on June 30th of each year. To ensure payment, all orders must be received and invoiced by June 30th. If they are not received and invoiced, the purchase order will be canceled, and a new requisition must be created for the new fiscal year. The deadline for requisitions will be April 15th please reach out to Purchasing if you have any questions or concerns.

REPLACEMENT OF EQUIPMENT / PROPERTY DUE TO VANDALISM

The following procedures shall apply for replacement of equipment destroyed or stolen and/or repair of property damaged as a result of vandalism:

1. A Theft, Entry, Vandalism Reports shall be submitted immediately upon the discovery of the loss or damage. The report shall include the police report with the case number.
2. This report is to be forwarded to the Assistant Superintendent of Business Services.
3. The principal/administrator at the site shall initiate a requisition to replace the item(s). The requisition shall indicate that this is a vandalism replacement and include a copy of the vandalism report as back up attached to the requisition in BEST and forward the original paperwork to Accounts Payable Department.

ORDERING NEWSPAPERS

Newspaper subscriptions are to be ordered on a requisition and subsequent purchase order. The requisitioner needs to indicate the delivery address and specific department in the proper area on the requisition form.

ORDERING MAGAZINES

Subscriptions are to be ordered on a requisition and subsequent purchase order. The requisitioner needs to indicate the delivery address and specific department in the proper area on the requisition form.

Purchasing

FIELD TRIPS

Request for Field Trips are entered on the Field/Study Trip & Bus Request form found on the Informed K-12 site. Fill out the forms completely including site requesting, teachers attending, leave and arrival times, destination, number of teachers and students attending, and the account number. Once the form has been completely filled out and submitted, it will route through the approval workflow process.

All forms once successfully routed through approval will be sent to Purchasing. A bus will then be secured and a copy of the form with bus company details and estimated costs will be sent to the site Office Manager. At that time, the Office Manager will create a requisition for the estimated costs in order to ensure a timely payment to the transportation company.

If changes need to be made to any part of the trip, purchasing will need such changes in writing. Take the original Field trip Form, cross out the old information and write in the new information and email it to the Purchasing Department. Confirm that purchasing has received the changes. When the correction(s) has been made with the bus company, purchasing will notify the site that the changes are confirmed in writing.

All field trip requests must be submitted at least one month or more prior to the trip. The trips must be pre-approved by the site Principal and Educational Services Department (and in case of ADA required buses, the Assistant Superintendent Student Support Services). If PTA or ASB funds are used, then they also need to approve the field trip request before the bus order is placed. Please note that we cannot bill PTA without an approved PTA Donation Form. Any costs incurred will be charged to the site if no form is received.

For liability reasons, buses must be contracted through the Purchasing Department and only with a District authorized vendor. All bus companies must submit liability and worker's compensation certificates before a trip can be taken.

Purchasing

COMPETITIVE BIDDING

PCC: Public Contract Code

GC: Government Code

EC: Education Code

BIDS

The District shall purchase equipment, supplies and services using competitive bidding when required by law and in accordance with statutory requirements for bidding and bidding procedures. In those circumstances, where the law does not require competitive bidding, the Board of Education may request that a contract be competitively bid if the Board determines that it is in the best interest of the District to do so.

Bid Limits

PCC22032 - CUPCAA

The District shall seek competitive bids through informal bidding for contracts involving an expenditure of \$60,000 or more for a public project contract. Competitive bids will be sought through advertisement for contracts exceeding \$200,000 or more for a public project contract.

Competitive bids shall be sought through advertisement for contracts exceeding \$109,300, as adjusted, must be let to the lowest responsible bidder if they are for the following:

1. The purchase of equipment, materials, or supplies to be furnished, sold, or leased to the district.
2. Services, except construction services.
3. Repairs, including maintenances, as defined in PCC Section 20115, that are not a public project as defined in PCC Section 22002.

Purchasing

COMPETITIVE BIDDING

The amount by which contracts shall be competitively bid shall escalate automatically based upon the annual adjustment by the Superintendent of Public Instruction. Starting January 1, 2024, The Superintendent of Public Instruction and the Board of Governors of the California Community College will annually adjust this amount to reflect the percentage change in the annual average value of the Implicit Price Deflator for the State and Local Government Purchases of Goods and Services. (Effective January 1, 2023, is \$109,300.)

PCC 20111 and 20112

The Board shall secure bids pursuant to for any transportation service expenditure of more than \$10,000 when contemplating that such a contract may be made with a person or corporation other than a common carrier, municipally owned transit system, or a parent/guardian of students who are to be transported, The Board may let this contract to other than the lowest bidder. Education Code 39802

Purchasing

ADVERTISED BIDS

PCC 22032

The District shall seek competitive bids through advertisement for contracts involving an expenditure of \$200,000 or more for a public project. For contracts involving between \$60,000 and \$200,000 are subject to the Informal Bidding Procedures set forth by the State of California Uniform Construction Cost Accounting Commission (CUPCCAA).

Unless otherwise authorized by law, contracts shall be let to the lowest responsible bidder who shall give such security as the Board of Education requires, or else all bids shall be rejected.

PCC 22002

Public project means construction, reconstruction, erection, alteration, renovation, improvement, painting, repainting, demolition, and repair work involving a District owned, leased, or operated facility.

PCC 20115

Maintenance means routine, recurring and usual work for preserving, protecting, and keeping a district facility operating in a safe, efficient, and continually usable condition for the intended purpose for which it was designed, improved, constructed, altered, or repaired. Maintenance includes, but is not limited to, carpentry, electrical, plumbing, glazing, and other craft work designed to preserve the facility, as well as repairs, cleaning and other operations on machinery and other permanently attached equipment. This definition does not include, among other types of work, janitorial or custodial services, and protection provided by security forces, nor does it include painting, repainting, or decorating other than touchup.

Purchasing

ADVERTISED BIDS

PCC 20112

For the purpose of securing bids, the board shall publish at least once a week for two weeks in some newspaper of general circulation published in the district, or if there is no such paper, then in some newspaper of general circulation, circulated in the county a notice calling for bids, stating the work to be done or materials or supplies to be furnished and the time when and the place where bids will be opened. Whether or not bids are opened exactly at the time fixed in the public notice for opening bids, a bid shall not be received after the stated bid closure time.

PCC 20118.1 – 20118.2 & EC81645

When making a contract for the procurement and/or maintenance of electronic data processing systems and supporting software, the Board may contract with any one of the three lowest responsible bidders. (This applies to the procurement of computers, software, telecommunication equipment, microwave equipment, and other related electrical equipment and apparatus.)

PCC 20116

It is unlawful to split or separate into smaller work orders or projects any work, project, service, or purchase for the purpose of evading the provisions of this article requiring contracting after competitive bidding.

Purchasing

PROCEDURES FOR ADVERTISED BIDS

The Superintendent or designee for the purpose of securing bids shall publish at least once a week for two weeks in some newspaper of general circulation published in the district, or if there is no such paper, then in some newspaper of general circulation, circulated in the county, and may post on the district's web site or through an electronic portal, a notice calling for bids, stating the work to be done or materials or supplies to be furnished and the time when and the place where bids will be opened. Whether or not bids are opened exactly at the time fixed in the public notice for opening bids, a bid shall not be received after that time. The governing board of the district may accept a bid that was submitted either electronically or on paper.

PCC 20112

Notice inviting formal bids for projects by a public agency that include a requirement for any type of mandatory pre-bid conference, site visit, or meeting shall include the time, date, and location of the mandatory pre-bid site visit, conference, or meeting, and when and where project documents, including final plans and specifications are available. Any mandatory pre-bid site visit, conference or meeting shall not occur within a minimum of five calendar days of the publication of the initial notice.

PCC 6610

Bid instructions and specification shall include the following requirements and information: All bidders shall certify the minimum, if not exact, percentage of post-consumer materials in products, materials, goods, or supplies offered or sold.

PCC 22152

All bids for construction work shall be presented under sealed cover and shall be accompanied by one of the following forms of bidder's security:

PCC 20107-20111

- 1.A cashier's check made payable to the District.
- 2.A certified check made payable to the District.
- 3.A bidder's bond executed by an admitted surety insurer and made payable to the District.

The security of unsuccessful bidders shall be returned in a reasonable period of time, but in no event later than 60 days after the bid is awarded by the Board of Education.

Purchasing

PCC 20111

Bids shall not be accepted after the advertised bid opening time, regardless of whether the bids are actually opened at that time.

PCC 20112

When two or more identical lowest or highest bids are received, the Board may determine by lot which bid shall be accepted.

PCC 20117

If the District requires that the bid include prices for items that may be added to or deducted from the scope of work in the contract, the bid solicitation shall specify which one of the following methods will be used to determine the lowest bid. In the absence of such a specification, only the method provided in item (a) below will be used:

PCC 20103.8

1. The lowest bid shall be the lowest total of the bid prices on the base contract without consideration of the prices on the additive or deductive items.
2. The lowest bid shall be the lowest total of the bid prices on the base contract and those additive or deductive items that were specifically identified in the bid solicitation as being used for the purpose of determining the lowest bid price.
3. The lowest bid shall be the lowest total of the bid prices on the base contract and those additive or deductive items that, when taken in order from a specifically identified list of those items in the solicitation, and added to or subtracted from the base contract, are less than or equal to a funding amount publicly disclosed by the District before the first bid is opened.
4. The lowest bid shall be determined in a manner that prevents any information that would identify any of the bidders or proposed subcontractors or suppliers from being revealed to the District before the ranking of all bidders from lowest to highest has been determined.

Any subsequent change or alteration of a contract shall be governed by the provisions of

PCC 20118.4.

After being opened, all submitted bids become public records pursuant to GC 6252 and shall be made available for review pursuant to law, Board policy, and administrative regulations.

When a standardized proposal form is provided by the District, bids not presented on the standard form shall be disregarded. **PCC 20111.5 (c)**

Purchasing

Alternative Bid Procedures for Technological Supplies and Equipment

Upon a finding by the Board that a particular procurement qualifies for the alternative procedure, the District may acquire computers, software, telecommunications equipment, microwave equipment, and other related electronic equipment and apparatus through competitive negotiation. This procedure shall not apply to contracts for construction or for the procurement of any product that is available in substantial quantities to the general public. **PCC 20118.2**

The competitive negotiation shall include, but not be limited to, the following requirements: **PCC 20118.1**

- 1.The Superintendent or Designee shall prepare a request for proposals that shall be submitted to an adequate number of qualified sources, as determined by the District, to permit reasonable competition consistent with the nature and requirement of the procurement.
- 2.Notice of the request for proposals shall be published at least once a week for two weeks in a newspaper of general circulation, at least 10 days before the date for receipt of the proposals.
- 3.The District shall make every effort to generate the maximum number of proposals from qualified sources and shall make a finding to the effect before proceeding to negotiate if only a single response to the request for proposals is received.
- 4.The request for proposals shall identify all significant evaluation factors, including price, and their relative importance.
- 5.The District shall provide reasonable procedures for the technical evaluation of the proposals received, the identification of qualified sources, and the selection for the award of the contract.
- 6.An award shall be made to the qualified bidder whose proposal meets the evaluation standards and will be most advantageous to the District with price and all other factors considered.
- 7.If an award is not made to the bidder whose proposal contains the lowest price, then the District shall make a finding setting forth the basis for the award.
- 8.The District, at its discretion, rejects all proposals and requests new proposals.
- 9.Provisions in any contract concerning utilization of small business enterprises, that are in accordance with the request for proposals, shall not be subject to negotiation with the successful proposer.

Purchasing

Bids Not Required

Upon a determination that it is in the best interest of the District, the Board of Education may authorize the purchase, lease, or contract for data-processing equipment, purchase materials, supplies, equipment, automotive vehicles, tractors, and other personal property through a public corporation or agency ("piggyback") without advertising for bids.

PCC 20118

Alternatively, if there is an existing contract between a public corporation or agency and a vendor for the lease or purchase of personal property, the district may authorize the lease or purchase of personal property directly from the vendor by contract, lease, requisition, or purchase order and make payment to the vendor under the same terms that are available to the public corporation or agency under the contract **PCC 20118.3**

Supplementary textbooks, library books, educational films, audiovisual materials, test materials, workbooks, instructional computer software packages, or periodicals may be purchased in any amount without taking estimates or advertising for bids. PCC 20118.3

Perishable commodities, such as foodstuffs, needed in the operation of cafeterias, may be purchased through bid or on the open market. **EC 38083**

In an emergency, when any repairs, alterations, work or improvement to any school facility is necessary to permit the continuance of existing school classes, or to avoid danger to life or property, the Board may, by unanimous vote and with the approval of the County Superintendent of Schools, contract for labor and materials or supplies without advertising for or inviting bids. **PCC 20113**

Bids shall not be required for day labor under circumstances specified in Public Contract Code 20114. Day labor shall include the use of maintenance personnel employed on a permanent or temporary basis **PCC 20114**

Purchasing

Sole Sourcing

Specifications for contracts for construction, alteration, or repair of school facilities may not limit bidding, either directly or indirectly, to any one specific concern. Specifications designing a particular brand name shall follow the description with the words “or equal” so the bidders may furnish any equal material, product, thing, or service. **PCC3400**

Specifications for contracts may designate a product by brand or trade name (sole sourcing) if the Board of Education has made a finding, described in the invitation for bids or request for proposals. That a particular material, product, thing, or service is designated for any of the following purposes: **PCC 3400**

- 1.To conduct a field test or experiment to determine its stability for future use.
- 2.To match others in use on a particular public improvement that has been completed or is in the course of completion.
- 3.To obtain a necessary item that is only available from one source.
- 4.To respond to the Board’s declaration of an emergency, as long as the declaration has been approved by four-fifths of the Board that issued the invitation for bid or request for proposals.

Prequalification Procedure

For any contract for which bids are legally required, the Board may require that each prospective bidder complete and submit a standardized questionnaire and financial statement. For this purpose, the Superintendent or Designee shall supply a form which requires a complete statement of the bidder’s financial ability and experience in performing public works. **PCC 20111.5**

Prospective bidders shall submit the questionnaire and financial statement at least five days before the date fixed for public opening of sealed bids. The information shall be verified under oath in the manner in which civil law pleadings are verified. The questionnaires and financial statements shall not be public records and shall not be open to the public inspection. **PCC 20111.5**

The Superintendent or designee shall establish a uniform system for rating bidders on the basis of completed questionnaires and financial statements in order to determine the size of contracts on which each bidder is qualified to bid. Bidders must be deemed prequalified by the District at least one day before the fixed bid-opening date. **PCC 20111.5**

The Superintendent or designee shall furnish each qualified bidder with a standardized proposal form. Bids not presented on the standard form shall be disregarded. **PCC 20111.5(c)**

Purchasing

Prequalification Procedure

The District may establish a procedure for pre qualifying bidders on a quarterly basis and may authorize that prequalification be considered valid for up to one calendar year following the date of the initial prequalification. **PCC 21000.5**

Protest by Bidders

A bidder may protest a bid award if he/she believes that the award was inconsistent with Board policy, the bid's specifications, or was not in compliance with the law.

A protest must be filed in writing with the Superintendent or designee within five working days after receipt of notification of the contract award. The bidder shall submit all documents supporting or justifying the protest. A bidder's failure to file the protest documents in a timely manner shall constitute a waiver of his/her right to protest the award of the contract.

The Superintendent or Designee shall review the documents submitted with the bidder's claims and render a decision in writing within 30 working days. The Superintendent or designee may also convene a meeting with the bidder in order to attempt to resolve the problem.

The bidder may appeal the Superintendent or Designee's decision to the Board. The Superintendent or Designee shall provide reasonable notice to the bidder of the time of Board considerations of the contract award. The Board's decision shall be final.

Purchasing

COOPERATIVE PURCHASING

In some cases the District can use existing contracts between vendors and other public agencies. Common examples of this type of purchasing are “piggybacking”, the California Multiple Award Schedule (CSMA) and the Western States Contracting Alliance (WSCA).

PCC 20118 permits a school district to enter into a contract with another public agency, or directly with a vendor, by “Piggybacking” its order on an existing order placed by another agency, without advertising for bids.

The District may accept these contracts when the original contract:

1. Has not passed the expiration date or exceeded its dollar amount (if limited); and
2. It has provisions that allow for piggybacking, and meets the DVBE requirements, and
3. Has been self-certified by the District originally conducting the bid; and
4. Has procured a copy of the contract you want to use.

ASSET PROGRAM

Each piece of equipment purchased that may be classified a capital asset (\$500.00 or greater and is not attached permanently to a building), must be identified as district asset.

INVENTORY OF EQUIPMENT E.C. 35168

The governing board of each school district, shall establish and maintain a historical inventory, or a audit trace inventory system, or any other inventory system authorized by the State Board of Education, which shall contain the description, name, identification numbers, and original cost of all items of equipment acquired by it whose current market value exceed five hundred dollars (\$500) per item, the date of acquisition, the location of use, and the time and mode of disposal. A reasonable estimate of the original cost may be used if the actual original cost is unknown.

To ensure this is accomplished, the following procedures will be performed.

Purchasing will stamp the purchase order with “ASSET NUMBER REQUIRED” when it is processed through purchasing.

An asset tag will be affixed to the item and log the required information into the asset file.

Purchasing

DISPOSITION OF SURPLUS EQUIPMENT

Private sale of personal property; disposition of property unsold at public auction or of insufficient value to defray cost of sale. E.C. 17546

1. If the governing board, by a unanimous vote of those members present, finds that the property, whether one or more items, does not exceed in value the sum of two thousand five hundred dollars (\$2,500), it may be sold at private sale without advertising, by any employee of the district empowered for the purpose by the board.
2. Any item or items of property having previously been offered for sale pursuant to Section 39520, but for which no qualified bid was received, may be sold at private sale without advertising by any employee of the district empowered for the purpose by the board.
3. If the board, by a unanimous vote of those members present, finds that the property is of insufficient value to defray the costs of arranging a sale, it may be disposed of in the local public dump on order of any employee of the district empowered for that purpose by the board. When a surplus sale takes place, Purchasing will coordinate the collection of all surplus items and will be responsible for updating the master database as equipment listed on the asset list is disposed of. This includes the selling price (if sold) and the date.

When an asset is moved, stolen, or lost, the site/department in charge of that asset must report the disposition of that asset to Purchasing so the master list may be updated.

OBSOLETE/SURPLUS FURNITURE AND EQUIPMENT LISTING

THIS FORM MUST BE TYPED

SITE:			
DATE:			
		DISTRICT ID	
ITEM	SERIAL #	TAG NUMBER	REASON

Purchasing

MAIL DELIVERY

The District is the site where all mail to the schools shall be received and sorted for delivery by a delivery driver to all locations. Each school and department have a specific location where all mail is delivered and picked up.

MAILING A PACKAGE

Packages mailed through the U.S. Postal Service are sent at the lowest rate allowable, UNINSURED unless requested otherwise. If you wish to be able to trace a shipment, or feel the contents should be insured, a note must be attached to each carton with the following information:

1. Request to insure
2. Value of contents
3. What are the contents being shipped
4. Name of sender

REMEMBER, WE HAVE NO WAY OF TRACKING A PACKAGE OR VERIFYING SHIPPING DATE IF IT WAS MAILED UNINSURED.

INTRADISTRICT MAIL

Intra-district mail is mail and parcels moved between various schools, departments, and the district office. It includes correspondence, memorandums, records, parcels, and boxes. It does not include major equipment items.

All correspondence should bear the name of the person the package is intended for and the name of the person sending the package.

Purchasing

JET MAIL

Mail moving outside of our school district to any other public school or school district in Los Angeles County or to the Los Angeles County Office of Education is delivered by Jet Mail. Jet mail bags are in the Business Office.

A special courier service makes daily pickups and deliveries to all county school district administration centers. The “JET MAIL” should be used to move any correspondence or reports and even small parcels to any other school, school district or community college operation within Los Angeles County.

Correspondence to be moved by the “JET MAIL” service should be placed in regular envelopes and contain both a return and sent to address. These addresses must indicate in the first line, the name of the district, in the second line, the name of the school or office, and in the third line, the name or title of the individual where appropriate. This address format is essential, as this mail moves from district administration center to district administration center rather than to street and city. Envelopes or packages to be moved via “JET MAIL” courier service should bear the notation “JET MAIL” on the top face, upper right-hand corner where stamps would normally be applied.



Purchasing

LEGAL CODES RELATING TO PURCHASING FOR CALIFORNIA SCHOOLS

The codes listed are those which contain information pertinent to those within the schools and departments. You can find a complete listing of codes on the California Legislative website: <http://leginfo.legislature.ca.gov/faces/codes.xhtml>

EDUCATION CODE	
EC 17540	Sale and purchase of personal property or school supplies
EC 17541	Applicability to sale of personal property by unified school district
EC 17542	Sale or lease of used property.
EC 17545	Sale of personal property; notice; public auction
EC17546	Private sale of personal property; disposition of property unsold at public auction or of insufficient value to defray cost of sale.
EC 17547	Deposit of money
EC 17548	Sale for replacement to lowest net bid
EC17549	Exchange of household appliances and equipment for new property.
EC17550	Letting of contract to lowest net bid after deducting purchase price of old material



Purchasing

LEGAL CODES RELATING TO PURCHASING FOR CALIFORNIA SCHOOLS

EDUCATION CODE	
EC 17551	Property fabricated by pupils
EC 17552	Sale of materials to adult pupils
EC 17553	Sale, gift or exchange of published material; license or copyrights
EC 17554	Agreements with agricultural cooperative or association
EC 17555	Sale or lease to private educational institutions
EC 17595	Purchase of supplies through Department of General Services
EC 17596	Duration of continuing contracts for services and supplies
EC17597	Sale of electronic data processing or other major items of equipment.
EC17598	Contract for electromechanical or electronic data processing work.
EC17599	Authority to contract for electromechanical or electronic data processing work.
EC17601	Contracts for electromechanical or electronic data processing work
EC 17604	Purchase of surplus property form federal agencies



Purchasing

LEGAL CODES RELATING TO PURCHASING FOR CALIFORNIA SCHOOLS

EDUCATION CODE	
EC17605	Delegation of powers to agents; liability of agents. Delegation of authority to purchase supplies and equipment; limitations on expenditures; review; personal property.
EC17606	Delegation of authority to superintendent or his designee to make transactions under certain value
EC 60420	Disposition of obsolete textbooks
EC 40000	Purchase of standard supplies and equipment
EC 40001	Purchases by district governing board
EC 40002	Purchase of other than standard supplies
EC 40004	County superintendent of schools as agent for purchases
EC 40011	Supplies furnished by district governing boards
EC40013	Advance payments for publications, postage, maintenance of equipment, etc.
EC 40014	Lease of personal property; caps and gowns
EC 17450	Authority to lease equipment
EC 17451	Provisions applicable to contracts



Purchasing

LEGAL CODES RELATING TO PURCHASING FOR CALIFORNIA SCHOOLS

EDUCATION CODE	
EC 17452	Terms of lease
EC 17453	Lease of surplus district property
EC 60510	Disposal of surplus or undistributed obsolete instructional materials
EC 60511	Requirements of recipients
EC 60512	Shipping
EC 35272	Educational and athletic materials

Purchasing

LEGAL CODES RELATING TO PURCHASING FOR CALIFORNIA SCHOOLS

PUBLIC CONTRACT CODES	
PCC 1102	Definition of Emergency
PCC 2000	Disabled veterans' business enterprises (DVBE)
PCC 20110	School districts; contracts; application
PCC20111	Contracts over \$15,000 for work to be done and over \$50,000 for materials or supplies; award to lowest responsible bidder
PCC 20112	Advertisements for Bids
PCC20113	Emergencies; award of contracts without bids or use of day labor or force account
PCC 20115	Maintenance defined
PCC20116	Split or separation into smaller work orders or projects; total cost on projects; records; informal bids
PCC 20117	Identical bids; determination of acceptance by lot
PCC20118	Authorization of Public Corporation or Agency to Make Leases or Purchases; warrants; costs of corporation or agency

Purchasing

LEGAL CODES RELATING TO PURCHASING FOR CALIFORNIA SCHOOLS

PUBLIC CONTRACT CODES	
PCC20118.1	Electronic data-processing systems; bids
PCC20118.3	Supplementary textbooks, library books, etc.; purchase without estimates or bids; operative date
PCC20118.4	Change without securing bids; writing; amount limitations
PCC 20129	Bidders security; performance bond
PCC20989	Bidders Security

Purchasing

LEGAL CODES RELATING TO PURCHASING FOR CALIFORNIA SCHOOLS

GOVERNING BOARD POLICIES OF BEVERLY HILLS UNIFIED SCHOOL DISTRICT PERTAINING TO PURCHASING	
AR	Administrative Regulation
BP	Board Policy
BP 3300	Expenditures and Purchases
BP 3311	Bids
AR 3311	Bids
AR 3311 (a)	Bids (Procedures)
BP 3312	Contracts
BP 3314	Payment for Goods and Services
BP 3315	Relations with Vendors
BP 3320	Claims and Actions Against the District

Risk Management

The Business Services Risk Management section serves as your clearinghouse for all things related to risk and insurance. You will find forms related to workers compensation and property and liability claims below.

Workers Compensation

Step 1: The employee is responsible for immediately reporting to their Supervisor that they have been injured while working.

Step 2: If the injury is an emergency, staff should dial 911 immediately. Call Company Nurse at 1-877-518-6702 after the employee has been transported to a hospital for medical treatment.

Skip to Step 3 if it is not an emergency.

Step 3: Employee and/or Supervisor will call 1-877-518-6702 Company Nurse 24/7 Hotline and complete the [Workers Compensation packet](#) before staff leaves the premises on the day of the injury.

Company Nurse (Injury Hotline/Nurse Triage) **Call: 877-518-6702**, Search Code: SLF01 (Beverly Hills Unified School District employees only)

Company Nurse will provide assistance regarding either a referral for medical treatment or simply recording the incident.

Company Nurse will refer you to the designated medical clinic for the district (unless you have pre-designated your personal physical prior to the injury).

Please contact Shemia Moore at ext. 2248 to find out if you have a completed pre-designation form on file.

Step 4: If Company Nurse determines that you need to be seen by a physician you will be referred to:

Culver City Urgent Care
9726 Venice Blvd.
Culver City, CA 90232

Risk Management

Make sure that the employee is able to drive safely.

Make sure the employee understands they will be required to pay for parking, but will be reimbursed by Keenan & Associates (insurance provider).

If an employee declines medical attention, the employee will need to complete a Waiver of Medical Attention form. Do not call Company Nurse and the employee should NOT be sent to Midway Industrial Healthcare Services.

Pre-Designation Form

If you would like to be treated by your doctor in the event you have a workers' compensation claim, you and your doctor must complete this form and return it to Shemia Moore in Business Services.

YOUR DOCTOR MUST SIGN THIS FORM, agreeing to treat you as a workers' compensation patient prior to you getting injured. If you are injured at work without a pre-designated doctor on file, you will need to be treated by doctors at Culver City Urgent Care.

Student Injuries

The following report should be completed by staff when student accidents occur on school property or during a school event and results in a student injury that requires treatment or follow up by a physician.

- Complete a **Confidential School Accident Report (CSA)**. Make sure all form fields are completed.

Certificates of Insurance

If you need to request Certificates of Insurance for off site events please contact Shemia Moore at extension 2248 or by email at smoore@bhusd.org.

Claim for Damages to Person or Property Form

This form must be submitted to Business Services in the event of damage to person or property. **Claim for Damages to Person or Property Form**

Technology

This memo aims to clearly understand the steps in requesting and procuring technology (hardware and software) resources for BHUSD's operational and educational needs.

Request Initiation

Any technology-related requirement will begin with submitting a formal request. This can be done by filling out the [Technology Request Form on Informed K-12](#).

The requester must provide comprehensive details about the needed technology, including specifications, quantity, purpose, and relevant budget considerations.

Review and Approval

Once the form is submitted, it will be reviewed by our IT department. This review involves assessing the capability of the required technology with our existing systems, cyber security considerations, and overall feasibility. The IT team will either approve the request or communicate any necessary adjustments.

Approval Attachment

Once the IT department approves the request, you will receive confirmation. You will attach the approved form to the requisition, initiating the procurement process.

Select Appropriate Technology Code

When submitting a requisition for technology-related purchases, select the appropriate technology object code from the list. Each technology object code corresponds to a specific product, software, or service category. (**4340** for software purchases; **4400** for non-computer related equipment such as TV, printer, scanner, etc.; **4410** for computers and related items (monitors, keyboard, hard drive, etc.); **5840** for technology related services (installation of TVs, computer configuration, etc.)

Technology

Tagging and Documentation

A designated procurement team or IT department representative will receive all delivered technology items at the district office. Each item will be tagged, including a description, quantities, and serial numbers, and assigned a unique BHUSD identifier. This information is essential for accurate inventory tracking. Once the items are tagged and verified, they can be authorized for deployment to the school sites.

By implementing this process, we ensure that all technology items are accounted for, adequately documented, and appropriately deployed to the school sites. This procedure enhances our overall inventory management and helps us make informed decisions about technology allocation.

Your cooperation in adhering to this process is highly appreciated. If you have any questions or require clarification, please get in touch with the procurement team or the IT department.



624 N. Rexford Drive, Beverly Hills CA 90210

Telephone: (310) 551-5100 | bhUSD.org



This Business Services Manual provides an updated overview of processes and relevant information. It is intended for informational purposes only.

If you need additional information or have any questions about the content in this guide, please feel free to contact the appropriate departments listed on the Contact Us page.