

Policy & Procedure Handbook

Table of Contents

Section 2000

2110.0 Storage of District Vehicles

Section 4000

4006.1 MOU Tuition Expense Assistance

Section 6100 Administration

6101.0 Governing Board

6101.1 Board Member Expense Reimbursement

6102.0 Code of Ethics and Business Conduct

6102.1 Conflict of Interest

6103.0 Organizational Chart

6104.0 At-Will Employment Statement

6110.0 Political Activity

6111.0 Equal Opportunity Employer

6111.1 Nepotism in the Workplace

6111.2 Disability Discrimination

6111.3 Pregnancy Discrimination

6111.4 Family Medical Leave Act (FMLA)

6111.5 Whistleblower

6111.6 Lactation Accommodation

6112.0 Harassment Prohibition

6112.2 Violence / Threats of Violence

6112.3 Violence / Threats of Violence EMS Scene

6112.4 Weapons

6113.0 Immigration Law Compliance

6114.0	Life-Threatening Illness in Workplace
6120.0	Injury & Illness Prevention
6121.0	Blood Bourne Pathogens
6122.0	Drug Alcohol Prohibition
6122.1	Tobacco and E-Cigarettes
6123.0	Acceptable Computer Use Form
6123.0	Computer Use
6124.0	Computer Security
6125.0	Identity Theft
6126.0	Community Outreach
6127.0	Records Retention & Destruction
6128.0	Public Records Request
6129.0	Finance Committee

Section 6200 Personnel

6201.0	Employee Hiring & Pre-Employment Screening
6201.1	Employee Health Fitness Exams
6201.2	Employee Immunizations
6202.0	Employee Classification
6202.1	Outside Employment
6203.0	Probationary Period
6204.0	Professional Conduct
6205.0	Ready, Willing, and Able / Corrective Action
6206.0	Complaint Investigation & Resolution
6207.0	Performance and Salary Review
6208.0	Make-Up Time
6209.0	Paid Holidays with Unpaid Leave Option
6209.1	Stipend Request Form

6209.1	Stipend
6209.2	Sick Leave
6209.3	Cell Phone Stipend
6209.4	Unpaid Personal Leave
6209.5	Jury Duty Time Off
6210.0	Progressive Disciplinary Action Written Warning
6210.0	Progressive Disciplinary Action
6211.0	Timekeeping
6211.1	Travel Time / Mileage Reimbursement
6211.2	Time Off Requests
6212.0	Reporting Time Pay

Section 6300 EMS

6301.1	Press Release Publication
6302.0	Ambulance Shift Schedule Agreement
6302.0	Ambulance Shift Schedule
6302.1	Ambulance Workday
6302.2	Ambulance Checkout
6302.3	Ambulance Decontamination and Restock
6302.4	Ambulance Operation
6302.5	Ambulance Employment Proficiency and Training
6302.6	Ambulance Wireless Communication
6302.7	Ambulance Camera / Mobile Phone Camera
6303.0	Patient Care Report
6303.1	Confidentiality of Protected Health Information Form
6303.1	Confidentiality of Protected Health Information From
6303.2	Protected Health Information, Patient Access, Amendment, Restriction

6303.3	Protected Health Information Staff Levels of Access Security
6303.4	Record of Calls
6303.5	Mandated Reporting
6303.6	Continuous Quality Improvement
6303.7	Prehospital Laboratory Test
6303.8	Controlled Substances
6304.0	Ambulance Uniform
6305.0	Second Out Ambulance
6305.1	Fire Camp Coverage
6306.0	Required Certifications
6306.1	Upgrading Level of Practice
6306.2	Continuing Education Program
6306.3	Run Review Program
6306.4	Ambulance Ride Along Agreement
6306.4	Ambulance Ride Along
6306.5	Paramedic Precept

Section 6400 Operations

6401.0	Use / Loan of Facilities
6401.1	Use / Loan of Equipment Agreement
6401.1	Use / Loan of Equipment
6402.0	Facilities / Equipment Maintenance
6402.1	Ambulance Maintenance and Repair
6402.1	Ambulance Maintenance and Repair Form
6402.2	Ambulance Replacement Schedule
6403.0	Issued Equipment – Property Checkout Form
6403.0	Issued Equipment
6404.0	Surplus Equipment / Property

6405.0 District Surveillance

6406.0 Accident / Incident Investigation

Section 6500 Finance

6501.0 Procurement

6502.0 Capitalization

6503.0 District Service Discounts

6504.0 Credit Card

6505.0 Financial Reserve

Policy: Storage of District Vehilces **Policy #: 2110.0**

Date Adopted: 12/19/2022

Date Revised:

Policy

The Southern Cascades Community Services District vehicle storage policy provides employees with guidelines for storage of company vehicles. A “company vehicle” is defined as any vehicle Southern Cascades Community Services District assigns to employees for work use. The policy applies to all employees who use a company vehicle, during and outside of working hours.

Southern Cascades Community Services District does not allow personal use of company vehicles. Personal use includes using the vehicle for personal errands between business activities, to commute between the workplace and home, or using the vehicle outside of business hours. Vehicles may not be parked at employee houses, nor outside of designated parking locations unless otherwise authorized by the District General Administrator.

Employee Acknowledgement:

Print: _____ Date: _____

Signature: _____

Policy: MOU Tuition Expense Assistance **Policy #: 4006.1**

Date Adopted: 12/09/2019

Date Revised:

Memorandum of Understanding

Southern Cascades Community Services District agrees to assist_____with tuition expense to attend_____, beginning ____ _____.

_____ Agrees to a two-year commitment with SCCSD in return for this financial support, with the two years commencing upon date of course completion.

It is agreed that tuition advanced by SCCSD shall be refunded in the event the student does not complete the program. A payment plan is acceptable, and shall be completed within one year of notice of non-completion.

By signing below, both parties signify understanding and agreement to the above.

Employee: _____ Date: _____

SCCSD Representative: _____ Date: _____

Policy: Governing Board Policy **Policy #: 6101.0**

Date Adopted: 12/09/2019

Date Revised:

Policy

The Board of Directors shall effect administration through written policies that are consistent with all applicable laws. Board policy will identify and establish the scope of a particular subject matter and provide guidance to management and staff.

The District General Manager shall implement and carry out the direction and intent of the Board of Directors' polices to achieve the mission, vision, goals and objectives of Southern Cascades Community Services District.

Procedure

Responsibility for initiating action concerning potential or existing policy matters shall be with the Board of Directors.

The District General Manager is charged with the responsibility of bringing to the attention of the Board, policy issues and/or legislative changes that affect the operation of SCCSD. The District General Manager shall implement and support policies of the Board, developing administrative procedures to carry out the direction and intent of Board policy.

Policies will be reviewed at least annually and updated on an ongoing basis, with periodic review and recommendation by Medical Director and or District Legal Counsel when necessary.

Policy: Board Member Expense Reimbursement Policy **Policy: 6101.1**

Date Adopted: 03/16/2026

Date Revised:

Purpose

This policy establishes procedures for reimbursing members of the Board of Directors for actual and necessary expenses incurred while performing official District duties. The purpose of this policy is to promote transparency, accountability, and responsible use of public funds.

Legal Authority

This policy is adopted pursuant to California Government Code provisions governing reimbursement of local agency officials, including:

- California Government Code §53232.2
- California Government Code §53232.3
- California Government Code §53232.4

These statutes require local agencies to adopt written expense reimbursement policies and publicly report reimbursed expenses.

General Policy

Board members may be reimbursed for actual and necessary expenses incurred while performing official District business. Expenses must be reasonable, directly related to District activities, and properly documented.

Public funds shall not be used for personal or political purposes.

Authorized Activities

Reimbursement may be provided for expenses incurred while participating in authorized District activities, including:

- Meetings with government agencies, stakeholders, or partner organizations
- Conferences, workshops, or training related to District governance or operations
- Legislative or regulatory meetings affecting District services
- Other activities approved by the Board

Reimbursable Expenses

The District may reimburse the following types of expenses when reasonably incurred in connection with authorized District business:

Mileage and Transportation

- Mileage for use of a personal vehicle at the IRS standard mileage rate in effect at the time of travel
- Parking fees and tolls
- Airfare (economy/coach class), train travel, or other reasonable transportation costs

Lodging

Reasonable lodging expenses for overnight travel related to authorized District business.

Meals

Reasonable meal expenses incurred during authorized travel or District-related meetings. Alcoholic beverages are not reimbursable.

Registration Fees

Registration costs for conferences, workshops, and training related to District responsibilities.

Other Necessary Expenses

Other reasonable expenses necessary to conduct District business may be reimbursed with appropriate documentation.

Non-Reimbursable Expenses

The following expenses will not be reimbursed:

- Personal expenses unrelated to District business
- Alcoholic beverages
- Entertainment expenses
- Expenses incurred by family members or guests
- Traffic citations or parking violations
- Travel upgrades beyond economy class unless specifically authorized

Expense Reporting Requirements

Board members requesting reimbursement shall submit an itemized expense report that includes:

- Date and description of the expense
- Business purpose of the expense
- Location of the activity
- Receipts or supporting documentation where applicable

Expense reports should generally be submitted within 60 days of the expense being incurred.

Public Reporting

Reimbursed expenses shall be reported in accordance with California law and made available for public inspection. Expense reports shall include the date, purpose, and amount of the expense.

Conference Attendance Reporting

Board members attending conferences, workshops, or training at District expense shall provide a brief report to the Board at a subsequent meeting describing the event and any relevant information obtained.

Violations of Policy

If the Board determines that a reimbursement request does not comply with this policy, the reimbursement may be denied or the Board member may be required to repay the District.

Policy: Code of Ethics and Business Conduct **Policy #: 6102.0**

Date Adopted: 03/17/2025

Date Revised:

Build Trust and Credibility

The success of our District is dependent on the trust and confidence we earn from our employees, customers and shareholders. We gain credibility by adhering to our commitments, displaying honesty and integrity and reaching company goals solely through honorable conduct. It is easy to *say* what we must do, but the proof is in our *actions*. Ultimately, we will be judged on what we do.

When considering any action, it is wise to ask: will this build trust and credibility for Southern Cascades Community Services District? Will it help create a working environment in which Southern Cascades Community Services District can succeed over the long term? Is the commitment I am making one I can follow through with? The only way we will maximize trust and credibility is by answering "yes" to those questions and by working every day to build our trust and credibility.

Respect for the Individual

We all deserve to work in an environment where we are treated with dignity and respect. Southern Cascades Community Services District "District" is committed to creating such an environment because it brings out the full potential in each of us, which, in turn, contributes directly to our business success. We cannot afford to let anyone's talents go to waste.

Southern Cascades Community Services District is an equal opportunity employer and is committed to providing a workplace that is free of discrimination of all types from abusive, offensive or harassing behavior. Any employee who feels harassed or discriminated against should report the incident to his or her manager or to human resources.

All District employees are also expected to support an inclusive workplace by adhering to the following conduct standards:

- Treat others with dignity and respect at all times.
- Address and report inappropriate behavior and comments that are discriminatory, harassing, abusive, offensive or unwelcome.
- Foster teamwork and employee participation, encouraging the representation of different employee perspectives.
- Seek out insights from employees with different experiences, perspectives and backgrounds.
- Act with professionalism.
- Support flexible work arrangements for co-workers with different needs, abilities and/or obligations.
- Confront the decisions or behaviors of others that are based on conscious or unconscious biases.
- Be open-minded and listen when given constructive feedback regarding others' perception of your conduct.

Southern Cascades Community Services District will not tolerate discrimination, harassment or any behavior or language that is abusive, offensive or unwelcome.

Create a Culture of Open and Honest Communication

At Southern Cascades Community Services District everyone should feel comfortable to speak his or her mind, particularly with respect to ethics concerns. Managers have a responsibility to create an open and supportive environment where employees feel comfortable raising such questions. We all benefit tremendously when employees exercise their power to prevent mistakes or wrongdoing by asking the right questions at the right times.

Southern Cascades Community Services District will investigate all reported instances of questionable or unethical behavior. In every instance where improper behavior is found to have occurred, the company will take appropriate action. We will not tolerate retaliation against employees who raise genuine ethics concerns in good faith.

For your information, refer to the District's Whistleblower policy.

Employees are encouraged, in the first instance, to address such issues with their managers or Human Resources, as most problems can be resolved swiftly. If for any reason that is not possible or if an employee is not comfortable raising the issue with his or her manager, Southern Cascades Community Services District's General Administrator does operate with an open-door policy.

Set Tone at the Top

Management has the added responsibility for demonstrating, through their actions, the importance of this Code. In any business, ethical behavior does not simply happen; it is the product of clear and direct communication of behavioral expectations, modeled from the top and demonstrated by example. Again, ultimately, our actions are what matters.

To make our Code work, managers must be responsible for promptly addressing ethical questions or concerns raised by employees and for taking the appropriate steps to deal with such issues. Managers should not consider employees' ethics concerns as threats or challenges to their authority, but rather as another encouraged form of business communication. At Southern Cascades Community Services District, we want the ethics dialogue to become a natural part of daily work.

Uphold the Law

Southern Cascades Community Services District's commitment to integrity begins with complying with laws, rules and regulations where we do business. Further, each of us must have an understanding of the District policies, laws, rules and regulations that apply to our specific roles. If we are unsure of whether a contemplated action is permitted by law or District policy, we should seek the advice from the resource expert. We are responsible for preventing violations of law and for speaking up if we see possible violations.

Proprietary Information

It is important that we respect the property rights of others. We will not acquire or seek to acquire improper means of a competitor's trade secrets or other proprietary or confidential information. We

will not engage in unauthorized use, copying, distribution or alteration of software or other intellectual property.

Avoid Conflicts of Interest

Conflicts of Interest

We must avoid any relationship or activity that might impair, or even appear to impair, our ability to make objective and fair decisions when performing our jobs. At times, we may be faced with situations where the business actions we take on behalf of the District may conflict with our own personal or family interests. We owe a duty to the District to advance its legitimate interests when the opportunity to do so arises. We must never use the District's property or information for personal gain or personally take for ourselves any opportunity that is discovered through our position with the District.

Here are some other ways in which conflicts of interest could arise:

1. Being employed (you or a close family member) by, or acting as a consultant to, a competitor or potential competitor, supplier or contractor, regardless of the nature of the employment, while you are employed with the District.

2. Hiring or supervising family members or closely related persons.

3. Owning or having a substantial interest in a competitor, supplier or contractor.

4. Having a personal interest, financial interest or potential gain in any District transaction.

5. Placing company business with a firm owned or controlled by a District employee or his or her family.

6. Accepting gifts, gratuity, meals, refreshments, entertainment, discounts, favors or services from a customer/potential customer, competitor or supplier.

Determining whether a conflict of interest exists is not always easy to do. Employees with a conflict of interest question should seek advice from management. Before engaging in any activity, transaction or relationship that might give rise to a conflict of interest, employees must seek review from their managers or the HR department.

Gifts, Gratuities and Business Courtesies

Southern Cascades Community Services District is committed to competing solely on the merit of our products and services. We will avoid any actions that create a perception that favorable treatment of outside entities or individuals was sought by the District, received or given in exchange for personal business courtesies; and as a result will not accept business courtesies including gifts, gratuities, meals, refreshments, entertainment, favors or other benefits from persons, customers, members, patients or companies with whom the District does or may do business. We will neither give nor accept business courtesies that constitute, or could reasonably be perceived as constituting, unfair business inducements that would violate law, regulation or policies of the District or customers, or would cause embarrassment or reflect negatively on the District's reputation.

Set Metrics and Report Results Accurately

Accurate Public Disclosures

We will make certain that all disclosures made in financial reports and public documents are full, fair, accurate, timely and understandable. This obligation applies to all employees, including all financial executives, with any responsibility for the preparation for such reports, including drafting, reviewing and signing or certifying the information contained therein. No business goal of any kind is ever an excuse for misrepresenting facts or falsifying records.

Employees should inform Executive Management and the HR department if they learn that information in any filing or public communication was untrue or misleading at the time it was made or if subsequent information would affect a similar future filing or public communication.

District Recordkeeping

We create, retain and dispose of our District records as part of our normal course of business in compliance with all District policies and guidelines, as well as all regulatory and legal requirements.

All corporate records must be true, accurate and complete, and District data must be promptly and accurately entered in our books in accordance with the District's and other applicable accounting principles.

We must not improperly influence, manipulate or mislead any unauthorized audit, nor interfere with any auditor engaged to perform an internal independent audit of the District's books, records, processes or internal controls.

Promote Substance Over Form

At times, we are all faced with decisions we would rather not have to make and issues we would prefer to avoid. Sometimes, we hope that if we avoid confronting a problem, it will simply go away.

At Southern Cascades Community Services District, we must have the courage to tackle the tough decisions and make difficult choices, secure in the knowledge that the District is committed to doing the right thing. At times this will mean doing more than simply what the law requires. Merely because we can pursue a course of action does not mean we *should* do so.

Although the District's guiding principles cannot address every issue or provide answers to every dilemma, they can define the spirit in which we intend to do business and should guide us in our daily conduct.

Accountability

Each of us is responsible for knowing and adhering to the values and standards set forth in this Code and for raising questions if we are uncertain about District policy. If we are concerned whether the standards are being met or are aware of violations of the Code, we must contact the HR department.

Southern Cascades Community Services District takes seriously the standards set forth in the Code, and violations are cause for disciplinary action up to and including termination of employment.

Be Loyal

Confidential and Proprietary Information

Integral to Southern Cascades Community Services District's business success is our protection of confidential District information, as well as nonpublic information entrusted to us by employees, customers and other business partners. Confidential and proprietary information includes such things as pricing and financial data, customer names/addresses or nonpublic information about other companies, including current or potential supplier and vendors. We will not disclose confidential and nonpublic information without a valid business purpose and proper authorization.

Use of District Resources

District resources, including time, material, equipment and information, are provided for District business use. Personal use is not permissible.

Employees and those who represent the District are trusted to behave responsibly and use good judgment to conserve District resources. Managers are responsible for the resources assigned to their departments and are empowered to resolve issues concerning their proper use.

Generally, we will not use District equipment such as computers, copiers and fax machines in the conduct of an outside business or in support of any religious, political or other outside daily activity, except for District-requested support to nonprofit organizations. We will not solicit contributions nor distribute non-work-related materials during work hours.

In order to protect the interests of the District's network and our fellow employees, the District reserves the right to monitor or review all data and information contained on an employee's company-issued computer or electronic device, the use of the Internet or District's intranet. We will not tolerate the use of company resources to create, access, store, print, solicit or send any materials that are harassing, threatening, abusive, sexually explicit or otherwise offensive or inappropriate.

Questions about the proper use of company resources should be directed to your manager.

Media Inquiries

Southern Cascades Community Services District is a well-known entity in our community, and from time to time, employees may be approached by reporters and other members of the community. In order to ensure that we speak with one voice and provide accurate information about the District, we should direct all inquiries to the General Administrator or Board of Directors. No one may issue a press release without first consulting with the General Administrator or Board of Directors.

Do the Right Thing

Several key questions can help identify situations that may be unethical, inappropriate or illegal. Ask yourself:

• Does what I am doing comply with the District's guiding principles, Code of Conduct and company policies?

• Have I been asked to misrepresent information or deviate from normal procedure?

• Would I feel comfortable describing my decision at a staff meeting?

- How would it look if it made the headlines?
- Am I being loyal to my family, my company and myself?
- What would I tell my child to do?
- Is this the right thing to do?

Information and Resources

General Administrator

Karli Frye – (530) 299-3110

Human Resources

(530) 325-5334

Policy: Conflict of Interest **Policy #: 6102.1**

Date Adopted: 12/09/2019

Date Revised:

Policy

Directors and administrative employees of Southern Cascades Community Services District, will, in performance of their duties, identify situations that present potential conflicts of interest. The definitions and procedures below are designed to help directors and administrative employees identify potential conflict of interest situations and act within board policy and procedures.

The following circumstances shall be deemed to create conflicts of interest (responsible person is defined as the Director or administrative employe

1) A contract or transaction between SCCSD and the responsible person or family member;

2) A contract or transaction between SCCSD and an entity in which a responsible person or family member has a material financial interest or of which such person is a director, officer, agent, partner, associate, trustee, personal representative, receiver, guardian, custodian, conservator, or other legal representative;

3) A responsible person competing with SCCSD in the rendering of services or in any other contract or transaction with a third party;

4) A responsible person's having a material financial interest in; or serving as a director, officer, employee, agent, partner, associate, trustee, personal representative, receiver, guardian, custodian, conservator, or other legal representative of or consultant to an entity or individual that competes with SCCSD in the provision of services or in any other contract or transaction with a third party.

5) A responsible person accepting gifts, entertainment or other favors from an individual or entity that does or is seeking to do business, or is a competitor with SCCSD; has received, is receiving or is seeking to receive a loan or grant, or to secure other financial commitments from SCCSD; or is a charitable organization operating in California, under circumstances where it might be inferred that such action was intended to influence the responsible person in the performance of his/her duties. This does not preclude the acceptance of items of nominal or insignificant value or entertainment of nominal or insignificant value, which are not related to any particular transaction or activity of SCCSD.

Procedure

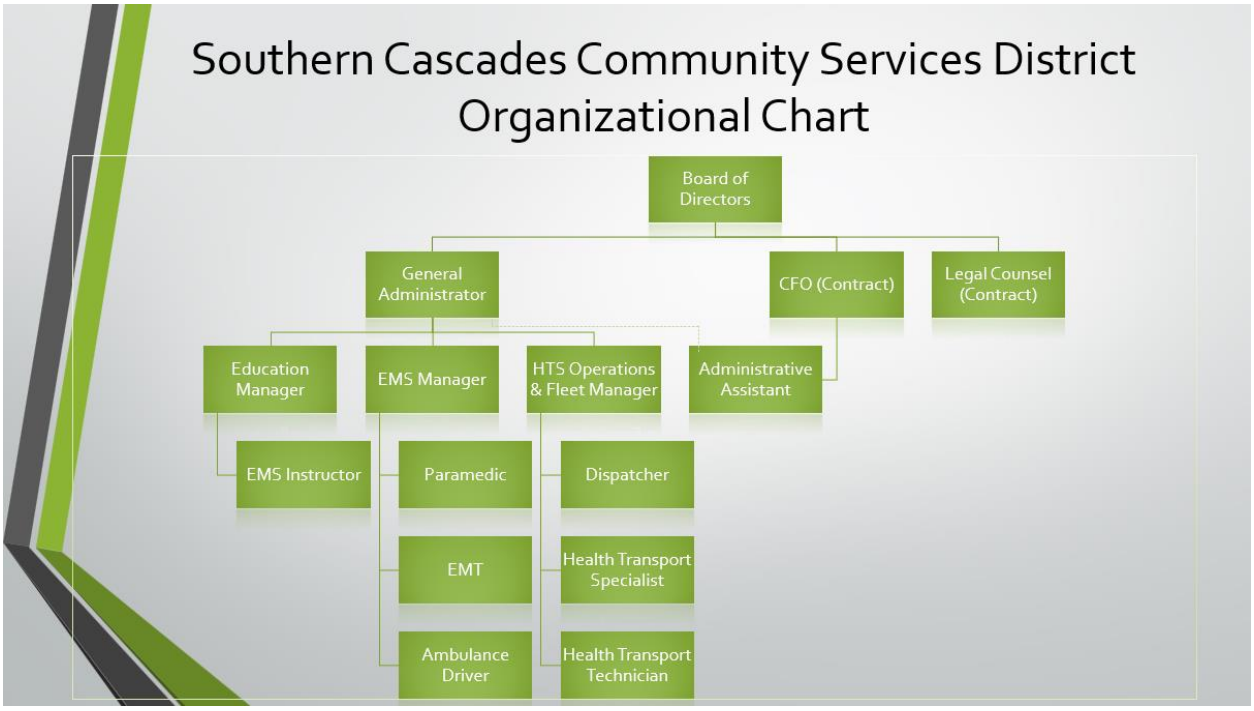
SCCSD Policy & Procedures Handbook

Prior to an employee action involving a conflict of interest, the employee having a conflict of interest shall disclose all facts material to the conflict of interest. Such disclosure shall be reflected in writing and submit to District General Manager.

Policy: Organizational Chart **Policy #: 6103.0**

Date Adopted: 12/09/2019

Date Revised: 01/20/2025



Policy: At-Will Employment Statement **Policy #: 6104.0**

Date Adopted: 05/20/2024

Date Revised:

Policy

Your employment with Southern Cascades Community Services District is at will. This means your employment is for an indefinite period of time and it is subject to termination by you or Southern Cascades Community Services District, with or without cause, with or without notice, and at any time. Nothing in this policy or any other policy of Southern Cascades Community Services District shall be interpreted to be in conflict with or to eliminate or modify in any way, the at-will employment status of Southern Cascades Community Services District employees.

The at-will employment status of an employee of Southern Cascades Community Services District may be modified only in a written employment agreement with that employee which is signed by the Chairman of the Board of Directors, of Southern Cascades Community Services District.

By your signature below, you acknowledge your understanding that your employment with Southern Cascades Community Services District is at will, and that nothing in this handbook is intended to constitute a contract of employment, express or implied.

_____

Employee Signature

_____

Employee Printed Name

_____

Date

Policy: Political Activity **Policy: 6110.0**

Date Adopted: 12/09/2019

Date Revised: 10/19/2026

Purpose

SCCSD is committed to lawful and impartial public service, appropriate use of public resources, and respect for employee rights to engage in lawful political activity as private citizens. This policy is intended to implement applicable law, including California Government Code sections 3201–3209 and 8314, without restricting protected activity.

Scope

This policy applies to District employees and officers. Individuals acting for the District, including contractors and consultants, must comply with the provisions applicable to official representation and District resources, subject to their agreements and applicable law.

Protected Personal Political Activity

Employees retain rights to lawful political activity and expression in a personal capacity. SCCSD will not discriminate, coerce, or retaliate against employees for protected political activities, affiliations, or choices. No employee is required to disclose personal voting preferences except where legally required.

Work Time and District Premises

Political activities during working hours or on District premises are governed by California Government Code section 3207 and any lawful restrictions adopted by the Board. Employees must fulfill assigned duties and may not improperly use compensated work time for campaign activity. This policy does not restrict activities protected by applicable law or authorized uses of public premises.

Public Funds and Resources

District funds, staff time, vehicles, equipment, email, websites, social-media accounts, facilities, and supplies must not be used for campaign purposes in violation of law. Official public communications must be authorized and comply with the distinction between lawful informational communications and impermissible campaign advocacy. Exceptions or authorizations must be legally supported and documented.

Authority, Coercion, and Solicitations

No employee or officer may use official authority to coerce or influence another person's political activity or campaign contribution in violation of law. Political solicitations involving other District employees or applicants must comply with Government Code section 3205 and related laws.

Official Uniforms and Representation

Employees and officers must comply with Government Code section 3206 concerning political activity while in uniform. Employees may not falsely imply that personal political positions are

official positions of SCCSD. Board approved District advocacy or information must follow applicable legal and authorization requirements.

Social Media and Speech

District controlled accounts may be used only for authorized District purposes. Employees may express lawful personal political views through private accounts; a personal view disclaimer is encouraged when reasonable observers could confuse personal views with official District views, but is not universally required. Confidential protected information may not be disclosed unlawfully. This section does not limit protected employee speech or legally protected reports of misconduct.

Professional Conduct

Employees must comply with neutral workplace rules regarding job performance, safety, nondiscrimination, harassment, threats, and interference with public services. Political disagreement alone does not establish misconduct. The policy shall be applied consistently and in accordance with protected speech and labor rights.

Reports and Nonretaliation

Concerns may be reported to a supervisor, General Manager, or Human Resources/designee. Reports concerning the General Manager may be directed to the Board Chair or other designated official. SCCSD will evaluate reports impartially, protect confidentiality as law permits, and prohibit retaliation for good-faith reporting or protected activity.

Enforcement and Legal Construction

Policy violations may result in lawful corrective or disciplinary action, subject to applicable employment rules and procedural protections. If this policy conflicts with governing law, that law controls. The General Manager will coordinate periodic review and seek counsel when interpretation is uncertain.

Policy: Equal Opportunity Employer **Policy #: 6111.0**

Date Adopted: 12/09/2019

Date Revised:

Policy

SCCSD strives to provide equal employment opportunity for all applicants and employees. We are committed to providing a work environment free of unlawful discrimination.

This policy applies to every employee and all workplace participants – those persons such as applicants, volunteers, interns, associates, contractors, vendors, students, and patients who interact with the workplace or who participate in work-sponsored activities, no matter his or her authority, position, or classification.

Conduct prohibited by this policy is unacceptable in the workplace setting, and applies to work-related settings such as business trips, business meetings, and business-related social events.

Discrimination Prohibited

Preventing discrimination begins with respect for, and adherence to, the law. Therefore, discrimination based on race, color, national origin, religion, sex, age, pregnancy, disability, marital status, military status, genetic information, sexual orientation, gender expression or identity, or any other status or condition protected by applicable federal, state or local laws, is prohibited.

SCCSD employment activities, training, education, safety and health programs are conducted without regard to race, color, national origin, religion, sex, age, pregnancy, disability, marital status, military status, genetic information, sexual orientation, gender expression or identity, or any other status or condition protected by applicable federal, state or local laws, except where a bona fide occupational qualification applies.

Reporting Discrimination or Harassment

If you believe you have been subjected to any form of discrimination, including harassment, or if you know of, or suspect, discrimination or harassment against another employee or workplace participant, you must report it immediately verbally and in writing to one of the supervisory staff or District General Manager regardless of the accused's identity or position. You will receive written acknowledgement of the complaint within 10 calendar days of receipt.

If you do not feel comfortable reporting to those listed above, or if you did report and are not satisfied with the response, then you should direct your report or dissatisfaction to SCCSD Board of Directors.

You are not required to confront the person or persons that have given you reason to report. However, if you experience discrimination or harassment, you must make a reasonable effort to make the discrimination known as soon as you experience or discover it. Discussing or reporting acts of discrimination to any person not listed above does not constitute a report.

Report concerns promptly so that discussion, investigation and needed corrective actions can be taken. Employees who have had a complaint addressed should immediately report should the harassment recur.

Policy: Nepotism in the Workplace **Policy #: 6111.1**

Date Adopted: 12/09/2019

Date Revised:

Policy

Relatives of current employees generally are considered for employment on the basis of their qualifications. However, where the hiring or employment of an employee's relative would result in a prohibited employment relationship or a conflict of interest, SCCSD does not consider such applications for employment.

1. **Prohibited Employment Relationships**

   The hiring, promoting, transferring, demoting or reassigning of relatives is prohibited if the employment of such an individual would result in the creation of:

   Supervisor/subordinate relationship between a relative and an employee: If a direct supervisory or managerial relationship would be established, relatives of a current employee cannot be considered as an applicant for an open position.

2. **Marriage between Employees**

   Employees who marry may continue in their current positions as long as a prohibited employment relationship is not created.

   Where such marriage does create a prohibited employment relationship, a reasonable period of time is allowed for either one or both of the employees to apply for other positions within the organization. If this is not possible, the employees are permitted to determine which one of them will resign.

3. **Classifications Covered by this Policy**

   This policy applies to hiring and employment decisions affecting all job classifications except where noted.

4. **Notification**

   Any employee whose status has changed due to marriage or other action which falls under this policy must inform his/her supervisor within 30 days or as soon as practical.

5. **Employment Action**

   All decisions and personnel actions taken as a result of this policy must be reviewed and approved by the SCCSD Board of Directors.

6. Definitions

Change of Status	An event which changes an employee's status, such as marriage.
Conflict of Interest	A situation in which an employee or Governing Board member has a private or personal interest sufficient to appear to influence the objective exercise of his or her official duties.
Employment Action	Any action which results in a change affecting employment, i.e., promotion, pay raise, transfer, etc.
Nepotism	Favoritism, whether shown or inferred, to a relative on the basis of relationship.
Prohibited Employment Relationship	A supervisor/subordinate relationship between a relative and an employee.
Relatives	For the purposes of this policy, relatives include the following: spouse, parent or stepparent, child or stepchild, sibling or step- sibling, father in-law, mother in-law, son in-law, daughter in-law, sister in-law, brother in-law, grandparent, grandchild, aunt, uncle, nephew or niece.

Policy: Disability Discrimination **Policy #: 6111.2**

Date Adopted: 12/09/2019

Date Revised:

Policy

SCCSD will make all decisions regarding recruitment, hiring, selection, training, advancement, discharge or other terms, conditions, or privileges of employment based on job-related qualifications and abilities. SCCSD will follow any state, local or federal law that provides greater protections for disabled individuals.

SCCSD prohibits, forbids, and does not tolerate discrimination against any qualified individual with a disability or because they are related to or associated with a person with a mental or physical disability. All qualified individuals with a disability are guaranteed the same employment opportunities as other employees or applicants. SCCSD prohibits verbal, physical, or visual conduct that belittles or demeans any qualified individual with a disability. Violators of this policy are subject to disciplinary action, up to and including discharge, for any act of disability discrimination reasonably believed to have been committed.

No person, no matter his or her title or position has the authority, expressed, actual, apparent or implied to discriminate against a qualified employee or applicant with a disability.

Procedure for Requesting Reasonable Accommodation

Qualified individuals with disabilities may make requests for reasonable accommodation to their immediate supervisor. On receipt of an accommodation request, Management will meet with the individual making the request to discuss and identify the precise limitations of job functions resulting from the disability and the potential accommodation that the Company might make to help overcome those limitations.

SCCSD will form a team to review and determine the feasibility of the requested accommodation, considering various factors including, but not limited to, the nature and cost of the accommodation, the availability of tax credits and deductions, outside funding, overall financial resources, and the accommodation's impact on the operation of the Company, including its impact on the ability of other employees to perform their duties.

SCCSD will inform the employee of the Company's decision on the accommodation request and when the appropriate steps will be taken for making the accommodation.

Policy: Pregnancy Discrimination **Policy #: 6111.3**

Date Adopted: 12/09/2019

Date Revised:

Policy

Regardless of title or position, no person or employee has the authority (expressed, actual, apparent or implied) to discriminate against a pregnant employee or applicant of SCCSD. This policy applies while on the job or during any company-related activity.

SCCSD prohibits and does not tolerate discrimination against anyone on the basis of pregnancy. The Company will treat all applicants and employees who are pregnant the same way as any other applicant or employee with regard to job-related functions, benefits, opportunities, and purposes. Violators of this policy are subject to disciplinary action, up to and including discharge, for any act of pregnancy discrimination reasonably believed to have been committed.

SCCSD will not deny a job or remove a pregnant employee from a position because the employee is pregnant, considering a pregnancy, or experiencing any pregnancy-related problems. SCCSD will make all recruitment, placement, selection, training and layoff decisions based solely on job-related qualifications and abilities. All decisions regarding a pregnant employee's placement in or continuation in a job will be based on the same consideration that governs all employment decisions – the employee's ability to satisfactorily perform the essential duties of the job in question.

SCCSD supports the pregnant employee's desire to continue in their regular ambulance duties, as recommended by the attending physician upon review of job description and physical requirements.

Procedure

If you are aware of workplace conflict or wrongdoing taking place, you must immediately discuss your questions, problems, complaints or reports with your immediate supervisor. If you feel uncomfortable doing so or if your direct supervisor is the source of the problem, condones the problem, or ignores the problem, immediately report to the General Manager.

If neither of these alternatives is satisfactory to you, you can direct your questions, problems, complaints, or reports to the Employee Representative to the Board of Directors, or Board of Directors. You are not required to directly confront the person who is the source of your report, question, or complaint before notifying any of those individuals listed. Nevertheless, you are required to make a reasonable effort to make wrongdoing or conflict known should it exist.

Policy: Family Medical Leave Act (FMLA) **Policy #: 6111.4**

Date Adopted: 05/20/2024

Date Revised:

Purpose

Southern Cascades Community Services District complies with the Family and Medical Leave Act (FMLA) and will grant up to 12 weeks of leave during a 12-month period to eligible employees (or up to 26 weeks of military caregiver leave).

The purpose of this policy is to provide employees with a general description of their FMLA rights. In the event of any conflict between this policy and the applicable law, employees will be afforded all rights required by law. If you have any questions, concerns, or disputes with this policy, please contact the Administrator.

Eligibility

To be eligible for leave under this policy, employees must meet **all** the following requirements:

- Have worked at least twelve (12) months for Southern Cascades Community Services District.
- Have worked at least 1,250 hours for Southern Cascades Community Services District over the twelve (12) months preceding the date the leave would commence.
- Currently work at a location where there are at least fifty (50) employees within seventy-five (75) miles.

The 12 months of employment do not have to be consecutive. All periods of absence from work due to or necessitated by service in the uniformed services are counted as hours worked in determining eligibility.

Reasons for Leave

To qualify as FMLA leave under this policy, the leave must be for one of the following reasons:

- The birth of a child or placement of a child with the employee for adoption or foster care.
- To care for a spouse, child or parent who has a serious health condition.
- For a serious health condition that makes the employee unable to perform the essential functions of his or her job.
- For any qualifying exigency arising out of the fact that a spouse, child or parent is a military member on covered active duty or on call to covered active duty status.
- To care for a covered service member with a serious injury or illness.

Amount of Leave

An eligible employee can take up to 12 weeks of FMLA leave during any 12-month period. The company will measure the 12-month period as a rolling 12-month period measured backward from the date an employee uses any leave under this policy. Each time an employee takes leave, the company will compute the amount of leave the employee has taken under this policy in the last 12 months and subtract it from the 12 weeks of available leave, and the balance remaining is the amount the employee is entitled to take at that time.

An eligible employee can take up to 26 weeks for the FMLA military caregiver leave during a single 12-month period. For this military caregiver leave, the company will measure the 12-month period as a rolling 12-month period measured forward. FMLA leave already taken for other FMLA circumstances will be deducted from the total of 26 weeks available.

Eligible spouses who both work for the District may only take a combined total of 12 weeks of leave for the birth of a child, adoption or placement of a child in foster care, or to care for a parent (but not a parent "in-law") with a serious health condition. Both may only take a combined total of 26 weeks of leave to care for a covered injured or ill service member (if each spouse is a parent, spouse, child or next of kin of the service member).

Intermittent Leave or a Reduced Work Schedule

Employees may take FMLA leave in one consecutive block of time, may use the leave intermittently (take a day periodically when needed over the year) or, under certain circumstances, may use the leave to reduce the workweek or workday, resulting in a reduced hour schedule. In all cases, the leave may not exceed a total of 12 workweeks (or 26 workweeks to care for an injured or ill service member) in a 12-month period.

The District may temporarily transfer an employee to an available alternative position with equivalent pay and benefits if the alternative position would better accommodate the intermittent or reduced schedule, in instances when leave for the employee or employee's family member is foreseeable and for planned medical treatment, including recovery from a serious health condition or to care for a child after birth or placement for adoption or foster care.

For the birth, adoption or foster care of a child, the District and the employee must mutually agree to the schedule before the employee may take the leave intermittently or work a reduced-hour schedule. Leave for birth, adoption or foster care of a child must be taken within one year of the birth or placement of the child.

When leave is needed for planned medical treatment, the employee must make a reasonable effort to schedule treatment so as not to unduly disrupt the District's operations.

Employee Notice Requirement

All employees requesting FMLA leave must provide verbal or written notice of the need for leave to the department manager, HR manager, or administrator.

When the need for the leave is foreseeable, the employee must provide the company with at least 30 days' notice. When an employee becomes aware of a need for FMLA leave fewer than 30 days in

advance, the employee must provide notice of the need for the leave either the same day the need for leave is discovered or the next business day. When the need for FMLA leave is not foreseeable, the employee must comply with the District's usual and customary notice and procedural requirements for requesting leave, absent unusual circumstances.

Within five business days after the employee has provided this notice, the HR manager will complete and provide the employee with a Notice of Eligibility and Rights and request a medical certification or other supporting documentation, as necessary.

Designation of FMLA Leave

Within five business days after the employee has submitted the required certification or other documentation, the HR manager will complete and provide the employee with a written response to the employee's request for FMLA leave using the FMLA Designation Notice.

Employee Status After Leave

An employee who takes leave under this policy may be asked to provide a fitness for duty clearance from a health care provider. This requirement will be included in the company's response to the FMLA request. Generally, an employee who takes FMLA leave will be able to return to the same position or a position with equivalent status, pay, benefits and other employment terms. The position will be the same or one that is virtually identical in terms of pay, benefits and working conditions. The District may choose to exempt certain key employees from this requirement and not return them to the same or similar position when doing so will cause substantial and grievous economic injury to business operations. Key employees will be given written notice at the time FMLA leave is requested of his or her status as a key employee.

Use of Paid and Unpaid Leave

An employee who is taking FMLA leave because of the employee's own serious health condition or the serious health condition of a family member must use all paid vacation, personal or sick leave prior to being eligible for unpaid leave. Sick leave may run concurrently with FMLA leave if the reason for the FMLA leave is covered by the established sick leave policy.

Disability leave for the birth of a child and for an employee's serious health condition, including workers' compensation leave (to the extent that it qualifies), will be designated as FMLA leave and will run concurrently with FMLA. For example, when an employee takes six weeks of Southern Cascades Community Services District pregnancy disability leave, the six weeks will be designated as FMLA leave and counted toward the employee's 12-week entitlement. The employee will then be required to substitute accrued (or earned) paid leave as appropriate before being eligible for unpaid leave for what remains of the 12-week entitlement. An employee who is taking leave for the adoption or foster care of a child must use all paid vacation, personal or family leave prior to being eligible for unpaid leave.

An employee who is using military FMLA leave for a qualifying exigency must use all paid vacation and personal leave prior to being eligible for unpaid leave. An employee using FMLA military

caregiver leave must also use all paid vacation, personal leave or sick leave (as long as the reason for the absence is covered by the District's sick leave policy) prior to being eligible for unpaid leave.

Intent to Return to Work from FMLA Leave

On a basis that does not discriminate against employees on FMLA leave, the District may require an employee on FMLA leave to report periodically on the employee's status and intent to return to work.

Definitions

Serious health condition means an illness, injury, impairment, or physical or mental condition that involves inpatient care or continuing treatment by a health care provider. This can include conditions with short-term, chronic, long-term or permanent periods of incapacity.

Spouse means a husband or wife as defined or recognized in the state where the individual was married and includes individuals in a common law or same-sex marriage. Spouse also includes a husband or wife in a marriage that was validly entered into outside of the United States, if the marriage could have been entered into in at least one state.

Child means a biological, adopted or foster child, a stepchild, a legal ward, or a child of a person standing in loco parentis, who is either under age 18, or age 18 or older and "incapable of self-care because of a mental or physical disability" at the time that FMLA leave is to commence.

Parent means a biological, adoptive, step or foster father or mother, or any other individual who stood in loco parentis to the employee when the employee was a child. This term does not include parents "in law."

Qualifying exigency includes short-notice deployment, military events and activities, child care and school activities, financial and legal arrangements, counseling, rest and recuperation, post-deployment activities, and additional activities that arise out of active duty, provided that the employer and employee agree, including agreement on timing and duration of the leave.

Covered active duty for members of a regular component of the Armed Forces, means duty during deployment of the member with the Armed Forces to a foreign country..For a member of the Reserve components of the Armed Forces, means duty during the deployment of the member with the Armed Forces to a foreign country under a federal call or order to active duty in support of a contingency operation, in accordance with 29 CR 825.102.

The next of kin of a covered service member is the nearest blood relative, other than the covered service member's spouse, parent or child in the following order of priority: blood relatives who have been granted legal custody of the service member by court decree or statutory provisions, brothers and sisters, grandparents, aunts and uncles, and first cousins, unless the covered service member has specifically designated in writing another blood relative as his or her nearest blood relative for purposes of military caregiver leave under the FMLA.

Covered service member is a current member of the Armed Forces, including a member of the National Guard or Reserves, who is receiving medical treatment, recuperation or therapy, or is in outpatient status or on the temporary disability retired list for a serious injury or illness.

Serious injury or illness is one that is incurred by a service member in the line of duty on active duty that may cause the service member to be medically unfit to perform the duties of his or her office, grade, rank or rating. A serious injury or illness also includes injuries or illnesses that existed before the service member's active duty and that were aggravated by service in the line of duty on active duty.

Policy: Whistleblower **Policy #: 6111.5**

Date Adopted: 05/20/2024

Date Revised:

Policy

A whistleblower as defined by this policy is an employee of Southern Cascades Community Services District who reports an activity that the employee considers to be illegal or dishonest to one or more of the parties specified in this policy. The whistleblower is not responsible for investigating the activity or for determining fault or corrective measures; appropriate management officials are charged with these responsibilities.

Examples of illegal or dishonest activities are violations of federal, state or local laws; billing for services not performed or for goods not delivered; and other fraudulent financial reporting.

If an employee has knowledge of or a concern of illegal or dishonest fraudulent activity, the employee is to contact his/her immediate supervisor or the human resources director. The employee must exercise sound judgment to avoid baseless allegations. An employee who intentionally files a false report of wrongdoing will be subject to discipline up to and including termination.

Whistleblower protections are provided in two important areas -- confidentiality and against retaliation. Insofar as possible, the confidentiality of the whistleblower will be maintained. However, identity may have to be disclosed to conduct a thorough investigation, to comply with the law and to provide accused individuals their legal rights of defense. Southern Cascades Community Services District will not retaliate against a whistleblower. This includes, but is not limited to, protection from retaliation in the form of an adverse employment action such as termination, compensation decreases, or poor work assignments and threats of physical harm. Any whistleblower who believes they are being retaliated against must contact the human resources manager immediately. The right of a whistleblower for protection against retaliation does not include immunity for any personal wrongdoing that is alleged and investigated.

Defend Trade Secrets Act (DTSA) Compliance: “Immunity from Liability for Confidential Disclosure of a Trade Secret to the Government or in a Court Filing:

> (1) Immunity—An individual shall not be held criminally or civilly liable under any federal or state trade secret law for the disclosure of a trade secret that—(A) is made—(i) in confidence to a federal, state or local government official, either directly or indirectly, or to an attorney; and (ii) solely for the purpose of reporting or investigating a suspected violation of law; or (B) is made in a complaint or other document filed in a lawsuit or other proceeding, if such filing is made under seal.
> (2) Use of Trade Secret Information in Anti-Retaliation Lawsuit—An individual who files a lawsuit for retaliation by an employer for reporting a suspected violation of law may disclose the trade secret to the attorney of the individual and use the trade secret

information in the court proceeding, if the individual—(A) files any document containing the trade secret under seal; and (B) does not disclose the trade secret, except pursuant to court order."

All reports of illegal and dishonest activities will be promptly submitted to the human resources manager who is responsible for investigating and coordinating corrective action.

Employees with any questions regarding this policy should contact human resources.

Policy: Lactation Accommodation **Policy #: 6111.6**

Date Adopted:

Date Revised: 01/20/2025

Lactation Accommodation Request Form

Employee name: _____

Job title/department: _____

Date of request: _____

I have read [Company Name's] lactation accommodation policy and I am requesting an accommodation to allow for lactation breaks while at work as follows (check all that apply):

____ A private space to express breast milk.

____ Lactation breaks that run concurrently with rest breaks already provided.

Current rest break times: _____

____ Lactation breaks in addition to already provided rest breaks.

Additional unpaid break time needed:_____

____ Other _____

_____ _____

Employee signature Date

****

To be completed by the employee's supervisor and returned to the employee with a copy sent to human resources.

Supervisor name: _____

Date received: _____

Your request for lactation break accommodations is

____ Approved as requested

____ Approved with modifications: _____

____ Denied due to: _____

_____ _____

Supervisor signature Date

Policy: Lactation Accommodation **Policy #: 6111.6**

Date Adopted: 01/20/2025

Date Revised:

Policy

Southern Cascades Community Services District provides a reasonable amount of break time to accommodate an employee's need to express breast milk for the employee's infant child. The District will make a reasonable effort to provide the employee with the use of a room or other location in close proximity to the employee's work area for the employee to express milk in private. Such space will meet the requirements of the California Labor Code including a surface to place a breast pump and personal items, a place to sit, access to electricity, a sink with running water, and a refrigerator for storing breast milk.

Procedures

An employee may request an accommodation for lactation breaks by submitting a lactation accommodation request form to the department supervisor.

The department supervisor must approve or deny the request in writing. The completed request form must be returned to the employee and a copy sent to the human resources department.

The requested break time should, if possible, be taken concurrently with other scheduled break periods. Nonexempt employees must clock out for any lactation breaks that do not run concurrently with normally scheduled rest periods. Any such breaks will be unpaid.

The company reserves the right to deny, in writing, an employee's request for a lactation break if the additional break time will seriously disrupt operations.

Employees have the right to file a complaint with the labor commissioner for any violation of rights provided under Chapter 3.8 of the California Labor Code regarding lactation accommodations.

Policy: Harassment Prohibition **Policy #: 6112.0**

Date Adopted: 12/09/2019

Date Revised:

Policy

SCCSD is committed to providing a work environment based on mutual respect and teamwork, and free of harassment.

This policy applies to every employee and all workplace participants – those persons such as applicants, volunteers, interns, associates, contractors, vendors, students, and patients who interact with the workplace or who participate in work-sponsored activities, no matter his or her authority, position, or classification.

Conduct prohibited by this policy is unacceptable in the workplace setting, and applies to work-related settings such as business trips, meetings, and business related social events.

Harassment Prohibited

Prohibited harassment includes conduct that has the purpose or effect of unreasonably interfering with a person's work performance or experience or creating an environment that is hostile, intimidating or offensive.

Impermissible conduct includes verbal, physical, sexual, written, digital, electronically-delivered, or any other form of harassment that belittles or demeans any individual on the basis of race, color, national origin, religion, sex, age, pregnancy, disability, marital status, military status, genetic information, sexual orientation, gender expression or identity, or any other status or condition protected by applicable federal, state or local laws is also strictly prohibited.

Sexually related materials such as pornography, objects, pictures or internet sites, verbal or visual conduct such as innuendoes, jokes, e-mail, voice mail messages, leering or stalking, physical contact such as grabbing groping, pinching, patting, massaging. Conduct intended to be innocent may constitute sexual harassment. Regardless of intent, how others interpret behavior is important.

Reporting Discrimination or Harassment

If you believe you have been subjected to any form of discrimination, including harassment, or if you know of, or suspect, discrimination or harassment against another employee or workplace participant, you must report it immediately verbally and in writing to one of the supervisory staff, Clinical Coordinator, Operations Coordinator, or Administrator, regardless of the accused's identity or position. You will receive written acknowledgement of the complaint within 10 calendar days of receipt.

If you do not feel comfortable reporting to those listed above, or if you did report and are not satisfied with the response, then you should direct your report or dissatisfaction to SCCSD Board of Directors.

You are not required to confront the person or persons that have given you reason to report. However, if you experience discrimination or harassment, you must make a reasonable effort to make the discrimination known as soon as you experience or discover it. Discussing or reporting acts of discrimination to any person not listed above does not constitute a report.

Report concerns promptly so that discussion, investigation and needed corrective actions can be taken. Employees who have had a complaint addressed should immediately report should the harassment recur.

Workplace Investigations

A report of discrimination, harassment or retaliation will result in an appropriate investigation of the allegations. SCCSD may use third parties to investigate allegations. All employees and workplace participants have a responsibility to cooperate fully with any investigation. The interviews, allegations, statements, and identities are confidential, on a need-to-know basis, consistent with the law and the investigation process and goals. Unreasonable refusal to participate in an investigation may lead to discipline, including termination.

Those found to have discriminated against or harassed another in the workplace are subject to appropriate corrective action, including counseling, training, reassignment, disciplinary action, including termination, consistent with the results of the investigation, severity of conduct, and employment history.

Retaliation Prohibited

Retaliation can include, but is not limited to, discrimination, harassment, or any other unfair treatment or abuse of power. SCCSD prohibits retaliation of any kind against those who, in good faith, report discrimination or who assist in the investigation of a report of discrimination.

If you believe you are experiencing retaliation or, if you know of or suspect retaliation against another person for reporting a violation of this policy or for participating in an investigation of a violation of this policy, you should report the retaliation immediately in the manner provided above, regardless of the accused's identity or position.

Please note that you do not have to confront the person who is the source of the retaliation before reporting it, but you must report it as soon as you experience or discover it. Discussing or reporting acts of retaliation to any person not listed above does not constitute a report.

Any employee or workplace participant retaliating against persons making a good faith report of a violation of this policy or for assisting in an investigation of a report of discrimination or harassment is subject to discipline or termination.

Knowingly Fals Reports Prohibited

Any employee or workplace participant making a knowingly false report of discrimination, harassment, or retaliation, will be subject to discipline, including termination.

Reporting Periods

Department of Fair Employment and Housing (DFEH) - 365 days from the last act

Department of Labor (DOL) – 365 days from the last act

Equal Employment Opportunity Commission (EEOC) – 300 days from the last act or notification of act

Policy: Anti - Retaliation **Policy #: 6112.1**

Date Adopted: 12/09/2019

Date Revised:

Policy

SCCSD prohibits and does not tolerate retaliation against any employee because of that employee's participation in protected activities, including but not limited to good faith reporting of workplace wrongdoing, making a protected claim against the organization, participating in any related investigation, or properly using Government benefits. Any employee who engages in prohibited retaliation is subject to disciplinary action, up to and including possible termination.

No person, no matter his or her title or position, has the authority, expressed, actual, apparent or implied, to retaliate against any employee.

SCCSD recognizes that making false accusations of wrongdoing in bad faith can have serious consequences for those who are wrongly accused. SCCSD prohibits deliberately making false and/or malicious allegations, as well as deliberately providing false information during an investigation. Anyone who violates this rule is subject to disciplinary action, up to and including termination.

Procedure

If you feel retaliation is taking place, you must immediately discuss your questions, problems, complaints, or reports with your immediate supervisor. If you feel uncomfortable doing so or if your direct supervisor is the source of the problem, condones the problem, or ignores the problem, immediately report to the General Manager.

If neither of these alternatives is satisfactory to you, then you can immediately direct your questions, problems, complaints, or reports to the Board of Directors. You are not required to directly confront the person who is the source of your report, question, or complaint before notifying any of those individuals listed.

Policy: Violence / Threats of Violence **Policy #: 6112.2**

Date Adopted: 12/09/2019

Date Revised:

Policy

SCCSD is committed to preventing workplace violence and providing a safe work environment. SCCSD prohibits and does not tolerate violent acts or threats of violence against employees, visitors, guests or other individuals within its facilities or during any Company-related activity (including off-duty periods).

Violence may be described as verbal or physical threats, intimidation, and/or aggressive physical contact. Prohibited contact includes, but is not limited to the following:

- Intimidation, harassment, assault, battery, stalking, or conduct that causes a person to believe that he or she is under a threat of death or bodily injury
- Inflicting or threatening injury or damage to another person's life, health, wellbeing, family or property
- Possessing a firearm, explosive, hazardous devices or substances, or other dangerous weapon, or using an object as a weapon on SCCSD property or during any Company- related activity
- Abusing or damaging SCCSD or employee property
- Using obscene or abusive language or gestures in a threatening manner
- Raising voices in a threatening manner

Because of the potential for misunderstanding, joking about any of the above conduct is also prohibited. Employees are also expected to refrain from fighting, "horseplay" or other conduct that may be dangerous to others.

Restraining Orders: Any employee who obtains a restraining order against any person should immediately notify management. SCCSD has made a commitment to provide a safe workplace and can only do so if it receives information concerning individuals who have been ordered to maintain a distance from its facilities and/or employees.

There are often signs serving as a warning that violence in the workplace may occur. Please review the following list of common early warning signs, keeping in mind that demonstration by an individual or one or many of the actions on the below list do not automatically point to certain violence. However, their activities should be noted to assist in detecting and defusing a potential workplace incident.

Warning Signs of Potential Violence:

- Increase in use of alcohol or using drugs
- History of violent or aggressive behavior or frequent physical fighting off or on duty

- Displaying a loss of control (i.e., loss of temper on a frequent basis, frequently for unsubstantial reasons, or over minor issues)
- Either joking or making serious direct or veiled threats
- Physically, verbally or emotionally intimidating others or instilling fear, for example harassing phone calls, emails and/or stalking
- Being obsessed with one's job and having no known outside interests
- Being a loner and/or expressing a strong desire for a personal or romantic relationship with a co-worker (under these circumstances, the co-worker may feel threatened and report the unwanted attention)
- Obsession with weapons or militia, particularly if this is new behavior for an employee
- Feeling constantly disrespected, demonstrating a "me versus the world" attitude, experiencing difficulty with authority (for example feeling discriminated against, harassed, or intentionally targeted)
- Does not accept criticism well and commonly harbors resentment
- Expressing desperation, significant frustration or depression over recent professional, personal, or financial problems
- Fascination with other recent incidents of violence and approval of the use of violence
- Disregard for safety, thus presenting a risk to self and others
- Demonstrates a lack of conscience and/or abuse towards other persons or animals
- Vandalism or property damage
- Failing to acknowledge the feelings or rights of others
- Having been a victim of violence or bullying

What to do: If you witness or suspect a potentially violent situation, or are dealing with a threatening or violent person, do not place yourself in danger or try to intercede. You should not attempt to challenge or disarm the individual. Tips proven to be effective in this type of situation are as follows:

- Try to remain calm
- Keep a distance of 4-6 feet
- Do not touch the threatening or violent individual
- Make constant eye contact, but do not try to 'stare them down'
- Actively listen and respond to the individual
- If a supervisor or other appropriate authority can be safely notified of the need for assistance without endangering your safety or that of others, do so. Otherwise, cooperate and follow the instructions given. Please see reporting procedures below

Procedure

All threats of (or actual) violence, both direct and indirect, must be reported as soon as possible to your immediate supervisor. If you feel uncomfortable doing so or if your direct supervisor is the source of the problem, condones the problem, or ignores the problem, immediately report to the General Manager.

If neither of these alternatives is satisfactory to you, then you can immediately direct your questions, problems, complaints, or reports to the Employee Representative to the Board of

Directors, or the Board of Directors. You are not required to directly confront the person who is the source of your report, question, or complaint before notifying any of those individuals listed.

Employees are empowered to contact the appropriate law enforcement authorities without first informing their immediate supervisor if there is a reasonable belief that immediate danger to their own safety or that of others exists. Employees shall then immediately report to their supervisor or others in the chain of command.

A reportable incident can be an act or threat from employees, as well as other members of the public and includes those threats or acts that may be perceived, actually experienced, or witnessed. When reporting an act or threat of violence, you should be as specific and detailed as possible. Employees must also report all threats or violent acts they witness or experience while on duty away from SCCSD premises or during any Company-related activity, or which is related to the employee or legitimate business interest of SCCSD.

The identity of the individual making a report will be protected as much as is practical. In order to maintain workplace safety and the integrity of its investigation, SCCSD may suspend employees suspected of violence or threats of violence, either with or without pay, pending investigation.

In no instance will an employee be disciplined, retaliated against or discharged for good faith reporting of any legitimate act of threat of violence. Anyone reasonably believed to have engaged in retaliation of any kind will be subject to disciplinary action up to and including termination of employment and/or prosecution for a criminal behavior linked to retaliatory activity. False or intentionally misleading reports are unacceptable and will be handled through SCCSD personnel procedures regarding disciplinary measures up to and including termination when appropriate.

Policy: Violence / Threats of Violence at EMS Scene **Policy #: 6112.3**

Date Adopted: 12/09/2019

Date Revised:

POLICY

SCCSD is committed to keeping EMS personnel safe at scene. The reality however is that no EMS scene is safe.

Characteristically high-risk scenes include:

- Assaults
- Domestic disputes
- Overdose cases
- Situations involving recreational drugs and alcohol
- Psychiatric problems especially ones involving potential or threatened suicide
- Gunshot wounds or stabbings
- Calls with limited, or no information or involving a "man down"
- Outdoor roadway scenes

If directed by the dispatcher or if circumstance not know by dispatchers are found, SCCSD policy is:

- Stage safely away from a high-risk scene until law enforcement permits EMS entry.
- Even if law enforcement has cleared a scene, recognize that this does not guarantee the scene is safe.
- As a rule, don't park the EMS vehicle directly in from of the scene.
- Avoid standing in front of windows.
- Don't stand directly in front of an entry door. Stand to the side of the door.
- If a voice from inside a building says to "come on in, the doors open," strongly consider waiting for law enforcement. If you think that it is likely safe, open the door to the side and enter cautiously after pausing for a brief time.
- Light up a dark scene. But if using a flashlight, keep it to the side and not in front of you as potential assailants will target a flashlight.
- Keep yourself between the patient and/or bystanders and an escape exit.
- Avoid assessing patients in a kitchen whenever possible. Many potential weapons reside in a kitchen.
- In addition to using the secondary survey as a physical assessment tool, be alert for the possibility of a hidden weapon at that time.
- Maintain scene awareness throughout the call. At least one crew member should be primarily assigned to observe the scene for potential physical threats and other safety hazards. Avoid tunnel vision.
- Remember that all of us want our "personal space". The closer we get to a hostile individual, the more likely he or she may react much more negatively. Try to give them space while talking with them in hopes that they may calm with conversation from a distance. Additionally, realize that a patient or bystander that gets too close to providers may be a threat. If a potentially violent individual invades our personal space, we have

much less ability to protect ourselves from assault.

- Be flexible in your approach to patients, keeping in mind that sometimes cultural differences may play a role in difficult interaction. While our patients often come from very divergent backgrounds or lifestyles, it's best not to be judgmental.
- Maintaining eye contact with the patient and others in the conversation is important. It's usually a good idea to verbalize and explain to the patient and bystanders what is being done and is planned.
- Non-verbal communication cues can either help or hurt a situation. Try to avoid sending negative cues, no matter how unintentional. Sometime subtle things like a roll of the eyres in response to a comment from a patient may in fact be perceived by the patient as an insult and provoke a reaction that was avoidable
- Conversely, be alert for the non-verbal cues that patients or bystanders send us. Darting eyes, sudden movements, pacing, clenching and unclenching of fists suggests a potentially violation individual who may be close to exploding.

Policy: Weapons **Policy #: 6112.4**

Date Adopted: 12/09/2019

Date Revised:

Policy

Firearms or weapons of any kind are prohibited on the Southern Cascades Operations Base and Training Center.

Firearm means shotgun, rifle, pistol, compressed air gun, pellet gun, BB gun, or revolver from which shot, bullets, or missiles are discharged by compressed air, explosive or combustible material, capable of propelling any shot, bullet or missile.

Deadly or dangerous weapon means any weapon capable of being used to inflict great bodily injury or death.

Peace officer means any such officer within the laws of the state duly constituted, acting in his or her official line of duty.

Procedure

When weapons encountered during ambulance operations, such as on the patient's person or belongings, it is preferred to leave the weapon secured at residence, or at the scene with law enforcement.

A weapon discovered during transport must be secured and transferred formally to hospital staff or law enforcement according to hospital policy.

Policy: Immigration Law Compliance **Policy #: 6113.0**

Date Adopted: 12/09/2019

Date Revised:

Policy

SCCSD is committed to employing only United States citizens and resident aliens who are authorized to work in the United States and it does not unlawfully discriminate on the basis of citizenship or national origin.

In compliance with Immigration Reform and Control Act of 1986, each new employee must complete the Employment Eligibility Verification Form I-9 and present documentation establishing identity and employment eligibility within three business days of the employee's hire date. If the employee is unable to provide documentation within three days, they may be allowed 90 days to submit documentation, providing that the employee can provide proof that the necessary documents have been requested.

Former employees who are rehired must also complete the form if they have not completed an I-9 within the past three years, or if their previous I-9 is no longer retained or valid.

Policy: Life-Threatening Illness in Workplace **Policy #: 6113.0**

Date Adopted: 12/09/2019

Date Revised:

Policy

Employees with life-threatening illness, such as cancer, heart disease or AIDS, often wish to continue their normal pursuits, including work, to the extent allowed by their condition. SCCSD supports these endeavors as long as employees are able to meet acceptable performance standards. As in the case of other disabilities, SCCSD will make reasonable accommodations in accordance with all legal requirements to allow qualified employees with life-threatening illnesses to perform the essential functions of their jobs.

Medical information on individual employees is treated confidentially. SCCSD will take reasonable precautions to protect such information from inappropriate disclosure. Managers and other employees have a responsibility to respect and maintain the confidentiality of employee medical information. Anyone inappropriately disclosing such information is subject to disciplinary action, up to and including termination of employment.

Policy: Injury & Illness Prevention **Policy #: 6120.0**

Date Adopted: 12/09/2019

Date Revised:

Policy

SCCSD considers accident prevention of primary importance in all phases of operations and administration. It is our intention to provide safe and healthy working conditions and to establish and insist upon safe practices at all times by all employees.

SCCSD is committed to preventing injuries and providing a safe workplace. To achieve this goal, we have adopted an Illness and Injury Prevention Program. The General Manager and/or Designee are responsible for implementing the provisions of this program and addressing specific workplace safety and health problems. Direct questions regarding workplace safety to the General Manager.

It is the responsibility of Management to make employee safety an integral part of their daily function. It is equally the duty of every employee to accept and follow established safety regulations and procedures. The Illness and Injury Prevention Plan is available at each station, placed in a binder on the main bookshelf.

Policy: Blood Borne Pathogens **Policy #: 6121.0**

Date Adopted: 12/09/2019

Date Revised:

Policy

The Designated Health Officer shall develop and maintain a written Exposure Control Plan in order to eliminate or minimize employee occupational exposure to blood and other body fluids, and in compliance with Cal/OSHA Standard CCR-T85193.

Policy: Drug / Alcohol Prohibition **Policy #: 6122.0**

Date Adopted: 12/09/2019

Date Revised: 07/17/2023

Policy Statement

The purpose of this policy is to assure worker fitness for duty and to protect District employees and the public from risks posed by the use of alcohol and controlled substances.

Southern Cascades Community Services District recognizes that the use of alcohol and/or controlled substances in the workplace is not conducive to safe working conditions. In order to promote a safe, healthy and productive work environment for all employees, it is the objective of the District to have a work force that is free from the influence of alcohol and controlled substances.

Applicability: This policy applies to all employees when they are on District property or when performing any District related business. It also applies to off-site lunch periods and breaks when an employee is scheduled to return to work.

Prohibited Substances: "Prohibited substances" addressed by this policy include the following:

a) Drugs: marijuana, amphetamines, opiates, phencyclidine (PCP) and cocaine.
b) Alcohol: The use of beverages or substances, including any medication, containing alcohol such that it is present in the body at a level in excess of the concentration outlined in this policy while actually performing, ready to perform, or immediately available to perform any District business is prohibited. "Alcohol" is defined as: the intoxicating agent in beverage alcohol, ethyl alcohol, or other low molecular weight alcohol, including methyl or isopropyl alcohol.
c) Legal Medications: Using or being under the influence of any legally pre-scribed medication(s), or non-prescription medication(s) while performing district business or while on District property is prohibited to the extent that such use or influence affects job safety or effective and efficient job performance. This prohibition includes the use of medically prescribed marijuana. An employee who feels his/her performance of work-related duties may be impaired by use of any legal substance which carries a warning label that indicates that mental functioning, motor skills and/or judgment may be adversely affected should report it to his/her supervisor, and medical advice should be sought before performing work-related duties. In the above instance, an employee using legal prescribed medication or non-prescription medication may continue to work if the supervisor determines that the employee does not pose a safety threat and that job performance is not affected by such use.

Prohibited Conduct:

a) Manufacture, Trafficking, Possession and Use: Engaging in unlawful manufacture, distribution or dispensing of a controlled substance or alcohol on District premises, in a District vehicle or while conducting District business off the premises is

absolutely prohibited. Violation may result in termination. Law enforcement shall be notified, as appropriate, where criminal activity is suspected. Engaging in unlawful possession or use of a controlled substance or alcohol on District premises, in a District vehicle or while conducting District business off the premises is absolutely prohibited. Violation will result in removal from duty and possible termination concluding an investigation.

b) Impaired/Not Fit for Duty: Any employee who is reasonably suspected of being impaired, under the influence of a prohibited substance, or not fit for duty shall be removed from job duties and required to undergo a reasonable suspicion controlled substance or alcohol test. Employees failing to pass the reasonable suspicion controlled substance or alcohol test shall remain off duty and may be terminated. A controlled substance test is considered positive (failed) if the individual is found to have a quantifiable presence of a prohibited substance in the body above the minimum thresholds defined in Appendix A. An alcohol test is considered positive (failed), if the individual has an alcohol concentration of 0.04 or greater. An individual with an alcohol concentration of 0.02 or greater, but less than 0.04, must be removed from duty for 24 hours and subject to return-to-duty testing. Upon return-to-duty testing, a result of 0.02 or greater will be considered positive (failed) and result in termination.
c) Alcohol Use: No employee may report for duty or remain on duty when his/her ability to perform assigned functions is adversely affected by alcohol or when his/her breath alcohol concentration is 0.04 or greater. An employee with an alcohol concentration of 0.02 or greater, but less than 0.04, will be removed from duty for 24 hours and subject to return-to-duty testing. No employee shall use alcohol during working hours. No employee shall use alcohol within four (4) hours of reporting for duty. Violations of this provision is prohibited and will subject the employee to disciplinary action, including removal from duty and/or termination.
d) Compliance with Testing Requirements: All employees are subject to controlled substance testing and breathe alcohol testing. Any employee who refuses to comply with a request for testing, who provides false information in connection with a test or who attempts to falsify test results through tampering, contamination, adulteration, or substitution shall be removed from duty immediately and may result in terminated. Refusal to submit to a test can include an inability to provide a urine specimen or breathe sample without a valid medical explanation, as well as a verbal declaration, obstructive behavior or physical absence resulting in the inability to conduct the test.
e) Positive Controlled Substance and/or Alcohol Test: Positive (failed) tests will result in immediate removal from duty and may result in termination.
f) Voluntary Admittance: All employees who feel they have a problem with controlled substances and/or alcohol may request voluntary admission to a rehabilitation program. Requests must be submitted to the General Manager or his/her designee for review. Program costs and subsequent controlled substance and/or alcohol testing costs will be paid by the employee. An employee completing a rehabilitation program must agree to and sign a Return-To-Duty Agreement, and pass a return-to-duty controlled substance and/or alcohol test. A positive result on the return-to-duty test will result in termination from employment. Participants in the rehabilitation program may use FMLA leave, accumulated sick leave, vacation and floating holidays, if any.

Notifying The District of Criminal Drug Conviction: Pursuant to the "Drug Free Workplace Act of 1988," any employee who fails to immediately notify the District of any criminal controlled substance statute conviction shall be subject to disciplinary action, up to and including termination of employment.

Proper Application of the Policy: The District is dedicated to assuring fair and equitable application of this Substance Abuse Policy. There-fore, supervisors are required to administer all aspects of the policy in an unbiased and impartial manner. Any supervisor who knowingly disregards the requirements of this policy, or who is found to deliberately misuse the policy with respect to his/her subordinates shall be subject to disciplinary action, up to and including termination of employment.

Testing for Prohibited Substances: Analytical urine controlled substance testing and breathe testing for alcohol will be conducted. All employees shall be subject to testing prior to employment, post-accident, and for reasonable suspicion. In addition, all employees will be tested prior to returning to duty after failing a controlled substance and/or alcohol test

Testing shall be conducted in a manner to assure a high degree of accuracy and reliability using techniques, equipment, and laboratory facilities which have been approved by the Department of Health and Human Services (DHHS), including split-sample testing.

An initial controlled substance screen will be conducted on each specimen. For those specimens that are positive, a confirmatory Gas Chromatography/Mass Spectrometry (GC/MS) test will be performed.

Tests for alcohol concentration will be conducted utilizing an approved Evidential Breath Testing device (EBT) operated by a trained Breath Alcohol Technician (BAT) at a facility approved by the Department of Health and Human Services (DHHS). If the initial test indicated an alcohol concentration of 0.02 or greater, a confirmation test will be performed to confirm the result of the initial test. An employee who has a confirmed alcohol concentration of 0.02, but less than 0.04 will be removed from his/her position for at least twenty-four (24) hours unless a retest results in an alcohol concentration of 0.02 or less. An alcohol concentration of 0.04 or greater will be considered a positive alcohol test and in violation of this policy.

Any employee who has a confirmed positive controlled substance or alcohol test will be removed from his/her position, and/or terminated.

The District affirms the need to protect individual dignity, privacy and confidentiality throughout the testing process.

Circumstances under Which Employees May Be Tested:

a) Pre-Employment Testing: All job applicants for any position who have been offered District employment, including current employees who promote, demote or transfer to another position, shall undergo urine controlled substance testing prior to employment. Receipt of a satisfactory test result is required prior to employment and failure of a controlled substance test will disqualify the candidate from further consideration for employment. Probationary

employees who receive a positive alcohol and/or substance abuse test will fail to complete the District's probationary period.

b) Reasonable Suspicion Testing: All employees will be subject to urine and/or breathe testing when there is a reason to believe that controlled substances or alcohol use is adversely affecting job performance. A reasonable suspicion referral for testing will be made on the basis of documented objective facts and circumstances which are consistent with the effects of substance abuse. Examples of reasonable suspicion include, but are not limited to, the following:
    1. Adequate documentation of unsatisfactory work performance or on-the-job behavior.
    2. Physical signs and symptoms consistent with prohibited substance use.
    3. Occurrence of a serious or potentially serious accident that may have been caused by human error.
    4. Fights (i.e., physical contact), assaults and flagrant disregard or violations of established safety, security, or other operational procedures.

    Reasonable-suspicion determinations will be made by a supervisor who is trained to detect the signs and symptoms of controlled substance and alcohol use and who reasonably concludes that an employee may be adversely affected or impaired in his/her work performance due to prohibited substance abuse or misuse.

c) Post-Accident Testing. Employees will be required to undergo controlled substance and/or breathe alcohol testing if they are involved in an accident with a District vehicle that results in a fatality. This includes all employees who are on duty in the vehicles. In addition, a post-accident test will be conducted if an accident results in injuries requiring transportation to a medical treatment facility; or where one or more vehicles incurs disabling damage that requires towing from the site; or the employee receives a citation under State or local law for a moving traffic violation arising from the accident.

    Following an accident, the employee will be tested as soon as possible, but not to exceed eight (8) hours for alcohol and thirty-two (32) hours for controlled substances. Any employee who leaves the scene of the accident without appropriate authorization prior to submission to controlled substance and alcohol testing will be considered to have refused the test and be subject to termination of employment. Post-accident testing of employees will include not only the operations personnel, but any other employees whose performance could have contributed to the accident.

d) Return-to-Duty Testing: All employees who previously tested positive for a controlled substance or alcohol test must test before returning to duty.

e) Employee Requested Testing: Any employee who questions the result of a required controlled substance test may request that an additional test be conducted. This additional test may be conducted at the same laboratory or at a different DHHS certified laboratory. The test must be conducted on the split sample that was provided at the same time as the original sample. All costs for such testing are to be paid by the employee unless the second test invalidated the original test. The method of collecting, storing, and testing the split sample will be consistent with the procedures set forth by the DHHS certified laboratory. The employee's request for a retest must be made within 72 hours of notice of the initial test result. Requests after 72 hours will only be accepted if the delay was due to documentable facts that were beyond the control of the employee.

f) Records Retention. The District shall maintain complete records of alcohol and/or controlled substance test results for each employee in a secure location with controlled

access. Employee records are confidential and will be available to any state or local officials with regulatory authority over the District or any of its employees only. Records will be kept for a minimum of five (5) years regarding the following: employee alcohol tests; positive controlled substance tests; documentation on refusals to take alcohol or controlled substance tests; and, employee evaluations and referrals.

Return-to-Duty after Rehabilitation: If an employee is returned to duty following rehabilitation, he/she must agree to and sign a Return-to-Duty Agreement, and pass a return-to-duty controlled substance and/or alcohol test. The cost of any rehabilitation and subsequent controlled substance and/or alcohol testing is borne by the employee and is on a one-time basis only. An employee will be immediately terminated from employment on the occurrence of a second verified positive test result. Employees may use accumulated sick leave, vacation, administrative leave, personal necessity leave, and/or floating holidays, if any, to participate in a rehabilitation program.

Test Related Time-Off Work Provisions: Any employee who is relieved from duty due to a positive drug or controlled substance test must use accumulated compensated leave (i.e., vacation, sick leave, administrative leave, personnel necessity leave or floating holidays, if any) during the regularly scheduled work time missed. If the employee has insufficient accumulated compensated leave to cover the regularly scheduled work time missed due to a positive alcohol or controlled substance test, such time shall be without pay. In the event there is a false positive test the District, upon verification, will compensate the employee for any regularly scheduled work time missed as a result thereof.

Contact Person: Any questions regarding this policy should be directed to the following District representative:
Name: Karli Frye
Title: General Administrator
Address: 205 Ash Valley Rd Adin, CA 96006
Telephone: (530) 299-3110

Definitions:

a) Accident - An unintended happening or mishap where there is loss of human life (regardless of fault), bodily injury or significant property damage.
b) Alcohol - The intoxicating agent in beverage alcohol, ethyl alcohol or other low molecular weight alcohol including methyl or isopropyl alcohol.
c) Alcohol Concentration - The alcohol in a volume of breath expressed in terms of grams of alcohol per 210 liters of breath as indicated by an evidential breath test under this policy (e.g., 0.02 means 0.02 grams of alcohol in 210 liters of expired deep lung air).
d) Alcohol Use - Consumption of any beverage, mixture, or preparation, including any medication containing ethyl alcohol.
e) Breath Alcohol Technician (BAT) - A person trained to proficiency in the operation of the Evidential Breath Testing (EBT) device that the technician is using in the alcohol testing procedures. BAT's are the only qualified personnel to administer the EBT tests.
f) Collection Site - A place designated by the District where individuals present themselves for the purpose of providing a specimen of urine and/or breathe.
g) Confirmation Test - For alcohol testing, a second test following a screening test with a result of 0.02 or greater, that provides quantitative data of alcohol concentration. For controlled

substances testing this is a second analytical procedure to identify the presence of a specific drug or metabolite which is independent of the screen test and which uses a different technique and chemical principle from that of the screen test in order to ensure reliability and accuracy. (Gas chromatography/mass spectrometry (CG/MS) is the only authorized confirmation method of cocaine, marijuana, opiates, amphetamines, and phencyclidine.)

h) Controlled Substance (Drug) Test - A method of detecting and measuring the presence of alcohol and other controlled substances, whether legal or illegal, in a person's body. A controlled substance test may be either an initial test or confirmation test. An initial controlled substance test is designed to identify specimens having concentrations of a particular class of drug above a specified concentration level. It eliminates negative specimens from further consideration.
i) Covered Employee - A person, including a volunteer or applicant, who performs a function for the District.
j) District – Southern Cascades Community Services District.
k) District Time - Any period of time in which an employee is actually performing, ready to perform, or immediately available to perform any District functions.
l) Driver - Any person who operates a motor vehicle for the District. This includes full time, regularly employed drivers; and casual, intermittent or occasional drivers.
m) Drug (Controlled Substance) Metabolite - The specific substance produced when the human body metabolizes (changes) a given drug (controlled substance) as it passes through the body and is excreted in urine.
n) Evidential Breath Testing Device (EBT) - The device to be used for breath alcohol testing.
o) Post-Accident Alcohol and/or Controlled Substance testing - Testing conducted after accidents on employees whose performance could have contributed to the accident. For drivers this is determined by a citation for a moving traffic violation and for all fatal accidents even if the driver is not cited for a moving traffic violation. See "Accident."
p) Pre-Employment Controlled Substance testing - Testing conducted after an offer to hire has been extended to a job applicant, but before actually performing District functions as an employee. Also required when employees transfer to another position.
q) Prohibited Drugs (Controlled Substances) - Marijuana, cocaine, opiates, amphetamines, or phencyclidine.
r) Prohibited Substances - Synonymous with drug abuse and/or alcohol misuse or abuse.
s) Reasonable Suspicion Alcohol and/or Controlled Substance Testing - Testing conducted when a trained supervisor observes behavior or appearance that is characteristic of alcohol misuse or controlled substance abuse.
t) Refuse to Submit (to an Alcohol and/or Controlled Substance Test) - Failure by an employee to provide an adequate breath or urine sample for testing without a valid medical explanation after that employee received notice of the requirement to be tested, or engages in conduct that clearly obstructs the testing process (i.e., verbal declarations, obstructive behavior or physical absence resulting in the inability to conduct the test).
u) Rehabilitation - The total process of restoring an employee to satisfactory work performance through constructive confrontation, treatment, and/or support groups to resolve personal, physical or emotional/mental problems which contributed to job problems.
v) Return-to-Duty Alcohol and/or Controlled Substance testing - Testing conducted when an employee who has violated the prohibited alcohol or controlled substance conduct standards returns to performing duties.

w) Return-to-Duty Agreement - A document agreed to and signed by the General Manager or his/her designee and the employee that outlines the terms and conditions under which the employee may return to duty after having had a verified positive controlled substance test result, or an alcohol concentration of 0.04 or greater on an alcohol test.
x) Screening (Initial) Test - An analytical procedure in alcohol testing to determine whether an employee may have a prohibited concentration of alcohol in their system. In controlled substance testing, it is an immunoassay screen to eliminate negative urine specimens from further consideration
y) Supervisor - Foreman, Superintendent, Division Manager or General Manager who has had one hour of training on the signs and symptoms of alcohol abuse and an additional hour training on the signs and symptoms of controlled substance abuse
z) Vehicle – Any automobile owned by the District.

Procedures:

Reasonable Suspicion Testing:

a) An employee who may possibly be under the influence of alcohol and/or controlled substances is observed by a supervisor. Any employee may identify someone suspected of alcohol and/or controlled substance abuse to any supervisor (employees should realize, however, that it is against District policy to make false or malicious statements about other employees and doing so can result in disciplinary action). The supervisor must witness first-hand the employee's signs and symptoms.
b) The supervisor is then obligated to ensure that the matter is immediately investigated. If possible, two supervisors determine (independently or together) that the employee in question may be under the influence of alcohol and/or controlled substances.
c) When the supervisor(s) suspect and believe that the employee may be under the influence of alcohol and/or controlled substances, the employee is then immediately suspended from duty (with pay) and driven by a District employee (or others designated) to the District specified collection site. Because of a testing facility requirement, the employee in question must show proof of identification, such as a driver's license photo or state-issued photo identification card. Whenever practical, the General Manager (or his/her designee) should be notified in advance of the employee being taken to the collection site.
d) At the collection site, the employee will be required to submit a urine sample in the event that controlled substances are suspected, or a breath sample in the event that alcohol intoxication is suspected by the on-duty technician. Care will be taken to provide the employee with maximum privacy without compromising the integrity of the sample.
e) The District will take precautions to prevent the employee being tested from going back to work and driving their own car home if any of the tests are positive. Instead, the employee will be taken home from the collection by a District employee (or others designated).
f) The employee whose test results are negative (0.02 alcohol concentration or less) will be reinstated immediately. The employee whose confirmation test results indicate an alcohol concentration greater than 0.02 but less than 0.04, will not be permitted to return to duty or perform any functions for twenty-four (24) hours after administration of the test and will be subject to return-to-duty testing. The employee whose confirmation test result indicates an alcohol concentration of 0.04 or greater for alcohol will be removed from duty and/or terminated. Employees having voluntarily admitted to a rehabilitation program will be subject to return-to-duty testing and must agree to and sign a Return-To-Duty Agreement.

Failure or refusal to submit to return-to-duty testing will result in the employee's termination of employment.

g) The employee whose controlled substance test results are verified negative will be reinstated immediately. The employee whose controlled substance test is verified positive will be removed from duty and/or terminated. Employees having voluntarily admitted to a rehabilitation program will be subject to return-to-duty testing and must agree to and sign a Return-To-Duty Agreement. Failure or refusal to submit to return-to-duty testing will result in the employee's termination of employment.

Post- Accident:

a) The employee notifies a supervisor that an accident has occurred.
b) The supervisor determines that the circumstances of the accident warrant a post-accident test when a citation was issued or a fatality occurred. Thereafter, the supervisor directs the employee to immediately go to the collection site for alcohol and controlled substance testing. Because of a testing facility requirement, the employee in question must have proof of identification, such as a driver's license photo or state-issued photo identification card.
c) At the collection site, the employee will be required to submit a urine sample for controlled substances and a breath sample for alcohol testing to the on-duty technician. Care will be taken to provide the employee with maximum privacy without compromising the integrity of the sample.
d) The General Manager (or his/her designee) will be notified that an accident has occurred and that the employee was instructed to go to the collection site.
h) The employee whose test results are negative (0.02 alcohol concentration or less) will be released to return to work. The employee whose confirmation test results indicate an alcohol concentration greater than 0.02 but less than 0.04, will not be permitted to return to duty for 24 hours after administration of the test and will be subject to return-to-duty testing. The employee whose confirmation test result indicates an alcohol concentration of 0.04 or greater will be removed from duty and/or terminated. Failure or refusal to submit to return-to-duty testing will result in the employee's termination. Employees having voluntarily admitted to a rehabilitation program will be subject to return-to-duty testing and must agree to and sign a Return-To-Duty Agreement. Failure or refusal to submit to return-to-duty testing will result in the employee's termination of employment.
i) The employee whose controlled substance test results are verified negative will be released to return to work. The employee whose controlled substance test is verified positive will be removed from duty and/or terminated. Employees having voluntarily admitted to a rehabilitation program will be subject to return-to-duty testing and must agree to and sign a Return-To-Duty Agreement. Failure or refusal to submit to return-to-duty testing will result in the employee's termination of employment.

Return-To-Duty:

a) The employee notifies a supervisor than an accident has occurred. The supervisor determines that the circumstances of the accident warrant a post-accident test when a citation was issued or a fatality occurred. Thereafter, the supervisor directs the employee to immediately go to the collection site for alcohol and controlled substance testing. Because of a testing facility requirement, the employee in question must have proof of identification, such as a driver's license photo or state-issued photo identification card.

b) At the collection site, the employee will be required to submit a urine sample for controlled substances and a breath sample for alcohol testing to the on-duty technician. Care will be taken to provide the employee with maximum privacy without compromising the integrity of the sample.
c) The General Manager (or his/her designee) will be notified that an accident has occurred and that the employee was instructed to go to the collection site.
d) The employee whose test results are negative (0.02 alcohol concentration or less) will be released to return to work. The employee whose confirmation test results indicate an alcohol concentration greater than 0.02 but less than 0.04, will not be permitted to return to duty for 24 hours after administration of the test and will be subject to return-to-duty testing. The employee whose confirmation test result indicates an alcohol concentration of 0.04 or greater will be removed from duty and/or terminated. Employees having voluntarily admitted to a rehabilitation program will be subject to return-to-duty testing and must agree to and sign a Return-To-Duty Agreement. Failure or refusal to submit to return-to-duty testing will result in the employee's termination.
j) The employee whose controlled substance test results are verified negative will be released to return to work. The employee whose controlled substance test is verified positive will be removed from duty and/or terminated. Employees having voluntarily admitted to a rehabilitation program will be subject to return-to-duty testing and must agree to and sign a Return-To-Duty Agreement. Failure or refusal to submit to return-to-duty testing will result in the employee's termination of employment.

Specimen Collection of Strange and/or Unrecognizable Substances:

a) An employee is observed with a strange and/or unrecognizable substance.
b) The supervisor, in the presence of a witness, places the strange and/or unrecognizable substance into a clear plastic bag. The bag is sealed, labeled and signed by both the supervisor and the witness.
c) An incident report is written by the supervisor and signed by both the supervisor and the witness.
d) The plastic bag containing the specimen and a copy of the incident report is taken to the collection site for transportation to the laboratory for analysis.

Deviations from Procedures: Unless otherwise provided in Southern Cascades Community Services District policies, deviations from the foregoing procedures shall not invalidate the results of any prohibited substance tests verified positive by a DHHS certified laboratory.

_____

Employee's Name Printed Date

Prescription Drug Use Form **Policy #: 6122.0**

Date Adopted: 12/09/2019

I, the undersigned, declare that I am taking the prescription or non-prescription drug _____ _____, which has the following adverse side effects which may impair my ability to perform my duties:_____
_____
_____
_____

Duration I expect to be taking the medication: _____

Employee Signature:_____ Date:_____

Supervisor comments or any possible accommodations:_____
_____
_____
_____
_____

Supervisor Signature:_____ Date:_____

Policy: Tobacco and E-Cigarettes **Policy #: 6122.1**

Date Adopted: 12/09/2019

Date Revised:

Policy

SCCSD is committed to maintaining a healthy, comfortable, clean and productive environment for staff and the public. Rules about the use of tobacco on SCCSD premises are designed to balance the desires of tobacco and/or e-cigarette users and non-users, to comply with California State law and to comply with Modoc County ordinances.

1) No tobacco use of **any form** inside SCCSD buildings or vehicles.
2) No e-cigarette use inside SCCSD buildings or vehicles.
3) Smoking is permitted in outdoor areas, 20' from doors, windows, vehicles. No smoking is allowed within 50' of the aircraft, fuel storage areas, staff parking area and use must not impact other workers sharing the workplace. Butts must be secured by the user. Butts cannot be left on the grounds.
4) Chewing is permitted in outdoor areas, 20' from doors, windows, vehicles. Use must not impact other workers sharing the workplace. Spit and discarded chew must be secured by the user. These items cannot be left on the grounds.
5) Use of these products is permitted during breaks only, never during patient contacts.
6) SCCSD workplace shall be free of smoke, vapor, spit containers, and other waste products of smoking, chewing tobacco, and electronic cigarettes.
7) No butts, plugs, or spit containers shall be used or disposed of in buildings or vehicles, nor left visible on the grounds.
8) The employee is responsible for the safe disposal of waste in outdoor trash dumpsters only. Employees will ensure spit containers will not leak. Employees will ensure fire danger has been mitigated.
9) Visitors and students of SCCSD shall conform to the same rules.
10) The designated smoking area is the gravel parking area on the east side of the facility.

All persons share the responsibility for adhering to and enforcing these requirements.

Acceptable Computer Use Form **Policy #: 6123.0**

Date Adopted: 12/09/2019

I understand that all electronic communications systems and all information transmitted by, received from, or stored in these systems are the property of SCCSD. I also understand that these systems are to be used for Company-related purposes and only incidental personal use, and that I have no expectation of privacy in connection with the use of this equipment or with the transmission, receipt, or storage of information in this equipment.

I agree not to use a code, access a file, or retrieve any stored communication unless authorized. I acknowledge and consent to SCCSD monitoring my use of this equipment at any time and at its discretion. Such monitoring may include printing up and reading all email entering, leaving, or stored in these systems, tracking Internet usage, and listening to my voicemail messages in the ordinary course of operations.

Name of Employee (please print):_____

Employee's Signature:_____ Date:_____

Name of SCCSD Witness (please print):_____

Signature of SCCSD Witness:_____ Date:_____

Policy: Computer Use **Policy #: 6123.0**

Date Adopted: 12/09/2019

Date Revised:

Policy

Southern Cascades Community Services District provides hardware, software and telecommunications equipment and internet access in order to accomplish administrative, business, educational and documentation tasks that support the SCCSD mission.

SCCSD policy is also intended to apply to employee's usage of their personal equipment (such as laptops, cell phones, cameras, etc.) that may be used on SCCSD property, within its vehicles, or during any SCCSD activity.

This policy is meant to set forth guidelines regarding access to and disclosure of information / messages sent or received by SCCSD employees using the system. This policy may be changed at any time. The Internet, email, phone, mail or any communications or information system of SCCSD is not to be used any way that may be disruptive, offensive to others, or harmful to morale. Violators of this policy will be subject to disciplinary action, up to and including discharge, for any violation reasonably believed to have been committed.

SCCSD treats all computer files, including email sent or received, as Company-related information. SCCSD has the capability and reserves the right, with or without notice, to access, monitor, review, copy, and/or delete any computer files, including email sent or received, and all web site communications and/or transactions. If employees make incidental use of the computer system for personal files or email, they should not expect personal files or email to be protected from review by the Company. Accordingly, employees should not use computer systems to create or transmit any information they wish to be kept private. Because SCCSD is sensitive to the legitimate rights of employees, every effort will be made to guarantee that workplace monitoring is done in an ethical and respectful manner.

Use of the computer system to engage in any communications that are in violation of this or any Company policy is strictly prohibited. SCCSD prohibits the display or transmission of sexually explicit images, messages, cartoons, or any transmission or use of communications that contain profane or offensive language, ethnic slurs, racial epithets, or anything that may be construed as harassment or disparagement of others based on their race, color, national origin, gender, age, disability, religion or political beliefs.

SCCSD computer systems shall not be used to solicit for commercial ventures, religious or political causes, or outside organizations that are not authorized by the SCCSD.

SCCSD prohibits the unauthorized use of software. The District expects its employees to conduct themselves responsibly in this regard. Employees should refrain from making or using unauthorized copies of software programs.

Upon voluntary or involuntary termination of services with SCCSD, employees may not take any computer-related programs, files or materials for personal possession. Again, all computer- related materials are the property of the Company. Upon termination, SCCSD may shut off the former employee's computer systems.

Workstations and all related equipment are provided for the performance of tasks that are part of the User's job functions. User access to system controls and settings shall be limited to that which is necessary to perform job responsibilities. The Network Administrator and/or Designee(s) shall be responsible to monitor and track acceptable computer use.

By using SCCSD technology resources, Users consent to monitoring of workstation uses, acknowledging there is no expectation of privacy.

Appropriate recreational use in the living quarters, after workday tasks and within SCCSD policy, is permitted within the 24-hour shift. This includes Internet use, email, and educational programs installed by Network Administrator.

User Responsibilities

- Maintain a confidential password for network and PCR access
- Maintain privacy of protected health information
- Log-off when the workstation is to be left unattended
- Report computer malfunctions as soon as possible to Network Administrator
- Use technology resources and equipment responsibly and within job description

Network Administrator Responsibilities

- Adhere to the above User responsibilities
- Assure performance of regular system and network maintenance tasks
- Provide for security of protected health and employee information
- Respond and troubleshoot computer malfunctions as soon as possible
- Maintain a working network that will support SCCSD mission

Prohibited Acts

- Unauthorized alteration, modification or copying of SCCSD software
- Installation of personal software on a SCCSD computer
- Unauthorized changes to computer and/or network settings
- Use of another employee's password to gain unauthorized access
- Solicitation for commercial ventures, religious, or political causes
- Reading, copying, altering or deleting another employee's computer files
- Viewing or transmission of threatening, obscene or pornographic material

- Acts that will interfere with normal operation of computers, terminals or networks
- Violation of any Federal, State or County law or ordinance, including copyrighted material

Policy: Computer Security **Policy #: 6124.0**

Date Adopted: 12/09/2019

Date Revised:

Policy

SCCSD shall implement physical safeguards for all workstations from which Electronic Protected Health Information (PHI) may be accessed. Management shall oversee the implementation of physical safeguards as deemed appropriate in order to restrict access to workstations that access electronic protected health information, so that only authorized Users may access those workstations.

- Users shall be given passwords to access the system
- Users must be logged off whenever the workstation is left unattended

Transmission Security
SCCSD shall implement and maintain technical security mechanisms to guard against unauthorized access to Electronic Protected Health Information that is being transmitted over an electronic communications network.

Integrity controls such as firewall, anti-virus and anti-spyware shall be kept current. PHI shall be encrypted whenever deemed appropriate.

Sanitation of Computer Hard Drives
Any computer that is removed from use must have the hard drive sanitized prior to being declared surplus and re-distributed.

Computers that do not contain protected health information or personal employee information, may be sanitized by file deletion.

Computers that do contain protected health information or personal employee date, must be overwritten so that meaningful information cannot be recovered from a hard drive. Qualified software must be used to properly overwrite the hard drive. There may be situations where the nature of the information is such that the preferred course of action is to destroy the hard drive. If malfunctions of the hard drive preclude overwriting, the hard drive should be destroyed.

Software that came installed on surplus computers may be left in place. Additional software purchased by the Company must be removed to ensure that any license(s) purchased by Provider and its subsidiaries are not inappropriately used.

Documentation of sanitation procedures shall be maintained with inventory files.

Policy: Identity Theft **Policy #: 6125.0**

Date Adopted: 12/09/2019

Date Revised:

Policy

The Fair and Accurate Credit Transactions Act (FACTA) also known as Red Flag Rules requires organizations subject to the legislation implement red flag procedures to detect, prevent and mitigate identity theft in connection with customer accounts.

FACTA regulations primarily target financial institutions, and extend to the other groups who fit the definition of "Creditor", including agencies that maintain accounts that are subject to a reasonably foreseeable risk of identity theft.

Southern Cascades Community Services District does not issue credit cards or cash advances on behalf of customers.

Red flag detection and prevention associated with receiving credit card payments shall include:

- Verification of the identity of proposed credit card user for onsite and offsite sales
- Reporting of any suspected attempt at identity theft or misuse of a credit card
- Utilizing secure third party merchant services for credit card transactions
- Annual review of identity theft protection policies and procedures

Policy: Community Outreach **Policy #: 6126.0**

Date Adopted: 12/09/2019

Date Revised:

Policy

SCCSD will serve as a resource for the general public, community, and for other EMS agencies in Modoc and Lassen County, providing support that is appropriate within our area of expertise, knowledge and skills.

This will include teaching classes pertinent to EMS, performing safety standbys at public events, making presentations to special groups, participation in EMS drills, and other activities that promote the safety and well-being of our community.

Procedure

Management has the responsibility of overseeing and assisting with coordination of special events. Responsibility for specific programs may be delegated to SCCSD employees, along with clear communication of expectations. Employees with such delegated responsibilities are to work within SCCSD policy and procedure, reporting progress to management on a regular basis.

Staffing / distribution of teaching opportunities such as CPR or Continuing Education courses, special event standbys and other community outreach and public relations is to be as fair and equitable as possible, within required certifications and training level.

Policy: Records Retention & Destruction **Policy: 6127.0**

Date Adopted:

Date Revised:

Purpose

The purpose of this Policy is to establish a uniform system for the creation, maintenance, retention, preservation, retrieval, and lawful destruction of Southern Cascades Community Services District records.

This Policy is intended to:

1. Ensure compliance with California law;
2. Preserve records necessary for District operations, accountability, historical value, audits, litigation, public transparency, and governance;
3. Reduce unnecessary storage of obsolete paper and electronic records;
4. Provide a standard process for destroying records only when legally authorized.

California Government Code section 60201 allows a district's legislative body to adopt a records retention schedule by resolution if the schedule complies with Secretary of State guidelines, classifies records by category, and establishes a standard protocol for destruction or disposition.

Scope

This Policy applies to all District records, regardless of format, including:

- Paper records;
- Electronic files;
- Emails;
- text messages or instant messages related to District business;
- photographs, maps, plans, audio, video, databases, spreadsheets, and digital records;
- records stored on District systems, cloud platforms, personal devices, or third-party platforms when they relate to District business.

California's Public Records Act defines "writing" broadly to include handwriting, printing, photographs, email, facsimile, symbols, sounds, and other recorded communications, regardless of storage method.

Definitions

District Record - any writing or recorded information prepared, owned, used, received, or retained by the District that relates to the conduct of District business.

Official Record Copy - the single designated version of a record that must be retained for the applicable retention period.

Duplicate or Convenience Copy - a copy kept for reference, convenience, or distribution, where the official record copy is retained elsewhere.

Retention Period - the minimum period a record must be retained before it may be destroyed.

Legal Hold - a suspension of normal destruction due to litigation, claim, investigation, audit, Public Records Act request, subpoena, or other legal requirement.

Records Coordinator - the District officer or employee designated by the General Manager to administer this Policy.

Policy Statement

The District shall retain and dispose of records in accordance with this Policy and the attached Records Retention Schedule.

No District record may be destroyed unless:

1. The applicable retention period has expired;
2. The record is not subject to a legal hold, audit, investigation, claim, litigation, subpoena, or pending Public Records Act request;
3. Destruction is authorized under this Policy and applicable law;
4. Destruction is documented on a Records Destruction Log;
5. The Records Coordinator and General Manager approve the destruction; and
6. Where required, the Board of Directors has authorized destruction by resolution or has adopted a retention schedule authorizing the destruction process.

A District officer who willfully destroys, removes, alters, mutilates, or falsifies a public record without legal authorization may be subject to criminal penalties under Government Code section 6200.

Records That May Not Be Destroyed Except as Authorized by Law

The District shall not destroy records that are legally required to be preserved. Under Government Code section 60201, special districts may not destroy certain categories of records, including records relating to formation or reorganization of the district, meeting minutes of the legislative body, pending litigation or claims, pending Public Records Act requests, pending construction, non-discharged debt, real property title, non-discharged contracts, or records that have not fulfilled their administrative, fiscal, or legal purpose.

The following District records shall generally be retained permanently unless counsel confirms otherwise:

- District formation, organization, reorganization, annexation, detachment, boundary, and LAFCO records;

- Board meeting minutes;
- adopted ordinances, except repealed or invalid ordinances as permitted by law;
- adopted resolutions;
- real property deeds, easements, title documents, rights-of-way, encumbrances, and property acquisition records;
- records relating to outstanding District debt;
- records relating to ongoing contracts;
- final budgets, audits, and annual financial statements;
- adopted master plans, capital improvement plans, and major infrastructure records;
- records determined to have permanent historical value.

Public Records Act Requests

Records that are the subject of a pending California Public Records Act request shall not be destroyed until the request has been resolved. Government Code section 60201 specifically prohibits destruction of records subject to a pending CPRA request until the request has been granted or two years have elapsed after the District gave written notice that the request was denied.

The District should respond to requests for copies of records within the time required by the California Public Records Act. Government Code section 7922.535 generally requires an agency to determine within 10 days whether a request seeks disclosable public records in the agency's possession and to notify the requester of that determination.

Legal Holds

The General Manager, Records Coordinator, or District Counsel may issue a legal hold when records may be relevant to:

- litigation or threatened litigation;
- claims;
- audits;
- investigations;
- subpoenas;
- Public Records Act requests;
- construction disputes;
- employment disputes;
- regulatory inquiries;
- insurance claims.

When a legal hold is issued, normal destruction of affected records shall be suspended until the hold is released in writing.

Electronic Records and Email

Electronic records shall be retained based on their content, not their format. Emails, text messages, cloud documents, and digital files that document District business shall be retained for the same period as comparable paper records.

Routine transitory communications may be deleted when they no longer serve an administrative purpose, unless they are subject to a legal hold or Public Records Act request. Examples include duplicate meeting reminders, routine scheduling emails, spam, system notifications, and courtesy copies, provided they do not document District decisions, actions, approvals, financial matters, personnel matters, contracts, or policy.

Duplicate and Convenience Copies

Duplicate copies may be destroyed when they are no longer needed, provided the official record copy is retained for the full retention period.

Government Code section 60200 allows a special district's legislative body to authorize destruction or disposition of duplicate records when the original or a permanent photographic record is retained by an officer or department of the district.

Scanned Records

The District may scan paper records for storage and retrieval. Before destroying original paper records after scanning, the District should confirm that:

1. The scanned image is complete, accurate, legible, and accessible;
2. The electronic storage system reasonably protects against unauthorized alteration;
3. The record is not required by law to be retained in original paper form;
4. Destruction is consistent with this Policy, the retention schedule, and District Counsel's advice.

For permanent or legally sensitive records, the District should consult counsel before destroying originals.

Records Destruction Procedure

At least annually, the Records Coordinator may identify records eligible for destruction.

Before destruction, the Records Coordinator shall:

1. Confirm the record category and applicable retention period;
2. Confirm that the retention period has expired;
3. Confirm that no legal hold, audit, claim, litigation, subpoena, investigation, or Public Records Act request applies;
4. Prepare a Records Destruction Log;

5. Obtain written approval from the General Manager;
6. Obtain District Counsel review when required or advisable;
7. Destroy records in a secure manner appropriate to the sensitivity of the records.

Confidential records shall be shredded, securely deleted, or otherwise destroyed in a manner that protects personal, financial, attorney-client, personnel, medical, security, or other confidential information.

Records Destruction Log

The District shall maintain a permanent Records Destruction Log documenting:

- record category;
- description of records destroyed;
- inclusive dates;
- retention period;
- date of destruction;
- method of destruction;
- approving official;
- confirmation that no legal hold applied.

Responsibility

The Board of Directors shall adopt the Records Retention Schedule by resolution.

The General Manager shall implement this Policy and may designate a Records Coordinator.

The Records Coordinator shall maintain the retention schedule, coordinate annual record reviews, maintain destruction logs, and assist departments with compliance. If no Records Coordinator is designated, the General Manager shall carry out the duties of the Records Coordinator role.

All District officers, employees, consultants, and contractors who create or maintain District records shall comply with this Policy.

Review and Updates

The Records Coordinator and General Manager shall review this Policy and the Records Retention Schedule at least every five years, or sooner if required by changes in law, District operations, technology, or records management practices.

The California Secretary of State explains that a records retention schedule should identify records an agency creates and maintains, the required retention periods, and the disposition method, and that current schedules help ensure obsolete records are destroyed with proper authorization and in accordance with law.

Attachment A

Records Retention Schedule

“Permanent” means the District should preserve the record indefinitely unless District Counsel approves another legally permissible retention period.

Record Category	Description	Retention Period
District formation and organization records	formation documents, LAFCO filings, boundary maps, reorganization records	Permanent
Board meeting minutes	regular, special, emergency, adjourned meeting minutes	Permanent
Board resolutions	adopted resolutions	Permanent
Ordinances	adopted ordinances	Permanent, except repealed/invalid ordinances may be handled as allowed by law
Board agendas and agenda packets	agendas, staff reports, board packets, attachments	Permanent
Notices of meetings	Brown Act notices, special meeting notices	2 years
Audio/video recordings of Board meetings	recordings used to prepare minutes	1 year after minutes approved, unless designated permanent or subject to hold
Election records	notices, candidate filings, certificates, election correspondence	5 years, or longer if required by election law or county election official
Policies and procedures	adopted administrative, financial, HR, safety, procurement, and governance policies	Permanent while active plus 5 years after superseded

Record Category	Description	Retention Period
Budgets	adopted annual budgets and amendments	Permanent
Audits and financial statements	annual audits, audited financial statements	Permanent
General ledgers and journals	accounting ledgers, journals, trial balances	7 years
Accounts payable	invoices, warrants, check registers, purchase documentation	7 years
Accounts receivable	billing records, receipts, deposits	7 years
Payroll records	payroll registers, wage records, timesheets	7 years
Compensation, reimbursement, credit card, and travel records	employee compensation, expense reimbursements, District-paid credit cards, travel compensation records	7 years after date of payment
Bank records	bank statements, reconciliations, deposit slips	7 years
Grant records	applications, agreements, reimbursement claims, reports	7 years after grant closeout, or longer if grant terms require
Contracts and agreements	professional services, vendor contracts, MOUs, leases	Life of contract plus 7 years; do not destroy while contract is non-discharged
Public works construction records	bids, plans, specifications, change orders, pay estimates, notices, project correspondence	10 years after project acceptance; permanent for final plans/as-builts and major infrastructure

Record Category	Description	Retention Period
Unaccepted public works bids/proposals	unsuccessful bids and proposals for public works	At least 2 years
Patient Care Reports	EMS patient care records	10 years after date of service
Billing Records	all District billing records	10 years from date of service, date of final payment/denial, contract period end, or audit completion – whichever is later
Real property records	deeds, easements, rights-of-way, title, acquisition/disposition records	Permanent
Debt records	bonds, loans, financing documents, continuing disclosure	Permanent while debt outstanding plus 7 years after discharge; key final documents permanent
Claims and litigation	claims, pleadings, settlement documents, counsel correspondence, litigation files	Permanent for final judgments/settlements; other files 7 years after final resolution
Public Records Act requests	requests, correspondence, response letters, produced/withheld record logs	2 years after final response; longer if disputed or litigated
Personnel files	employment application, hiring records, evaluations, discipline, separation records	Duration of employment plus 7 years
Recruitment files	job postings, applications, interview notes, selection records	3 years after recruitment closes
Workers' compensation files	claims, medical restrictions, correspondence, settlements	Duration of claim plus 5 years; longer if counsel advises

Record Category	Description	Retention Period
Safety and OSHA records	injury logs, safety inspections, incident reports, training	5 years
Training records	required employee, ethics, harassment, safety, certification training	5 years after separation or superseded, whichever is later
Permits and licenses	District-issued or District-held permits, regulatory approvals	Life of permit/license plus 5 years; permanent for major infrastructure/regulatory approvals
Environmental records	CEQA documents, notices, mitigation records, environmental reports	Permanent for final CEQA/environmental determinations and mitigation records
Service specific operational records	service logs, maintenance records, inspections, compliance records	5–10 years depending on legal/regulatory requirements; permanent for system maps and major assets
Asset and infrastructure records	asset inventories, facility records, maintenance histories, as-builts	Life of asset plus 7 years; as-builts permanent
Insurance policies and claims	policies, certificates, claim correspondence	Policies permanent; claims 7 years after closure
Correspondence — policy or decision-making	correspondence documenting District decisions, approvals, interpretations, or policy	5 years; permanent if historically significant
Correspondence — routine administrative	scheduling, transmittals, routine requests, non-policy correspondence	2 years or until no longer needed
Email and electronic messages	retained according to content	Same as equivalent record category

Record Category	Description	Retention Period
Social media records	District posts, comments, messages relating to District business	2 years, or longer if policy, legal hold, PRA request, or historical value applies
Website content	official notices, agendas, policy postings, public announcements	2 years after removal; permanent for policy-level content
Maps, plans, GIS, and engineering drawings	final maps, utility maps, system plans, facility drawings	Permanent
Emergency management records	emergency plans, incident response records, disaster recovery records	Plans permanent while active plus 5 years; incident records 7 years
Duplicate/convenience copies	extra copies where official copy is retained	Until no longer needed
Drafts and notes	drafts not retained in ordinary course and not documenting final action	Until no longer needed, unless subject to hold or PRA request
Transitory records	spam, listservs, routine reminders, non-substantive messages	Until no longer needed

Attachment B

Records Destruction Log

Date Destroyed	Department	Record Category	Description	Inclusive Dates	Retention Period	Method of Destruction	Approved By	Legal Hold Checked
						Shred / secure delete / other		Yes / No

Policy: Public Records Request **Policy #: 6128.0**

Date Adopted: 09/15/2025

Date Revised:

Public Records Request Form
(California Public Records Act – Gov. Code § 7920.000 et seq.)

Requester Information

- **Name:** _____
- **Organization (if applicable):** _____
- **Mailing Address:** _____
- **City/State/ZIP:** _____
- **Phone Number:** _____
- **Email Address:** _____

Records Requested

Please describe the records you are requesting. Be as specific as possible, including dates, subjects, titles, or departments if known. The District may seek clarification if needed.

Description of Records:

_____

_____

_____

_____

Preferred Format

☐ Inspection at District Office
☐ Paper Copies (copying fees may apply)
☐ Electronic Copies (if available; actual media costs may apply)

Delivery Method

☐ Pick up in person
☐ Email (if electronic)
☐ Mail (postage costs may apply)

Acknowledgment

The District will respond to this request within 10 calendar days as required by the California Public Records Act. Some responses may require an extension of up to 14 additional days for unusual circumstances, with written notice. Fees may apply for copies or mailing.

Signature: _____ Date: _____

District Use Only

- Date Received: _____
- Response Due: _____
- Staff Assigned: _____
- Notes: _____

Policy: Public Records Request **Policy #: 6128.0**

Date Adopted: 09/15/2025

Date Revised:

Purpose

This policy establishes procedures for members of the public to access records of the Southern Cascades Community Services District ("District") in compliance with the California Public Records Act (CPRA**)**. The District is committed to transparency and accountability while balancing the need to protect records exempt from disclosure under law.

Right of Access

1. The public has a right to inspect or obtain copies of identifiable public records maintained by the District, except those exempt under the CPRA or other applicable law.
2. Records include any writing, regardless of physical form, that relates to the conduct of District business and is prepared, owned, used, or retained by the District.

Submitting a Request

1. **Format of Request**
    - Requests should be submitted in writing (email, letter, or District form), though oral requests will also be accommodated when possible.
    - Written requests are encouraged to ensure clarity and accurate response.
2. **Submission Channels**
    - **By Mail:** Southern Cascades CSD PO Box 239 Adin, CA 96006
    - **By Email:** General Manager: kfrye@southerncascades.org
    - **In Person:** At the District office during regular business hours.
3. **Content of Request**
    - Requests should reasonably describe identifiable records. Broad or vague requests may result in delays.
    - Requesters need not state the purpose of the request.

District Response

1. **Acknowledgment**
    - Within 10 calendar days of receiving a request, the District will determine whether the request seeks disclosable public records and notify the requester of its determination.
    - In unusual circumstances (as defined by CPRA), the District may extend this period by up to 14 additional days, with written notice to the requester.
2. **Production of Records**
    - Records will be made available promptly, within a reasonable time, considering the volume of records and staff workload.
    - Records may be inspected at the District office during regular business hours, or copies may be provided.

Fees

1. **Inspection**: No fee is charged for record inspection.
2. **Copies**: The District may charge the direct cost of duplication (e.g., per-page copy fees or actual cost of electronic media).
3. **Mailing Costs**: If applicable, the requester will bear the cost of mailing.

Exemptions

Certain records are exempt from disclosure under the CPRA, including but not limited to:

- Personnel, medical, or similar files where disclosure would constitute an unwarranted invasion of privacy or violation of privacy practices.
- Records of pending litigation or attorney-client privileged communications.
- Security-sensitive information (e.g., utility infrastructure, cyber systems).
  The District will cite the specific legal authority for any withheld records.

Appeals

If a request is denied, in whole or in part, the requester may submit a written appeal to the District's Board of Directors. The Board will review and respond in accordance with the law.

Records Retention

Public records are maintained and disposed of according to the District's Records Retention Schedule and applicable state law.

Contact Information

For questions regarding this policy or to submit a request:
Southern Cascades Community Services District
General Manager
PO Box 239
Adin, CA 96006
(530) 299-3110
kfrye@southerncascades.org

Policy: Finance Committee **Policy #: 6129.0**

Date Adopted: 09/15/2025

Date Revised:

Purpose

The Finance Committee ("Committee") is established by the Board of Directors ("Board") of the Southern Cascades Community Services District ("District") to provide oversight, analysis, and recommendations on matters related to the District's financial health. The Committee serves in an advisory capacity only; all final decisions are made by the full Board.

Authority

The Committee operates under the authority of the Board of Directors. The Committee does not have independent decision-making authority but may review, recommend, and report to the Board on financial matters.

Responsibilities

The Committee shall:

1. Review and provide recommendations on:
    - Annual operating and capital budgets.
    - Monthly and annual financial statements.
    - Long-range financial planning and reserves.
    - Annual audits and responses to audit findings.
    - Investment and cash management practices.
    - District fee schedules and financial policies.
2. Monitor fiscal performance against adopted budgets.
3. Recommend policies for financial transparency and accountability.
4. Report regularly to the Board on Committee activities.

Membership

1. **Board Members**:
    - The Committee shall consist of two members of the Board of Directors, appointed by the Board President and confirmed by the Board.

- This ensures less than a quorum of the Board participates, in compliance with the Brown Act.

2. **Staff Support**:
    - The General Manager and Chief Financial Officer shall provide staff support, reports, and technical expertise. Staff are non-voting.
3. **Community Members (Optional)**:
    - The Board may appoint up to two community members to serve in an advisory, non-voting capacity.
    - Community members must be residents or tax payers within the District.
    - Appointment is subject to an application and Board approval.

Meetings

1. **Brown Act Compliance**:
    - As a standing committee, the Finance Committee is subject to the Ralph M. Brown Act.
    - Meetings shall be publicly noticed, open to the public, and include an opportunity for public comment.
2. **Frequency**:
    - The Committee shall meet at least monthly, with additional meetings scheduled as needed.
3. **Agenda & Minutes**:
    - Agendas shall be prepared and posted in compliance with the Brown Act.
    - Minutes shall be prepared and maintained as official public records.

Reporting

The Committee shall report its findings and recommendations to the full Board of Directors at a regularly scheduled Board meeting.

Term & Dissolution

1. Board and community members serve one-year terms, renewable by Board action.
2. The Committee may be dissolved by majority action of the Board.

Limitations

- The Committee has no authority to:

    - Approve budgets or expenditures.
    - Enter into contracts.
    - Direct staff outside of Board authorization.
- The Committee's role is advisory only.

Policy: Employee Hiring and Pre-Employment Screening **Policy: 6201.0**

Date Adopted: 10/19/2026

Date Revised:

PURPOSE

The purpose of this policy is to establish consistent hiring and pre-employment screening standards to ensure that individuals employed by the District are qualified, appropriately credentialed, and meet all applicable employment, safety, regulatory, and contractual requirements.

SCOPE

This policy applies to all individuals seeking employment with the District, including:

- Administrative and office personnel.
- Non-Medical Transportation (NMT) and Non-Emergency Medical Transportation (NEMT) drivers.
- Emergency Medical Services (EMS) personnel, including ambulance drivers, Emergency Medical Technicians (EMTs), and paramedics.
- Other positions established by the District.

Screening requirements may vary depending on the position, assigned responsibilities, and applicable regulatory or contractual obligations.

POLICY STATEMENT

The District is committed to hiring qualified individuals who meet the standards necessary to safely and effectively perform their assigned duties.

All applicants selected for employment shall be subject to applicable pre-employment verification and screening requirements, which may include:

1. Employment Qualifications: Verification of education, experience, training, and other job-related qualifications.
2. Background Checks: Criminal background checks and other required screenings, as permitted or required by applicable law.
3. Drug and Alcohol Screening: Pre-employment drug and/or alcohol testing when required by law, regulation, contract, or District policy.
4. Licenses and Certifications: Verification of current and valid professional licenses, certifications, endorsements, and required credentials applicable to the position.
5. Driving Qualifications: Verification of driver's license status, driving history, and eligibility to operate District vehicles for positions involving driving duties.

6. Regulatory and Contract Requirements: Verification that applicants meet applicable federal, state, local, licensing, insurance, and service contract requirements.
7. Additional Position-Specific Requirements: Completion of any additional screenings, examinations, training, or qualifications required for the position.

HIRING AND EMPLOYMENT ELIGIBILITY

The District shall evaluate applicants based on their qualifications, ability to perform the essential duties of the position, and compliance with applicable employment requirements.

Employment offers may be contingent upon satisfactory completion of required pre-employment screenings and verification of job-related credentials.

No employee shall be permitted to perform duties requiring specific licenses, certifications, clearances, or other qualifications until the District has verified that the applicable requirements have been satisfied.

Failure to meet or maintain a required qualification may result in withdrawal of a conditional employment offer or other appropriate employment action, consistent with applicable law and District policy.

POSITION-SPECIFIC REQUIREMENTS

Administrative and Office Personnel

Administrative and office employees shall meet the qualifications established for their positions and complete applicable pre-employment screening requirements.

NMT/NEMT Drivers

Drivers shall meet all applicable requirements for transporting members, including required driver's licenses, driving record standards, background checks, drug screening, training, and any additional requirements established by the District's transportation contracts, insurance providers, or governing agencies.

EMS Personnel

EMS personnel, including ambulance drivers, EMTs, and paramedics, shall possess and maintain all licenses, certifications, training, and qualifications required for their assigned duties.

Personnel shall also satisfy applicable EMS regulations, medical oversight requirements, background screening standards, driving qualifications, and contractual obligations.

ONGOING EMPLOYMENT REQUIREMENTS

Employees are responsible for maintaining all licenses, certifications, and qualifications required for their positions throughout employment.

Employees shall promptly notify District management of any suspension, expiration, restriction, revocation, or other change that may affect their eligibility to perform assigned duties.

The District may conduct periodic verification, background rechecks, driving record reviews, or other screenings when required or permitted by law, contract, insurance requirements, or District policy.

EQUAL EMPLOYMENT OPPORTUNITY AND CONFIDENTIALITY

The District shall administer its hiring practices consistently and in accordance with applicable equal employment opportunity, nondiscrimination, privacy, and employment laws.

Screening results shall be reviewed in accordance with applicable legal requirements. Criminal history or other screening information shall not automatically disqualify an applicant unless disqualification is required by law or an applicable lawful standard.

Applicant and employee screening records shall be maintained confidentially, with access limited to authorized personnel.

RESPONSIBILITY AND ADMINISTRATION

District management shall be responsible for implementing and administering this policy, including:

- Establishing and verifying position-specific hiring qualifications.
- Coordinating required pre-employment screenings.
- Confirming compliance with applicable licensing, regulatory, insurance, and contractual requirements.
- Maintaining appropriate employment and credential verification records.
- Ensuring that employees meet applicable qualifications before performing assigned duties.

The District General Manager or designated management personnel may establish administrative procedures necessary to implement this policy.

POLICY COMPLIANCE

All hiring decisions and employment screening activities shall be conducted in accordance with this policy, applicable District personnel policies, and governing laws.

When applicable legal, regulatory, licensing, or contractual requirements establish stricter standards than this policy, those requirements shall govern.

EFFECTIVE DATE AND REVIEW

This policy shall become effective upon approval by the Board of Directors.

The policy shall remain in effect until amended or rescinded in accordance with District procedures.

Policy: Employee Health / Fitness Exams **Policy #: 6201.1**

Date Adopted: 12/09/2019

Date Revised:

Policy

Health Exam / DMV Physical
Required at hire. New employee must be certified sufficiently free of disease to perform assigned duties. DMV physical shall be used for ambulance staff.

If a new or existing employee fails the health /DMV exam, he or she will have one opportunity to retest, within a three-week period.

Failure of health / DMV physical will result in removal from ambulance schedule, and possible termination if the employee is not able to successfully complete this requirement.

Respiratory Protection Certification and Fit Test
Per Cal-OSHA, employees shall undergo medical screening and certification they can safely utilize respiratory protection, as outlined in SCCSD Respiratory Protection Plan.

Failure of medical screening for respiratory protection will result in removal from ambulance schedule and possible termination if the employee is not able to successfully complete this requirement.

Policy: Employee Immunizations **Policy #: 6201.2**

Date Adopted: 12/09/2019

Date Revised:

Policy

SCCSD is committed to employee, student and community health. To optimize employee protection from communicable disease and to help prevent the spread of disease to the patients we serve, the following immunizations and vaccinations are required for healthcare providers in SCCSD facilities.

1) **Hepatitis B Vaccine** – Series of three shots, followed by titer in 1-2 months, or proof
2) **Influenza Vaccination** – Annually by standing order by Modoc County Health Officer
3) **Measles, Mumps & Rubella (MMR)** – Two doses, 4 weeks apart, or proof
4) **Tetanus, Diphtheria, Acellular Pertussis (Tdap) Vaccine**- One booster or proof
5) **Tuberculosis Test** – Annually, or annual review of symptoms for positive skin test
6) **Varicella Vaccination** – Two doses, 4 weeks apart or proof

Current healthcare recommendations will be followed on titer testing.

SCCSD will provide for the above vaccinations and testing at no cost to employees. For staff with SCCSD provided health benefits, SCCSD will pay any associated charge after insurance.

EMS students providing patient care on the ambulance will provide proof of all requirements prior to start.

Immunization records will be maintained on file for all employees.

Policy: Employee Classification **Policy #: 6202.0**

Date Adopted: 12/09/2019

Date Revised:

Policy

Regular Full Time: Employees who have successfully completed the probationary period and are scheduled to regularly work one of the following schedules:

Office Staff: 30 hours per week or greater
Ambulance Staff: Two 24-hour shifts or more per week

Regular Part-Time: Employees who have successfully completed the probationary period and are scheduled to regularly work one of the following schedules:

Office Staff: < 30 hours per week
Ambulance Staff: less than 48 hours per week

Supplemental: Supplemental employees shall remain probationary and are scheduled to work on an as needed / as available basis.

Office and Ambulance Staff: As needed

Temporary: Employees hired for a specific term or project.

Emergency: Employees hired to meet a specific need in urgent circumstances, when customary hiring practices will be waived. This type of employment is strictly temporary.

Management/Administrative: Employees who have successfully completed the probationary period and are scheduled per agreement with the Board of Directors.

Policy: Outside Employment **Policy #: 6202.1**

Date Adopted: 12/09/2019

Date Revised:

Policy

An employee may hold a job with another employer as long as he/she satisfactorily performs his/her job responsibilities with SCCSD.

Employees with outside employment are held to the same performance standard, and are subject to the same scheduling priorities as those without outside or secondary employment.

If outside employment consistently interferes with employee performance, presents a conflict of interest, or has a potentially negative affect on SCCSD, the employee may be asked to reduce or discontinue outside employment as a condition of continued employment with SCCSD.

For reasons of safety, ambulance personnel shall be strongly discouraged from working an all-night shift for another employer, where sleep is not possible, followed by a SCCSD ambulance shift, without prior notification of Management.

Policy: Probationary Period **Policy #: 6203.0**

Date Adopted: 12/09/2019

Date Revised: 02/19/2024

Policy

All new and rehired employees are subject to a 90 day probationary period, commencing with their most recent date of hire. During this period the employee and SCCSD have an opportunity to determine whether further employment is appropriate.

SCCSD may extend the duration of the probationary period one or more times, at the discretion of management. Employment may be terminated at any time during or after the probationary period with or without cause and with or without notice.

An employee who successfully completes the probationary period will be notified that he or she has become a regular full-time or part-time employee of SCCSD.

Successful completion of the probationary period does not guarantee employment with SCCSD or change the at-will status of the employment relationship.

Supplemental employees shall remain on probationary status.

Policy: Professional Conduct **Policy #: 6204.0**

Date Adopted: 12/09/2019

Date Revised:

Policy

Employees are expected to conduct themselves in an appropriate manner as judged by a reasonable person. SCCSD encourages a congenial work environment of respect and professionalism and therefore provides the following examples of prohibited behavior at SCCSD. It is not possible to list all forms of behavior that are considered unacceptable in the workplace. However, a list of prohibited work-related conduct includes:

- Theft;
- Alcohol or illegal drugs in the workplace, while on duty, or while operating employer-owned vehicles or equipment;
- Fighting or threatening violence in the workplace;
- Insubordination or other disrespectful conduct;
- Sexual or other unlawful or unwelcome harassment;
- Explosives or firearms in the workplace;
- Excessive absenteeism;
- Unauthorized use of telephones, mail system, or other Company-owned equipment;
- Violation of personnel policies; and
- Unsatisfactory performance or conduct
- Unprofessional Conduct at all EMS scenes including contact with peer First Responders, law enforcement patients and family members.

This list is intended to be representative of the types of activities that may result in disciplinary action. It is not intended to be comprehensive and does not change the employment-at-will relationship between the employee and SCCSD.

Policy: Ready, Willing and Able / Corrective Action **Policy #: 6205.0**

Date Adopted: 12/09/2019

Date Revised:

Policy

Employees are expected to understand and demonstrate professional standards of job performance, interpersonal skills and conduct. Any employee not ready, willing or able to perform assigned duties in a positive and professional manner may be subject to corrective action.
Circumstances may sometimes warrant immediate termination, and SCCSD reserves the right to employ at will.

Examples of offenses which may prompt corrective action include but are not limited to: Failure to follow timekeeping rules, failure to arrive at work on time, unauthorized absence from work, carelessness in restock, decontamination, or station duties.

Offenses which may result in immediate termination include, but are not limited to: Proven theft or dishonesty, insubordination, disregard for company procedures or safety rules, intoxication, drinking, possession, use of or sale of alcoholic beverages or illegal drugs on SCCSD premises or in company vehicles, breaching patient confidentiality, improper performance of clinical care duties, falsification of records, involvement in two 'at fault' accidents in a three year period, unsafe vehicle operations, physical violence, threats, verbal abuse or intimidation directed to any personnel or patient, sexual or other harassment.

The above examples for conduct prompting possible corrective action or immediate termination are merely illustrations, not exclusive causes. Repeated misconduct in a variety of areas, or multiple or repetitive items of concern will be considered disregard for company procedures / professional standards of conduct and performance.

SCCSD at its option, may place an employee on a paid administrative leave pending investigation of misconduct.

Corrective action may be provided by any supervisory personnel and includes verbal counseling, written warnings or reprimands, suspension without pay, demotion, reduction in pay, and/or termination.

1) Verbal counseling: For relatively minor misconduct or performance problems, the supervisor shall counsel the employee verbally, specifying the unacceptable behavior and identifying what correction action or behavior is needed to meet a satisfactory level of performance.

   The employee shall be advised that failure to correct the behavior/performance will result in additional corrective action, up to and including termination of employment.

The employee's supervisor shall document the verbal counseling and employee and supervisor shall sign a notice of verbal counseling.

2) Written warning or reprimand: If the employee's behavior/performance does not improve sufficiently after verbal counseling, or if, in the discretion of the supervisor, the misconduct/unsatisfactory performance is deemed to warrant more severe corrective action, the employee may receive a written notice.

   The written notice shall specify the unacceptable behavior and identify what corrective action or behavior is required to meet a satisfactory level of performance.

   A copy of the written notice shall be maintained in the employee's personnel file.

   The employee may request removal of the written notice after two years.

3) Suspension: If the corrective action consists of an unpaid suspension, the supervisor shall notify the employee in writing of the corrective action. The notice shall:

   a. State the intended action, reason for it, and dates of suspension.
   b. State the misconduct upon which the corrective action is based.
   c. State that the employee has the right to respond verbally or in writing before the effective date of the action.
   d. State that the suspension will not be joined by paid time off.

4) Termination: If the proposed correction is termination, the employee shall be notified of such, and given the opportunity to discuss the proposed corrective action prior to its effective date. If at-will termination is utilized, no reason or misconduct shall be stated.

   The supervisor shall:

   a. State the intended action, reason for it, and effective date.
   b. State the misconduct upon which the corrective action is based.
   c. State that the employee has the right to respond verbally or in writing before the effective date of the action.
   d. State the employee's right to appeal the corrective action to the TCLS Board of Directors.

   SCCSD may place the employee on a paid administrative leave or an unpaid suspension pending the optional appeal hearing.

   The employee may appeal a determination for corrective action, in writing, within five (5) calendar days from the date of the written notice of action. The appeal shall be submitted to the Board Chairman, who will convene an emergency Board meeting or obtain consensus of the Board. Employee shall receive written notification of the decision to either uphold or modify the proposed corrective action within 5 calendar days.

Terminated employees shall receive payment for all wages and accrued and unused paid time off due them on the last day of employment.

Policy: Complaint Investigation and Resolution **Policy: 6206.0**

Date Adopted: 12/09/2019

Date Revised: 04/20/2026

Purpose

Southern Cascades Community Services District is committed to providing safe, professional, and high-quality services. This policy establishes a clear, consistent, and fair process for reporting, investigating, documenting, and resolving complaints related to:

- Billing and financial practices
- Personnel conduct and performance
- Delivery of services

This policy supports the District's commitment to accountability, transparency, and continuous improvement, and aligns with the District's Accident / Incident Investigation Policy, Progressive Disciplinary Action Policy, and Drug / Alcohol Prohibition Policy.

Scope

This policy applies to all SCCSD employees, including:

- Administrative staff
- EMS personnel
- Health transport staff
- Supervisors and management

This policy applies to all District-related activities, whether on-site or off-site.

Policy Statement

All complaints shall be promptly reported and thoroughly investigated to:

- Determine facts and root causes
- Identify corrective actions
- Ensure compliance with District policies and standards
- Improve service quality and reduce recurrence

Complaint investigations are fact-finding processes and are not disciplinary actions by themselves. Any disciplinary action will be handled separately in accordance with the Progressive Disciplinary Action Policy.

Reporting Requirements

1) **Employee Responsibility**

   Employees must:

   - Report complaints or concerns promptly to a supervisor or designated management representative
   - Cooperate fully with any investigation
   - Provide accurate and complete information

   Failure to cooperate may result in disciplinary action.

2) **Complaint Sources**

   Complaints may be received from:

   - Patients or clients
   - Members of the public
   - Employees
   - Contractors or partner agencies

Non-Retaliation

Employees will not be penalized or retaliated against for reporting complaints or participating in investigations in good faith. Retaliation is strictly prohibited.

Complaint Categories

1) **Billing Complaints**
   - Incorrect charges or invoices
   - Insurance or payment disputes
   - Unauthorized billing
2) **Personnel Complaints**
   - Unprofessional conduct
   - Policy violations
   - Communication or behavior concerns
3) **Service Delivery Complaints**
   - Delays or failure to respond
   - Quality of care or transport services

- Failure to meet operational standards

Investigation Process

1) **Initiation**

   A supervisor, manager, or Human Resources representative will initiate an investigation as soon as practicable after receiving a complaint.

2) **Evidence Collection**

   The investigation may include:

   - Statements from employees, complainants, and witnesses
   - Review of reports, billing records, dispatch logs, or patient care documentation
   - Audio, video, or vehicle data (if applicable)
   - Review of training records and prior incidents

3) **Employee Statements**

   Employees may be required to provide written statements. Refusal to cooperate may result in disciplinary action.

4) **Administrative Leave**

   An employee may be placed on administrative leave (with or without pay, as appropriate) if necessary to ensure safety, integrity of the investigation, or operational stability.

Determination and Findings

The investigation will assess:

- Whether the complaint is substantiated, partially substantiated, or unsubstantiated
- Contributing factors (procedural, human, environmental, or systemic)
- Compliance with District policies, protocols, and training

Resolution and Corrective Actions

Based on findings, actions may include:

- Billing corrections, refunds, or adjustments
- Additional training or coaching
- Policy or procedure changes
- Service recovery actions
- Referral to the Progressive Disciplinary Action process when appropriate

Communication

The District will provide a response to the complainant, as appropriate, including:

- Summary of findings (as permitted by confidentiality laws)
- Actions taken or planned

Documentation and Recordkeeping

All complaints, investigation materials, and findings will be documented and retained in accordance with District record retention requirements.

Records may be maintained separately from personnel files when appropriate.

Appeals

Complainants or employees may submit additional information related to the complaint within five (5) business days of notification of findings.

Confidentiality

All complaint investigations will be handled with respect for privacy and confidentiality to the extent permitted by law.

Questions

Employees with questions regarding this policy should contact their supervisor or the General Manager.

No Contractual Rights

Nothing in this policy creates a contract of employment or alters the at-will employment relationship.

Policy: Performance and Salary Review **Policy #: 6207.0**

Date Adopted: 12/09/2019

Date Revised: 05/09/2024

Purpose

The performance appraisal process provides a means for discussing, planning and reviewing the performance of each employee.

Performance appraisals influence salaries, promotions and transfers, and it is critical that supervisors and managers are objective in conducting performance reviews and in assigning overall performance ratings.

Eligibility

All full- and part-time employees are provided an annual performance review and consideration for merit pay increases as warranted.

Performance Review Schedule

Performance appraisals are conducted annually on the hiring anniversary of the employee. Each Southern Cascades Community Services District supervisor or manager is responsible for the timely and equitable assessment of the performance and contribution of subordinate employees.

Salary Increases

A performance appraisal does not always result in an automatic salary increase. The employee's overall performance and salary level relative to position responsibilities must be evaluated to determine whether a salary increase is warranted. Out-of-cycle salary increases must be preapproved by the department manager, and Administrator.

Salary Equity Reviews

A supervisor or manager may request an analysis of an employee's salary at any time the supervisor or manager deems appropriate. This request should be made to the HR manager or Administrator, who will review the employee's salary in comparison to other employees in comparable positions and within the guidelines of Southern Cascades Community Service District's compensation policy.

Processes

HR will establish the format and timing of all review processes. The completed evaluations will be retained in the employee's personnel file.

Employee performance is measured by applying performance standards directly to the performance expectations stated in the employee's job description. Performance evaluation methods shall include direct and indirect observations of employee performance.

Performance standards shall be clearly defined. Receiving a “Minimally Meets Standards” requires a plan for improvement. Receiving a “Below Standards” rating requires disciplinary action.

Salary increase requests must be supported by a performance appraisal for salary change processing. Supervisors or managers may not discuss any proposed action with the employee until all written approvals are obtained.

HR will review all salary increase/adjustment requests to ensure compliance with company policy and that they fall within the provided guidelines.

Policy: Make-Up Time Request **Policy #: 6208.0**

Date Adopted: 05/20/2024

Date Revised:

Employee Information

Name:	
Department:	
Position:	
Supervisor:	

Absence Details

Date(s) of Absence:	
Total Hours Missed:	
Reason for Absence:	

Proposed Make-Up Time

Acknowledgements

- ☐ I understand that make-up time must occur in the same workweek as the absence.
- ☐ I will not use lunch or break periods to make up time.
- ☐ I acknowledge that make-up time will be paid at my regular rate and does not qualify for overtime.
- ☐ I am requesting approval in advance, except in the case of an unexpected emergency.

Employee Signature: _____ Date: _____

Supervisor Approval: ☐ Approved ☐ Denied

Supervisor Signature: _____ Date: _____

Policy: Make-Up Time **Policy #: 6208.0**

Date Adopted: 05/20/2024

Date Revised:

Purpose

The purpose of this policy is to allow work time flexibility while still complying with applicable wage and hour laws.

Allowable Make-up Time

Nonexempt employees of Southern Cascades Community Services District may make-up time they are absent from the job in lieu of using leave benefits or leave without pay if absence and the make-up time worked both occur during the same workweek. The standard workweek begins on the Sunday of each week and concludes on Saturday.

Time may be made up by working extra time before or after the standard workday hours. Working through a lunch period or break period is not permitted for make-up time. Make-up time hours will be paid at the employee's regular rate and are not eligible for overtime.

Prior Approval

Except in unexpected emergencies, an employee must first obtain approval from his or her supervisor to use the make-up time option.

Policy: Paid Holidays with Unpaid Leave Option **Policy: 6209.0**

Date Adopted: 11/18/2024

Date Revised: 10/19/2026

Eligibility

Nonexempt hourly employees who fall into the below 4-Week Average Hour Tiers and who have worked for Southern Cascades Community Services District for at least 90 days are eligible to receive holiday pay.

Rehired Employees

An employee who is rehired more than one year after their last day worked for the District will be considered a new employee for purposes of this policy and must complete a new 90-day eligibility period before qualifying for holiday pay.

Employees rehired within one year of their last day worked will not be required to restart the 90-day holiday pay eligibility period, provided they had previously completed the required 90-day eligibility period before separation.

Holiday Pay Tiers

For the purposes of this policy, the 4-Week Average Hours Tiers are calculated on the previous four full weeks (Sunday – Saturday) of hours worked for the employee, prior to the Holiday.

4-Week Average Hours Tiers

Hours Worked	Hourly Holiday Pay Received
32 – 40 Hours	8 Hours
24 – 32 Hours	6 Hours
16 – 24 Hours	4 Hours

Paid Holidays

Southern Cascades Community Services District recognizes six paid holidays each year:

- New Year's Day
- Memorial Day
- Independence Day
- Labor Day
- Thanksgiving Day
- Christmas Day

Should a holiday fall on a weekend the holiday will not be observed.

Procedures

The following conditions apply to Southern Cascade Community Services District's holiday pay policy:

- Holiday pay will not be considered as time worked for the purpose of overtime calculations.
- Holiday pay is computed at the employee's current base rate of pay.
- If an employee is scheduled to work on an observed holiday, the employee will be paid his or her regular rate of pay plus holiday pay in accordance with the 4-Week Average Hours Tier applicable for said employee.
- Holidays will not be paid to employees on any type of unpaid leave.
- Holidays will not be paid to employees if they fall on a day in which the employee has a restricted work schedule.
- Holidays falling within an approved time off will be recorded as holiday pay.
- An employee must be present at work on his or her last scheduled day prior to the holiday and the first scheduled day after the holiday to receive holiday pay.

Time off without pay may be granted to employees who desire to observe a religious holiday that is not recognized by Southern Cascades Community Services District, provided there is no undue hardship to the district.

Policy: Stipend Request Form **Policy #: 6209.1**

Date Adopted: 05/20/2024

Date Revised:

Stipend Request Form

Name: _____ Date: _____

Stipend Type:

☐ EMS Call Response

Date Stipend Duty Completed: _____

To be completed by administrative staff	
Approved:_____ Date:_____	Stipend Amount : $_____

Policy: Stipend **Policy #: 6209.1**

Date Adopted: 05/20/2024

Date Revised:

Purpose

A stipend is a fixed small payment made to employees who participate in duties outside of their regular work assignments on a limited and/or varying basis. Stipends are issued at set rates in relation to the duty provided outside of the employees scope of work and are subject to change. Stipends are not intended to replace an employees regular duties.

Eligibility

Eligibility is determined by the Administrator after evaluation of multiple factors:

- Nature of duty to be completed by employee.
- Determination of duty to be categorized as outside of the employees regular scope of work.
- Necessity of duty to be completed.
- Accessibility of alternative employees to complete such duty if directly related to their scope of work.

Allowable Stipends

EMS Call Response	Rate: -$50.00- per call

Procedure

Employees who engage in allowable stipend duties are required to submit such duties for payment as follows:

- Employees must complete the Stipend Payment form and submit to the manager or administrator for approval.
- Employees are expected to submit the Stipend Payment form for approval as soon as practicable, no later than two days after the duty was performed.

Upon approval, all stipends payments will be issued in accordance with regular pay periods.

Policy: Sick Leave **Policy #: 6209.2**

Date Adopted: 07/21/2025

Date Revised: 08/18/2025

Employees eligible for sick leave are entitled to at least five days or 40 hours, whichever is more during a given calendar year.

Sick leave is allocated using an up-front policy making the full amount of sick leave for the year available immediately at the beginning of the calendar year, except for initial hires where 3 days or 24 hours will be made available for use by the 90th calendar day of employment and an additional 2 days or 16 hours will be made available for use by the 200th calendar day of employment. Any unused sick leave still available at the end of a calendar year will not carry over to the next calendar year.

You can take paid sick leave for yourself or a family member, it can be taken to recover from physical or mental illness or injury, to seek medical diagnosis, treatment, or preventative care. Family members include the employee's parent, child, spouse, registered domestic partner, grandparent, grandchild, sibling, or designated person.

Before sick leave can be taken, an employee must have completed a 90-day employment period.

For all employees classified as full-time, sick leave will be calculated by multiplying the employee's base rate of pay, by the number of hours the employee would have otherwise worked that day.

For all other employee classifications, sick leave will be paid on a pro-rated basis. For the purposes of this policy, the 4-Week Average Hours are calculated on the previous four full weeks (Sunday-Saturday) of hours worked for the employee prior to taking sick leave. Sick leave will be calculated by multiplying the employee's base rate of pay, by the number of hours allocated in the tier based on the employee's 4-Week Average Hours.

4-Week Average Hours Tier

Hours Worked	Hourly Sick Leave Received
32 – 40 Hours	8 Hours
24 – 32 Hours	6 Hours
00 – 24 Hours	4 Hours

At the end of employment with Southern Cascades, employees will not be paid out for any unused sick leave.

PHONE STIPEND AGREEMENT
Southern Cascades Community Services District (CSD)

This Phone Stipend Agreement ("Agreement") is entered into by and between Southern Cascades Community Services District (CSD) ("District") and the undersigned employee ("Employee").

Purpose

The purpose of this Agreement is to provide a stipend to employees who are required to use their personal mobile phones for District-related business.

Eligibility

Employees eligible for a phone stipend must:

- Have job duties that require regular and necessary use of a mobile phone for District business.
- Receive prior approval from their supervisor and/or District management.

Stipend Amount

The District agrees to provide a stipend in the amount of $23.25 per pay period, based on a 26-pay-period payroll cycle (equivalent to approximately $50.00 per month).

- This stipend is intended to offset business-related use of the Employee's personal mobile device.
- The stipend amount may be reviewed and adjusted periodically at the District's discretion.

Payment Terms

- The stipend will be paid automatically through payroll on a per pay period basis (26 pay periods annually).
- The stipend is considered taxable income unless otherwise specified by applicable law.

Employee Responsibilities

The Employee agrees to:

- Maintain an active personal mobile phone plan with sufficient voice, text, and/or data services.
- Use the phone in a professional manner consistent with District policies.
- Be reasonably available during work hours as required by their role.
- Comply with all applicable District policies, including confidentiality and data security requirements.

District Responsibilities

The District agrees to:

- Provide the agreed-upon stipend in a timely manner through payroll.
- Clearly communicate expectations regarding availability and usage.

Equipment and Liability

- The Employee is responsible for the purchase, maintenance, and replacement of their personal mobile device.
- The District is not liable for loss, damage, or wear and tear of the Employee's personal device.
- The District may require reasonable access to business-related communications as permitted by law.

Termination of Stipend

The stipend may be discontinued if:

- The Employee no longer meets eligibility requirements.
- Employment with the District ends.
- The District determines the stipend is no longer necessary.

At-Will Nature

This Agreement does not alter the at-will employment relationship between the Employee and the District.

Acknowledgment

By signing below, both parties acknowledge and agree to the terms outlined in this Agreement.

Employee Name: _____
Employee Signature: _____
Date: _____

Supervisor Name: _____
Supervisor Signature: _____
Date: _____

District Representative: _____
Signature: _____
Date: _____

Effective Date of Agreement: _____

Policy: Cell Phone Stipend **Policy: 6209.3**

Date Adopted: 05/18/2026

Date Revised:

Purpose

The purpose of this Agreement is to provide a stipend to employees who are required to use their personal mobile phones for District-related business.

Eligibility

Employees eligible for a phone stipend must:

- Have job duties that require regular and necessary use of a mobile phone for District business.
- Receive prior approval from District General Manager.

Stipend Amount

The District agrees to provide a stipend in the amount of $23.25 per pay period, based on a 26-pay-period payroll cycle (equivalent to approximately $50.00 per month).

- This stipend is intended to offset business-related use of the Employee's personal mobile device.
- The stipend amount may be reviewed and adjusted periodically at the District's discretion.

Payment Terms

- The stipend will be paid automatically through payroll on a per pay period basis (26 pay periods annually).
- The stipend is considered taxable income unless otherwise specified by applicable law.

Employee Responsibilities

The Employee agrees to:

- Maintain an active personal mobile phone plan with sufficient voice, text, and/or data services.
- Use the phone in a professional manner consistent with District policies.
- Be reasonably available during work hours as required by their role.
- Comply with all applicable District policies, including confidentiality and data security requirements.

District Responsibilities

The District agrees to:

- Provide the agreed-upon stipend in a timely manner through payroll.
- Clearly communicate expectations regarding availability and usage.

Equipment and Liability

- The Employee is responsible for the purchase, maintenance, and replacement of their personal mobile device.
- The District is not liable for loss, damage, or wear and tear of the Employee's personal device.
- The District may require reasonable access to business-related communications as permitted by law.

Termination of Stipend

The stipend may be discontinued if:

- The Employee no longer meets eligibility requirements.
- Employment with the District ends.
- The District determines the stipend is no longer necessary.

At-Will Nature

This Agreement does not alter the at-will employment relationship between the Employee and the District.

Policy: Unpaid Personal Leave **Policy: 6209.4**

Date Adopted: 05/18/2026

Date Revised: 10/19/2026

Purpose

The District recognizes that employees may occasionally need time away from work for personal reasons that are not covered by paid sick leave, legally protected leave, or any other District-provided paid time off benefit. Because the District does not provide vacation or general paid time off, approved personal time away from work under this policy will be unpaid.

Scope

This policy applies only to discretionary, unpaid personal leave requested by an employee for reasons that are not otherwise covered by applicable federal, state, or local law.

This policy does not apply to California paid sick leave, family or medical leave, pregnancy disability leave, disability-related accommodations, jury or witness duty, crime-victim leave, military leave, voting leave, school-related leave, or any other leave or accommodation protected by law. Requests for legally protected leave will be handled in accordance with applicable law and District policy.

This policy shall be administered together with the District's Time Off Request Policy, Sick Leave Policy, and Driver Availability Forms.

Requesting Unpaid Personal Leave

Employees are expected to submit requests for unpaid personal leave at least two weeks in advance whenever the need for leave is foreseeable. Requests should be submitted to the employee's manager via email and should include:

- the dates requested;
- the expected date of return;
- whether the request is for full-day or partial-day absence; and
- any other information needed to evaluate staffing coverage.

Examples:

- "Requesting the entire day off on August 10."
- "Requesting August 10–12 off."
- "I will be unavailable until 12:00 p.m."

- “I need to leave by 2:30 p.m.”
- “I am available for trips between 8:00 a.m. and 1:00 p.m. only.”

For planned leave, a request submitted the day or evening before a scheduled shift or trip is not considered adequate notice.

The District understands that advance notice may not always be possible. When the need for leave is not foreseeable, employees must notify their manager as soon as practicable.

NMT/NEMT drivers must submit requests via email directly to the HTS Manager. For a partial-day request, drivers must identify the specific hours they will be unavailable for trips.

Verbal requests, text messages, and requests made only to another employee do not satisfy this requirement.

Drivers do not need to request unpaid leave for days or times already recorded as unavailable on their current Driver Availability Form. Changes to regular driver availability must be submitted on an updated Driver Availability Form.

Approval of Leave

Unpaid personal leave is not automatically granted and must be approved in advance, except where otherwise required by law. For NMT/NEMT drivers, approval must be confirmed by email from the HTS Manager; sending a request does not mean the leave is approved. The HTS Manager will review requests based on legitimate business needs, including staffing levels, scheduling needs, workload, prior approved absences, and the timing and duration of the requested leave.

To help prevent short staffing, the District generally will not approve more than two employees for discretionary unpaid personal leave on the same day. If more than two employees request the same day off, management will consider factors such as the order in which requests were received, business needs, employee availability, and fairness in scheduling.

This staffing limit does not apply where leave is protected by law.

NMT/NEMT drivers may not independently exchange, transfer, or reassign assigned trips. Any trip changes must be coordinated through the HTS Manager.

Pay During Leave

Unpaid personal leave is unpaid. Employees will not receive wages for time not worked under this policy.

This policy does not create, accrue, or provide vacation, PTO, or paid personal time. California treats earned vacation/PTO as wages when an employer provides it, and “use it or lose it” vacation policies are not recognized by the Labor Commissioner; because the District does not provide vacation or PTO under this policy, no vacation or PTO is earned or accrued.

Paid Sick Leave Is Separate

Paid sick leave is governed by the Districts' California Paid Sick Leave policy and applicable law. Employees may use available paid sick leave for qualifying reasons under California law. Paid sick leave requests will not be denied solely because other employees are already scheduled off, and employees will not be required to provide two weeks' notice for unforeseeable sick leave.

California law allows employers to require reasonable advance notice for foreseeable paid sick leave, and notice as soon as practicable when the need is unforeseeable.

Job Protection and Return to Work

Approval of unpaid personal leave under this discretionary policy does not guarantee job protection unless job protection is required by applicable law. Employees are expected to return to work on the approved return date. Failure to return as scheduled or failure to communicate with the employee's manager may result in disciplinary action, up to and including termination, subject to applicable law.

No Retaliation

The District prohibits retaliation against employees for requesting or taking leave protected by federal, state, or local law. Employees who believe they have been denied protected leave or retaliated against for requesting leave should report the concern to management immediately.

Policy: Jury Duty Time Off **Policy #: 6209.5**

Date Adopted: 02/17/2026

Date Revised:

Policy Statement

Southern Cascades Community Services District supports employees in fulfilling their civic responsibility to serve on jury duty. Employees who are summoned for jury service will be provided time off in accordance with this policy.

Eligibility

Nonexempt hourly employees who fall into the below 4-Week Average Hour Tiers and who have worked for Southern Cascades Community Services District for at least 90 days are eligible to receive jury duty pay.

For the purposes of this policy, the 4-Week Average Hours Tiers are calculated using the previous four full weeks (Sunday–Saturday) of hours worked by the employee prior to the first day of jury service.

4-Week Average Hours Tiers

Hours Worked	Jury Duty Pay Received
32 – 40 Hours	8 Hours per day
24 – 32 Hours	6 Hours per day
16 – 24 Hours	4 Hours per day

Jury Duty Pay

Eligible employees will receive jury duty pay at a maximum of two days pay, for each scheduled workday missed due to jury service, in accordance with the applicable 4-Week Average Hours Tier.

Jury duty pay is calculated at the employee's current base rate of pay.

Procedures and Conditions

The following conditions apply to Southern Cascades Community Services District's jury duty policy:

- Jury duty pay will not be considered time worked for the purpose of overtime calculations.
- Employees must provide a copy of the jury summons to their supervisor as soon as practicable after receipt.

- Employees are expected to report to work if released from jury duty with sufficient time remaining in the workday, as determined by their supervisor.
- Jury duty pay will not be provided to employees on any type of unpaid leave.
- Jury duty pay will not be provided if jury service falls on a day in which the employee has a restricted work schedule.
- Jury duty pay will not exceed the number of hours the employee was otherwise scheduled to work on that day.

Extended Jury Service

If jury service extends beyond the period covered by paid jury duty under this policy, additional time off may be taken as unpaid leave, subject to operational needs and supervisory approval.

Policy: Progressive Disciplinary Action – Written Warning From **Policy #: 6210.0**

Date Adopted: 05/20/2024

Date Revised:

Written Warning

Employee Name:	**Job Title:**	
Department:	**Supervisor:**	
Date:		
__ **First Warning**	__ **Second Warning**	__ **Final Warning**

The purpose of this written warning is to bring to your attention new or ongoing deficiencies in your conduct and/or performance. The intent is to define for you the seriousness of the situation so that you may take immediate corrective action. This written warning will be placed in your personnel file.

Reason for warning (violation of company policy or unsatisfactory performance/behaviors):
Prior discussion or warnings on this subject (verbal/written, dates):
Relevant company policy violated:
Corrective action required:
Consequences of failure to improve performance or correct behavior:

The above has been discussed with me by my supervisor. I understand the contents and acknowledge and understand the corrective action required. I also acknowledge and understand the potential consequences of noncompliance.

Signatures:

Employee: _____ Date: _____

Supervisor: _____ Date: _____

Division/Dept. Manager: _____ Date: _____

Policy: Progressive Disciplinary Action **Policy #: 6210.0**

Date Adopted: 12/16/2024

Date Revised:

Purpose

Southern Cascades Community Services Districts' progressive discipline policy and procedures are designed to provide a structured corrective action process to improve and prevent a recurrence of undesirable employee behavior and performance issues.
Outlined below are the steps of Southern Cascades Community Services Districts' progressive discipline policy and procedures. Southern Cascades Community Services District reserves the right to combine or skip steps depending on the facts of each situation and the nature of the offense. Some of the factors that will be considered are whether the offense is repeated despite coaching, counseling or training; the employee's work record; and the impact the conduct and performance issues have on the organization.
Nothing in this policy provides any contractual rights regarding employee discipline or counseling, nor should anything in this policy be read or construed as modifying or altering the employment-at-will relationship between Southern Cascades Community Services District and its employees.

Procedure

Step 1: Counseling and verbal warning

Step 1 creates an opportunity for the immediate supervisor to bring attention to the existing performance, conduct or attendance issue. The supervisor should discuss with the employee the nature of the problem or the violation of company policies and procedures. The supervisor is expected to clearly describe expectations and steps the employee must take to improve his or her performance or resolve the problem.

Within five business days, the supervisor will prepare written documentation of the verbal counseling.

Step 2: Written warning

The Step 2 written warning involves more-formal documentation of the performance, conduct or attendance issues and consequences.

During Step 2, the immediate supervisor and a division manager or director will meet with the employee to review any additional incidents or information about the performance, conduct or attendance issues as well as any prior relevant corrective action plans. Management will outline the consequences for the employee of his or her continued failure to meet performance or conduct expectations.

A formal written warning requiring the employee's immediate and sustained corrective action

will be issued within five business days of a Step 2 meeting. The written warning may also include a statement indicating that the employee may be subject to additional discipline, up to and including termination, if immediate and sustained corrective action is not taken.

Step 3: Suspension and final written warning

Some performance, conduct or safety incidents are so problematic and harmful that the most effective action may be the temporary removal of the employee from the workplace. When immediate action is necessary to ensure the safety of the employee or others, the immediate supervisor may suspend the employee pending the results of an investigation.

Suspensions that are recommended as part of the normal sequence of the progressive discipline policy and procedures are subject to approval from a next-level manager and HR.

Depending on the seriousness of the infraction, the employee may be suspended without pay in full-day increments consistent with federal, state and local wage and hour employment laws. Nonexempt/hourly employees may not substitute or use an accrued paid vacation or sick day in lieu of the unpaid suspension. In compliance with the Fair Labor Standards Act (FLSA), unpaid suspension of salaried/exempt employees is reserved for serious workplace safety or conduct issues. HR will provide guidance to ensure that the discipline is administered without jeopardizing the FLSA exemption status.

Pay may be restored to the employee if an investigation of the incident or infraction absolves the employee of wrongdoing.

Step 4: Recommendation for termination of employment

The last and most serious step in the progressive discipline process is a recommendation to terminate employment. Generally, Southern Cascades Community Services District will try to exercise the progressive nature of this policy by first providing warnings, issuing a final written warning or suspending the employee from the workplace before proceeding to a recommendation to terminate employment. However, Southern Cascades Community Services District reserves the right to combine and skip steps depending on the circumstances of each situation and the nature of the offense. Furthermore, employees may be terminated without prior notice or disciplinary action.

Management's recommendation to terminate employment must be approved by human resources (HR) and the District Administrator.

Appeals Process

Employees will have the opportunity to present information to dispute information management has used to issue disciplinary action. The purpose of this process is to provide insight into extenuating circumstances that may have contributed to the employee's performance or conduct issues while allowing for an equitable solution.

If the employee does not present this information during any of the step meetings, he or she will have five business days after each of those meetings to present such information.

Performance and Conduct Issues Not Subject to Progressive Discipline

Behavior that is illegal is not subject to progressive discipline and may result in immediate termination. Such behavior may be reported to local law enforcement authorities.

Similarly, theft, substance abuse, intoxication, fighting and other acts of violence at work are also not subject to progressive discipline and may be grounds for immediate termination.

Documentation

The employee will be provided copies of all progressive discipline documentation, including all written warnings. The employee will be asked to sign copies of this documentation attesting to his or her receipt and understanding of the corrective action outlined in these documents. Copies of these documents will be placed in the employee's official personnel file.

Policy: Timekeeping **Policy #: 6211.0**

Date Adopted: 05/20/2024

Date Revised:

Purpose

To comply with its legal obligations to maintain accurate time records and to ensure that employees are paid for all hours worked, Southern Cascades Community Services District requires employees to accurately record their hours worked during each workday.

Eligibility

All nonexempt employees are required to accurately record hours worked.

Procedures

Unless otherwise notified, employees are required to accurately record their work time through the use of an electronic time-keeping system. Employees are required to submit their time records promptly following the close of the pay period so that their time records can be reviewed by their supervisor or manager before their paychecks are processed for the pay period. Employees are required to accurately record their work hours to ensure that they are paid for all hours worked as required by applicable law. “Hours worked” is defined by law as all time an employee is subject to the control of an employer and includes all time that an employee is suffered or permitted to work, whether or not required to do so.

Employees will be responsible for electronically signing their timecards, confirming that their timecards are accurate and ready for supervisor or manager review and approval. All timecards must be electronically approved in the District timekeeping platform at the end of each pay period.

At no time may any employee perform off-the-clock work or otherwise alter, falsify or manipulate any aspect of their timekeeping records to inaccurately reflect or hide hours worked, meal periods taken or time spent working during meal periods.

The obligation to accurately record all hours worked does not relieve employees of their obligations to obtain advance approval from their supervisor or manager before working overtime or hours beyond the regular work schedule. Employees who work beyond their regularly scheduled work

hours, including overtime or off-schedule hours, without prior authorization by their supervisor or manager are subject to disciplinary action, which may include termination of employment.

Employees will be informed on their first day on the job whether they are required to record their work time by a time clock, a time sheet or some other method. Whatever the method of timekeeping, employees are expected to follow the established procedures in keeping an accurate record of hours worked.

Any changes or corrections to an employee's timecard or time record must be initiated by the employee and his or her supervisor or manager. Under no circumstances may any employee punch or record another employee's timecard.

Employees with questions about this policy or their time records should contact their supervisor, manager, or human resources.

Policy: Travel Time / Mileage Reimbursement **Policy #: 6211.1**

Date Adopted: 01/20/2025

Date Revised:

Purpose

Typically, time spent by employees commuting to and from work is not regarded as work time and is not covered under this policy. Similarly, mileage incurred during commuting is also excluded. However, Southern Cascades Community Services District recognizes time spent traveling for work-related purposes during the workday as work time and compensates employees with travel pay and mileage reimbursement for such travel, as outlined in this policy.

Eligibility

Employees who are required to travel for work-related purposes are eligible for travel pay and mileage reimbursement under this policy.

Procedures

Employees required to travel for work-related purposes during the workday will be compensated at their designated rate of pay and reimbursed for mileage based on the current IRS mileage rate. All work-related travel and mileage reimbursement must receive prior approval from the employee's supervisor or manager.

Employees are responsible for recording work-related travel time and mileage expenses on their timesheets in accordance with the company's Timekeeping Policy.

Travel pay will apply in the following circumstances:

1. ***Travel to an alternative work location*.** If an employee is required to travel to a worksite other than their pre-designated work location, all time spent traveling from either the pre-designated work location or the employee's home (whichever is closer) to the alternative site, and back to their normal work location, is considered work time.

2. ***Extended travel*.** If an employee is required to travel out of town for work-related purposes, the time spent traveling to and from the out-of-town location, including all time spent as a passenger on an airplane, train, bus, taxicab or car, is considered work time; however, any time the employee spends engaged in personal activities (such as meal time, sleeping, sightseeing or watching television) will not count as work time. If the employee uses their personal vehicle for such travel, mileage reimbursement will be provided from the employees pre-designated work location or employees' home (whichever is closer) to the pre-defined destination of such travel.

Reimbursement will be issued with the employee's regular paycheck.

Employees with questions regarding travel pay should contact their manager or the human resource department.

Policy: Time Off Requests **Policy: 6211.2**

Date Adopted: 10/19/2026

Date Revised:

1. PURPOSE

The purpose of this policy is to establish a consistent, documented, and administratively accountable process for requesting driver time off, reporting sick leave, maintaining driver availability records, and managing transportation scheduling.

Due to the variable nature of Non-Medical Transportation (NMT) and Non-Emergency Medical Transportation (NEMT) services, drivers do not necessarily work fixed daily schedules or predetermined hours. Transportation assignments are based on member transportation needs, driver availability, vehicle availability, trip locations, scheduling requirements, and other operational considerations.

This policy is intended to:

- Establish consistent communication and documentation requirements for driver absences and availability changes.
- Support effective transportation scheduling and continuity of services.
- Clarify the procedures for requesting unpaid time off and reporting sick leave.
- Establish management responsibilities for reviewing requests and maintaining scheduling records.
- Ensure appropriate administration and verification of paid sick leave.
- Prevent unauthorized changes to assigned transportation trips.
- Promote operational accountability and consistent application of District procedures.

2. SCOPE

This policy applies to all District drivers providing NMT/NEMT services through the HTS transportation program, regardless of employment classification or individual scheduling arrangements.

This policy shall be administered in conjunction with the District's existing personnel policies, Sick Leave Policy, Employee Handbook, and governing laws.

3. POLICY STATEMENT

All drivers must follow the District's established procedures for requesting time off and reporting changes in availability.

The following requirements apply to all drivers:

1. Time-Off Requests: If a driver needs time off during a day or time they are normally available to work, they must submit a request by email to the HTS Manager.
2. Regular Days Off: Drivers do not need to request time off for days or times already listed as unavailable on their current Driver Availability Form.
3. Changes in Availability: Drivers who need to change their regular availability must complete and submit an updated Driver Availability Form to the District.
4. Approval of Unpaid Time Off: Sending an email does not mean the requested time off is approved. Drivers must receive an approval email from the HTS Manager before considering planned unpaid time off approved.
5. Sick Leave: Drivers must notify the HTS Manager via email when requesting sick leave. All sick leave will be handled according to the District's Sick Leave Policy and applicable law.
6. Scheduling Authority: The HTS Manager is responsible for reviewing time-off requests, confirming approvals, and making necessary changes to driver schedules. Drivers may not independently change or exchange assigned trips.

4. ESTABLISHED DRIVER AVAILABILITY

4.1 Regularly Scheduled Unavailable Days

Drivers who have regularly scheduled unavailable days documented on their current Driver Availability Form shall not be required to submit individual time-off requests for those established periods.

Management shall use the availability information maintained by the District when preparing and assigning transportation schedules.

A time-off request is required when a driver seeks to be unavailable during a day or time that the driver's current Driver Availability Form identifies as available for work.

4.2 Changes to Regular Availability

Drivers requesting a temporary or permanent change to their established regular availability shall:

1. Request a Driver Availability Form from the HTS Manager.
2. Complete the form to identify the proposed updated availability.
3. Submit the completed form to the District.

The existing Driver Availability Form shall remain the District's documented record of driver availability until an updated form is submitted.

Submission of an updated form does not authorize a driver to independently alter or discontinue an assigned transportation trip. Any necessary changes to existing assignments shall be coordinated through the HTS Manager.

5. UNPAID TIME-OFF REQUESTS

5.1 Submission Requirements

Drivers requesting unpaid time off for vacations, personal appointments, planned absences, or other non-sick-leave purposes shall submit their requests by email directly to the HTS Manager.

Requests shall include:

- The specific date or dates requested.
- Whether the request is for an entire day or a portion of a day.
- For partial-day requests, the specific hours during which the driver will be unavailable or available for transportation assignments.

Examples:

- “Requesting the entire day off on August 10.”
- “Requesting August 10–12 off.”
- “I will be unavailable until 12:00 p.m.”
- “I need to leave by 2:30 p.m.”
- “I am available for trips between 8:00 a.m. and 1:00 p.m. only.”

Because driver schedules may vary based on transportation assignments, requests shall identify the actual period of unavailability rather than relying solely on a general statement that the driver needs time off.

5.2 Advance Notice

Drivers are required to submit planned unpaid time-off requests as far in advance as reasonably possible to allow management sufficient time to coordinate transportation schedules and ensure coverage of member trips.

Submitting a time-off request the day or evening before a scheduled trip does not constitute adequate advance notice.

Drivers are expected to plan ahead and submit requests before transportation assignments have been finalized whenever reasonably possible.

Last-minute requests for planned unpaid time off may be denied based on scheduling requirements, available driver coverage, and the District's operational needs.

This requirement does not apply to qualifying sick leave or other legally protected absences, which shall be handled in accordance with applicable District policies and law.

5.3 Review and Approval

The HTS Manager shall review unpaid time-off requests based on relevant operational considerations, including:

- Scheduled and anticipated transportation obligations.
- Availability of qualified drivers.
- Vehicle availability.

- Existing driver assignments and previously approved absences.
- Trip locations, timing, and service requirements.
- Other relevant District staffing and operational needs.

The HTS Manager shall communicate approval or denial of the request by email.

Unpaid time off shall not be considered approved until written confirmation of approval has been provided by the HTS Manager.

6. SICK LEAVE NOTIFICATION AND ADMINISTRATION

6.1 Reporting Sick Leave

Drivers requesting leave that qualifies under the District's current Sick Leave Policy shall notify the HTS Manager by email as soon as reasonably possible, consistent with applicable law and District policy.

The notification should identify:

- The applicable date or dates.
- Whether the absence involves an entire day or a portion of a day.
- The approximate period of unavailability, when known.
- That the absence is being requested under the District's Sick Leave Policy.

Examples:

- “I am requesting sick leave for the entire day today.”
- “I am requesting sick leave and expect to be unavailable until approximately 1:00 p.m.”
- “I am requesting sick leave for a qualifying family member for the entire day.”
- “I need to use sick leave and leave at approximately 2:00 p.m.”

Drivers shall not be required to disclose detailed private medical information in their routine sick leave notification.

If an emergency or other circumstance prevents timely email notification, the employee shall notify management as soon as reasonably practicable through an available means of communication and provide written follow-up when reasonably possible.

6.2 Sick Leave Eligibility and Protection

Sick leave eligibility, permissible uses, notice requirements, and payment shall be governed by the District's current Sick Leave Policy and applicable law.

The HTS Manager shall acknowledge sick leave notifications and coordinate any necessary transportation scheduling adjustments.

Management acknowledgment serves as an administrative record of notification and shall not be construed as a discretionary condition of legally protected sick leave.

6.3 Determination of Paid Sick Leave Hours

Drivers shall not be required to calculate the number of paid sick-leave hours when reporting an absence.

Management and/or payroll shall determine the applicable paid sick-leave hours based on the District's Sick Leave Policy.

For employees whose sick leave is calculated using the Four-Week Average Hours Method, management and/or payroll shall review the applicable previous four full weeks of hours worked and determine the appropriate sick-leave amount under the District's established policy.

Once the applicable sick-leave hours have been determined, management and/or payroll shall ensure that the hours are recorded on the employee's timecard.

6.4 Employee Timecard Verification

Drivers are responsible for reviewing their timecards before submission at the end of each pay period.

Employees who have requested paid sick leave shall verify that the applicable sick-leave hours have been recorded accurately.

If an employee identifies missing or potentially incorrect sick-leave hours, the employee shall contact the HTS Manager before submitting the timecard whenever reasonably possible.

Management and/or payroll shall review reported discrepancies and make any required corrections in accordance with District procedures and applicable payroll requirements.

Employees are expected to promptly report known discrepancies rather than assume that corrections will automatically occur after timecard submission.

A reporting or timecard discrepancy shall not eliminate an employee's entitlement to sick leave or wages otherwise required by applicable law.

7. REQUIRED COMMUNICATION PROCEDURES

Email to the HTS Manager shall serve as the District's official method for submitting planned time-off requests and documenting routine sick leave notifications.

Verbal statements, text messages, or communications directed solely to another employee shall not constitute a formal planned time-off request.

Exceptions shall be made when required by applicable law or when emergency circumstances reasonably prevent use of the established email process.

The HTS Manager shall be responsible for maintaining appropriate records of requests, management responses, and related scheduling determinations.

8. TRANSPORTATION ASSIGNMENTS AND SCHEDULE CHANGES

8.1 Management Authority

The HTS Manager shall retain responsibility for coordinating and administering driver schedules and transportation assignments.

Scheduling decisions shall be made with consideration for member transportation needs, driver availability, trip requirements, vehicle availability, and operational efficiency.

8.2 Prohibition on Independent Trip Exchanges

Drivers shall not independently arrange, exchange, transfer, or reassign transportation trips with other drivers.

Requests to exchange assigned trips directly between drivers shall not be accommodated outside the District's established management scheduling process.

All modifications to assigned trips must be coordinated and authorized by management.

8.3 Unexpected Inability to Complete Assigned Trips

If an unforeseen circumstance prevents a driver from completing an assigned trip, the driver shall notify the HTS Manager as soon as reasonably possible.

The HTS Manager shall determine the appropriate operational response, including whether the trip must be reassigned to another qualified driver.

Drivers shall not independently arrange alternative transportation coverage or assume that another employee has accepted responsibility for an assigned trip.

9. ROLES AND RESPONSIBILITIES

9.1 Drivers

Drivers are responsible for:

- Maintaining accurate Driver Availability Forms.
- Submitting time-off requests using the established email procedure.
- Providing sufficiently specific dates and periods of unavailability.
- Obtaining written approval before taking discretionary unpaid time off.
- Reporting sick leave in accordance with District policy and applicable law.
- Reviewing timecards for accuracy before submission.
- Promptly reporting known payroll or sick-leave discrepancies.
- Communicating unexpected scheduling conflicts to the HTS Manager.
- Refraining from unauthorized trip exchanges or scheduling adjustments.

9.2 HTS Manager

The HTS Manager is responsible for:

- Receiving and reviewing driver time-off requests.

- Providing written responses to discretionary unpaid time-off requests.
- Receiving and documenting sick leave notifications.
- Maintaining current driver availability records.
- Coordinating transportation coverage and schedule adjustments.
- Ensuring that transportation assignments are administered consistently.
- Coordinating with payroll regarding applicable paid sick leave.
- Reviewing and addressing reported timecard discrepancies.
- Communicating and administering this policy consistently.

9.3 Management and Payroll

Management and payroll personnel shall be responsible for calculating, recording, and verifying applicable paid sick-leave hours in accordance with the District's established Sick Leave Policy and applicable requirements.

10. RECORDKEEPING AND CONFIDENTIALITY

The District shall maintain appropriate records of driver availability, time-off requests, management approvals, sick leave notifications, and applicable payroll adjustments.

Records shall be retained in accordance with District records retention requirements and applicable law.

Employee medical information, when obtained, shall be handled confidentially and maintained in accordance with applicable privacy and personnel record requirements.

11. COMPLIANCE AND ACCOUNTABILITY

All drivers and responsible management personnel are expected to comply with the procedures established by this policy.

Failure to follow established procedures for discretionary unpaid time-off requests, unauthorized schedule changes, or independent trip reassignments may result in appropriate administrative or corrective action, consistent with District personnel policies and applicable law.

Nothing in this policy shall be interpreted or administered in a manner that interferes with protected leave rights, legally required accommodations, or other employee protections.

12. POLICY ADMINISTRATION AND REVIEW

The HTS Manager shall be responsible for the day-to-day administration of this policy.

District management shall periodically review the policy to ensure continued effectiveness, consistency with transportation operations, and alignment with applicable employment requirements.

Material changes to the policy shall be presented to the Board of Directors for review and approval, consistent with the District's policy governance procedures.

13. EFFECTIVE DATE

This policy shall become effective on the date established by the Board of Directors and shall remain in effect until amended or rescinded through the District's applicable governance procedures.

All affected drivers shall be provided notice of the policy and its required procedures.

Policy: Reporting Time Pay **Policy #: 6212.0**

Date Adopted: 10/21/2024

Date Revised:

I. Reporting Time Pay

"Reporting time pay" is a form of wages that compensate employees who are scheduled to report to work but who are not put to work or who are furnished with less than half of their scheduled day's work because of late or short notice. This applies when the scheduled shift is canceled or reduced to less than half of the original scheduled hours.
Employees are owed at least half of their scheduled hours, but no less than two hours or no more than four hours.

Drivers who are scheduled for work, and who take steps to report to work for an assigned shift, but are not provided work because the member's trip is cancelled with little or no notice, will be paid for a minimum of two hours and a maximum of four hours at their regular rate of pay.

II. Short Notice Cancellations

Reporting time pay may be owed if an employer cancels a shift on short notice. For purposes of this policy, short notice is 2 hours or less.

III. Notification to Drivers

When a scheduled shift is cancelled with short notice, drivers will be notified by telephone, and if the driver does not answer, by voicemail. In addition, a confirming email will be sent to the driver through the Southern Cascades Community Services District email system.

IV. Reporting to Work Criteria

Eligibility for reporting time pay is satisfied with the following actions:

1. Physically appearing and clocking in at the workplace at the start of the shift;
2. Appearing at a member's location for a pick up;
3. Starting out on the driving route;
4. Southern Cascades Community Services District failure to notify pursuant to Section III of this policy

V. Exceptions

There are several exceptions to reporting time pay.

1. Acts of God, including wildfires, earthquakes, storms and other interruptions to operations or transportation routes, when the situation is out of the Agency's control.

2. Unexpected utility failures, such as power outages.

3. When operations cannot begin or continue due to threats to employees or property, or when civil authorities recommend that work not begin or continue; or

4. The reporting time pay provisions do not apply to employees on paid standby status or when an employee has a regularly scheduled shift of less than two hours, such as a relief cashier who works only during a one-hour period in the middle of the day.

VI. Non-Exempt Employees

Reporting time pay applies to non-exempt employees, who are eligible for overtime pay under FLSA Standards. Exempt employees, like administrative or executive employees, are not eligible for reporting time pay.

Reporting time pay is considered a premium wage, but it is not counted as part of an employee's regular rate for overtime compensation

VII. Record Keeping

Southern Cascades Community Services District will maintain accurate records of when reporting time pay is required and paid. Reporting time pay will be reflected on pay stubs for pay periods during which it is applied.

VIII. Final Checks

Should a driver separate from employment with reporting time pay owed, it will be included in the final payroll check.

Policy: Press Release / Publication **Policy #: 6301.1**

Date Adopted: 12/09/2019

Date Revised:

Policy / Procedure

The General Manager must approve all published information prior to release. This is to include newspaper articles and advertisements, information posted to SCCSD Web Site, interviews, and any other public relations format including social media that pertains to SCCSD operations.

Ambulance Shift Schedule Agreement **Policy #: 6302.0**

Date Adopted: 12/09/2019

Employee:_____ Set Shift Days:_____

The above shift schedule is set, per Employee request and available seniority-based days.

Employee has the flexibility to trade shift days for personal needs. Changes should not create undue overtime or operational concerns, and be approved by the EMS Program Director or Designee.

Employee can expect to work the set schedule as allocated, with the advisement that at times schedules may be modified due to unusual events, vacancies, training, etc.

It is the intent to provide the Employee with a predictable schedule, allowing for both flexibility and minimal disruption of days, and stable ambulance coverage with minimum adjustments for Management.

Employee Signature:_____ Date:_____

Supervisor Signature:_____ Date:_____

Policy: Ambulance Shift Schedule **Policy #: 6302.0**

Date Adopted: 12/09/2019

Date Revised:

Policy

As a minimum, scheduling of ambulance shifts will be accomplished in accordance with contract provisions for coverage areas within the Nor Cal EMS, 24/7 staffing of one ALS ambulance and one Quick Response Vehicle (QRV).

Preferred ambulance staffing is a crew consisting of one advanced life support provider and one basic life support provider. Double ALS shifts may occur only after full ALS coverage is achieved on the schedule.

Regular full-time and part-time ambulance personnel will have a set schedule allocated, based on seniority and available open days. Supplemental ambulance staff shifts will be allocated on an as needed basis.

Shifts for full and part-time staff are consecutive. When possible, open shifts days will also be consecutive.

Management has the responsibility to make operational changes needed to maintain stable coverage. Attendance of a paramedic program by a SCCSD sponsored employee may temporarily affect set schedules.

Management has the responsibility to anticipate and plan for additional coverage as needed for special events and seasonal needs. Scheduling for special events shall minimize overtime expense, with shifts offered in as fair and equitable a manner as possible.

Procedure

The Operations Coordinator is responsible for ambulance schedule. Set shift days are allocated starting with employees with the most seniority, based on days available. It is the intent to provide employees with their preference as much as possible, and SCCSD with operational, stable coverage. Regular full-time schedules will be filled prior to regular part-time regardless of seniority.

At the time of set shift allocation staff will sign a shift agreement that outlines employee and company expectations.

Staff has the flexibility to trade days temporarily to accommodate personal needs, with Operations Coordinator approval. Staff wishing to trade days permanently may make a written request. On approval, a new shift agreement will be signed. Changes should not create overtime or operational concerns such as uncovered simultaneous ALS and BLS or prolonged periods of non-consecutive open days.

Set days may be subject to occasional modification due to unusual events. Unexpected vacancies may affect set schedules. Other options will be explored prior to change to set schedule.

Attendance of a paramedic program by SCCSD sponsored employee may affect set schedules. Students are encouraged to seek voluntary trades. For paramedic programs that operate every other day, this may not be feasible. If SCCSD is not sponsoring the employee, a request for schedule modification may not be approved.

The staff is encouraged and expected to work together to cover the schedule when unusual events require flexibility, and as much notice as possible will be given to coordinate changes and minimize disruption of staff.

If a regular employee leaves their position, there will be opportunity for remaining staff to move to those days. A move to open days will not affect the fixed days of other staff. Approval will be based on seniority, with verification that senior staff had first refusal. Changes need to work operationally.

The schedule will be posted quarterly, with next period posted two weeks in advance.

Policy: Ambulance Workday **Policy #: 6302.1**

Date Adopted: 12/09/2019

Date Revised:

Policy

Ambulance workday is defined as that portion of the 24-hour ambulance shift that falls between 0800 and 1630. The first priority of ambulance staff is to remain in readiness for 911 response, avoiding excessive fatigue. Optimum readiness is well-rested, well-nourished, hydrated, in uniform, with checkout of equipment complete and any needed corrections to equipment reported and/or addressed.

When not running calls, there are many productive tasks to support response readiness, patient care, skills proficiency, fitness, and station cleanliness.

1) Morning checkout at the start of each shift, to be performed as a team in most circumstances. (Required)
2) Checkout of second-out units, as designated, to be performed as a team, following completion of first-out check. (Required)
3) Detail ambulances, inside and out. (Required)
4) Perform physical fitness routine to improve health and reduce injury risk.
5) Perform CQI review of peer patient care reports.
6) Study journals, textbooks, protocols, etc., to reinforce and improve knowledge base.
7) Detail station / office / grounds. Defined as floors clean with no obvious dirt, stains, debris or scuffs, all areas clean and neat, bathrooms freshly cleaned. (Required)
8) Perform errands and/or other duties that may arise as requested.
9) Work on other duties as assigned, after completion of required items.

It is permissible to attend to personal errands during the shift, if not excessive.

It is expected that crews stay together during the workday to optimize response times.

Policy: Ambulance Checkout **Policy #: 6302.2**

Date Adopted: 12/09/2019

Date Revised:

Policy

Checkout of first-out ambulances and equipment shall occur on a daily basis to ensure units are stocked to established par levels and all equipment is clean and fully functional.

Second-out ambulances shall be checked out on a regular weekly schedule, as a minimum standard.

Daily checkout and checkout of second-out units on the designated day, is to be of first priority at the beginning of the shift. This task is to be accomplished as a team, with any deficiencies corrected and/or reported as necessary. Correction of deficiencies, decontamination, and needed detailing shall also be accomplished as a team.

Daily and weekly checkouts shall be documented on the designated form and maintained on file for seven years.

Procedure

Management is responsible to ensure checkout form is provided, completed in full as established above, and maintained on file.

Daily checkout is to be performed as a team, at the beginning of each shift. ALS personnel are responsible for ALS equipment and medications, BLS personnel are encouraged to assist in this area for familiarity and knowledge. Partners are to work as a team until the entire checkout is complete, sharing responsibility to review and inspect each item to ensure proper function before it is checked off.

Monthly outdates are to be performed during checkout on or before the 1st of each month.

Deficiencies shall be corrected immediately. If unable to correct, deficiencies are to be communicated to the oncoming crew, and to the appropriate employee for corrective action. Vehicle and equipment concerns must be reported in writing immediately to the responsible person.

Safety concerns are to be reported to management immediately, and followed with a written report. If an employee deems a piece of equipment is not functioning properly and may pose a serious threat to safety, the equipment may be placed out of service immediately. Equipment must be clearly marked for lockout. Management and/or the responsible employee (i.e., Fleet Maintenance) must be contacted as soon as possible with full report.

Policy: Ambulance Decontamination and Restock **Policy #: 6302.3**

Date Adopted: 12/09/2019

Date Revised:

Policy

SCCSD ambulances and equipment are to be maintained to a high standard of cleanliness in order to protect employees and patients from communicable disease.
Decontamination procedures shall be initiated immediately upon completion of each patient contact.

Procedure

Partners are to work together as a team to complete decontamination. The partner who has performed patient care must complete those duties prior to helping with decontamination. After giving report to receiving RN or Physician, and upon obtaining needed signatures, billing information, and performing medication restock, partner will assist with completing any remaining decontamination tasks.

Reusable equipment that has been contaminated with blood or body fluids is to be immediately cleaned and disinfected at the receiving hospital. Ambulance interior surfaces, equipment, and gurney are also to be cleaned and disinfected immediately following each patient transport. An OSHA approved cleaning solution will be used (stocked on ambulances and in hospitals). After cleaning, re-spray item surface and allow to dry. Item should remain wet for a total of two minutes, or according to product specifications. Smooth surfaces may be re-sprayed and wiped as needed to improve appearance and remove spray residue.

All employees are to use personal protective equipment and universal precautions when cleaning and disinfecting equipment and ambulances. Gloves will be worn at all times when exposure to blood or other bodily fluids is possible. Gowns and eye protection will be worn if warranted. Dispose of contaminated gloves and other personal protective equipment properly and wash hands thoroughly before re-handling clean equipment.

Restocking of supplies used is also a cooperative effort, with the patient care partner communicating supplies used, and partners working together to ensure all restock items have been completed.

Policy: Ambulance Operation **Policy #: 6302.4**

Date Adopted: 12/09/2019

Date Revised:

Policy

Statutes and regulations governing the operation of emergency vehicles have been established for public health and safety. Compliance with applicable requirements and the exercise of sound judgment together with defensive driving techniques are essential for safe ambulance operation and will enhance patient transportation.

All SCCSD vehicles shall be operated in a safe and courteous manner, in compliance with California Vehicle Code, California Health and Safety Code, Title 13, Title 22, Division 9 of the California Code of Regulations.

Special privileges and/or exemptions specified under Vehicle Code Section 21055 permit Code 3 (use of red warning lamps and siren) operation. All ambulance employees must be familiar with Code 3 responsibilities. Privileges granted under Section 21055 do not relieve the driver from the duty to drive with due regard for the safety of all persons using the highway, nor protect him/her from the consequences of an arbitrary exercise of the privileges.

All ambulance employees must submit and maintain a current copy of Form DL-51 – Medical Examination Report. The DL-51 must be signed by a Medical Doctor, and is required every two years. All ambulance attendants must have a clean driving record, as evidenced by the DMV Pull Notice Program. This report should reflect not more than two (2) Class B and no Class A violations in a three (3) year period.

All new ambulance employees shall receive training in emergency vehicle operations as a mandatory part of their orientation, with a minimum of four hours classroom training and 16 hours of hands-on driving instruction. All ambulance employees shall receive an annual update of the emergency vehicle operations course.

Seatbelts shall be worn at all times during vehicle operation. Patients shall wear gurney seatbelts during transport. Attendant performing patient care shall wear seatbelt whenever possible.

All SCCSD vehicles will operate with headlights on at all times.

Ambulance employees shall adhere to SCCSD standard operating procedures for emergency response.

Procedure

Management has the responsibility for tracking individual employee driving records through the DMV Pull Notice Program. Management is responsible to ensure training provided meets

or exceeds minimum standards listed above.

Ambulance drivers who receive a Class A violation/license suspension will not be eligible for employment with SCCSD during the period of suspension.

An individual who has a combination of two (2) Class B moving violation convictions and/or chargeable accidents in a three (3) year period will be issued a warning letter.

An individual who has a combination of three (3) moving violation convictions and/or chargeable accidents in a three (3) year period will be issued a written suspension from driving SCCSD vehicles for a period of 90 days.

Any individual who has more than three (3) moving violation convictions and/or chargeable accidents in a three (3) year period will not be eligible to operate TCLS emergency vehicles and will receive notice of termination of employment.

Definitions: Class A Violation. An individual who has a Class A Violation within the past three years normally receives a license suspension from the issuing DMV. Class A violations include driving while intoxicated or under the influence of drugs, negligent homicide arising out of the use of a motor vehicle, operating during a period of suspension or revocation, using a motor vehicle for the commission of a felony, aggravated assault with a motor vehicle, operating a motor vehicle without the owner's authority, permitting an unlicensed person to drive, reckless driving, and hit and run driving.

Class B Violation. All moving violations not listed as Type A violations. Exceeding posted speed limit is a Class B violation.

Policy: Ambulance Employee Proficiency and Training **Policy #: 6302.5**

Date Adopted: 12/09/2019

Date Revised:

Policy

Southern Cascades recognizes the skills required to provide emergency medical care require practice and reinforcement to maintain proficiency. In order to maintain knowledge and skills, familiarity with equipment and supplies, and ensure that each patient receives competent and efficient care, the following minimum shift schedule and training attendance are required.

Shift Schedule

Supplemental ambulance staff shall submit available shift days, minimum two per month. Employees unavailable to SCCSD more than three consecutive months will be removed from active status.

Training

All ambulance staff shall attend a minimum of two run reviews per quarter and meet all mandatory training requirements. Employees unable to meet minimum training expectations or accomplish make-up assignments (when available) will be removed from active status.

Active status may be resumed when the employee is able to meet minimum requirements.

Procedure

It is recognized that the ambulance schedule may not consistently have available shifts to meet minimum requirements. Management has the discretion to maintain an adequate pool of supplemental employees.

Training provided by equal or higher level provider, such as run review at Mercy and/or Shasta Regional Medical Centers may be accepted in lieu of local training. Employees need to submit it to Clinical Coordinator for approval.

Employees not able to attend SCCSD training need to communicate regularly with SCCSD and the Clinical Coordinator to ensure their knowledge and practice of clinical performance, current protocol, standard operating procedure, and safety procedure is up to date.

Policy: Ambulance Wireless Communications **Policy #: 6302.6**

Date Adopted: 12/09/2019

Date Revised:

Policy

The use of wireless communications, such as cell and satellite phones, is valuable as a backup to customary modes of communication, and provides additional crew safety. The safe and appropriate use of these devices, especially during ambulance operations, is the purpose of this policy.

Personal use of cell phones, including talking, texting, and internet is prohibited while driving.

Procedure

As an emergency vehicle operator, your first responsibility is to pay attention to the road, your partner, and your patient. Use of phones must not impair driver focus and safe vehicle operation. Use of cell phone necessary to the emergency response is acceptable.

Personal phone use is not appropriate during vehicle operation. Pull over to talk, or wait until a time when you are not responsible for operating the vehicle. Your emergency vehicle, partner, and patient deserve and expect your full attention on the roadway.

Policy: Ambulance Camera / Mobile Phone Camera **Policy #: 6302.7**

Date Adopted: 12/09/2019

Date Revised:

Policy

The use of cameras on an emergency scene is permissible in the following situations:

1. **Medical Care:** Photos sent with patient to the ER to illustrate mechanism of injury.
2. **Training:** Photos used to provide EMS education, such as mechanism of injury, auto extrication, etc.
3. **Public Relations:** Photos taken with intent to use in public relations and specialevents.

The use of cameras on an emergency scene is prohibited in the following situations:

1. **Breach of Patient Confidentiality:** Photos in which the patient is identifiable are prohibited. Photos that include such identifiers as license plates are not permissible. Patient confidentiality must be protected by crews at all times.
2. **Crime Scene/Possible Crime Scene:** Crime scene photos are the sole responsibility of law enforcement. Medical personnel are to withdraw and protect the integrity of the scene as much as possible. Photo-taking is strictly prohibited at any possible crime scene.
3. **Deceased Persons:** There is no valid reason to photograph the deceased. Medical personnel are to respect and protect the deceased.
4. **Personal Use:** Photos are not to be taken for personal use.

Procedure

First and foremost responsibility at an emergency scene is safety and patient care. Camera use shall occur only after all patient care needs have been addressed, and shall not delay transport.

At a safety standby, first and foremost responsibility is to be accessible by the IC and attentive to operations. Photos are a low priority and must not compromise readiness, operations, or availability of crew.

All photos taken during EMS response are to be routed to Medical Team Leader or Operations Manager for review prior to their use (with the exception of photos sent to ER illustrating mechanism of injury).

Policy: Patient Care Report **Policy #: 6303.0**

Date Adopted: 12/09/2019

Date Revised:

Policy

A patient care report (PCR) shall be generated for each patient contact. The ambulance attendant providing patient care is responsible for completing the PCR.

PCR shall also be completed when the responding unit is cancelled prior to arrival at scene, and when no patient is located on arrival at scene. The PCR is especially important in documentation of a patient refusal of care against medical advice. When more than one patient is encountered, a PCR must be generated for each patient.

The PCR is a legal document, and must accurately reflect the conditions found and treatments recommended and/or administered, as well as changes in patient status during and in response to treatment. Adequate time and care must be taken to ensure the PCR is complete, organized, and error-free. The PCR must be completed as soon as practical after the incident, and within 24 hours. Completion of the PCR takes precedence over all workday projects and chores.

SCCSD requires a computer-generated PCR whenever possible, and provides the program and equipment necessary. A handwritten PCR is acceptable when it is impractical to use a computer, as in the case of fire camp.

The PCR is a confidential document and access is strictly limited. Patients and their representatives are entitled to view and/or obtain a printed or electronic copy of their run report by signing a release and/or by subpoena. All requests will be routed to the Privacy Officer for review and approval.

PCR shall remain on file, protected by security measures, for a minimum of seven years.

Procedure

PCR is generated utilizing the PCR program provided, completed by the attendant providing patient care, proofread and checked for accuracy of content, within 24 hours of incident.

Policy: Confidentiality of Protected Health Information **Policy #: 6303.1**

Date Adopted: 12/09/2019

Date Revised:

Staff Member Verification

SCCSD prohibits the release of any patient information to anyone outside the organization unless required for purposes of treatment, payment or health care operations. Discussion of protected health information (PHI) within the organization should be limited. Acceptable use of PHI within the organization include, but are not limited to, exchange of patient information needed for the treatment of the patient, billing, and other essential health care operations, peer review, internal audits, and quality assurance activities.

I understand that the services we provide to patients are private and confidential and that I am a crucial step in respecting the privacy rights of SCCSD patients. I understand that it is necessary, in the rendering of care that patients provide personal information and that such information may exist in a variety of forms such as electronic mail, oral, written or photographic and that all such information is strictly confidential and protected by federal and state laws.

I agree that I will comply with all confidentiality policies and procedures during my entire employment with SCCSD. If I, at any time, knowingly or inadvertently breach the patient confidentiality policies and procedures, I agree to notify the Privacy Officer immediately.

Examples of possible breach of confidentiality include but are not limited to:

- Loss or temporary misplacement of clipboard containing PHI
- Loss or temporary misplacement of Toughbook containing PHI
- Accidental disclosure of patient identifying information during training
- Accidental fax of PHI to the wrong number
- Computer stations left unsecured with PHI displayed
- PHI left unsecured on desk while PCR in progress
-

I understand that possible breaches must be reported immediately so that any risk to the patient may be assessed and mitigated, and required notifications made according to HIPAA regulation.

I have read and understand all privacy policies and procedures that have been provided. I agree to abide by all policies or be subject to disciplinary action, which may include verbal or written warning, suspension, or termination of employment.

Employee Signature: _____ Date:_____

Policy: Confidentiality of Protected Health Information **Policy #: 6303.1**

Date Adopted: 12/09/2019

Date Revised:

Policy

SCCSD prohibits the release of any patient information to anyone outside the organization unless required for purposes of treatment, payment or health care operations. Discussion of protected health information (PHI) within the organization should be limited. Acceptable use of PHI within the organization include, but are not limited to, exchange of patient information needed for the treatment of the patient, billing, and other essential health care operations, peer review, internal audits, and quality assurance activities.

Training of Staff: SCCSD requires all existing and new staff members receive privacy training in accordance with the HIPAA Privacy Rule, within a reasonable time of joining our organization, as part of their orientation process. Employees will receive updates as necessary when there is a material change to policies and procedure.

Breach of PHI: In the event of a possible breach of PHI, the Privacy Officer will determine the nature and extent of PHI involved, the person who used the PHI or to whom the disclosure was made, whether the PHI was actually acquired or viewed, and the extent to which the risk to PHI has been mitigated.

If it is concluded there was a breach of PHI, the Privacy Officer will notify the patient in writing, by first class mail to the most recent address on file.

In accordance with HIPAA regulation, a Breach Log will be kept. All breaches involving less than 500 individuals will be reported to California Health and Human Services within 60 days of the end of the calendar year in which the breach was discovered. The same is required for a breach of more than 500 individuals, with the addition of media notification.

Procedure

Privacy Officer shall provide all staff with training on the HIPAA Privacy rule. Such training will include:

1) Overview of HIPAA regulations;
2) Description of protected health information;
3) Patient rights under the HIPAA Privacy Rule;
4) Staff member responsibilities under the HIPAA Privacy Rule;
5) Role of the Privacy Officer in concerns regarding privacy issues;
6) Importance of HIPAA compliance;
7) Consequences of HIPAA violations;
8) Review of HIPAA policies and forms.

Policy: Protected Health Information, Patient Access, Amendment, Restriction **Policy #: 6303.2**

Date Adopted: 12/09/2019

Date Revised:

Policy

Under the HIPAA Privacy Rule, individuals have the right to access and to request amendment or restriction on the use of their protected health information, (PHI) contained in designated record sets.

Designated record sets consist of the following:

1) Patient care report created by EMS field personnel;
2) Electronic claims or paper records of actual claims to Medicare or other insurance companies;
3) Patient-specific claim information, such as remittance advice, explanation of benefits, charge screens, patient account statements, signature authorization and agreement to pay documents;
4) Medicare advance beneficiary notices, insurance company notices, documentation submitted by the patient, copies of insurance cards or coverage summaries;
5) Amendments to PHI, or statements of disagreement by the patient when amendment is requested but not granted;
6) Copies of records created by other service providers (first responders, air medical, nursing homes, etc.) used by SCCSD as part of treatment or payment purposes.

Procedure

Access. Patient or representative will complete Request for Access form. Identity will be verified. Privacy Officer or designee will act on request within 30 days of receipt or sooner. An extension of an additional 30 days may be requested in writing if warranted, with circumstances of extension explained by written notice.

Access may be denied in the following circumstances, with no appeal:

1) Information requested was compiled in reasonable anticipation of, or use in a civil, criminal or administrative action or proceeding;
2) Information requested was obtained from someone other than a health care provider under a promise of confidentiality, and the requested access would be reasonably likely to reveal the source of the information.

Access may be denied in the following circumstances, subject to review and appeal:

1) Licensed health care professional has determined that the access requested is

reasonably likely to endanger the life or physical safety of the individual or another person;

2) Protected health information makes reference to another person (other than a health care provider) and a licensed health care professional has determined that the access requested is reasonably likely to cause substantial harm to that person;
3) If the request for access is made by a personal representative of the individual and a licensed health care professional has determined that access by that person is reasonably likely to cause harm to the individual or another person.

In the case of denial for the reasons above, the patient may request a review by sending a written request to the Privacy Officer. In response, SCCSD will designate a licensed health care professional who was not directly involved in the denial to review the decision to deny access. The review official will determine within a reasonable time period whether the denial is appropriate. The Privacy Officer will provide the patient with written notice of the determination.

The patient may also file a complaint in accordance with Privacy Practices Complaint Procedure.

When access is granted, electronic or hard copies are to be provided. Original records are not to leave SCCSD premises. SCCSD may charge a reasonable fee for copies.

All requests for access, whether granted or denied, shall be logged in the PHI Disclosure Log.

Amendment. Patient or representative will complete Request for Amendment form. Identity will be verified. Privacy Officer will act on request within 60 days of receipt or sooner. An extension of an additional 30 days may be requested in writing if warranted, with circumstances of extension explained by written notice.

If request for amendment is granted, requestor will receive written notice.

SCCSD may deny a request for amendment for the following reasons:

1) SCCSD did not create the PHI at issue;
2) The originator of the PHI is no longer available to act on the amendment;
3) The information is not a part of the designated record set;
4) The information is deemed accurate and complete.

If request for amendment is denied, requestor will receive written explanation. Such explanation shall contain the information that the individual may file a statement of disagreement, and how to file such a statement. The individual may request that the request for amendment and statement of disagreement be included with any future disclosures of the PHI. The explanation shall also describe how the individual may file a complaint with SCCSD, and that they may also file a complaint with the Secretary of Health and Human Services.

SCCSD may prepare a written rebuttal to the statement of disagreement. All such statements will be appended to the PHI.

If SCCSD receives a notice from another covered entity that it has amended its own PHI in

relation to a particular patient, the ambulance service must amend its own PHI that may be affected by the amendments.

Restriction. Patient or representative will complete Request for Restriction form. Identity will be verified. SCCSD is not required to agree to any restriction, and given the emergent nature of our operation, we generally will not agree to a restriction. Privacy Officer or designee will act on request within 30 days of receipt or sooner. An extension of an additional 30 days may be requested in writing if warranted, with circumstances of extension explained by written notice.

If the information the patient wishes to restrict is needed in order to provide emergency treatment, SCCSD may use the PHI or disclose such PHI to another health care provider to provide treatment to the individual.

If the patient requests restriction of PHI to a health plan about a healthcare service for which the patient has paid for out of pocket in full, the request for restriction will be honored.

Policy: Protected Health Information **Policy #: 6303.3**

Staff Levels of Access / Security

Date Adopted: 12/09/2019

Date Revised:

Policy

SCCSD maintains strict requirements on the security, access, disclosure and use of protected health information. Access, disclosure and use of PHI will be based on the role of the individual staff member in the organization, and will only be to the extent that the person needs access to PHI to complete necessary job functions.

Staff Access: Role-based access to protected health information is defined below by job title. Access to PHI is limited to the below persons and to the identified PHI only, based upon reasonable determination of minimum information necessary to perform individual job duties.

Administrator/Privacy Officer – May access all PHI in fulfilling responsibilities in patient care, quality assurance, compliance, payroll, billing, membership. This position has primary responsibility to oversee privacy related tasks such as access, denial, accounting, amendment, and restriction of PHI, breach notification, staff training and retraining, the security of PHI, and complaint resolution.

Administrative Assistant/Billing / Privacy Officer Designee - May access dispatch information, patient care reports, billing information and related records as necessary to complete payroll, billing, and administrative functions. This position may access all PHI while assisting in privacy related tasks such as access, denial, accounting, amendment, and restriction of PHI, breach notification, staff training and retraining, the security of PHI, and complaint resolution.

Clinical and Operations Coordinators - May access dispatch information, patient care reports, billing information and related records to the extent necessary for treatment, payment and operations, including monitoring compliance, performing continuous quality improvement, training, back up of records, and complaint investigation. To review PHI for court ordered appearance, make request through Privacy Officer or Designee.

Ambulance Attendant – May access dispatch information, patient care reports, billing information and related records to the extent necessary for treatment, payment and operations, including performing continuous quality improvement, training, and backup of records. To review PHI for court ordered appearance, make request through Privacy Officer or Designee.

Staff Security: All staff need to be sensitive about the importance of maintaining the confidence and security of all patient care information. Coworkers and other staff members should not have

access that is not necessary for the completion of their job duties.

Verbal Security. Conversations about patients and their health care should not take place in areas where those without a need to know are present. Be sensitive to your level of voice and to the fact that others may be in the area where you are speaking.

Physical Security. In the field, staff will protect and keep possession of paperwork, clipboards and tough books. If PHI is accidentally left at the receiving hospital or at a scene, efforts to retrieve will begin immediately. Call the receiving facility and request the item be secured by the charge nurse. Return for the item, or make arrangements for authorized SCCSD staff to retrieve. Report the incident immediately to the Privacy Officer.

In the station, protect PHI. Do not leave unsecured PHI on desks, printers, or copier. Secure the PHI and place it where it will not be inadvertently viewed by visitors until the PCR is complete and PHI filed securely.

Administrative, Technical and Physical Safeguards: As methods for gathering and charting patients' PHI evolve, SCCSD will perform continual risk analysis to protect PHI from breach.

Administrative Safeguards:

- Business associate agreements
- Removal of all patient-identifiable information prior to chart review training sessions
- Direction to staff to secure and protect PHI during the gathering of information, patient care, patient care reporting, and transport of PHI

Technical Safeguards:

- Web-based patient care reporting program with secure log-on procedure and encryption
- Tracking of access to PHI by user login within the web-based program
- Password protection on local computers, routers, and hard drive storage
- Cleansing of retired/surplus computers
- Pre-programmed fax numbers

Physical Safeguards:

- No visitors are present in the facilities without staff
- Locked filing cabinets for the storage of paper PHI

Policy: Record of Calls **Policy #: 6303.4**

Date Adopted: 12/09/2019

Date Revised:

Policy

In compliance with California Highway Patrol requirements, a "record of calls" is to be maintained. The record of calls is kept in the form of a log. Each call is promptly recorded in ink, utilizing one line per patient. The record of calls is a source of statistical data. Access to the record of calls is strictly limited, to protect patient privacy.

Procedure

Log is kept in chronological order, as much as possible, with the understanding that PCRs generated will be logged when they arrive in Adin. One line is used per patient. A new page is started at the beginning of each month. Data logged is the following:

- Date of service
- Name of patient
- Location of pick-up
- Nature of call (MVA, Cardiac, SOB, etc.)
- Requested by (911, Private, Facility)
- Time of dispatch
- Time of response
- Time arrived scene
- Time left scene
- Time arrived destination
- Destination or other disposition (AMA, Cancelled)
- Code of response and transport
- Unit identification / vehicle number (ex. Medic 31/ #2533)
- Crew initials

Policy: Mandated Reporting **Policy #: 6303.5**

Date Adopted: 12/09/2019

Date Revised:

Policy

In compliance with Section 11166 of the California Penal Code, any medical practitioner who has knowledge of or observes a child in his or her professional capacity or within the scope of his or her employment whom he or she knows or reasonably suspects has been the victim of child abuse, must report the known or suspected instance of child abuse to a child protective agency immediately or as soon as practically possible.

In compliance with Section 15630 of the welfare and institutions code, any health practitioner who in his/her capacity or within the scope of his/her employment, either has observed an incident that reasonably appears to be physical abuse, has observed a physical injury where the nature of the injury, its location on the body, or the repetition of the injury, clearly indicates that physical abuse has occurred, or is told by an elder or dependent adult that he/she has experienced behavior constituting physical abuse, shall report the known or suspected instance of physical abuse either to the long term care ombudsman coordinator or local law enforcement agency when the abuse has occurred in a long term facility, or to either the county adult protective services agency or local law enforcement agency when the physical abuse is alleged to have occurred anywhere else.

Procedure

For emergency or immediate response contact Modoc or Lassen County Child and Adult Protective Services by Hotline at (530) 233-6602 or (888) 845-0924 24-hours a day. Follow up with a printed report.

Lassen County Child and Adult Protective Services may be contacted at (530) 251-8158.

If contact cannot be made with the above numbers Call 911 in the respective County.

PDF Fill in forms for child and adult abuse reporting are located in the SCCSD electronic forms file. Online reports made on Friday afternoons, weekends and holidays may not be processed until the next business day.

Paper forms are maintained in the ambulance forms file cabinet with instructions for faxing or mailing. File printed report in Operations office.

Policy: EMS Quality Improvement Plan **Policy: 6303.6**

Date Adopted: 12/09/2019

Date Revised: 04/20/2026

Purpose

This Quality Improvement (QI) Plan is established in accordance with Nor Cal EMS Agency policies and California EMS Authority regulations. The purpose of this plan is to ensure a continuous quality improvement (CQI) process that objectively and systematically monitors, evaluates, and improves the quality and appropriateness of patient care, operational performance, and compliance with established EMS standards.

Authority And Oversight

EMS Manager / QI Coordinator: Gonzalo Solorio
Medical Director: Dr. Behnam Faridian

The Medical Director maintains ultimate authority over clinical care, protocols, and QI activities. The QI Coordinator is responsible for implementation, data collection, case review, and reporting.

Service Description

Southern Cascades CSD provides ALS-level care through a Quick Response Vehicle (QRV) model in accordance with Nor Cal EMS policies.

CQI Framework

Southern Cascades CSD utilizes a Continuous Quality Improvement (CQI) model including data collection, trend analysis, corrective action, and re-evaluation. This process is non-punitive and focused on improvement.

Mandatory Call Review

100% of patient care reports (PCRs) will undergo QI review evaluating clinical care, protocol adherence, documentation, and decision-making.

Focused Audit Categories

- Cardiac Arrest
- Optional Scope Utilization
- Pediatric Patients
- AMA / Refusals
- Treat-and-Release

Review Timeframes

Routine calls reviewed within 72 hours. High-risk events reviewed immediately.

Performance Indicators

- Response times
- Cardiac arrest outcomes
- Protocol compliance
- Documentation quality
- Optional scope usage
- Refusal rates

Corrective Action

Includes feedback, training, and remediation. All actions documented and tracked.

Education And Training

All staff complete Nor Cal EMS orientation. Quarterly training required.

QI Meetings

Quarterly CQI meetings for case review and system improvement.

Confidentiality

All QI activities are confidential and used for improvement purposes.

Annual Review

Plan reviewed annually and updated as needed.

Policy: Prehospital Laboratory Tests **Policy #: 6303.7**

Date Adopted: 12/09/2019

Date Revised:

Policy

To ensure staff proficiency and provide for accurate test results, SCCSD has established the following guidelines for the use of prehospital laboratory devices (glucometers). The Operations Manager shall be responsible for this program, and ensure that pre-hospitalstaff maintain their competency to perform test procedures by providing regular instruction and review.

Manufacturer's guidelines shall be followed. Glucometers shall be calibrated each time a new vial of test strips is opened by following the instructions provided. A full quality control check (both self-check and High/Low solutions) shall be performed before using the glucometer for the first time, if the cap is left off the vial of test strips, if the glucometer is dropped, and in the event of a suspicious test result.

SCCSD requires the following steps in addition to manufacturer's guidelines:

First-Out Ambulances:

- Daily inspection and self-check shall occur each morning. In the event of an error reading during self-check, the High/Low solutions shall be utilized to ensure proper function. If readings are not within manufacturer's recommended levels, the unit shall be taken out of service immediately.
- Monthly testing with High/Low solutions shall be performed concurrent with out-date checks, and documented on the Daily Checkout sheet. If readings are not within manufacturer's recommended levels, the unit shall be taken out of service immediately.

Second-Out Ambulances:

- Inspection and self-check shall occur on a weekly basis. In the event of an error reading during self-check, the High/Low solutions shall be utilized to ensure proper function. If readings are not within manufacturer's recommended levels, the unit shall be taken out of service immediately.
- Monthly testing with High/Low solutions shall be performed concurrent with out-date checks, and documented on the Daily Checkout sheet. If readings are not within manufacturer's recommended levels, the unit shall be taken out of service immediately.

Note: When you open a new bottle of glucose control solution, write the date on the label. Opened bottles of glucose control solution are good for three months, or until the expiration date, whichever comes first.

Policy: Controlled Substances **Policy #: 6303.8**

Date Adopted: 12/09/2019

Date Revised:

Policy

The purpose of this policy is to ensure compliance with state and federal regulations and local EMS agency policy governing the use of Drug Enforcement Agency (DEA) controlled substances.

Advanced life support ambulances shall be stocked with controlled substances in accordance with State and local EMS agency policies. Advanced Life Support personnel are responsible for the security of Controlled Substances in accordance with these policies. (Nor-Cal EMS Policy 410 – Management of Controlled Substances)

Procedure

All Controlled Substances shall be stored in a container with a numbered lock, secured within a permanent key-locked compartment within the ambulance.

Controlled substances and lock number shall be verified and documented daily on ambulance checkout by advanced life support provider.

A complete and accurate continuing log (e.g., real-time inventory) is required for each substance and must be maintained on a current basis. The log shall be uniquely and consecutively numbered for tracking purposes. Records shall be retained permanently and shall include:

-Date and time of administration, re-supply, or outdate activity
-Patient name
-Amount administered
-Amount wasted
-Substance administered
-Count of each controlled substance
-Initials of Paramedic and Re-Supplying RN or Pharmacist (2 sets of initials all transactions)
-Lock number

Re-supply of administered controlled substances is accomplished through Trinity Hospital Emergency Department, in accordance with hospital policies and procedures. Re-supply form and controlled substance log are verified and initialed by ALS and the re-supplying RN. The waste of any unused controlled substance shall be witnessed and initialed by receiving or re-supplying RN.

Replacement of outdating controlled substances is accomplished through Trinity Hospital Pharmacy only, in accordance with pharmacy policies and procedures, documented and initialed by ALS and Pharmacist.

Each line of activity and change of numbered-lock shall be verified by the advanced life support provider and re-supplying RN or pharmacist, who shall jointly initial the appropriate line of the continuing record. At no time is one signature adequate.

Any unusual occurrence, discrepancy in controlled substances or documentation, loss of paperwork, etc., shall be immediately reported in writing to Supervisor, who shall also report in writing to the issuing agent.

Policy: Ambulance Uniform **Policy #: 6304.0**

Date Adopted: 12/09/2019

Date Revised:

Policy

In order to promote a professional appearance that is easily identifiable, SCCSD EMS personnel are issued uniforms. Employees are expected to be in the same form of issued uniform as their duty partner every day, 0800-1630, with temporary exception for work projects and physical fitness training.

Uniforms must promote a positive appearance, be clean and in good repair, shirts tucked in, black uniform belt required, plain buckle. Undershirts may be worn, solid white or black. Printed undershirts are not permitted. Photo ID shall be worn. Belt, boots, and undershirt are the responsibility of the employee.

The uniform components that will be issued by SCCDS are:

- Dark Green button down shirts, Short Sleeve and Long Sleeve, Dark Green polo shirts Short Sleeve (Full time employees will be issued one long sleeve button down and any combination of two other shirts)
- One Dark Green full zip up hooded sweatshirt.
- One Hi Vis Yellow rain proof, wind proof Jacket.

All shirts including sweatshirts will have Southern Cascades Patches on both upper sleeves.

HI Vis Jacket will have Southern Cascades logo on front and reflective lettering denoting level of training on back of jacket.

All EMS personnel will be issued Photo ID which will be worn at all times when on duty.

Badges will be issued to all EMS personnel upon being sworn in as Southern Cascades employees.

All the above equipment and uniforms will remain SCCSD property and will be returned if employee no longer employed by SCCSD.

Black duty boots meeting SCCSD standards must be worn for all scheduled shifts: Height minimum 6” from center heel insole to center boot top, not counting loop or tongue; Cut, puncture and abrasion resistant; Ankle support including laces or zipper system; Toe safety; Barrier protection; Black. Tennis or other casual shoes are not permitted.

Uniform hats are issued. No other hats such as fire department, sports, etc.

Ambulance personnel shall wear issued uniforms only while on duty. The EMS uniform components issued and are to be worn by ambulance staff only.

Initial and replacement uniforms are obtained through the General Manager or EMS Program Manager. Some items require special order, batch purchasing, or successful completion of orientation and are therefore not immediate.

Replacement is as needed to maintain professional appearance.

SCCSD t-shirts may be issued for casual wear, teaching, fire camp, and special events. T-shirts are not acceptable for first-out ambulance duty.

Policy: Second Out Ambulance **Policy #: 6305.0**

Date Adopted: 12/09/2019

Date Revised:

Policy

Second out ambulances are maintained in readiness to respond during times of multiple calls and/or patients, out of area transfers, long response times, and first-out crews running long hours during sleep period.

Second out ambulances shall be staffed and utilized for planned special events and public safety standbys.

Second-out ambulances shall be checked out on a designated weekly basis, as a minimum. Status of second out ambulances shall be tracked and communicated to crews in regard to equipment and supplies stocking level and readiness.

Scheduling of staff for planned second-out ambulances shall be distributed as equally as possible, dependent on availability.

Emergency staffing of second-out ambulances occurs on a first-come, first-served basis, with staffing preference of EMT-P and EMT-I combination. Providing patient care in the most efficient manner is the response priority. Three-person crew is acceptable if the dispatch appears to warrant.

Uniform for second-out ambulance shall be the same as for first-out units when the event is planned. Emergency second-out attendants shall wear the required uniform whenever possible. At a minimum, attendants shall wear clothing and shoes suitable for ambulance response and personal safety. No shorts or sandals for safety reasons.

Pay for second-out staffing is for time worked, with a 2-hour minimum. Twenty-four hour staffing of second-out ambulances occurs occasionally during special events. Expectations regarding shift length and pay will be communicated to crews. Full 24-hour coverage of second-out is paid under the same structure as first-out shifts.

Policy: Fire Camp Coverage **Policy #: 6305.1**

Date Adopted: 12/09/2019

Date Revised:

Policy

SCCSD shall provide standby services at fire incidents upon request. A prompt response is necessary by the responding crew, unless otherwise requested by the dispatch.

In the event that a first-out unit responds, they will be released as soon as practical by a second-out unit, staffed specifically for the fire camp.

Scheduling of fire camp shifts will not take priority over first-out coverage. Crews must keep first-out shift commitments.

Procedure

Distribution of fire camp shifts will be accomplished as equally as possible, dependent upon availability. Off-duty personnel will be contacted first, to minimize disruption of the first-out schedule.

Preferred staffing level for ambulance standby is one EMT-P and one EMT-I. When this is not available, two ALS providers will be acceptable. Two BLS providers will not be utilized, unless specifically requested by CDF or USFS, and approved by Management. First aid standby may be staffed either by BLS or ALS personnel.

Fire camp is paid at employee's overtime rate, and time is paid for the full 24 hours, or the full time spent on duty. Pay starts when the employee leaves SCCSD quarters in the ambulance and continues until the employee returns to SCCSD quarters. Shift change occurs at the fire camp in most instances.

Crew is responsible for bringing their own personal items such as extra clothing, towels, spending money, snacks, etc.

Policy: Required Certifications **Policy #: 6306.0**

Date Adopted: 12/09/2019

Date Revised:

Policy

It is expected that ambulance employees, as professional medical providers, are responsible for maintaining the licenses and certifications required to perform at their current level of practice.

Required Certifications:

- Nor-Cal Accreditation
- State License (applicable to level of practice)
- National Registry (maintenance of this certification optional, encouraged)
- California Driver License (employee responsibility)
- Ambulance Driver License
- DMV Physical
- CPR Certification
- ACLS (applicable to level of practice)
- PALS or PEPP (applicable to level of practice)

An employee with a lapse in required certification, at a minimum, will be relieved from duty until proof of required certification is submitted. Release of duty shall be leave without pay. Maintenance of current required certifications is a professional expectation. Employees allowing such lapse are subject to discipline under Policy 2300.0, up to and including termination.

Procedure

Initial certification fees are the responsibility of the employee. SCCSD will reimburse active employees for the cost of re-certifications (excluding CDL) during the length of their employment. In order to be reimbursed, employees will submit the completed application and a copy of the card received. Reimbursement will not be made until the re-certification is successfully completed.

Employees whose primary EMS employment is with SCCSD will be reimbursed 100%.

Employees whose primary employment is with another EMS provider will be reimbursed at their SCCSD full-time equivalent if the other employer does not provide reimbursement. FTE will be calculated using the previous twelve months.

Initial certification fees for active SCCSD employees upgrading their level of practice will be reimbursed based on primary employment and full-time equivalent as described above, at the

discretion of management. (Based upon SCCSD need for ALS providers current financial status, and employee expected work availability.) This includes Nor-Cal Accreditation, State Paramedic License and National Registry.

Policy: Upgrading Level of Practice **Policy #: 6306.1**

Date Adopted: 12/09/2019

Date Revised:

Policy

SCCSD encourages education and growth in employees to maintain and enhance morale and job satisfaction. When an existing employee desires to upgrade level of practice, approval must be sought from management, with confirmation that there will be a position available at the new level.

SCCSD may sponsor an employee's education, with Management recommendation and Board approval. A written agreement shall be generated, outlining commitment of the employee to remain with SCCSD for a period specified and agreed upon by both parties, and plan for reimbursement in the event of non-completion.

In order to maximize benefit to SCCSD, priority will be focused on employees who live within the service district, and those with a history and/or expectation of consistent shifts scheduled with SCCSD.

1) Obtain management confirmation that there will be a position available at the new level.
2) Obtain management and board approval for sponsorship.
3) Complete and pass all phases of a recognized and approved paramedic program.
4) Upon receiving course completion certificate, the employee begins an evaluation period at SCCSD, for the purpose of ensuring readiness to function at the higher level of care in the field. During this process, the employee is not to be scheduled or respond second-out with a BLS partner. Evaluation is informal, performed by a SCCSD employee of equal or higher level of practice, approved by management.
5) Upon receiving positive evaluation, management approval, and confirmation that the employee feels ready to perform at the higher level of practice, employee will receive written confirmation of status change, with a 90-day probationary period.

Policy: Continuing Education Program **Policy #: 6306.2**

Date Adopted: 12/09/2019

Date Revised:

Policy

SCCSD strongly supports an environment of continuing education and improvement. Toward this end, SCCSD shall organize and provide a regular program of education and outreach to EMS providers in Modoc and Lassen County, ensuring relevant content that enhances the practice of prehospital emergency medical care, related to the knowledge base or technical skills required of field providers.

SCCSD will provide continuing education certificates within state regulations, EMSA guidelines, and local EMS agency policies. Records will be maintained on each course taught, including date of instruction, location, participant rosters, sample course test or other method of evaluation, and record of continuing education units issued. Records will be maintained for a minimum of four years.

Management is responsible for this program, and may delegate and share responsibility as appropriate.

Policy: Run Review Program **Policy #: 6306.3**

Date Adopted: 12/09/2019

Date Revised:

Policy

In order to assist ambulance employees in obtaining the required number of continuing education units, SCCSD shall provide a regular schedule of run reviews. The purpose of run review is tied to continuous quality improvement and education. These programs mesh together to promote a high quality of patient care and accountability.

Management is responsible for obtaining staff input and creating a schedule of run review that meets the re-certification needs of employees, while providing meaningful education and skills practice. Run review records will be maintained for a minimum four years.

Management will work together with base hospital to provide this program.

Policy: Ambulance Ride Along Agreement **Policy #: 6306.4**

Date Adopted: 12/09/2019

Date Revised:

Name: _____ Date: _____

Address: _____ Level of Training: _____

Phone: _____ Certification #: _____

Reason for Request: _____ Department: _____

Statement of Confidentiality: I,_____acknowledge and understand that everything I see or hear while riding with or working for Southern Cascade Community Services District is privileged and confidential information. I hereby agree to keep all patient information confidential and protect the privacy of all involved parties, including information learned at emergency scenes, at the receiving hospital, and any related law enforcement or other protective agency involvement. I understand that I am subject to legal action for breach of confidentiality.

Initial:_____

Release of Liability: I,_____request authorization to accompany and observe emergency ambulance personnel of Southern Community Services District. I am aware that there is inherent danger in emergency ambulance operations and hereby accept responsibility for all risks of injury, illness or death. I hereby release Southern Community Services District and any of its affiliate organizations from all actions, claims, or demands that I, my assignees, heirs, distributes, guardians, and legal representatives may have for injury, illness, damage and/or death arising from my voluntary participation in ambulance observation / ride along activities.

Initial:_____

Standard of Dress / Professionalism: Persons riding along with Southern Cascades must present a clean and neat appearance including attention to personal hygiene such as clean and combed hair, and being free of heavy perfumes and body odor. Dark slacks, white shirt, tucked in with belt are required. Fire department uniform is acceptable. Protective footwear (boots) required.

Initial:_____

Code of Conduct: I agree to follow directions given, adhere to all safety standards, universal precautions, scope of practice and maintain high awareness to safe operations, whether as a trained participant, or as an observer. Standard workplace policies must be observed, including but not limited to prohibition of alcohol, drugs, harassment and violence. I understand the ambulance ride along may be terminated if any concerns arise.

Reviewed, Accepted, Approved

Southern Cascades CSD:_____ Date:_____

Ride-Along Participant:_____ Date:_____

Policy: Ambulance Ride Along **Policy #: 6306.4**

Date Adopted: 12/09/2019

Date Revised:

Policy

SCCSD supports the concept of ambulance ride along for the purpose of education and to satisfy certification requirements. Ride along may also be granted for allied agencies, and local government for cross training and broadened perspective.

Ride along is not intended to be a regular occurrence, as it exposes SCCSD to added liability. Ambulance ride along is a privilege that will be revoked if deemed necessary by crews and management.

Ambulance crews shall extend themselves to provide a positive and educational experience to the participant.

Procedure

- Participant must be 18 years of age.
- Ambulance ride along must be approved and scheduled in advance with Ride Along Agreement form completed for each participant, outlining expectations and requirements.
- Crews will be provided with advance notification.
- Crews will model professional and safe conduct in all interactions, provide detailed orientation to ambulance and equipment, access to skills practice or educational materials in down time.
- Crews may terminate a ride along if concerns arise, contact Management for support.
- Ride-along shift is 0800 through 1630 hours. Overnight ride-along is not regularly offered.

Policy: Paramedic Precept **Policy #: 6306.5**

Date Adopted: 12/09/2019

Date Revised:

Policy

Eligible SCCSD employees are strongly encouraged to provide paramedic precepting. In the process of precepting a paramedic student, the Preceptor gives back to EMS some of the time and energy that was extended on his or her behalf by paramedic instructors, clinical staff, and preceptors. By extending themselves to share their knowledge and experience in a positive, supportive and professional manner, the Preceptor not only gives, but receives great benefit.

Preceptor shall meet Nor-Cal EMS guidelines for preceptor eligibility. Attendance of preceptor training is highly encouraged.

Preceptors shall adhere to the regulations of the specific paramedic program. Preceptor shall be responsible to ensure the intern works within SCCSD policy and procedure, adhering to all safety requirements and blood borne pathogens plan.

SCCSD receives the right to discontinue the internship, based upon consistent issues of performance, safety or liability concerns.

Procedure

Interns may not receive pay for intern shifts. Financial incentive for preceptors shall be based upon SCCSD budget and current financial outlook.

Interns shall perform their new skills only when with their primary or secondary preceptor.

Interns shall wear the attire specified by their program, in accordance with SCCSD requirements: Dark blue pants, white or gray button front or polo shirt (no bright colors, no t-shirts), with identification as provided by the program. Trousers shall be worn with a belt. Footwear shall be black leather shoes or boots.

Policy: Use / Loan of Facilities **Policy #: 6401.0**

Date Adopted: 12/09/2019

Date Revised:

Policy

Southern Cascades Community Services District considers Southern Cascades Base and Training Center a "Community Public Safety Center". As such, the classroom facilities and grounds are available to agencies and activities related to public safety.

Management shall be responsible to limit access to appropriate areas, and to provide strict protection of confidential records such as personnel or patient records.

Procedure

Requests for use / loan of facilities will be reviewed and approved, subject to acceptable use and availability. A key will be issued to responsible party, accessing classroom and attached restroom facility. Crew quarters and office are not offered or available.

Agency will be given written and verbal instructions on equipment and facility use, restrictions, and process for securing facility and returning key.

Policy: Use / Loan of Equipment Agreement **Policy #: 6401.1**

Date Adopted: 12/09/2019

Date Revised:

Policy

SCCSD equipment may be loaned or rented to a cooperating agency or organization, as described below.

All use of SCCSD equipment is subject to the first call of SCCSD and the accomplishment of our program.

All users of SCCSD equipment shall be responsible for damage or loss of such equipment.

Employees may sign out equipment, as it directly relates to their employment with SCCSD, through Management. Equipment shall not be loaned for personal use.

Agency: _____ Date:_____

Equipment Requested: _____

Purpose: _____

Date of Equipment Use:_____

Equipment Return Date:_____

The undersigned agrees to reimburse Southern Cascades Community Services District for any damaged or lost equipment.

Agency Representative:_____ Date:_____

SCCSD Representative:_____ Date:_____

Policy: Use / Loan of Equipment **Policy #: 6401.1**

Date Adopted: 12/09/2019

Date Revised:

Policy

SCCSD equipment may be loaned or rented to a cooperating agency or organization, within the policy and procedures provided below.

All use of SCCSD equipment is subject to the first call of SCCSD and the accomplishment of our program.

All users of SCCSD equipment shall be responsible for damage or loss of such equipment.

Employees may sign out equipment, as it directly relates to their employment with SCCSD, through Management.

Requests for loan of emergency equipment may be of an urgent nature. Management is given the authority to grant such requests on a verbal agreement, subject to first call of SCCSD needs.

EMS Education Division audio visual and training manikins will only be utilized at the Southern Cascades Training Center.

Procedure

1) Requesting agency shall submit request.
2) Management shall review request, contacting appropriate program coordinators to ensure no scheduling conflicts exist.
3) Request shall be approved or disapproved at the discretion of Management.
4) Equipment use form shall be completed and signed by both parties, with clear arrangements in place regarding equipment return.

Policy: Facilities / Equipment Maintenance **Policy #: 6402.0**

Date Adopted: 12/09/2019

Date Revised:

Policy

Management will work together to oversee the maintenance and condition of all SCCSD facilities and equipment, tracking deferred maintenance needs, replacement schedules, and other matters relating to good maintenance practices.

Equipment maintenance records shall be kept for the life of the equipment/machinery. Equipment that is worn, unsafe, or which age precludes cost-effective maintenance shall be replaced according to priority and budget.

Heater filters, electric motors, gardening equipment, etc., all need periodic maintenance to keep top efficiency and longevity. Management is responsible to oversee and/or delegate maintenance tasks.

Management shall annually report to the Board relating to the condition of buildings and grounds, and the needs foreseen for the upcoming year.

Procedure

Tracking of buildings and grounds projects shall be performed. Annual report of upcoming maintenance and equipment needs will occur at the October board meeting, in conjunction with budget preparation.

Policy: Ambulance Maintenance and Repair **Policy #: 6402.1**

Date Adopted: 12/09/2019

Date Revised:

Policy

Management shall be responsible for ensuring that SCCSD vehicles receive a regular program of preventive maintenance. Vehicles will be maintained to the highest degree of safety by a provider trained and certified by the equipment manufacturer to perform such work.

Vehicles will be rotated out of service for preventative maintenance on a regular schedule as outlined below. Vehicles will be immediately removed from service for major defects. Major defects include, but are not limited to flat tire or excessive tire wear, engine or transmission problem, steering or braking abnormality. Any finding by the emergency vehicle operator that questions vehicle safety must be reported to management immediately, and the vehicle removed from service until the condition is researched and resolved by a trained provider.

Complete records of vehicle maintenance and repairs, warranty work, recall notices, etc., shall be kept in an organized manner, for the life of the vehicle.

Emergency vehicles shall be weighed before being placed in service to ensure they are operating at or under the maximum weight limit for the vehicle. Guidelines for weighing vehicles are included on form 5002.1.

Procedure

Maintenance / Inspection Schedule

- Oil, lube and filter change every 3,000 miles
- Comprehensive preventive maintenance check every 6,000 miles
- Seasonal equipment changes including removal and replacement of studded tires and automatic tire chains
- Ensure traditional tire chains carried on each ambulance by November
- Coordinate annual ambulance inspections

Other Records

- Maintain current registration and insurance records in each vehicle
- Maintain fuel log and cards in each vehicle
- Oversee and track accident/incident reporting

Policy: Ambulance Maintenance and Repair Form **Policy #: 6402.1**

Date Adopted: 12/09/2019

Date Revised:

Guidelines for Weighing Vehicles

Vin #:_____ SCCSD Unit #:_____

Vehicle Description:_____ Year:_____

Make/Model:_____

Weight Information: (found of Safety Compliance Certification label)

Gross Vehicle Weight Rating:_____

Gross Front Axle Weight Rating:_____

Gross Rear Axle Weight Rating:_____

Actual Weights: (weigh on certified scale, fully loaded)

Front Axle Weight: L _____ R _____

Rear Axle Weight: L _____ R _____

Number of Seating positions: _____(est. 200# per seat)

Gross Vehicle Weight:_____

Left Side Weight (front and rear combined):_____ % Difference:_____

Right Side Weight (front and rear combined):_____ % Difference:_____

Emergency vehicles shall be weighed before being placed in service. None of the weights should exceed axle ratings, nor should the front-to-rear bias exceed the manufacturer's recommendations. The side-to-side weights should differ by more than 7%

If any vehicles are overweight, efforts should be made to reduce the weight to within legal limits. Attach a copy of the weigh slip to completed form.

Weighed and reviewed by:_____ Date: _____

Policy: Ambulance Replacement Schedule **Policy #: 6402.2**

Date Adopted: 12/09/2019

Date Revised:

Policy

In order to provide ambulance service of high quality, in as safe and reliable a manner as possible, SCCSD shall plan and implement timely vehicle upgrades.

It is recognized that when a vehicle reaches a certain age or mileage, repairs and maintenance cost will exceed the cost of replacement.

First Out. First out ambulances may be utilized up to a limit of 200,000 miles, or approximately 4-5 years, then rotate to second-out response.

Second Out. Second out ambulances may be utilized up to a limit of 300,000 miles, dependent upon performance, reliability and cost of maintenance.

Policy: Issued Equipment – Property Checkout Form **Policy #: 6403.0**

Date Adopted: 12/09/2019

Date Revised:

Employee:	**Hire Date:**
Job Title:	**Status:**

Equipment and Property Issued to Employee:

_____ **Radio:**_____/_____
Make / Model **Serial #**

_____ **Pager:**_____/_____
Make / Model **Serial #**

_____ **Winter Jacket and Liner, Wear Guard Size:**_____

_____ **Other:**_____

_____ **Other:**_____

_____ **Other:**_____

_____ **I have received the above equipment and/or property in good condition.**

____ **I am responsible for returning the above listed equipment and/or property in reasonable condition upon termination of employment.**

_____ **Should equipment in my possession be damaged or lost due to negligence, I understand I may be required to reimburse SCCSD.** (Grossly in excess of normal wear and tear)

Employee Signature **Date**	**Employer Signature** **Date**

Policy: Issued Equipment **Policy #: 6403.0**

Date Adopted: 12/09/2019

Date Revised:

Policy

Management shall be responsible for issuing equipment appropriately to accomplish the program of SCCSD.

Equipment issued shall be limited to communications pagers and radios. Employees may be issued pagers and radios, based upon their availability and location of residence. Communications equipment will be placed for maximum efficiency, with the purpose identified as quick response of second out ambulances.

Full-time employees will have first priority of equipment issued, at discretion of Management. Part-time and supplemental employees will be issued equipment based upon their availability to SCCSD, and response time from residence.

Equipment such as computers, printers, etc., shall not be issued to employees, excepting Management. This equipment shall remain on SCCSD premises, available for employees to check out for the accomplishment of SCCSD programs. Such use will be scheduled on an equipment use list.

Procedure

Issue of SCCSD communications equipment shall be at the discretion of Management.

Written record of equipment issued shall be completed for each employee when applicable. Property checkout form shall be completed in full as equipment is issued.

Property issued shall be returned to SCCSD as requested by Management, on employment status or availability change.

Policy: Surplus Equipment / Property **Policy #: 6404.0**

Date Adopted: 12/09/2019

Date Revised: 04/17/2023

Policy

SCCSD property that has become obsolete, is no longer required for SCCSD purposes, or has been replaced shall be disposed of according to Management direction. Items declared surplus may be sold, donated to another government entity, or disposed of in the local dump.

Items over $1000 in value shall require Board notification and approval.

Conditions of all sales shall comply with existing laws.

If the Board determines that the property does not exceed a value of $2,500 it may be sold at private sale without advertisement. Items that have been advertised for sale, but for which no bid was received, may also be sold without further advertisement.

Items that exceed $2,500 in value may be advertised and sold utilizing a sealed bid process.

Monies derived from sale of SCCSD equipment shall be credited to the general fund.

Procedure

Management is responsible to keep equipment current, and to dispose of those items that are no longer functional, updating the SCCSD inventory list regularly.

Bids received shall be opened at a board meeting, or at the board's direction, and surplus equipment/property distributed according to the highest bid.

Care should be taken in selling equipment. To minimize potential problems, all property should be advertised and sold on an "as is" basis.

Policy: District Surveillance **Policy #: 6405.0**

Date Adopted: 07/15/2024

Date Revised:

Purpose

The purpose of this policy is to outline surveillance and tracking of Southern Cascades Community Services District property.

Company Monitoring

Southern Cascades Community Services District reserves the right to install security and/or tracking devices on District property for specific business reasons, such as security, theft protection or protection of proprietary information, staff, and members.

"Property," as the term is used in this policy, is defined as any piece of equipment, furnishing, vehicle, building or supply leased, owned, donated or otherwise in the custodial care of Southern Cascades Community Services District or any person acting as its agent.

No Southern Cascades Community Services District employee should expect privacy on Southern Cascades Community Services District premises or when using Southern Cascades Community Services Districts property or networks, except that which is required by law.

Employee privacy in nonwork areas will be respected to the extent possible. Southern Cascades Community Services District's reasonable suspicion of onsite drug use, physical abuse, theft or similar circumstances would be possible exceptions. Legal advice will be sought in advance in such rare cases where nonwork-area privacy must be compromised.

Vehicle Monitoring

Activities.Monitored

Southern Cascades Community Services District vehicle ("property") monitoring will be conducted at all times District vehicles are running via Electronic Logging Fleet Camera devices.

Employees will not be monitoring during personal time such as unpaid meal breaks. At such times monitoring may be disengaged by turning the vehicle off.

Data.Collected.~~.~~Use.of.Collected.Data

GPS Tracking and visual and audio data will be collected of street and inside vehicle views to;

1) Ensure the safety of employees and members
2) Provide in cab safety alerts to improve driving behaviors
3) Provide self-coaching of drivers for interactive driver behavior improvement
4) Reward drivers for safe driving habits
5) Protect security of vehicle from theft

6) Conduct investigations of accidents or incidents in order to make evidence-based decisions as a result, including but not limited to; implementation of driver performance improvement planning, disciplinary action, and in some cases termination
7) Adhere to guidelines set forth in accordance with Southern Cascades Community Services District contract with Partnership Health Plan of California
8) Reduce liability
9) Monitor DTC codes

Vendors.or.Third.Parties.with.Access.to.Data

Partnership Health Plan of California will have access strictly limited to GPS Data Collection as a requirement of the contract between Partnership Health Plan of California and Southern Cascades Community Services District.

Southern Cascades Community Services District's insurance carrier will have access to GPS data collections and audio and video data in the event of an accident, in accordance with California State Law and the National Labor Relations Act. Legal advice will be sought in advance for such cases.

District.Administrative.Staff.Access

The Southern Cascades Community Services District General Administrator and Health Transportation Manager will have access to collected data.

Monitoring.Frequency

Monitoring of driver behavior events and safety alerts will be conducted on a daily basis and as needed basis for accidents or incidents.

Data.Retention.

GPS Tracking data is retained for two years. Audio/Video Data is retained for one month.

Consent.to.GPS.Tracking.and.Audio~~-~~Video.Recording

Consent is given upon using or entering the Southern Cascades Community Services District vehicle as a paid employee, volunteer, or member.

Employees should contact their supervisor or the human resource (HR) department if they have questions about this policy.

Nothing in this policy is intended to, nor should be construed to limit or interfere with employee rights as set forth under all applicable provisions of the National Labor Relations Act, including Section 7 and 8(a)(1) rights to organize and engage in protected, concerted activities regarding the terms and conditions of employment.

Policy: Accident / Incident Investigation Policy **Policy: 6406.0**

Date Adopted: 03/16/2026

Date Revised:

Purpose

Maintaining a safe workplace is essential to Southern Cascades CSD's operations, and it is the District's policy to promote safety on the job and comply with applicable laws regarding safety in the workplace. The health and well-being of employees is foremost among the District's concerns. For this reason, employees are expected to assist the District in maintaining safe working conditions. Employees are required to follow common-sense safety practices and correct or report any unsafe conditions to supervisor. Similarly, employees are required to report any workplace accidents, injuries and illnesses to their supervisor.

This policy establishes a clear, consistent, and fair process for reporting, investigating, documenting, and responding to accidents and incidents involving employees, vehicles, passengers, contractors, or property. This policy supports the District's commitment to safety, accountability, and continuous improvement, and aligns with the District's Progressive Disciplinary Action Policy and Drug / Alcohol Prohibition Policy.

Scope

This policy applies to all employees, drivers, supervisors, and management personnel while at work or engaged in District-related activities, whether on District premises or off-site.

Policy Statement

All accidents and incidents shall be promptly reported and thoroughly investigated to:

- Determine root causes
- Identify corrective actions
- Ensure compliance with safety, drug and alcohol, and disciplinary policies
- Reduce the likelihood of recurrence

Accident and incident investigations are fact-finding processes, not disciplinary actions by themselves. Disciplinary action, if warranted, will be handled separately in accordance with the Progressive Disciplinary Action Policy.

Reporting Requirements

1. **Fitness for Duty**
   Employees are required to report to work for each scheduled workday able to safely and competently perform their assigned duties. If an employee is unable to safely or

competently perform job duties for any reason, the employee must immediately inform their supervisor or designated management representative.

2. **Unsafe Conditions**
   Employees who observe or experience unsafe working conditions must immediately report those conditions to their supervisor or designated management representative.

3. **Accidents and Injuries Involving Employees**
   All accidents, injuries, illnesses, or incidents involving employees, regardless of severity, must be reported immediately to a supervisor. Employees involved in a work-related accident or injury are required to complete all applicable reports and cooperate fully with the District's recording, reporting, and investigation obligations.

4. **Accidents and Injuries Involving Passengers or Third Parties**
   All accidents or injuries involving passengers, customers, vendors, contractors, or any other individual occurring in connection with District operations must be reported immediately to a supervisor, regardless of severity, or 911 if necessary.

5. **Non-Retaliation**
   Employees will not be penalized or retaliated against for reporting unsafe working conditions, accidents, injuries, illnesses, or incidents in good faith. Timely reporting is essential to maintaining a safe and healthy workplace.

Drug and Alcohol Testing

- Post-accident drug and/or alcohol testing shall be conducted when required under the District's Drug / Alcohol Prohibition Policy.
- Failure or refusal to submit to required testing will be treated as a policy violation and may result in disciplinary action up to and including termination.

Investigation Process

1. **Initiation of Investigation**
   - A supervisor or human resources shall begin the investigation as soon as practicable following notification.

2. **Evidence Collection**
   - Statements from involved employees and witnesses
   - Photographs, videos, or diagrams of the scene
   - Vehicle inspection reports
   - Applicable law enforcement or medical reports
   - Review of training records and prior incidents

3. **Employee Statements**

- Employees may be asked to provide written statements.
- Refusal to cooperate with an investigation may result in disciplinary action.

4. **Administrative Leave**
    - An employee may be placed on temporary administrative leave (with or without pay, as appropriate) pending completion of the investigation when safety concerns exist.

Determination and Findings

The investigation will assess:

- Whether the event was preventable or non-preventable
- Contributing factors (environmental, mechanical, procedural, human factors)
- Compliance with District policies, training, and safety procedures

Corrective Actions

Based on investigation findings, corrective actions may include:

- Additional training or coaching
- Policy or procedure changes
- Equipment repair or replacement
- Referral to the Progressive Disciplinary Action process when appropriate

Disciplinary Action

If policy violations are identified, disciplinary action will be administered in accordance with the Progressive Disciplinary Action Policy. The District reserves the right to skip or combine disciplinary steps depending on the severity of the incident and surrounding circumstances.

Certain conduct, including but not limited to illegal activity, substance abuse, intoxication, or willful safety violations, may result in immediate termination.

Documentation and Recordkeeping

- All accident and incident reports, investigation materials, and findings shall be documented and retained in accordance with District record retention requirements.
- Investigation records will be maintained separately from routine personnel files when appropriate.

Appeals

Employees may submit additional information or documentation related to the investigation within five (5) business days of being notified of investigation findings.

Confidentiality

All investigations will be handled with respect for employee privacy and confidentiality to the extent permitted by law.

Questions

Employees with questions regarding this policy should contact their supervisor or the General Manager.

No Contractual Rights

Nothing in this policy creates a contract of employment or alters the at-will employment relationship.

Policy: Procurement **Policy #: 6501.0**

Date Adopted: 08/19/2024

Date Revised: 06/16/2025

Chapter 1 – Policy
Chapter 2 – General
Chapter 3 – Procurement of Materials, Supplies, Equipment, and Recurring Expenditures
Chapter 4 – Procurement of Professional Services
Chapter 5 – Payment

Chapter 1 – Policy

1.1 Purpose

It is in the interest of Southern Cascades CSD to establish administrative procurement practices that facilitate efficient business operations and provide fair compensation and local workforce opportunities whenever possible within a framework of high quality, competitive service offerings.

1.2 Procedures

This Procurement Policy provides the authority, approval requirements and procedures for the procurement of materials, supplies, equipment, services, and in the approved fiscal year budget.

1.3 Definitions

A. District General Administrator. The SOUTHERN CASCADES CSD District General Administrator or, in his/her absence, the Chief Financial Officer.
B. CFO. The Chief Financial Officer.
C. Division Manager. The EMS and/or HTS Manager.
D. Board of Directors or Board. The Board of Directors of the SOUTHERN CASCADES CSD establishes policies for the operation of the SOUTHERN CASCADES CSD.
E. Capital Equipment. Equipment with a purchase price of two thousand five hundred dollars ($2,500) or more as designated by the District General Administrator.
F. Contract. A written agreement covering the performance of work or services including the furnishing of labor, materials, tools and equipment in performing services to SOUTHERN CASCADES CSD. The term Contract includes Purchase Orders.
G. SOUTHERN CASCADES CSD. Southern Cascades Community Services District.
H. Department Manager. The District General Administrator, Chief Financial Officer, and Division Manager.
I. Change Order or Contract Amendment. Alterations, deviations, additions to or deletions from the plan, specifications and/or scope of services, including the right to increase or decrease the quantity of any item or portion of the work or services or to delete any item or

portion of the work or services as may be deemed to be necessary, as determined by SOUTHERN CASCADES CSD, for the proper completion, construction of the work or services contemplated.

J. Task Order Contract. Contract with pre-qualified consultant or contractor where specific services are contracted for by Task Orders.
K. Emergency. "Emergency" means a sudden, unexpected occurrence, involving a clear and imminent danger, demanding immediate action to prevent or mitigate loss of, or damage to, life, health, property, or essential public services.
L. Purchasing Agent. Department Manager.
M. Purchase Order. A form designed to contain all necessary information and signatures relevant to purchases by SOUTHERN CASCADES CSD and is used as a written order to a vendor and may be either an original order or may confirm a verbal order. The current Purchase Order forms may be in paper or electronic form and developed and/or modified from time to time at the discretion of the District General Administrator.
N. Recurring Expenditures. Administrative expenditures that occur from time to time in the normal course of SOUTHERN CASCADES CSD business, including, but not limited to, the following: Utilities (electricity, heating fuel, telephone service, etc.), servicing of SOUTHERN CASCADES CSD equipment under contract, fuel for operation of SOUTHERN CASCADES CSD vehicles and equipment, debt service payments, payroll, payroll taxes and benefits, insurance, postage, postage meter rental and ongoing rental payments.
O. Warrants. Checks and electronic payment for materials, supplies, equipment, and services received by the SOUTHERN CASCADES CSD.

1.4 Fiscal Year Budget

The fiscal year budget approved by the Board provides the authority to SOUTHERN CASCADES CSD staff to procure materials, supplies, equipment, services, referenced in the approved budget for the upcoming fiscal year.

1.5 Conflicts with the Law

To the extent any provision herein conflicts or is inconsistent with State or Federal law, then said State or Federal law shall control, but only to the extent of the inconsistency, and no other provisions herein shall be affected.

1.6 Severability

If any one or more of the provisions/sections contained in this Procurement Policy shall for any reason be held to be invalid, illegal or unenforceable in any respect, then such provision or

provisions shall be deemed severable from the remaining provisions hereof, and such invalidity, illegality or unenforceability shall not affect any other provision hereof, and this Procurement Policy shall be construed as if such invalid, illegal or unenforceable provision had not been contained herein.

1.7 Monitoring

A. It is important for SOUTHERN CASCADES CSD to evaluate materials, equipment, and services of all current suppliers. Suppliers with a low rating can be viewed as costing the SOUTHERN CASCADES CSD time and money, and, therefore, should be terminated upon documentation.
B. In an effort to obtain the best prices possible, vendors contacted for quotes and/or bids shall be regularly reviewed to ensure competitive pricing and maintenance of vendor lists.
C. This Procurement Policy should be reviewed on a periodic basis and updated where deemed appropriate to reflect changes in SOUTHERN CASCADES CSD's operations. The District General Administrator, acting with the Board, may at any time make changes to this Procurement Policy to facilitate a more efficient and accountable procurement process for SOUTHERN CASCADES CSD.

1.8 Procurements Containing Both Equipment and Services

When contracting for services that include the purchase and installation of equipment such as computers and electronic devices, the determination of whether the purchase should be as a procurement of material, supplies, and equipment or the procurement of services shall be made at the District General Administrator's discretion after giving consideration to the costs of the equipment, whether or not the equipment is unique to the person or firm providing the services and the cost of the services.

1.9 Compliance with Other District Policies and Potential Conflicts

Procurement practices must comply with other District policies and procedures. If there is a conflict between policies, the District General Administrator will use their discretion to determine the appropriate solution.

1.10 Federally Declared Emergencies

In the event of an emergency declared by the President of the United States, SOUTHERN CASCADES CSD must comply with Federal procurement standards as a condition of receiving public assistance funding from the Federal Emergency Management Agency (FEMA) for contract costs for eligible work. FEMA funding is governed by Title 2 of the Code of Federal Regulations (CFR) Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards. In the event of a Federally declared emergency, SOUTHERN CASCADES CSD will utilize the required FEMA purchasing regulations for all new expenditures that may be eligible for reimbursement. When possible, SOUTHERN CASCADES CSD will still abide by the District's Procurement Policies, but if a conflict exists, the Federal regulations will take precedence.

1.11 Procurement Related to Federal Grants

In the event the District receives Federal grant awards, SOUTHERN CASCADES CSD must comply with Federal procurement standards as a condition of receiving funding as governed by Title 2 of

the Code of Federal Regulations (CFR) Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards for all related purchases. When possible,

SOUTHERN CASCADES CSD will still abide by the District's Procurement Policies, but if a conflict exists, the Federal regulations will take precedence.

1.12 Conflicts of Interest

A. SOUTHERN CASCADES CSD employees, department managers, and Directors are prohibited from using the following practices in conducting business activities:
    1. Practices which might result in unlawful activity, including, but not limited to, rebates, kickbacks, commissions, or other unlawful considerations.
    2. Participating in the selection process when the employee, department manager, or Director has a relationship with a person or business entity seeking a contract which would subject the employee to the same prohibition as in Government Code Section 87100 related to Conflicts of Interest, which provides.
    3. "No public official at any level of state or local government shall make, participate in making or in any way attempt to use his official position to influence a governmental decision in which he knows or has reason to know he has a financial interest."
    4. Purchasing or otherwise acquiring SOUTHERN CASCADES CSD property and equipment, including surplus property and equipment, for personal use or profit.
B. No SOUTHERN CASCADES CSD employee, department manager, or Director shall accept, directly or indirectly, any gift, rebate, money or anything else of value from any person or entity if such gift, rebate, money or anything of value is intended to reward or be inducement for conducting business, placing orders with, or otherwise using the recipient's position with SOUTHERN CASCADES CSD to secure an agreement with the SOUTHERN CASCADES CSD.

1.13 Ethical Conduct in Procurement

A. Ethical conduct in managing SOUTHERN CASCADES CSD's procurement activities is absolutely essential. Staff must always be mindful that they represent the District and the Board of Directors and share a professional trust with other staff and the general public. Therefore, when making a purchase, keep in mind the following factors:
    1. Is this purchase necessary for the job at hand or for SOUTHERN CASCADES CSD to carry on its normal business activities?
    2. Is this a reasonable and lowest possible cost for this type of purchase?

Chapter 2 - General

2.1 Signing Authority

The District General Administrator, or in their absence the Chief Financial Officer or Division Manager, is hereby authorized to sign on behalf of SOUTHERN CASCADES CSD the following documents:

A. Any documents necessary to conduct the general business of SOUTHERN CASCADES CSD that do not require prior approval of the Board.

B. Any documents necessary to conduct the general business of SOUTHERN CASCADES CSD requiring approval of the Board, after said documents have received approval of the Board, unless the Board specifies that the document be signed by the Board President.

2.2 Budgeted Procurements

A. Budget. At the beginning of each fiscal year, the District General Administrator shall issue a complete SOUTHERN CASCADES CSD Budget approved by the Board. This budget will contain the purchasing account corresponding with budgeted funds for each account. Each SOUTHERN CASCADES CSD department will receive its own budget for conducting purchasing transactions. It is the responsibility of each Department Manager to control spending and monitor the funds in the account line items that they are authorized to use. A monthly status report will be issued showing a comparison between budgeted amounts and the department's purchasing activity.
The District General Administrator is authorized to exceed budgeted expenditures by ten percent (10%) without Board approval. If this occurs, the District General Administrator shall account to the Board at the mid-year budget review or if after its completion, within sixty (60) days of the expenditures and request the appropriate budget amendments and/or transfers.

B. District General Administrator Approval. Subject to Section C, below, the District General Administrator or, in their absence, the Chief Financial Officer or Division Manager shall approve all Contracts, Contract Amendments, Change Orders, Task Order Contracts (and related Task Orders) and Purchase Orders. "Absence" means the District General Administrator's inability to exercise their authority at the time when SOUTHERN CASCADES CSD needs to take the necessary steps to procure goods or services.

C. Board approval required. Board approval is required for the following.
    1. Contracts, Contract Amendments and Purchase Orders for the purchase of supplies, equipment, materials or recurring expenditures where the estimated cumulative cost is ten thousand dollars ($10,000) or more.
    2. Professional service contracts and Amendments where the estimated cumulative cost is ten thousand dollars ($10,000) or more.
    3. Any procurement referred to the Board for their consideration by the District General Administrator or Chief Financial Officer.

2.3 Emergency Procurements

Upon the written finding of the District General Administrator that an emergency situation exists, the District General Administrator is authorized to approve unbudgeted expenditures up to twenty thousand dollars ($20,000). The District General Administrator shall account to the Board within thirty (30) days of the expenditures and request the appropriate budget amendments and/or transfers.

2.4 Board Discretion to Waive Policy

The Board of Directors reserves the right, at its sole discretion, to waive any or all provisions of this Procurement Policy when it is deemed to be in the best interest of the organization. Such waivers must be formally approved and documented in the minutes of the Board meeting at which the waiver is granted. This discretion may be exercised on a case-by-case basis and does not establish a precedent or ongoing exemption from the Policy.

2.5 Methods of Procurements

The following chart summarizes methods of procurement by category.

A. **Supplies, Equipment, and Recurring Expenditures**. See Chapter 3, below, for procedures and limitations.

Dollar Amount	Procurement Method
$0-$5,000	No Purchase Required.
$5,001-$9,999	Written Quote (minimum 3 quotes) Purchase Order or Contract Required.
$10,000-$49,999	Written Quote (minimum 3 quotes) Purchase Order – Board Approval Required for Contract or Purchase Order.
$50,000+	Prepare Notice of Inviting Proposals for Board Approval – Board Approval Required for Contract or Purchase Order.

B. **Professional Services**. See Chapter 4, below, for procedures and limitations.

Dollar Amount	Procurement Method
$0-$9,999	Solicit Proposals from a Qualified consultant/Professional by Whatever Method the Purchasing Agent Deems Appropriate Under the Circumstances.
$10,000+	Prepare Request for Proposals for Board Approval – Board Approval of Contract Required.

Chapter 3 – Procurement of Materials, Supplies, Equipment, and Recurring Expenditures

3.1 Introduction

A. The following procedures are established for the procurement of materials, supplies and equipment, as referenced in Government Code Section 54202.
B. Methods of Procurement:

1. Purchases of materials, supplies, equipment, and recurring expenditures are normally made pursuant to Purchase Orders as described in this Chapter.
2. In the discretion of the Purchasing Agent and with the approval of the District General Administrator and SOUTHERN CASCADES CSDLegal Counsel, a contract may be substitutedfor a Purchase Order.

3.2 Purchases of Materials, Supplies and Equipment with an Estimated Cost of Less Than Fifty Thousand Dollar ($50,000).

For purchases of materials, supplies and equipment with an estimated cost of less than $50,000 the following shall apply:

A. <u>Types of Quotations</u>

1. No purchase order is required for standard or non-complex materials with an estimated price of $5,000 or less.
2. <u>Verbal</u>. Verbal requests for quotations will be provided to a minimum of three (3) vendors for purchases of standard or non-complex materials with an estimated price of $5,001 to $10,000 and not covered by a contractual agreement.
3. <u>Written</u>. Written requests for quotations (RFQ) will be sent to a minimum of three (3) vendors under the following conditions.
    a. Purchases estimated to exceed $10,000, but less than a total of$50,000.
    b. All Capital Equipment purchases exceeding $10,000, but less than a total of $50,000.
    c. Non-standard conditions, requirements, instructions, etc.
    d. Any occasion where more permanent documentation is advisable.
    e. Any purchase based on best value rather than lowest price.

B. **<u>Award of Purchase Orders</u>**. The Department Manager will examine the quotations for completion and thereon determine the most responsive bidder with consideration of price, date of delivery, and quality. The quotation will be attached to the Purchase Order. The purchase order and the award will be made by the Department Manager after review by the District General Administrator. The Department Manager or his/her designee will notify the successful and unsuccessful vendors.

3.3 Purchases of Materials, Supplies and Equipment Equal to Or Greater Than Fifty Thousand Dollars ($50,000)

A. Purchases of material, supplies and equipment equaling to or greater than fifty thousand dollars ($50,000) shall be approved by the Board with the vendor who, in response to the Notice of Inviting Proposals, submits a proposal that most closely meets SOUTHERN CASCADES CSD's specifications with the consideration of price and delivery dates.
B. The Request for Proposals (RFP) shall be published and distributed by the Department Manager in a manner to reasonably assure that the proposed purchase is made to a vendor that most closely meets SOUTHERN CASCADES CSD's specification with consideration of price, availability of service and delivery dates.

C. The Request for Proposals shall include the following:
    1. A statement of specifications of equipment and/or supplies to be purchased;
    2. The location and deadline for submission of proposals;
    3. The location where the specifications and proposal forms, if required, may be secured;
    4. The proposed delivery date and place of delivery;
    5. The date, time and place assigned for the opening of sealed proposals;
    6. The type and character of proposal security required, if any;
    7. A statement that SOUTHERN CASCADES CSD intends to award the Contract to the vendor who submits a proposal that most closely meets SOUTHERN CASCADES CSD specifications with the consideration of price and delivery dates;
    8. That SOUTHERN CASCADES CSD reserves the right to reject all proposals; and
    9. Notice that no vendor can withdraw its proposal for a period of sixty (60) days from the date of opening proposals.
D. Alternative Procedure. As an alternative to the procedures described in Paragraphs A, B and C, above, the Board may approve the purchase of supplies and equipment by accepting a proposal submitted by a vendor to another public agency for similar equipment and/or supplies upon the Board approving the purchase by Resolution making the following findings:
    1. The other agency's procedures for the purchase were substantially similar to the SOUTHERN CASCADES CSD's procedures as stated in Paragraphs A, B and C, above.
    2. The equipment and/or supplies to be purchased by SOUTHERN CASCADES CSD is substantially similar to the supplies and equipment purchased by the other agency, so that the submitted proposals would be responsive to SOUTHERN CASCADES CSD's specifications.
    3. The negotiations regarding the purchase are minor and the proposed purchase is consistent with the policy of awarding the contract to the most responsive vendor with the consideration of price and delivery date.

3.4 Non-Competitive Negotiations

A. Under some circumstances, SOUTHERN CASCADES CSD competitive solicitation requirements may be dispensed with when the services, materials, supplies, equipment, and recurring expenditures are only available from one source either because the brand or trade name article, goods, or product is the only one which will properly meet the needs of SOUTHERN CASCADES CSD or the item is unique and available only from a sole source.
B. This approach involves procurement of materials, supplies, and equipment through solicitation of a proposal from only one source. Such negotiations may be used in limited situations when the award of a contract or purchase order is not feasible under other methods upon the following findings:
    1. The purchase price is reasonable; and
    2. One or more of the following exists:

a. The product is the only one that will properly meet the needs of SOUTHERN CASCADES CSD because:
    i. The item is unique and is available only from a sole source; or
    ii. The item is unique and is designed to match others used in or furnished to a particular installation, program, facility orlocation.
b. The product will be used in a field test or experiment to determine the product's suitability for future use.
c. The procurement is for the renewal or extension of a contract for continuing professional services to SOUTHERN CASCADES CSD.
d. Public exigency or emergency will not permit delay.
e. A Federal Grantor authorized non-competitive negotiations.

C. Findings
1. The Department Manager shall make written findings referenced in Subparagraph B(2) above to be approved by the District General Administrator for purchases less than ten thousand dollars ($10,000) that are not otherwise approved by the Board.
2. The Board by Resolutions shall adopt findings for purchases referenced in
3. Subparagraph B(2) above for purchases of ten thousand dollars ($10,000) or more.

3.5 Purchase Order Preparation

A. Purchase orders shall be prepared from a properly completed purchase order form. The form is designed to contain all the necessary information and signatures relevant to the purchase within SOUTHERN CASCADES CSD.
B. The purchase order form is used as a written order to a vendor and shall include a Purchase Order number. A Purchase Order may also serve as a written change order. Purchase Orders must be approved as referenced in Section 3.2 above.
C. Each purchase order form shall be filled out by SOUTHERN CASCADES CSD employee prior to SOUTHERN CASCADES CSD funds being obligated for a purchase and shall contain the following information:
1. Purchase order number, date, department, and who wrote it.
2. To whom the purchase order is issued, together with a complete address.
3. Quantity/unit and description of item(s) to be purchased.
4. General Ledger account number to be charged.
5. Unit price and extended amount (depending upon quantity).
6. If applicable, the words "OPEN PO" and "EXPIRATION DATE," not to exceed past the end of the current fiscal year, at the top of the purchase order form.
7. The words "NOT TO EXCEED" if it is for a repetitive purchase or a contract amount.
8. The total amount of the purchase order shall include charges for freight and tax,if applicable.
9. The initial purchase order MUST have attached to it the following: the written quote or estimate or a copy of the contract, or other backup supportingdocumentation.

D. The purchase order must be submitted immediately to the District General Administrator or his/her designee. The purchase order date must precede the order date.
E. Any incomplete purchase orders will be returned to the Department Manager for completion.
F. Insofar that it does not conflict with any other Procurement Policy limitations, a purchase order may be exceeded by up to 10% of the original purchase order amount. No increase may be given for quoted prices.

3.6 Open Purchase Orders

A. A blanket or open purchase order can be used to reduce the time-consuming process of filling out a purchase order form for each purchase when it is with the same vendor and for repeat materials.
B. Open purchase orders are to be used when SOUTHERN CASCADES CSD will:
    1. Purchase repetitive, specified services or items, or categories of items from the same vendor over a period of less than one year, or on a monthlybasis.
    2. Order standard materials or maintenance supplies, which require numerous shipments.
    3. Obtain more favorable pricing through volume commitments.
C. An employee making a purchase with an open purchase order vendor shall immediately transmit the invoice to their Department Manager for processing. The Department Manager shall sign the invoice and indicate the budgetary account upon the face of the invoice and promptly route the invoice to Accounts Payable for payment.
D. Open purchase orders generally should NOT be used when:
    1. No benefit will be derived over and above a regular purchase.
    2. Prices are unknown at ordering time, or subject to change later withoutnotice.
    3. Quality of vendor or service is questionable.
    4. Control over SOUTHERN CASCADES CSD expenditures would be weakened significantly.
E. An open purchase order differs from the normal purchase order only in the date entry block that now has a date range not to exceed past the end of the current fiscalyear.
F. Each year during the month of June, each Department Manager will review alldepartment blanket purchase orders and reissue all necessary blanket purchase orders effective July 1.

Chapter 4 – Procurement of Professional Services

4.1 Applicability

A. The procedures established herein are for the procurement of professional and consulting services including, but not limited to, auditors, electricians, financial advisors, technology advisors, rate consultants, plumbers, private architects, landscape architect, engineers, environmental consultants, landsurveyors, and/or constructionproject managers, or other individuals or organizations possessing a high degree of professional, unique specialized technical skill or expertise, not always adaptable to competitive bidding.

B. It is the policy of SOUTHERN CASCADES CSD to employ professional and other consultant services whenever it is in SOUTHERN CASCADES CSD's best interest.
C. The requirements to solicit proposals referenced in Sections 4.4 & 4.5, below, do not apply to:
    1. Contract Amendments so long as the amendment is related to the completion of the contemplated work or services of the original Contract.
    2. Contracts for the continuation of professional service where the key personnel providing services have relocated to a different firm or company.
    3. Contracts for services related to litigation.

4.2 Method of Procurement

Procurement of Professional Services is normally made pursuant to a Contract or Task Order Contract.

4.3 Qualifications

Professional service contracts shall be awarded on the basis of demonstrated competence and qualifications for the type of service to be performed and at a fair and reasonable price to SOUTHERN CASCADES CSD.

4.4 Professional Services with An Estimated Cost of Less Than Ten Thousand Dollars ($10,000)

A. For contracts estimated to be less than ten thousand dollars ($10,000) the Purchasing Agent will solicit proposals from qualified consultants and professionals by whatever method the Purchasing Agent deems most appropriate under thecircumstances.
B. Professional services will only be procured by a contract that is approved by the District General Administrator and SOUTHERN CASCADES CSD legal counsel.

4.5 Professional Services with An Estimated Cost of Ten Thousand Dollars ($10,000) Or More

The following procedures shall apply to the procurement of professional services with an estimated cost of ten thousand dollars ($10,000) or greater.

A. The Board of Directors shall approve the request for proposals and the award of professional service contracts.
B. The written contract shall be awarded to the professional service provider who, in response to a request for proposals, submits a statement of qualifications and proposal for services that most closely meets SOUTHERN CASCADES CSD's requirements at a fair and reasonable cost.

4.6 Non-Competitive Negotiations

A. Under some circumstances, SOUTHERN CASCADES CSD competitive solicitation requirements may be dispensed with when the professional service is only available from one source either because the professional service provider is the only provider which will

properly meet the needs of SOUTHERN CASCADES CSD or the professional service is unique and available only from a sole source.

B. This approach involves procurement of professional services through solicitation of proposals from only one source. Such negotiations may be used in limited situations based on the following findings:
    1. The service provider is qualified pursuant to Section 4.3.
    2. The cost of the services is reasonable; and
    3. One or more of the following exists:
        a. The proposed service provider is uniquely knowledgeable and qualified because similar/related services have been previously provided to the SOUTHERN CASCADES CSD; or
        b. An Emergency will not permit delay.
C. Findings
    1. The Department Manager shall make written findings referenced inSubparagraph A, above, to be approved by the District General Administrator for Professional Services Contracts where the cumulative costs are estimated at less than ten thousand dollars ($10,000) that are not otherwise approved by the Board.
    2. The Board by Resolutions shall adopt findings references in Subparagraph A, above, for Professional Services Contracts where the cumulative costs are estimated at ten thousand dollars ($10,000) or more.

Chapter 5 – Payment

5.1 Warrants

A. All supporting documents including the Purchase Order, Task Order, proof of receipt, packing slip, etc. will be attached to the Invoice and presented to the District General Administrator for payment pursuant to subparagraph B, below. The Invoices will be reviewed and approved (paper or digital signature) by the District General Administrator verifying that the documents are internally consistent, that invoices being paid are original, that receipt of goods or services has been acknowledged by the SOUTHERN CASCADES CSD Department Manager and that the amounts agree between documents.

5.2 Check Signing Procedures

A. The designated Directors of SOUTHERN CASCADES CSD, the District General Administrator, and the Chief Financial Officer are authorized to sign check(s) on behalf of the SOUTHERN CASCADES CSD.
B. All checks under fifty thousand dollars ($50,000) in value issued by the SOUTHERN CASCADES CSD shall contain one (1) signature.
C. All checks over fifty thousand dollars ($50,000) in value issued by the SOUTHERN CASCADES CSD shallcontain two (2) signatures, one of which shall be a Director of the SOUTHERN CASCADES CSD.

5.3 Payment Via SOUTHERN CASCADES CSD Credit Cards

A. All purchases using a SOUTHERN CASCADES CSD credit card are subject to the same requirements and procedures as outlined in this policy, and the following additional requirements:
    1. All SOUTHERN CASCADES CSD credit cards shall be issued on a departmental basis in the name of each Department Manager. The District General Administrator shall manage the administration of SOUTHERN CASCADES CSD credit cards.
    2. Only the District General Administrator, Department Managers, and Supervisors are authorized to sign credit card purchases. Department Managers may allow their department employees to use the department credit card; however, the Department Manager is responsible for its care and control.
    3. Credit card purchased related to travel will adhere to the District's Travel and Reimbursement Policy.
    4. The credit limit on SOUTHERN CASCADES CSD credit cards shall be ten thousand dollars ($10,000) per month for the District General Administrator and five thousand dollars ($5,000) per month for each Department Manager.
    5. Credit card purchases for orders that are made via telephone or Internet are permitted. A receipt must be obtained and turned in to Accounts Payable.
    6. The use of SOUTHERN CASCADES CSD credit cards for personal purchases or spending is prohibited. Any violation of this policy will result in loss of SOUTHERN CASCADES CSD credit card privileges and violations are subject to disciplinary action.
    7. Cash advances on any SOUTHERN CASCADES CSD credit card are prohibited. Any violation of this policy will result in disciplinary action.

5.4 Payment by Electronic Funds Transfer

A. SOUTHERN CASCADES CSD may make payments by Electronic Funds Transfer (EFT), Automated Clearing House network (ACH), and electronic check(s) in compliance with the applicable payment provisions of this Chapter 6 and banking rules and regulations.
B. SOUTHERN CASCADES CSD may make payments by Wire Transfer for exceptional circumstances with prior approval from the District General Administrator or the Board. Examples of exceptional circumstances include instances when expediency is required, or for real estate transactions. If other types of payment options are available, Wire Transfers should not be used due to their increased cost and lower security compared to other forms of electronic payment.

Policy: Capitalization **Policy #: 6502.0**

Date Adopted: 12/09/2019

Date Revised:

Purpose

This accounting policy establishes the minimum cost (capitalization amount) that shall be used to determine the capital assets to be recorded in Southern Cascades CSD'S books and financial statements.

Capital asset definition and thresholds

A "Capital Asset" is a unit of property with a useful life exceeding one year and a pre-unit acquisition cost exceeding $2,500.00. Capital assets will be capitalized and depreciated over their useful lives. Southern Cascades CSD will expense the full acquisition cost of tangible personal property below the thresholds in the year purchased.

Capitalization method and procedure

All Capital Assets are recorded at historical cost as of the date acquired.

Tangible assets costing below the threshold amount are recorded as an expense for Southern Cascades CSD's annual financial statements (or books). In addition, assets with an economic useful life of 12 months or less must be expensed for both book and financial reporting purposes.

Documentation

Invoices substantiating the acquisition cost of each unit of property are to be retained for a minimum of 10 years.

Resident Discount Request Form

For Emergency Medical Services

Section 1: Resident Information

Full Name: _____

Phone Number: _____

Email Address: _____

Residential Address: _____

City: _____ State: _____ ZIP: _____

Section 2: Parcel Tax Verification

Number of Parcels Owned (max 2): _____

Parcel Number(s): _____

Section 3: Service Details

Date of Service: _____

Type of Service Received:

☐ Emergency Ambulance Transport
☐ Other EMS Service (please specify): _____

Amount Charged: $_____

Amount Requested for Discount: $_____

Section 4: Required Attachments

☐ Proof of residency within SCCSD EMS service boundaries (e.g. Utility Bill, ID, or other documentation showing proof of physical address)

☐ Evidence of parcel tax payment (e.g. property tax statement, **including receipt of payment**)

☐ Invoice from SCCSD EMS service for which discount is requested.

Submission Instructions

Submit completed form and required documents to Southern Cascades Community Services District:
Mail: Southern Cascades CSD PO Box 239 Adin, CA 96006
In-person: Southern Cascades CSD 205 Ash Valley Rd. Adin, CA 96006

Section 5: Certification

I hereby certify that the information provided above is true and accurate. I understand that discount eligibility is contingent upon verified payment of the parcel tax and that the maximum annual discount is $130. I authorize Southern Cascades Community Services District to verify all information.

Signature: _____ Date: _____

Submission Instructions

Submit completed form and required documents to Southern Cascades Community Services District:

Mail: Southern Cascades CSD PO Box 239 Adin, CA 96006

In-person: Southern Cascades CSD 205 Ash Valley Rd. Adin, CA 96006

Policy: District Service Discounts **Policy #: 6503.0**

Date Adopted: 04/21/2025

Date Revised: 10/20/2026

Policy Purpose

This policy outlines the eligibility, process, and documentation required for residents of the Southern Cascades Community Services District to receive a discount for emergency medical services, as a benefit of the parcel tax assessment levied by the District.

Eligibility

Residents are eligible for the annual discount if they meet the following criteria:

- Reside within the boundaries of the Southern Cascades Community Services District.
- Are listed as the owner or legal occupant of a parcel(s) assessed under the SCCSD Parcel Tax.
- Have paid the parcel tax of $65 per parcel, up to a maximum of two parcels per calendar year.

Discount Benefit

Eligible residents may receive:

- Up to $130 per calendar year in discounts on qualifying services provided by the District:
    - Emergency Medical Services

The discount shall not exceed the total amount paid by the resident toward the parcel tax assessment in the current calendar year.

Qualifying Services

Discounts apply only to services directly provided by SCCSD, including but not limited to:

- Emergency ambulance transport
- Other related Emergency Medical Services

Application Procedure

Residents must submit a Discount Request Form to the District office along with the following:

- Proof of residency within the SCCSD boundaries (e.g., utility bill, ID).
- Evidence of parcel tax payment (e.g., property tax statement).

- Invoice or receipt from SCCSD service for which the discount is requested.

Submissions can be made via:

- In-person at the SCCSD office
- Mail: Southern Cascades CSD PO Box 239 Adin, CA 96006

Processing and Application of Discount

- The District will review each application within 30 days of receipt.
- Approved discounts will be credited to the resident's account or refunded, depending on the nature of the service and payment method.
- Residents may apply for the discount multiple times within a year, up to the $130 annual maximum if two parcels are assessed.

Recordkeeping and Auditing

- The District will maintain all applications and supporting documents for a minimum of 3 years.
- An annual audit will be conducted to ensure compliance and accuracy in the administration of discounts.

Limitations

- Discounts do not carry over to subsequent years.
- Services provided by third parties not affiliated with SCCSD are not eligible.
- Maximum discount is capped at $130 per calendar year if two parcels have been assessed and $65 if one is assessed, regardless of service usage.

Policy: Credit Card **Policy: 6504.0**

Date Adopted:

Date Revised:

Purpose

The purpose of this Credit Card Policy ("Policy") is to establish clear rules and internal controls for the issuance, use, monitoring, reconciliation, and revocation of Southern Cascades Community Services District credit cards.

This Policy is intended to ensure that District credit cards are used only for authorized public purposes, that all purchases are properly documented and approved, and that public funds are protected from misuse, waste, fraud, or abuse.

Policy Statement

District credit cards are issued for the convenience of the Southern Cascades Community Services District ("District") and shall be used only for authorized District business.

A District credit card is not a personal benefit, compensation, or personal line of credit. Personal charges are prohibited, even if the cardholder or user intends to reimburse the District.

All credit card purchases must comply with this Policy, the District Procurement Policy, the approved fiscal year budget, conflict-of-interest rules, public contracting requirements, grant requirements when applicable, and all other applicable laws and District procedures.

Definitions

Cardholder: The District General Manager or a Department Manager to whom a District credit card has been issued or assigned.

Authorized user: A Supervisor or department employee permitted by a Department Manager to use a department credit card for authorized District business.

District credit card: Any credit card, charge card, purchasing card, fuel card, store card, travel card, or similar payment card issued to or used by the District.

Authorized purchase: A purchase that is necessary for District business, within the approved budget, within the cardholder or authorized user’s authority, properly documented, and consistent with this Policy and the District Procurement Policy.

Approving official: The District General Manager, Chief Financial Officer, Department Manager, Board President, or other person designated to review and approve credit card transactions.

Personal use: Any use of a District credit card for a non-District purpose, regardless of whether the cardholder or user intends to reimburse the District.

Issuance Of District Credit Cards

A. Departmental Issuance

District credit cards shall be issued on a departmental basis in the name of each Department Manager, consistent with the District Procurement Policy. The District General Manager shall manage the administration of all District credit cards.

B. Authorized Cardholders

District credit cards may be issued to or maintained by the following individuals only, unless otherwise approved by the Board of Directors and consistent with the District Procurement Policy:

1. District General Manager.
2. Department Managers.
3. Other positions specifically authorized by the Board of Directors.

C. Authorized Signers and Users

Only the District General Manager, Department Managers, and Supervisors are authorized to sign for credit card purchases. A Department Manager may allow a department employee to use the department credit card for authorized District purchases; however, the Department Manager remains responsible for the care, control, documentation, and proper use of the department credit card.

D. No Personal Entitlement

A District credit card is issued for District convenience only. Issuance or use of a District credit card is not a personal entitlement, benefit, compensation, or personal line of credit.

E. Cardholder Agreement

Before receiving or using a District credit card, each cardholder and authorized user shall sign a Credit Cardholder Acknowledgment and Agreement confirming that the individual has received, read, understands, and agrees to comply with this Policy and the District Procurement Policy.

F. Card Inventory

The District shall maintain a current inventory of all District credit cards, including the cardholder name, department, card issuer, last four digits of the card number, credit limit, issuance date, and date of cancellation or return.

Credit Limits

A. Monthly Credit Limits

Unless otherwise approved by the Board of Directors, District credit card limits shall be as follows:

Position/Card	Monthly Limit	Notes
District General Manager	$10,000 per month	Consistent with Procurement Policy No. 6501.0
Each Department Manager	$5,000 per month	Consistent with Procurement Policy No. 6501.0

B. Lower Limits and Restrictions

The District General Manager may establish lower card limits, transaction limits, merchant restrictions, cash advance blocks, or other administrative controls as needed to protect District funds and ensure compliance with District policy.

C. No Authority to Exceed Procurement Limits

A credit card limit does not authorize a cardholder or user to exceed purchasing authority, budget authority, purchase order requirements, quote requirements, contract requirements, legal review requirements, or Board approval requirements.

Relationship To Procurement Policy

A. Same Procurement Requirements Apply

All purchases made using a District credit card are subject to the same requirements and procedures set forth in the District Procurement Policy. Use of a District credit card is a payment method only. It does not replace or waive any requirement for quotes, purchase orders, contracts, budget approval, Board approval, legal review, or other procurement procedures.

B. Purchase Orders, Quotes, Contracts, and Board Approval

If a purchase requires a purchase order, quote, contract, Board approval, or other approval under the District Procurement Policy, those requirements must be satisfied before the credit card is used, unless an emergency or other lawful exception applies.

C. Budget Compliance

Credit card purchases must be within the approved fiscal year budget and charged to the appropriate account. Department Managers are responsible for monitoring the funds in the budget line items they are authorized to use.

D. Federal Grants and Federally Declared Emergencies

Credit card purchases related to federal grants or federally declared emergencies shall comply with applicable federal procurement requirements, including requirements that may apply under Title 2 of the Code of Federal Regulations Part 200. If federal requirements conflict with District procedures, the federal requirements shall control to the extent required for eligibility or compliance.

Authorized Uses

District credit cards may be used only for authorized District business and only when the purchase complies with the District Procurement Policy, this Policy, the approved budget, and any applicable travel, reimbursement, grant, or public contracting requirements.

Authorized uses may include:

- Supplies, materials, tools, parts, and equipment needed for District operations.
- Recurring expenditures or routine operational purchases approved under the District Procurement Policy.
- Emergency purchases authorized under District policy.
- Registration fees for approved conferences, trainings, workshops, or meetings.

- Authorized travel expenses, provided the expense complies with the District's Travel and Reimbursement Policy.
- Telephone or internet purchases, provided a receipt is obtained and turned in to Accounts Payable.
- Fuel, vehicle-related expenses, postage, permits, licenses, software, subscriptions, or other District business expenses authorized under the District Procurement Policy.

Prohibited Uses

District credit cards shall not be used for:

- Personal purchases or personal spending of any kind.
- Cash advances, ATM withdrawals, money orders, wire transfers, gift cards, prepaid cards, cryptocurrency, or other cash-equivalent purchases.
- Alcoholic beverages, tobacco, cannabis, controlled substances, or related products.
- Entertainment, recreation, sporting events, movies, or amusement activities, unless expressly approved in advance by the Board for a valid public purpose.
- Political, campaign, lobbying, or election-related expenses, unless expressly authorized by law and approved by the Board.
- Donations, sponsorships, or charitable contributions unless approved by the Board and authorized by law.
- Fines, penalties, traffic citations, parking tickets, late fees caused by the cardholder or user, or interest charges caused by failure to submit required documentation.
- Expenses for spouses, family members, guests, or companions.
- Purchases from vendors in which the cardholder or user has a financial interest or conflict of interest.
- Purchases that split a transaction to avoid purchasing limits, quote requirements, purchase order requirements, contract requirements, or Board approval.
- Purchases that exceed the approved budget, card limit, purchasing authority, or procurement authority.
- Travel expenses that do not comply with the District's Travel and Reimbursement Policy.
- Any purchase prohibited by the District Procurement Policy, this Policy, applicable law, grant requirements, or Board direction.

Prior Approval

A. General Requirement

Cardholders and authorized users shall obtain approval before making purchases when required by this Policy, the District Procurement Policy, budget controls, or direction from the District General Manager or Board of Directors.

B. Purchases Requiring Prior Approval

Prior approval is required for purchases that require approval under the District Procurement Policy, including but not limited to purchases requiring quotes, purchase orders, contracts, Board approval, or legal review; travel-related expenses; conference or training registration; lodging; equipment purchases; software subscriptions or recurring charges; and emergency purchases when advance approval is practical.

C. Emergency Purchases

In an emergency, a District credit card may be used to make purchases necessary to protect life, health, safety, District property, or essential District operations. The cardholder or authorized user shall notify the District General Manager or other approving official as soon as practical and provide documentation explaining the emergency need.

Receipts And Documentation

A. Receipt Required

A receipt must be obtained for every District credit card purchase and uploaded to the Districts accounting software.

B. Documentation Required

Each credit card purchase shall be supported by documentation showing:

- Date of purchase.
- Vendor name.
- Amount of purchase.
- Description of goods or services purchased.
- Public purpose of the purchase.
- Department or account to be charged.
- Purchase order, quote, contract, approval, or other backup documentation, if required by the District Procurement Policy.

C. Telephone and Internet Orders

Credit card purchases made by telephone or internet are permitted when otherwise authorized by District policy. The cardholder or authorized user must obtain a receipt, invoice, or order confirmation and submit it in the Districts accounting software.

D. Missing Receipts

If a receipt is lost or unavailable, the cardholder or authorized user shall complete a Missing Receipt Declaration explaining the purchase, amount, date, vendor, public purpose, and reason the receipt is unavailable. Repeated failure to submit receipts may result in suspension or revocation of credit card privileges.

E. Timely Submission

Receipts and supporting documentation shall be submitted within five (5) business days of the purchase, or sooner if required by the District. For travel-related expenses, receipts shall be submitted within five (5) business days after completion of travel.

Monthly Reconciliation

A. Cardholder Review

Each cardholder shall review the monthly credit card statement and verify all transactions.

B. Statement Certification

Each cardholder shall certify that all charges were for authorized District business and that all required receipts and documentation have been submitted.

C. Approval

Monthly credit card statements shall be reviewed and approved by the appropriate approving official.

D. Review of District General Manager Charges

Credit card charges made by the District General Manager shall be reviewed and approved by the Board President, Board Treasurer, Chief Financial Officer, or other Board-designated official.

E. Review of Department Manager Charges

Credit card charges made by a Department Manager shall be reviewed by the District General Manager, Chief Financial Officer, or other designated approving official.

F. Finance Review

The Chief Financial Officer, Accounts Payable staff, District Secretary, or other designated staff member shall review credit card statements for proper documentation, budget coding, mathematical accuracy, and compliance with this Policy.

G. Board Review

The Board of Directors may review credit card expenditures as part of the regular claims, warrant, or financial reporting process.

Payment Of Credit Card Statements

The District shall pay credit card statements in a timely manner to avoid late fees, interest, or penalties. Payment of a credit card statement does not constitute final approval of individual charges. Any unauthorized, unsupported, or improper charge remains subject to review, repayment, discipline, or other corrective action.

Security Of District Credit Cards

A. Cardholder Responsibility

Cardholders are responsible for safeguarding District credit cards and account information.

B. No Sharing Except Authorized Department Use

A District credit card shall not be loaned, shared, or used by anyone other than the cardholder or an authorized user permitted by the responsible Department Manager for authorized District business.

C. Online Storage

Cardholders and authorized users shall not store District credit card information in personal online accounts, personal devices, or vendor websites unless approved by the District General Manager and necessary for District business.

D. Lost or Stolen Cards

A lost, stolen, or compromised District credit card shall be reported immediately to the card issuer and to the District General Manager or Chief Financial Officer.

Disputed Or Fraudulent Charges

Cardholders and authorized users shall immediately report any disputed, incorrect, unauthorized, or fraudulent charge to the Chief Financial Officer, District General Manager, or other designated staff member. The District shall promptly notify the card issuer and take appropriate steps to dispute or resolve the charge.

Personal Or Unauthorized Charges

A. Personal Charges Prohibited

Personal charges are strictly prohibited, even if accidental or even if the cardholder or user intends to reimburse the District.

B. Repayment Required

A cardholder or user shall immediately reimburse the District for any personal, unauthorized, unsupported, or improper charge.

C. Corrective Action

Unauthorized use may result in suspension or revocation of credit card privileges, repayment, disciplinary action, referral to District Counsel, referral to law enforcement, or any other action permitted by law.

Revocation Or Suspension of Credit Card Privileges

A. Personal Use or Cash Advances

Use of a District credit card for personal purchases, personal spending, or cash advances is prohibited and shall result in loss of District credit card privileges and may result in disciplinary action.

B. Other Grounds for Suspension or Revocation

Credit card privileges may also be suspended or revoked for:

- Failure to provide receipts or documentation.
- Failure to comply with the District Procurement Policy.
- Failure to comply with this Policy.
- Exceeding card limits, purchasing authority, or budget authority.
- Splitting purchases to avoid approval or procurement requirements.
- Failure to safeguard the card.
- Employment separation, change in duties, or lack of continuing District business need.
- Suspected fraud, misuse, negligence, or abuse.

C. Authority to Suspend or Revoke

The District General Manager may suspend or revoke employee, Department Manager, or Supervisor credit card privileges. The Board of Directors may suspend or revoke credit card privileges of the District General Manager or any other person when appropriate.

D. Return of Card

Upon request, suspension, revocation, separation from District service, or change in duties, the credit card shall be immediately returned to the District and any outstanding receipts or documentation shall be submitted.

Card Cancellation Upon Separation or Change in Duties

When a cardholder separates from District employment or service, changes duties, or no longer has a business need for a District credit card, the card shall be returned immediately and cancelled or reassigned as appropriate. The District shall verify that all outstanding charges have been documented and reconciled.

Internal Controls

The District shall maintain internal controls for District credit cards, including:

- Maintaining an inventory of all active and inactive cards.
- Establishing written credit limits.
- Separating purchasing, approval, reconciliation, and payment duties when staffing allows.
- Requiring itemized receipts and documentation.
- Reviewing monthly statements.
- Cancelling unused or unnecessary cards.
- Monitoring recurring charges and subscriptions.
- Reviewing credit card activity for compliance with District policy.

Record Retention

Credit card statements, receipts, approvals, reimbursement records, missing receipt declarations, cardholder agreements, and related documents shall be retained in accordance with the District's records retention policy and applicable law.

Audit And Review

Credit card transactions may be subject to internal review, Board review, independent audit, public records requests, or other oversight. The District may periodically review this Policy and credit card activity to ensure compliance and improve internal controls.

Violations

- Violation of this Policy may result in corrective action, including but not limited to:
- Required reimbursement to the District.
- Suspension or revocation of credit card privileges.
- Written warning or disciplinary action.
- Referral to District Counsel.
- Referral to law enforcement or other appropriate authority.
- Any other action permitted by law.

Policy Review

This Policy may be reviewed and amended by the Board of Directors as needed to reflect changes in District operations, internal controls, laws, regulations, or best practices.

APPENDIX A

CREDIT CARDHOLDER ACKNOWLEDGMENT AND AGREEMENT

I acknowledge that I have received, read, and understand the Southern Cascades Community Services District Credit Card Issuance, Use, and Revocation Policy and the District Procurement Policy. I agree to comply with all requirements governing the use of District credit cards.

I understand that District credit cards may be used only for authorized District business and that personal use is strictly prohibited. I understand that I may be required to reimburse the District for any personal, unauthorized, unsupported, or improper charge and that misuse may result in suspension or revocation of credit card privileges, disciplinary action, or other corrective action permitted by law.

Cardholder/User Name: _____

Department: _____

Card Issuer / Last Four Digits: _____

Monthly Limit: _____

Signature: _____

Date: _____

APPENDIX B

MISSING RECEIPT DECLARATION

Complete this form when an itemized receipt is lost, unavailable, or not provided by the vendor. Repeated use of this declaration may result in suspension or revocation of credit card privileges.

Cardholder/User Name: _____

Department: _____

Date of Purchase: _____

Vendor Name: _____

Amount: _____

Description of Purchase: _____

Public Purpose: _____

Reason Receipt Is Unavailable: _____

I certify that the above purchase was for authorized District business, that no personal items were included, and that the information provided is true and correct to the best of my knowledge.

Signature: _____

Date: _____

Approving Official: _____

Date: _____

Policy: Financial Reserves **Policy: 6505.0**

Date Adopted: 10/19/2026

Date Revised:

Purpose

The purpose of this policy is to establish guidelines for maintaining and using District reserves in order to support financial stability, continuity of operations, and the District's ability to respond to emergencies and other unforeseen circumstances.

General Reserve

The District shall maintain a general operating reserve to the extent financially feasible.

Restricted funds, including grant funds and other monies that are legally, contractually, or otherwise restricted for a specific purpose, shall not be included when determining the amount available in the general operating reserve.

Reserve Target

The District shall make a good-faith effort to maintain a general operating reserve equal to approximately three months of total annual operating expenditures, or approximately twenty-five percent (25%) of annual operating expenditures.

The reserve target is intended as a financial goal and not as a mandatory minimum. The Board recognizes that the District's financial condition, revenue fluctuations, capital needs, and other circumstances may affect the District's ability to meet or maintain the target in any given fiscal year.

The reserve target shall be reviewed as part of the annual budget process.

Permitted Uses of Reserves

The general operating reserve may be used when necessary for purposes including, but not limited to:

- Emergency or unanticipated expenditures;
- Temporary cash-flow shortages;
- Significant reductions or delays in anticipated revenue;
- Major repairs or replacement of essential equipment or facilities;
- Unanticipated operating costs;
- Capital needs when determined by the Board to be in the District's best interest; and
- Other extraordinary or unforeseen circumstances affecting District operations.

Use of reserve funds shall require approval of the Board of Directors and shall be made in accordance with the District's applicable procurement, purchasing, and financial policies.

Replenishment of Reserves

When the general operating reserve falls below the District's target, the District shall make a good-faith effort to replenish the reserve as financial conditions allow.

Replenishment may occur through annual budget surpluses, unanticipated revenues, expenditure savings, or other unrestricted funds available to the District.

The Board may consider the District's financial condition, operational needs, capital requirements, and other relevant circumstances when determining the timing and amount of reserve replenishment.

Annual Review

The General Manager shall review the status of the District's general operating reserve during preparation of the annual budget and provide the Board with information regarding:

- The current reserve balance;
- The calculated three-month reserve target;
- Any anticipated use of reserve funds; and
- Any recommended plan for replenishment, if applicable.

Board Authority

Nothing in this policy limits the Board of Directors' authority to appropriate, use, or reallocate unrestricted District funds when the Board determines such action is necessary and in the best interest of the District, subject to applicable law and District policy.