

Oshkosh Public Library
Proposed Personnel Policy Revision
Library Employee Handbook Section 114 – Records & Transactions Management
June 30, 2022

REASON FOR REVISION

Minor revisions for changes in position titles and to acknowledge compliance with relevant state laws. The full policy section as proposed is reproduced immediately below this section. Only the sections in which revisions are being proposed are reproduced in the mark-up section further below.

REVISED POLICY

114 RECORDS & TRANSACTIONS MANAGEMENT

1. Purpose - Personnel records are essential to provide factual data about an individual's employment with the Library. In addition to meeting a variety of legal requirements, they also serve as a basis to evaluate qualifications for promotion or transfer; to determine the status, eligibility, rights and benefits of employees under pertinent regulations and serve to support other management decisions.
2. Responsibility & Authority
 - a. Library Board - The Oshkosh Public Library Board of Trustees, guided by the recommendations of the Library Director, shall approve new positions and grade changes through the annual budget process.
 - b. Library Director - The Library Director, shall approve all reclassifications, status changes, reallocation of existing positions, demotions and dismissal actions.
 - c. Library Business Manager - The Business Manager will act as the liaison to the City's Benefits Coordinator on all matters affecting Library employee participation in City fringe benefit programs. The City Benefits Coordinator maintains records of insurance, benefits and other information necessary for efficient benefit administration.
 - d. Library Administrative Office - The Library Administrative Office shall:
 - i. Establish, maintain and coordinate personnel transactions and records for all Library employees.
 - ii. Maintain a central personnel file for each Library employee showing name, address, title, salary, changes in status, performance evaluation, cumulative vacation, sick leave and such other pertinent information necessary for effective personnel administration and for compliance with State and Federal law.

iii. Advise and assist Library administrators and managers on all Library personnel transactions, records and system procedures.

iv. Act as liaison to the City payroll office on all matters affecting Library employee payroll, including changes to pay rates, the need to execute payroll deductions, etc.

e. Department Heads - Department Heads or their designated Supervisors shall:

i. Initiate and process transactions that affect their employees using forms provided by the Business Manager or Library Administrative Office.

ii. Maintain a record of each employee's compensatory time, if any, to justify time off from work.

iii. Promptly notify the Business Manager or Library Administrative Office of all changes in personnel information affecting records and payroll, including change of address or dependency, leave of absence or other pertinent information.

f. Employees - All employees shall be responsible for notifying their supervisor and the Library Administrative Office of any changes which affect their employment or benefit status, such as name, address, telephone number, marital status, number of dependents, and insurance coverage.

3. Security of Records - Access to personnel and payroll records is limited to those employees who utilize official records in order to perform their assigned duties. Other people who are authorized access should obtain the records from those assigned responsibility for their maintenance.

4. Public Inspection - Information is available for public inspection in accordance with the procedures prescribed by the Library Director, subject to State and Federal law governing open records.

5. Destruction of Records - Applications for employment, examinations, payroll and other records shall be kept according to the General Records Schedule for Wisconsin's Public Libraries and Public Library Systems.

[Section 114 Revised 30 June 2022]

MARK-UP OF REVISIONS TO CURRENT POLICY

114 RECORDS & TRANSACTIONS MANAGEMENT

2. Responsibility & Authority

c. Library ~~Assistant Director~~ Business Manager - The ~~Assistant Director~~ Business Manager will act as the liaison to the City's Benefits Coordinator on all matters

affecting Library employee participation in City fringe benefit programs. The City Benefits Coordinator maintains records of insurance, benefits and other information necessary for efficient benefit administration.

e. Department Heads - Department Heads or their designated Supervisors shall:

- i. Initiate and process transactions that affect their employees using forms provided by the ~~Assistant Director~~ Business Manager or Library Administrative Office.
- ii. Maintain a record of each employee's compensatory time, if any, to justify time off from work.
- iii. Promptly notify the ~~Assistant Director~~ Business Manager or Library Administrative Office of all changes in personnel information affecting records and payroll, including change of address or dependency, leave of absence or other pertinent information.

5. Destruction of Records - Applications for employment, examinations, payroll and other records shall be kept ~~at the discretion of the Library Director subject to State and Federal laws.~~ according to the General Records Schedule for Wisconsin's Public Libraries and Public Library Systems.

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