

***The Diocese of Kansas City-St. Joseph***

**Chancery Guidelines**

2/1/2008

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## 180 Building Safety

All visitors and guests are requested to stop at the switchboard. Anyone functioning as the switchboard operator should be particularly alert to any individual not stopping at the information desk, unless the individual is known to them. In the event of a suspicious individual being observed in the building, the switchboard operator shall immediately ring the bell with three short rings to alert all occupants of the building that there may be an intruder inside the Chancery Building. Men should respond by going to the front desk to find out about the concern.

If a suspicious individual is observed or encountered by any other occupant of the building, the switchboard operator should be called immediately and requested to sound the alarm. Give the following message: "The fire extinguisher is broken in the 'lobby'...'the basement'...'the second floor'...or the area where such person appears to be going".

No one should be admitted inside the Chancery before or after hours unless they are known by the staff member admitting them to the building OR unless they remain under the supervision/in the presence of the staff member admitting them to the building.

Purses and valuable items should be in a locked place.

## **181 Alarm System**

The building is open from 7:45 a.m. to 5:00 p.m. Monday through Friday. To get in without a key when the building is locked you may ring the bell located near the door to the left of the main entrance door. For further information on use of the building see Building Use.

The Intrusion and Fire Alarm System is in use nightly (set at 10:30 p.m.) and on weekends. The police will be called within one minute if alarm is not disarmed. Each department has a code and each employee in that department is responsible to know the code.

## **182 Emergency Procedures**

### **Discovery of Smoke or Fire**

In the event a fire is discovered or strong smoke odor smelled, the employee shall IMMEDIATELY CALL THE FIRE DEPARTMENT OR 9-911 WITHOUT RECOURSE TO HIGHER AUTHORITY.

The Chancery fire detection system is set off by smoke and heat sensors throughout the building. If you have discovered smoke or fire and the alarm has not yet gone off;

- Activate the fire alarm by pressing the fire button on any one of the three alarm panels (near the east entrance, and north entrances on the 1<sup>st</sup> and 2<sup>nd</sup> floors)
- Call 911 immediately to report the fire.
- Call switchboard to report the location of the fire.
- Evacuate from the building.

### **Sounding of Alarm**

On hearing an alarm you should evacuate the building using the nearest fire exit. Do not stop to collect your belongings. You should not re-enter the building until expressly allowed to do so by the proper authorities.

### **Evacuation of Building**

Do not use the elevator.

If there is smoke, crawl low underneath it and test doors for heat before you open them. If one of your escape routes can't be used quickly, go to your second exit.

Each floor has two employees designated as floor wardens; the primary role of the floor warden is to facilitate the evacuation of occupants from the floor during a fire drill. Please follow their direction in a prompt manner.

If the alarm is silenced, continue to evacuate the building until an (all clear) is given to re-enter the building.

### **Meeting Places**

Once outside, go to the assigned meeting place for your floor. Follow the instructions of fire and security personnel. Stay out of the way, and do not go back into the building until they say it is safe.

Basement and 1<sup>st</sup> Floor  
2<sup>nd</sup> Floor  
3<sup>rd</sup> Floor

Northeast Corner of Parking lot  
Southeast Corner of Parking Lot  
Side Lawn near large sign

It is the responsibility of the each department/office supervisor to account for the presence of their employees and guests. Once all employees and guests under your supervision are accounted for, immediately contact the Risk Manager and/or Finance Officer and report if all are present or if an employee is unaccounted for.

### **Know what to do if you can't escape.**

You will need to plan your actions in case immediate escape is impossible. If possible, for example, stay in a room with an outside window and always close doors between you and the fire. Think about what you could use - sheets, towel, curtains, or even large pieces of clothing - to stuff around cracks near the door and wave as a signal to rescuers. Know how to open the window to ventilate smoke but be prepared to close the window immediately if an open window makes the room smokier. If there is a phone, call the fire department with your location, even if firefighters are already on scene. Remember, stay low in smoke until you are rescued.

### **Employees Should:**

- Learn the locations of at least two exits from all work areas.
- Know where the nearest fire alarm is and how to use it.
- Post the fire department number on or near all phones.
- Know the exact address of their workplace.

### **What will happen when the fire alarm sounds?**

- Fire Alarm sounds.
- Everyone starts moving out of the building.
- Alarm is silenced.
- Everyone continues moving out of the building.
- Everyone arrives at their designated meeting place.
- Office Directors report to Risk Manager that all employees are present and accounted for. When all directors have contacted Risk Manager, everyone is cleared to return to the building.

# 183 Emergency Procedures Gillham Plaza Building

## Fire Alarm System/Equipment

Gillham Plaza is equipped with smoke detection devices and emergency pull stations that are monitored by an independent alarm system company at all times. In addition, fire extinguishers are located in common area hallways and elevator lobbies throughout the building. Please familiarize yourself with the location of the fire extinguishers, emergency pull stations and fire stairways nearest your suite.

Fire: Emergency Plan of Action

In a fire alarm situation - DO NOT PANIC

If a fire is detected, immediately notify the Fire Department (911) and give the following information:

Building Name: Gillham Plaza  
Street Address: 301 E. Armour Boulevard  
Floor Level: 1st floor  
Suite Number: 140

If the fire alarm sounds or you are instructed to evacuate, proceed in an orderly manner to the stairwell closest to your suite. Walk down to the 1<sup>st</sup>, 2<sup>nd</sup>, or 3<sup>rd</sup> floor and exit the building through the door equipped with an exit sign.

DO NOT ATTEMPT TO USE THE ELEVATOR — they are set to return to the ground floor for use by the Fire Department.

## Tornado/Earthquake

In the event of a tornado or earthquake warning for the downtown/midtown area, tenants and visitors should move away from all windows and proceed to the center core of the building common area hallways, elevator lobbies, and center fire stairwell.

DO NOT EXIT INTO THE PARKING GARAGE OR ONTO THE STREET LEVEL SURROUNDING THE PROPERTY.  
DO NOT USE THE ELEVATORS !!!!

## 280 Meeting Rooms

Schedule forms are available in the Print Shop hallway.

Room	Location	Seating	Reservations
<b>O'Hara Room</b>	2nd floor	12	Switchboard
<b>Assembly Room</b>	Basement Level	up to 50	Switchboard
(For larger gatherings. Has outside access as well as from within)			
<b>Lunchroom</b>	Basement Level	up to 20	Switchboard
<b>LeBlond Room</b>	2nd Floor - Tribunal	2-4	Tribunal x264.
<b>Bishop Sullivan Room</b>	2nd floor	8	School Office.
<b>Helmsing Room</b>	Gillham Plaza St 140	50	Switchboard
<b>Hoffman Room</b>	Gillham Plaza St140	50	Switchboard
<b>Bishop Lillis Room</b>	Gillham Plaza St 600	10-14	Stewardship Office

Coffee pots, television, VCR, food or drinks and other meeting materials should be removed from the room following the meeting. Please shut the lights off before leaving.

Meeting rooms and suites in the Gillham Plaza Building are restricted, and can only be accessed with security codes, please advise visitors accordingly. Security codes can be obtained from the switchboard operator in the main chancery building. Bathroom keys can be found on the table in the Bishop Lillis Room.

Instructions about use of these rooms are posted in each room. The code necessary to enter suite 140 is obtained from the switchboard operator. The code is changed weekly.

## **281 Suite 600 Gilliam Plaza Building**

### **ACCESS**

Please inform clients that they can gain access Monday through Friday from 8:00am to 5:00pm.

### **BUILDING HOURS**

Doors to the building are open Monday through Friday from 6:30 a.m. to 6:00 p.m. Magnetic key entry cards are necessary for access beyond these hours.

### **COPY MACHINE**

The copy machine is located in the work room on the southeast side of the suite. Enter either the office code or your personal code for the accounting office. For service, contact the Stewardship & Development Office Administrator.

### **EQUIPMENT**

- Cart: Located in the storage room.
- Electric Letter Opener: Located in the work room.
- Electric Stapler: Located in the work room.
- Paper cutter: Located in the work room.
- TV/VCR: Located in the storage room.

### **FAX MACHINE**

The fax machine is located in the work room. The fax number is: 756-5221. The operation manual is by the machine. Fax # for Property Management: 756-5572.

### **JANITORIAL SERVICE**

Trash will be emptied and common areas will be vacuumed daily. Offices will be vacuumed and dusted weekly. Should a special cleaning need arise, please contact the coordinator of the Property Management Office.

### **KITCHEN**

All are responsible for cleaning up their own dishes or putting dirty dishes and cups in the dishwasher. No items should be left in the sink.

There are volunteer sign up sheets placed in the kitchen for kitchen duty. Usually a week is taken at a time. Should kitchen supplies run out, contact the mail room.

### **MAIL DELIVERY**

Mail is picked up and delivered two times a day: 8:00 a.m., and 2:00 p.m. For large packages, please deliver them directly to the Chancery mail room. If there is a large mailing going out,

please contact mail room personnel in advance of the pick-up so proper arrangements can be made. Ask mailroom personnel if you have any questions on mailing procedures.

## **MAINTENANCE ISSUES**

All maintenance issues for Suite 600 should be brought to the attention of the Coordinator of the Property Management Office. Should that person not be available, contact Prudential Cres Realty 931-3101. Securities officers are located on the fourth floor. They provide security for tenants of the Gillham Plaza Building only. In an emergency, security personnel are in the building 24 hours a day (360-1629), ANY SERIOUS CONCERN, DIAL 9-911.

## **Recycling**

Recycling bins are located in the work room for paper. Can and bottle recycling is located in the kitchen. Certain offices in Suite 600 have agreed to empty these bins by taking recycling to the Chancery building.

## **SECURITY**

Any serious concern, dial 9-911.

## **SMOKING**

Gillham Plaza Building is smoke free. Smoking is allowed only on the first floor garage seating area specially designated for this purpose.

## **STORAGE**

A limited amount of storage is available. Contact the Coordinator of the Property Management Office for storage room questions.

## **SUPPLIES**

Most paper supplies can be found in the work room. Kitchen supplies are located in the kitchen. Should supplies run low, contact the mailroom for restock.

## 380 Travel Reimbursement

The Chancery will reimburse all reasonable business expenses incurred by an individual as a result of duties performed in connection with his/her job responsibilities. It is assumed that employees will use good judgement and appropriate discretion and reasonableness. Please Note: For expenses charged to the Diocesan corporate credit card, payments shall be made to credit card company. For expenses paid by employee, or expenses incurred by employee (eg. mileage), employee shall be paid directly.

### **Reimbursement Period**

Requests for reimbursement of expenses related to official business must be submitted within 30 days of incurring such expenses.

### **Travel:**

- IRS allowance per business mile shall be used for all approved business trips of 200 miles or less one way. For trips greater than 200 miles, travel reimbursement will not exceed a) the sum of the lowest available round trip airfare and ground transportation or b) associated expenses with car rental or c) the dollar equivalent of a or b whichever is smaller **unless approved in advance by the Diocesan Finance Officer.** (Mileage Tracking Forms and Travel Expense Report Forms can be obtained from the Accounting Office.) The Chancery will follow the IRS mileage reimbursement guidelines unless budget circumstances dictate otherwise.
- Only mileage in excess of the normal commute shall be reimbursed. Normal commute must be deducted when calculating a) travel to meetings, etc on the way to regular place of work, b) travel to meetings, etc. on the way to residence and c) travel to meetings which by-passes regular place of work. Another way of stating it is the lesser of a) mileage from home to destination or b) mileage from regular place of work to destination.
- Airfare will be reimbursed at the applicable coach class fare including travel agent or web based processing fees. If an employee cancels a flight on a non-refundable ticket due to illness, family emergency, etc., reimbursement will still be made subject to documentation of reason for cancellation. Cancellations for non-emergency reasons may result in the expense being non-reimbursable. All effort should be made to avoid unnecessary cancellations.
- Car rental charges are reimbursable at the most economical rate for a “mid-size” vehicle or the size and type of vehicle required to meet the transportation needs of

the employee to whom expenses are being reimbursed and other employees/guests traveling together. Employee shall have a valid driver's license and proof of insurance, and shall adhere to all policies as set forth by the rental companies. Non-employee drivers are not covered by diocesan insurance and must provide rental insurance coverage.

- Reimbursement will be generally limited to the mode of transportation that is the least expensive yet practical for the circumstances.
- Taxi fares, other ground transportation, tolls and parking expenses are reimbursable subject to submission of receipts.
- Lodging will be reimbursed for actual expenses for business internet, room and tax charges subject to submission of a detailed lodging receipt. Incidental and personal charges shall be the responsibility of the employee. Hotel and room type shall be reasonable in cost and appropriate to the business location.

**Meals:**

- Expenses for meals must be reasonable. Reimbursement for meals and incidentals will be based on actual expenditures as evidenced by receipts designating business purpose, number and names of guests, etc. Meals must be connected to a valid business purpose.

**Miscellaneous:**

- Tips are considered appropriate business expenses, but must be reasonable. Generally, meal tips should not exceed 20% of the base charges. All tips shall be shown on receipts or listed separately and itemized on the expense reimbursement request form.

**Expense Reimbursement Forms:**

Request for travel-related reimbursement shall be made using only an approved Travel Expense Report which can be obtained from the Accounting Office. Requests for mileage reimbursement shall be made using the Mileage Tracking Form. All other requests for reimbursement of business related expenses shall be made using the check request form. N:\Finance\chancery travel reimb policy 08-07.doc

## 381 Check Requests

### GENERAL INFORMATION:

Please print or type your check request to facilitate timely preparation of your check(s). Please list only two check requests per sheet.

Checks are printed on MONDAYS, WEDNESDAYS, AND FRIDAYS. Check requests are due by 5:00pm the day before if the check is needed on the current Monday, Wednesday, or Friday. We will accept check requests anytime during the week.

If your office is going to need a cash advance, please submit a separate check request for the cash advance. Please allow 2 days to handle the cash request if it is over \$40. You are required to submit a report to the finance office with documentation accounting for all cash given to your office.

If you need cash reimbursement for expense which you have incurred, please submit a separate check request for the cash and attach all supporting documentation. Please allow 2 days to handle the cash request if it is over \$40.

Check requests with appropriate documentation must be submitted within 30 days of the date the expense was incurred.

Credit cards use is for business purposes only and shall not be used for personal purchases.

If you have any questions regarding this matter, please contact the Accounting Office. Printed forms are available in the hallway outside the print shop and may be composed on the computer. Please complete the following sections:

#### DEPARTMENT:

The name of the office requesting the check, i.e. Finance, Media Center or Chancellor.

#### DATE SUBMITTED:

The date on which the check request is prepared.

#### ACCOUNT NUMBER(S):

The account number to which the goods or service is to be charged. If the check is to be charged to several account numbers, please list each and account number and the corresponding amount for that account separately, but show the total amount of the check.

#### BOB'S OFFICE SUPPLIES

01-5624-30-100-0	\$10.00
01-5555-20-200-0	10.00
01-5518-10-800-0	10.00
	\$30.00

#### PAYEE:

In addition to the name of the payee, the address of the business, organization, or individual receiving the check is required. The address is required for two reasons:

1. The Internal Revenue Service requires the Diocese to file a federal tax form 1099 for all goods or services paid to individuals or companies to which we pay over \$600 during the calendar year with the exception of legal corporations. If we fail to file 1099's on these individuals or business which are not legal corporations, the Diocese can be greatly penalized by the IRS. The IRS does view stipends as taxable income to be reported on the 1099 form. If you request a check for a business or individual not already in our system, we will return with the check a short form to be completed by the business or individual. The business or individual returns the form with their tax identification number and legal corporation status. This information is then kept on file in the Accounting Office to comply with federal code.
2. The information is very helpful if a check has to be researched at a later date.

CHECK AMOUNT: The total amount for which the check is to be written.

**VOUCHER DESCRIPTION:**

The information that appears on the lower portion of the printed check should consist of the following information:

- invoice number and date, if applicable
- statement date, if applicable
- description of services performed
- credit card account number and billing date
- description of goods or services if invoice number and date not available. Insufficient or inadequate information in this area which is NOT ACCEPTABLE is as follows:
  - "program expenses"
  - "books"
  - "pens & pencils"

More information is required. Please supply the name of the book, invoice number or date for the pens and pencils, or the specific items involved in the program expense.

**AUTHORIZED BY:**

The signature of the director of the department requesting the check or authorized department delegate is required.

**DOCUMENTATION:**

CHECKS WILL NOT BE PREPARED WITHOUT PROPER DOCUMENTATION.

All check requests MUST have some type of documentation ATTACHED.

- sales receipt
- credit card billing or slip

- billing statement or invoice
- letter requesting payment
- order form
- workshop or seminar registration form

Occasionally, a check must be prepared in before documentation is obtained. In that case, documentation is required to be submitted once the goods or service is purchased.

If documentation is not available, you **MUST SUBMIT A COPY OF THE SIGNED CHECK REQUEST ALONG WITH THE ORIGINAL CHECK REQUEST.**

Please note your office may be requested by the auditors to explain the issuing of a check without proper documentation.

## **382 Payroll Direct Deposit**

Direct deposit of payroll checks is available through the Accounting Office. One of your blank checks with the word "VOID" written across it is all that is necessary. At this time it is not possible to split your deposit into different accounts. You must choose the one account you prefer.

### **383 Contracts**

Employees are not permitted to enter into contracts (i.e., commit the Diocese) for products and services such as cell phones, credit cards, yellow page ads, copiers, certain office supplies and computers, leasing of facilities or vehicles. The Diocese may have agreements in place that provide group rates/discounts/terms for these products and services.

Employees should get supervisor approval for such purchases, and supervisors should be knowledgeable of and /or seek information from the Finance Office or Chancellor's Office on these terms. All contracts with references to insurance or liability must be reviewed by the Insurance Office or Finance Office.

## **384 Time Sheets**

Monthly TIME SHEETS should be given to your supervisor the first day following the end of the month. Supervisors submit TIME SHEETS to the Office of Personnel by the 5th of each and every month. Quarterly reports of accumulated sick and vacation leave are given to each employee.

## 481 Computers

Management Information Systems Department (MIS) will purchase and install Chancery Standard Software. The MIS department must be consulted before decisions are made regarding outsourcing system maintenance or design. The term system would entail database structures, websites and their domains, all software, email systems, browsers and systems that affect data on our servers as well as software that is distributed.

### Chancery Standard Software:

- All versions of MS Office software (Word, Excel, Access, PowerPoint, Outlook)
- All workstation versions of Windows and Windows XP
- All versions of Symantec Antivirus
- All Chancery wide Network operating software (Windows/NT, Windows 2000, Windows 2003)
- All Adobe Acrobat Reader Software
- Diocesan Mailing Database
- Webroot Spysweeper

### Department Specific Software Standards:

Administration:	HRIS
Finance:	AccPac HRIS on machine if applicable Lay Benefits on machine if applicable
Tribunal:	CaseMaster
Key:	Photoshop Illustrator PageMaker Adobe Acrobat Pro
Communications:	Photoshop Publisher FrontPage
Development:	Blackbaud Raisers Edge
CCSF:	Auction Tracker

New software may become a Chancery Standard under the following criteria:

- Software must be usable and accepted by multiple departments.
- Software standardization must be agreed upon by the Director of MIS and the MIS Steering Committee.

All software and specifically, programs created by and for the Chancery and Related Enterprises, are the property of the Diocese.

Copies of software cannot be shared or installed on home computers unless MIS indicates that

the Chancery owns a site license for the software.

Unique Software for a Single User, Group, or Department  
Procedure to identify, review, and purchase unique software:

- A user, group, or department identifies a need.
- A written request for MIS services is created.
- A needs assessment, characteristics concerning the functionality of the proposed Software is defined.
- A Needs document to the MIS Steering Committee is presented.
- Available software packages that meet the needs criteria are identified.
- Funds are budgeted by the particular office, user, group, department, etc.
- Any needed hardware is purchased and installed. Needed training is conducted.
- Implementation schedule with all involved is planned.

### **Rules for Software**

No software can be installed on a micro computer attached to the Chancery network without approval.

Under no circumstances should the following list of software items be allowed on any Chancery computers: AOL, AOL Instant Messenger, all spy-ware. Copies of purchased software borrowed from another computer, any purchased game software, chat software or any screen savers. All media must be checked for Virus.

### **Software Storage:**

#### **Non-MIS Purchased Software:**

All non-MIS purchased software must be stored in a safe place. The department or service area creating and maintaining the software are responsible to create appropriate backups and provide reliable software recovery. Original source diskettes and/or CD's of purchased software should be placed in the vault located in the accounting office or in the safe in the MIS storage room. Copies, if applicable, are stored in MIS. If any of these purchased programs are accidentally destroyed or damaged, and the original diskettes are not in the vault, the MIS staff will aid as much as possible to acquire replacement software. MIS staff cannot guarantee identical replacements

#### **MIS Software:**

It is the responsibility of the MIS staff to maintain backups of all networks and Chancery Standard Software.

## **482 Internet and Email**

This policy statement is intended as a reminder and a set of guidelines for staff as to the appropriate use of Diocesan computing resources for accessing information via the Internet. Appropriate uses of the Internet include instruction, study, research, and official work of Diocesan organizations. As with other communication devices, reasonable personal use of the Internet connection is acceptable, as long as the privilege is not abused. Computer resources are provided in part to allow members of the community to learn, explore, and grow. We do encourage you to do so, but also to keep in mind the responsibilities outlined below.

### **User Responsibilities:**

Employees with access to the Internet and the services provided through the connection offered by the Diocese of KC-SJ have some additional responsibilities. They must ensure that their actions do not reflect adversely on the diocese.

The Internet connection provided by the Diocese is not to be used for transmission of morally inappropriate, violent, or sexually explicit messages or images. It may not be used to solicit for commercial ventures or to benefit any organization not affiliated with the Diocese. All communications done via the Internet should be held to the same professional standards as with any other business communications. In addition, users must ensure that their conduct in public forums, email, and the Internet, conforms to the teachings of the Catholic Church.

### **Privacy:**

The Diocese has no intent to monitor electronic communications as a standard practice. By using the electronic communications facilities owned and provided by the Diocese, however, employees consent to the interception of any electronic communications when activities are called into question. Upon termination of employment the email account provided to the employee will be forwarded to a counterpart or to their replacement for continuity of service. It is the employee's responsibility to clear personal files from their computer when they leave Diocesan employment.

## **483 Software and Data Copying**

All copyrighted software and computer data are protected. Generally, copyrighted software or data cannot be copied without the express written consent of the copyright holder.

If you reproduce research materials from any Internet source, be sure to cite the source of the information on a list of references. Failure to do so may constitute plagiarism.

In general, if something would be illegal or a violation of Diocesan policies if it were done without a computer, it is probably illegal or a violation of Diocesan policies to do it with a computer.

## **484 Computer Systems Security**

The Diocese restricts access to its computing resources, and requires that users identify their accounts with a username and password. Sharing your account with others is prohibited. Deliberately violating system security, attempting to violate system security, and exploiting holes in system security on any Diocesan system are prohibited and will not be tolerated. If you do find a breach in the security of any Diocesan system, notify the Management Information Systems director immediately

## **485 Copy Machines**

Copy machines are located in the Bishop Helmsing Institute, one in the hallway of the second floor, north wing (for assistance contact Key Office), the School Office (for assistance contact School Office Secretary) and the Mail Room (for assistance contact Finance Area Secretary). All the copiers require an account number--whether the copies are for office or personal use. Copies for personal use will be billed to you at the end of the month.

## **486 Office Equipment**

Various office equipment items are available for business purposes. They are as follows:

<b>Equipment</b>	<b>Location</b>
Binding Machine	School Office
Collator	Print Shop
Electric Pencil Sharpener	Accounting Office
Electric Stapler	Switchboard
Folding Machine	Print Shop
Paper Shredder	Mail Room, basement level
Slide Projector	School Office
TV & VCR	School Office and the storage room behind the Assembly Room

## **487 Fax Machines**

FAX machines are located in the Mail Room, the School Office and The Key. Instructions for use are on the wall next to the machines. Forms to forward with your document are available at the machines. The Mail Room Office FAX number is 756-0878, the School Office number is 756-1571 and The Key number is 753-6205 and they are left on 24 hours a day.

## 488 Mail Database

The mail data base contains the names and addresses of all persons receiving mailings from the Diocese. Each record contains mail codes which tell us what mailing(s) the individual wants to receive. When labels are needed for a particular mailing, only the individuals that have the specific mail code in their record will receive such mailing.

The mail data base is supervised and maintained under the direction of the Vicar-General. The mail data base system is maintained by one person.

All employees having access to the network have the capability to access and utilize information from the system.

Changes that need to be made to the mail data base should be given to the \_\_\_\_\_ designated individual.

If new persons are to be added to the mail data base please use the form provided.

Forms are available in the Print-Shop hallway. All pertinent information for the record(s) is to be provided (i.e., address, telephone number, mail codes) on the form. You are asked to sign the form being submitted in case any clarification is needed.

## **489 Telephones**

(If, after reading these instructions, you have any questions concerning the phone system, contact the Finance Area Secretary)

MAIN PHONE #: (816) 756-1850    BACK DOOR #: (816) 756-1858  
OUTSIDE KC #: (800) 246-1850

### **VOICE MAIL**

A voice mail box will need to be programmed for all new employees. Supervisors should contact the Finance Area Secretary prior to a new employee(s) start date so that a mail box and phone adjustments can be programmed.

Absence from office: Please inform callers, by message on voice mail, if you plan to be away from your office for a day or more.

To access your voice mail from your phone - push V-Mail Button, the 9+your extension and then your security code.

To access your voice mail from out of the building - call 756-1858. As soon as the system answers, you can dial 9 and your extension number. It will then prompt you for your password (if you chose a password). You will then have access to your voice mail as if you were sitting at your desk.

You may choose to give the (back door) number and your extension number to people who regularly call. This will allow them to by-pass the switchboard and the phone will ring directly to you. If the caller does not have your extension number, they will be prompted to use the directory in order to reach you.

If your phone display indicates that you have a message but there are no messages when you check your voice mail, dial \*93 to cancel the display message.

### **SPECIAL MESSAGE BOXES**

If you would like a mail box programmed to accept reservations for a workshop, to give callers specific information on a topic, etc., please contact the Finance Area Secretary a week prior to the date you would like the mail box to take effect.

### **LONG DISTANCE CALLS**

To dial long distance, dial 9 for an outside line, then dial 1+ (Area Code) and 7 digit phone number. After you hear it dial, you will hear a solid tone or two short tones. As soon as you hear a tone, dial your two-digit accounting code (see your supervisor for this code). The call will then ring through. This accounting code allows the Accounting Office to track long-distance calls for billing purposes.

### **PERSONAL LONG DISTANCE CALLS**

Personal long distance calls may be made from your phone using the same method as above; however, you will need to fill out a form with your name and the number called. These forms are found in the hallway to the printing room and should be completed and forwarded (on a timely basis) to the Bookkeeper.

### **LOCAL CALLS**

Dial 9 for an outside line.

### **BEFORE/AFTER HOURS CALLS**

The Chancery switchboard can be bypassed before and after switchboard hours (9:00 to 5:00) by using the (back door) number (756-1858). However, even if 756-1850 is dialed, the caller will automatically be routed to the (back door) voice mail number. Callers can then access the phone system by dialing the party's extension or using the phone directory.

## **490** Typewriters

For IBM typewriter repair contact Dan Ried at 753-1080.  
For other typewriter repair contact ICS 483-3920.

## **491 Recording Conversations**

### ***(Recording of Telephone and Other Oral Conversations)***

Users of diocesan or parish telephone or computer systems, including but not limited to systems which have a digital recording feature, must comply with the following procedure in recording oral conversations.

Prior to recording any oral conversation, the system user must disclose to the other party or parties to the conversation that the user intends to record the conversation. Once the recording begins, the user must make a preliminary statement that the conversation is being recorded with the consent of all the parties.

If any party to the conversation objects to the recording of it, the user may:

- (a) have the conversation without recording it;
- (b) advise the party or parties that the conversation will not take place unless it is recorded: or
- (c) in the case of a conversation involving more than two parties, offer the party or parties who object to the recording the opportunity to drop off the call or out of the conversation once the recording begins.

## **580 Parking**

Free parking is available on the northeast side of building and in the covered parking lot between the Chancery and the Gillham Plaza Building.

## **581 Recycling**

Recycling containers for aluminum cans are provided in the Lunch Room and the Assembly Room. Please encourage the use of the recycling containers. Containers are also provided at the copiers on the second floor and the first floor for paper and magazines that can be recycled.

### **RECYCLING PROGRAM**

The large yellow container on the north end of the parking lot are for paper recycling.

Newspapers: Newspaper and newsprint only. This includes greenbar computer paper.

Magazines: Magazines and thin catalogs with shiny pages throughout, manufacturer(s) coupons.

Mixed Office Paper: Office paper, stationary including Fax-telex, receipts, file folders, any envelope except manilla, mail including letters, pamphlets, brochures, greeting cards, utility bills, etc., posters, triplicate forms, soft covered books with white pages up to one inch thick. Can be any color. (No carbon paper, tissue products, spirals, or rubber bands.) Paperboard: Slick or flat finish non-corrugated paperboard packaging (soft drink, gift and packaging boxes). No cellophane windows, over-wraps, liners; tissue paper products or waxed products. (Please clean and flatten all packaging). Phone Books: White and yellow pages accepted.

## **582 Social Committee**

The Social Committee is made up of 4-6 chancery employees who volunteer to be responsible for collecting \$2.00 per month from employees wishing to participate. Flowers/cards are sent for hospitalization or deaths, etc. The money is also used to celebrate other special occasions or holidays and a Christmas party. The committee term runs from January 1 through December 31.

## **583 Storage**

All areas should be kept neat. To store things in the room behind the Assembly Room, please contact the Property Management Office.

## 584 Office Supplies

Contact Finance Area Secretary with questions regarding supplies of any kind, unless otherwise noted.

<b>Envelopes</b>	Stored in Mail Room. Please sign out on the sheet posted at the end of the shelves.
<b>Forms</b>	Located on shelves outside the Printing Room-sign out on sheets at end of shelves.
<b>Kitchen Supplies</b>	Located in cupboards and the closet.
<b>Paper/Stationery</b>	Located in the Hall to the Printing Room. (Please sign out on the sheet posted on the side of the shelves. Also available here is an assortment of colored paper, letterhead paper, forms, phone message pads, etc. Contact Person: Finance Area Secretary )
<b>Other</b>	Ordinary office supplies are kept in the Mail Room. Please sign the form located on the shelf indicating items taken.

## **585 Late Opening/Early Closing of Offices**

When the Kansas City Missouri School District announces school closings due to ice or snow, the Chancery will open at 10:00am. When the School District is closed during vacation time (i.e., Christmas) call the Chancery for information regarding late opening. If the schools close due to cold weather, the offices will not open late.

If an employee is unable to get to work a vacation day may be taken or arrangements may be made with the supervisor.

On days before some holidays, the offices may close early.

When the offices close early or opens late, and an individual has vacation or sick time being used on that day, the amount of vacation or sick time to be recorded on the time sheet should match the number of hours the office was actually open. For example, if the offices open at 10:00 a.m. instead of 8:00 a.m. and you are taking a vacation day for that day, you would record 6 hours of vacation on your time sheet.

## **680 Library**

The Bishop Helmsing Institute Library has a variety of books which are available for use by Chancery staff. The current new library is located on the first floor and the old library is located on the third floor. These resources are open to anyone for use on library premises, or they may be checked out for a period of one month at a time. To check out library items please contact the Assistant Resource Director of the Bishop Helmsing Institute, whose office is located on the first floor.

## 681 Tuition Reimbursement

The Chancery offers a Tuition Reimbursement program to encourage employees to maintain and improve their job-related skills through formal degree seeking educational endeavors. The Chancery will reimburse eligible employees for tuition expenses (not including fees, books, supplies or travel costs) paid to accredited schools, colleges and universities, as set forth in this policy.

### Maximum Reimbursement

For undergraduate and graduate students, tuition reimbursement is offered for up to six credits per year. The Chancery will reimburse employees at the conclusion of a successfully completed course, pursuant to the following schedule:

- For an "A" grade, the Company will reimburse 100% of the tuition cost;
- For a "B" grade, the Company will reimburse 75% of the tuition cost;
- For a "C" grade, the Company will reimburse 50% of the tuition cost;

Reimbursement rates are not affected by grades that are accompanied by a plus sign (+) or a minus sign (-). Thus, for example, an eligible employee who receives a B+ will be reimbursed at 75%. Likewise, an eligible employee who receives a B- will be reimbursed at 75%.

The Chancery will not reimburse employees for courses in which the employee can receive a grade of only "PASS" or "FAIL," unless no other grade option is available for the course and the grade received for the course is "Pass". No reimbursements will be made for grades lower than a "C" or for audited courses.

Numerical equivalents of a letter grade may be accepted in lieu of a letter grade, provided the Chancery receives -- what it considers in its sole discretion to be -- adequate assurances from the accredited institution that the numerical grade is equivalent to a letter grade.

Tuition for undergraduate courses will be reimbursed up to a maximum of \$1200 per year. Graduate courses will be reimbursed up to a maximum of \$1800 per year.

Time spent working toward a degree is not compensable. All work must be performed outside normal working hours.

### Employee Eligibility

To be eligible for tuition reimbursement under this policy an employee must:

- Be a full-time employee;
- Have completed 90 days of service; and
- Be on the payroll when the course is completed.

Otherwise eligible employees are or become ineligible for tuition reimbursement under this policy, if:

- the employee has received a formal warning within six months prior to his or her request for pre-approval; or
- the employee receives a formal warning following pre-approval and before the course is completed.

### Coordination of Benefits

This Tuition Reimbursement Program meets the objectives of our Continuing Education Program. Some employees hold positions that are eligible for continuing education assistance. Benefits offered for

continuing education will be suspended while participating in the Tuition Reimbursement Program.

### **Courses and Programs Eligibility**

Associates, Bachelors, Masters and PhD degree programs are eligible for reimbursement if they are business or job related. All courses, required and elective, which are related to an employee's work or which lead to a business-related or job-related degree are eligible for reimbursement.

The Service Area Director, under the advisement of the employee's immediate supervisor, will make the final decision about whether a course or program is eligible for educational assistance and is related to your current job or a future one and will determine if job performance meets the standards needed to participate in the program

### **Application for Pre-Approval of Tuition Reimbursement**

Employees must obtain pre-approval for tuition reimbursement under this policy. To do so, employees must complete and submit to the Service Area Director a "Request for Tuition Reimbursement" form. If and when the course is pre-approved, this form will also serve as a request for payment form at the conclusion of the course.

### **Application for Reimbursement Upon Completion Of Course**

Upon completion of the pre-approved course, the employee must submit a copy of the "Request for Tuition Reimbursement" form to the immediate Supervisor, along with a grade card or transcript of grades and proof of payment. Proof of payment can be established by either a receipt or a copy of a canceled check (front and back)

### **Termination of Employment**

If an employee voluntarily resigns within one year following the completion of the last course for which assistance was received, he or she will be required to pay back all educational assistance benefits received during the preceding 12-month period. The reimbursement will generally be required at the time of the final paycheck. If separation is due to a reduction in force, Educational Assistance benefits will be paid for the current term and there will be no obligation to pay back reimbursed expenses.

### **Conclusion**

We hope that the Tuition Reimbursement program will develop your skills but we do not promise or guarantee that more education will result in promotions, new job assignments, or pay increases. Granting educational assistance in no way offers or implies a contract guaranteeing employment for any period of time or for any particular position. The granting of this benefit in no way obliges that work schedules will be adjusted to fit educational needs.

Employees eligible for assistance from sources other than the Chancery (e.g., government assistance to veterans/communities, grants, etc.) should seek recovery from the Chancery only for the amount not covered by outside sources.

## Tuition Reimbursement Application

All requests must be forwarded to the Service Area Director for final approval at least fifteen (15) days before you enroll or make a financial commitment.

Attach a copy of the official course(s) description from the institution's brochure or catalogue.

Approval is limited to those courses or programs itemized on this form, and are subject to the terms of the Tuition Reimbursement program.

Personal Information	School Information
Name	Name
Address	Address
City/St/Zip	City/St/Zip

Term Semester	Type Of Course	Toward Degree of	Expected Date of Degree
Begin _____	<input type="checkbox"/> Day	<input type="checkbox"/> Associates	Date: _____
End _____	<input type="checkbox"/> Evening	<input type="checkbox"/> Bachelor's	
	<input type="checkbox"/> Correspondence	<input type="checkbox"/> Master's	
		<input type="checkbox"/> Doctorate	

### Course information

Course Title (List each separately)	Catalogue Number	Credit Hours	Tuition Cost
1.			
2.			

Total Tuition	\$ _____
Less Financial Aid	\$ _____
Total Covered Tuition	\$ _____

Please explain why you believe this course(s) is job related:

\_\_\_\_\_  
Employee's Signature \_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor's Signature \_\_\_\_\_  
Date

- Approved forms will be returned to the employee.
- To receive reimbursement for eligible and approved expenses, the employee will re-submit this form to their immediate supervisor, along with proof of tuition payment and grades at the end of the semester.

## **682 Professional Staff Development**

Chancery employees are encouraged to improve job related skills through Professional/Staff Development opportunities. Professional/Staff Development opportunities usually fall into two categories: conferences and seminars/workshops.

### **Conferences**

- Service Area Directors, Office Directors, and Assistant Directors are able to attend one conference per year. Only exception is for School Superintendents, who are allowed one conference plus the NCEA Convention.
- Uniform budgets for conference attendance are established by the Finance Office as part of the annual budget process.
- Conference attendance must be approved by immediate supervisor.
- No more than four employees from one office may attend a single conference.

### **Seminars/Workshops**

- Budgets for attendance at seminars, workshops or local one day classes are established by the Finance Office as part of the annual budget process. A uniform amount is allocated per employee, but office directors have discretion to use for individual opportunities or a group/office in-service.

### **Continuing Education**

Certain ministerial/teaching offices and positions are allotted an annual amount for employee continuing education desired by employee but not required for job. Allocated amount is to be used for courses, fees, and books and is set by the Finance Office. Employee shall be responsible for transportation, room and board and other costs if applicable. Benefit will be suspended if employee is part of the Tuition Reimbursement Program for a formal degree.

## 780 Mail Room

Incoming mail can be picked up in the mail room each morning by 7:30. Outgoing mail must be in the mail room by 3:00pm each day. Mail dropped off after 3:00pm will not be mailed on that day. In the instance of a large mailing (200+ pieces), please have the mail in the mail room by 1:00pm due to the extra time needed for metering. It is possible to weigh one piece of your mail and have the envelopes metered prior to stuffing.

For other ordinary mail, please observe the following:

- Take mail to mail room.
- If you have several pieces of mail that contain the same item (or several that are all one ounce weight), please rubber band them together and put a post-it note on the bundle indicating the number of pieces and that they are the same weight. If the bundle does not fit in the slot, please note which department to charge it to and leave it on the table.
- Place your mail in the outgoing mail slot designated for your department. A few departments do not have slots. Mail for these departments should be identified by department name and left on the table.
- If your outgoing mail slot is full, or your pieces are too large for the slot, please follow the same steps as outlined above.
- All overseas mail must be left on the table with a note indicating which department/person is to be charged for the postage. If overseas mail is placed in outgoing slots, it is treated as first class mail and will come back to us for more postage.
- You may do personal mailings through our mail service. If it is not stamped mail, place it on the table noting who is to be charged. You will receive a bill from the Accounting Office at the end of the month.
- Postage stamps may be purchased in the Accounting Office.
- Envelopes can be sealed by the postage meter. Flaps on the envelopes must be down (not overlapping) when they are brought to the mail room.

## 781 Bulk Mail

### **Sending Bulk Mail through PSI Group**

If a bulk mailing (200+ pieces) with the diocesan indicia for permit #6084 is sent through PSI one of two things will happen:

If the mailing can go through the postage machine, PSI will process it from their center and then bill the Chancery for the postage. The postage does not come out of the 6084 account with the post office; therefore, it is not necessary to deposit funds into the 6084 account.

If the mailing will not go through the postage machine by PSI, they will then present it to the bulk mail center at the post office for processing and the postage is taken out of the 6084 account. Therefore, it is necessary to deposit funds to the 6084 account prior to sending the mailing to PSI.

Mailings that can go through the machine include:

- Post card
- Letter size envelope,
- Flyer with the fold at the bottom and a single tab (paper, not plastic) in the center on the top edge.

The mailing must also be...

- light in color so that neon red postal markings will be clearly visible,
- clear of any writing or design in the bottom 5/8 inch edge of the mailing
- uniform and straight in the placement of address labels with lettering that is dark and sharp in clarity

## **782 Federal Express & UPS Mail**

### **FEDERAL EXPRESS/OVERNIGHT DELIVERY**

Forms can be found on the desk in the mail room. For Federal Express, the number to call for pick-up is on the preprinted air bill. Note that our account number is also printed on the air bill. Questions: Contact the Mail Clerk or Chancery Building Manager.

### **UPS**

UPS delivers packages each morning around 11:00 and picks up packages each afternoon around 4:00. If you have a package to be shipped by UPS, the package is to be addressed and placed on the table in the Mail Room. The Mail Clerk will handle the package from that point on. Please make sure you include information for the billing of the package. Questions: Contact the Mail Clerk or Finance Area Secretary.

Office designated mail boxes are in the mail room located in the basement. Stamped out-going mail may be placed at the front reception desk before 10:00 a.m. or in the mail room with non-stamped mail which is picked up by 3:30 p.m. Mail must be in the mail room by 3:00 p.m.

## **783 Printing**

The printing room is located on the basement level, across the hall from the mail room. Printing includes, but not limited to envelopes, cards, brochures, fliers, etc.

All printing requests for 25 or more copies should be given to our printer. Fewer copies for special projects (e.g. graphics) may also go to the printer with a note stating this is a special request. Orders are to be placed in the "IN" box on the shelf outside the Print Room. The printer is here Monday through Friday. .

## 880 Archives

The following is the Records Management policy of the Diocese of Kansas City-St. Joseph:

3. Documents generated by an office, whether in hard copy or computer copy, are by definition OFFICIAL RECORDS of the corporation. Records originating outside the Chancery become official records when they become part of any office.
4. Official records are the property of the Diocese of Kansas City-St. Joseph.
5. Under no circumstances are any official records of the Chancery to be destroyed without previous authorization by the Department Head and consultation with the Archivist.
6. When an office funded by the Diocese is closed, the records of that office should be given to the Archivist, unless the records are needed by someone else in another office to accomplish their work.
7. Confidential records no longer of use to an office should be given to the Archivist or the Chancellor.
8. Records should be kept in the offices for five (5) years and then given to the Archivist. Papers which are needed in the day-to-day operation of an office, or are needed for reference, should be kept in the office until they are no longer needed.
9. Common sense is a reliable guide to the interpretation of the preceding six (6) paragraphs.

### GUIDELINES TO IMPLEMENT POLICY

1. Access to the records of a department will be controlled by the department head.
2. The Chancellor or the Archivist is available to answer questions about records retention.

## **881 Building Use**

Staff members may work on weekends with the knowledge of the service area director.

The staff member will be responsible for any person who enters the building with them. Children or other guests are not allowed to walk the halls of this building or enter a private office unaccompanied by the staff member.

The Gate in the hallway of the Basement Level is locked on weekends. If you are going to have a meeting and need access to either the Assembly Room or the Coke machine, please notify Mark Cullum by a written message and place the message in his mail slot on the shelf behind the Switchboard.

## **882 Switchboard**

The switchboard is open from 9:00 a.m. to 5:00 p.m.

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