

Washington County School District
Notice of Lead Finance Secretary Probationary Period

Lead Finance Secretaries must have the ability and skills necessary to perform their designated tasks in a high-performing manner. Lead Finance Secretaries are expected to be skilled and knowledgeable in school financial policies and procedures to ensure the other office staff are trained and have the knowledge necessary to effectively perform and complete financial related assignments.

As a condition of this assignment:

Lead Finance Secretaries shall serve a mandatory probationary period for the first year of their assignment before the assignment is final. It applies regardless of prior secretarial experience in another district. The probationary period may be extended for an additional year for any reason as deemed appropriate or necessary by the School Principal and/or Business Administrator or designee. If completion is unsuccessful, provisional or career employees have the right to return to a Secretary position at the lane and step held prior to the Lead Finance secretary assignment.

An employee who fails to satisfactorily complete the probation requirement has no right to appeal the decision and is not entitled to due process as described in District Policy 1450 or Utah Code § 53G-11-513 et seq.

Lead Finance Secretaries are expected to perform the following duties in a timely and proficient manner, that is in compliance with WCSD Policy & Procedures:

- Compliance with p-card policies & procedures to include timely and accurate reconciliation of p-card transactions.
- Monthly reconciliation of school & district accounts, bank records & reports, credit card statements, and p-card statements
- Train and ensure staff compliance with all WCSD financial policies & procedures.
- Timely and accurately submits purchase orders & submits receiving information into the finance system.
- Substantial compliance with documentation on all transactions to include bids, itemized receipts, explanation if sales tax was paid, and completed meal forms.

Statement of Understanding and Agreement

I have read and understand the terms and conditions of probation. I understand that my assignment to the Lead Finance Secretary position is not final until I have completed the probationary period. I understand and agree to the above identified terms and conditions of assignment.

Print Name

Employee ID

Signed

Date