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May

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May

The following Business processes should be started or in progress:

❑ Budget Process
❑ Next Year Payroll Process

The following business tasks have been identified for the month of May. Use the checklist below to ensure that the tasks are addressed, if applicable.

Application(s)	Task
Finance	❑ Excess Wealth districts make the fourth payment. ❑ Certify the Indirect Cost Rate (ICR) proposal if required. ❑ Complete the time and effort documentation for employees who are paid wholly or partially through federal grants, and who may use semi-annual certifications rather than monthly records of time and effort. Perform any required payroll adjustments. ❑ After the May payroll is posted, review the budget to ensure that there are adequate funds for the remainder of the year.
Payroll & Personnel	❑ Payoff retirees. (payroll run) ❑ Service Record Checklist (After May payroll.) ❑ Update leave on the current year service records if already created. ❑ Update next year's payroll for staffing changes. ❑ Supply next year payroll data to employees who are working on federal grants. Include salary and full benefit costs. ❑ Payoff any terminations. ❑ Verify any terminations final date for employee health coverage. If the employee completes the instructional school year, the LEA is required to offer, at the same contribution, through August. If the employee is going to another LEA, it is recommended to coordinate with the new LEA.


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