

North Carolina Public Schools  
***Benefits and Employment  
Policy Manual  
2012-2013***

Public Schools of North Carolina  
Department of Public Instruction  
Division of Human Resources  
School Personnel Support  
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## 2012-2013 Benefits Manual Revisions

Legislation passed by the General Assembly has an impact upon the Benefits Manual. Changes required by legislation are referenced with the appropriate bill. Other changes are the result of LEA feedback or editorial adjustments. All changes are summarized below.

Benefit Manual Section	Type of Change	Actual Change
Annual Vacation Leave	Deletion, Addition, G.S. 115C-316 Session Law 2012-145, Section 7.1 316	<p><b>3.1.3 Use of Annual Vacation Leave</b></p> <p>(d) <b>Restrictions on use by instructional personnel, <del>and</del> teacher assistants, <del>and bus drivers</del>:</b> Classroom teachers who require a substitute, school media coordinators who require a substitute, <del>and</del> teacher assistants who require a substitute <del>and bus drivers</del> may not take annual vacation leave at any time that students are scheduled to be in attendance except as provided in Section 3.2 (Leave for Catastrophic Illness), or Section 3.3 (Leave for New Parents) of this manual. <u>However, local school boards of education may adopt policies permitting instructional personnel employed for 11 or 12 months in year-round schools to, with the approval of the principal, take annual vacation leave at a time when students are in attendance; local funds shall be used to cover the cost of substitute teachers.</u> Instructional personnel who do not require a substitute may, with their supervisor's approval, take annual vacation leave on any day school is in session.</p> <p>(e) <b>Annual vacation leave in lieu of sick leave:</b> Annual vacation leave may be used in lieu of sick leave. Instructional personnel who require substitutes <del>and bus drivers</del> are subject to the restrictions set forth in paragraph (d) above.</p> <p>(g) <b>Disability:</b> Employees may elect to exhaust annual vacation leave during the 60-day waiting period or in lieu of short-term disability benefits. Instructional personnel who require substitutes <del>and bus drivers</del> may use this leave only on days that students are not scheduled to be in regular attendance or in</p>

		<p>accordance with the provisions of Section 3.2 (Leave for Catastrophic Illness), or Section 3.3 (Leave for New Parents) of this manual. This election does not extend the 365-day duration of short-term disability.</p> <p><a href="#">G.S. 115C-316 Session Law 2012-145, Section 7.1</a></p>
<p><b>Annual Vacation Leave for Catastrophic Illness</b></p>	<p>Deletion, Addition, G.S. 115C-316 Session Law 2012-145, Section 7.1 316</p> <p>Addition</p>	<p><b>3.2.1 <u>Benefit</u></b></p> <p>Instructional personnel who require substitutes <del>and bus drivers</del> may take annual vacation leave at a time when students are scheduled to be in attendance if the leave is due to a catastrophic illness of the employee and if all the employee's available sick leave has been exhausted.</p> <p>This leave is available only for the employee's personal illness.</p> <p><a href="#">G.S. 115C-316 Session Law 2012-145, Section 7.1</a></p>

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## **1.1 – Employee Classification Definitions**

### **1.1.1 Overview**

This section defines the classifications of public school employees to determine certain benefits and privileges afforded when employed.

### **1.1.2 Permanent Employee**

As used in these policies “permanent employee” means an employee who is either:

- (a) Employed to fill a position that is to be permanent if needs and funds continue. A permanent employee is eligible to receive full or pro-rata benefits, or
- (b) Employed for at least six full consecutive months of employment to either replace one or more employees who are on an approved leave of absence without pay, or to fill a vacancy until a qualified replacement is employed. A person employed for at least six full consecutive months is eligible to receive full or pro-rata benefits, therefore the eligibility for benefits must be determined at the time of the initial assignment, or when the assignment status changes.

Permanent employees who work at least 30 hours per week must be enrolled in the Teachers’ and State Employees’ Retirement System and must receive employer-paid medical insurance for self.

They may be classified as full-time or part-time, but must work a minimum of 20 hours per week.

Permanent employees do not lose permanent status during any period of temporary or interim assignment to another position in the same school system when it is anticipated that the employee will be returned to the permanent position.

### **1.1.3 Part-time Employee**

As used in these policies “part-time employee” means an employee who regularly works at least 20 hours per week, but less than the number of hours set as full time for that class of work.

Any permanent employee who works at least 30 hours per week must be enrolled in the Retirement System and receive employer-paid medical insurance for self.

#### **1.1.4 Full-time Employee**

As used in these policies “full-time employee” is a person employed to fill a vacancy whose regular work week is the number of hours established as full-time for the class of work assigned, but not less than 30 hours per week.

Two or more part-time assignments with the same LEA may be combined to satisfy requirements to become a full-time employee. An employee working in two or more positions may not earn more benefits than those allowed for a single, full-time position.

#### **1.1.5 Temporary Employee**

As used in these policies “temporary employee” means a person who is either:

- (a) Employed to fill a vacancy working less than 20 hours per week, or
- (b) Employed to fill a vacancy for less than six full consecutive months of employment.

Temporary employees:

- May be classified as full-time or part-time.
- They are not eligible to earn paid leave and do not participate in the retirement system.
- They do not receive nor can purchase health benefits through the State Health Plan.
- Temporary employees may not use leave earned during any previous employment.

#### **1.1.6 Interim Employee**

As used in these policies “interim employee” means a person employed for less than six full consecutive months to replace an employee who is on an approved leave of absence and is expected to return.

#### **1.1.7 Instructional Personnel**

As used in these policies “instructional personnel” means classroom teachers and teacher assistants. Instructional personnel who require substitutes are prohibited from using annual vacation leave on student attendance days, except as provided in Section 3 of this manual.



### **1.1.8 Substitute Employee**

As used in these policies “substitute employee” means a person employed to fill in for a permanent employee who is using paid leave. There are specific regulations for substitute teachers, See Section 11.1.

Substitute employees are considered temporary employees and:

1. Are not eligible to earn leave.
2. Do not participate in the retirement system.
3. Do not receive nor can purchase health benefits.
4. May not use leave earned during any previous employment while assigned as a temporary employee

### **1.1.9 Volunteer**

As used in these policies, “bona fide volunteer” means an individual who:

- (a) Volunteers of his/her own free will;
- (b) Does not receive and does not expect to receive compensation (with no agreement or expectation of payment at a later date); and
- (c) Provides services which would normally be provided by an (unpaid) volunteer.

Volunteering is not employment; therefore, volunteers cannot be used to fill or hold any vacancies. Volunteering also must not affect or influence any future decisions the employer may make with regard to the volunteer’s possible employment in the local education agency.

### **1.1.10 State Agencies for Shared Leave**

For the purpose of Voluntary Shared Leave, a state agency includes the University of North Carolina System and its 16 constituent institutions; the central administration of the Community College System of North Carolina; Council of State Agencies (Office of the Lieutenant Governor, Department of State Treasurer, Department of the State Auditor, Secretary of State, Department of Justice, Department of Public Instruction, Department of Agriculture and Consumer Services, Department of Insurance and Department of Labor) and the Cabinet Agencies (Department of Administration, Department of Correction, Department of Commerce, Department of Crime Control and Public Safety, Department of Cultural Resources, Department of Health and Human Services, Department of Environment and Natural Resources, Department of Transportation and Department of Revenue and other Boards, Commissions and agencies as identified by the Office of State Personnel.)

### **1.1.11 Recording Leave Units**

Leave may be recorded in units of hours, one -half days, or whole days, as determined by the local board of education. The same unit must be used for earnings and use.

### **1.1.12 Immediate Family**

As used in these North Carolina LEA benefit policies “immediate family” means the employee’s:

- (a) Spouse,
- (b) Children,
- (c) Parents,
- (d) Brothers,
- (e) Sisters,
- (f) Grandparents,
- (g) Grandchildren, and
- (h) Dependents living in the employee’s household.

Also included are the step, half, and in-law relationships.

As used in the federal Family Medical Leave Act, immediate family is parent, spouse or child. (See Section 8.2.1)

### **1.1.13 LEA and Charter School**

As used in these policies, local education agency (LEA) is a public school system operated by a local board of education. A charter school is a public school established according to G. S. 115C-238.29E and operated by a non-profit board of directors.

### **Legal Reference(s)**

NC Constitution, Article IX, Section 5

16 NCAC 6C.0101

16 NCAC 6C.0402

G.S. 115C-12.2

Code of Federal Regulations, Title 29, Part 825, The Family and Medical Leave Act of 1993, as amended

## 2.1 – Legal Holidays

### 2.1.1 Paid Legal Holidays

Permanent public school employees receive pay for the same number of legal holidays occurring within the period of employment as those designated by the State Personnel Commission for State employees. Permanent part-time employees are entitled to paid holidays on a pro rata basis. Paid holidays are granted only to employees who are in pay status through the day on which the holiday is scheduled, or in pay status for  $\frac{1}{2}$  or more of the workdays in the month. This includes Independence Day for summer employment.

Note: Employees would not earn holidays scheduled before their date of employment or after their date of separation or when the employee is on leave without pay for more than half of the workdays and holidays in the month.

Temporary employees are not entitled to paid holidays.

With the exception of Veteran's Day, the local board of education determines when holidays are scheduled in the school calendar. The following holidays are designated by the State Personnel Commission for State employees:

New Year's Day

Martin Luther King, Jr's Birthday

Good Friday

Memorial Day

Independence Day

Labor Day

Veteran's Day (Note: Veteran's Day must be observed as a holiday for students and staff.)

Thanksgiving Day – Two days

Christmas – Two days. Exception: When Christmas falls on Tuesday, Wednesday, or Thursday it is three days.

### **Legal Reference(s)**

G.S. 115C-84.2

G.S. 115C-272(b)(1)

G.S. 115C-285(a)(1)

G.S. 115C-316(a)(1) and (2)

## **2.2 – Bona Fide Religious Holidays**

### **2.2.1 Observance of Bona Fide Religious Holidays**

Absence from school for bona fide religious holidays may be allowed for a maximum of two days within any one school year with prior approval from the superintendent. Days designated may not be already scheduled as vacation or other holidays in the school calendar. Absence for these religious holidays will be with full pay.

The employee must agree to make up the amount of time for which his or her absence has been excused. The time must be made up at a time agreed upon by the employee and his or her immediate supervisor or principal.

When a substitute is employed on these holidays, payment must be made from the same source of funds as the employee's salary (local, federal, or state funds).

#### **Legal Reference(s)**

G.S. 115C-12(8)  
16 NCAC 6C.0404

### 3.1 – Annual Vacation Leave

#### 3.1.1 Purpose

The purpose of paid annual vacation leave is to allow and encourage all employees to renew their physical and mental capabilities and to remain fully productive. Employees are encouraged to request annual vacation leave during each year in order to achieve this purpose.

#### 3.1.2 Eligibility and Rate of Earning

All full-time and part-time permanent employees who work or are on paid leave (including paid holidays and workers' compensation) for one-half or more of the workdays in a monthly pay period are entitled to earn annual vacation leave at the same rate provided for state employees. Leave for a part-time employee is computed on a pro rata basis of the amount earned by a full-time employee in that class of work. A single employee working in two or more positions may not earn more than the benefits allowed for one full-time position.

The rate of earning is based on the length of total State service as follows:  
(See Sections 13.1.2 and 13.1.3 regarding earning State service.)

#### Vacation Leave Accrual Rate

Years of State Service	Monthly Full-time Accrual Rates	12 Month Full-time Accrual Rates
Less than 5 years	1.17 days (9.33 hours)	14 days (112 hours)
5 but less than 10 years	1.42 days (11.33 hours)	17 days (136 hours)
10 but less than 15 years	1.67 days (13.33 hours)	20 days (160 hours)
15 but less than 20 years	1.92 days (15.33 hours)	23 days (184 hours)
20 years or more	2.17 days (17.33 hours)	26 days (208 hours)

Bus drivers who work less than 20 hours per week and who are not otherwise entitled to earn vacation as described above are entitled to earn one day per year (equal in length to one regular workday for each driver) if:

- a) They are employed to drive a regular daily route (i.e., they are not substitute drivers), and
- b) They were employed as regular drivers the entire previous school year.

A bus driver who is terminated or resigns before taking the leave day is not entitled to compensation for the annual vacation leave day.

### 3.1.3 Use of Annual Vacation Leave

- (a) For 10-month employees the first 10 days of annual vacation leave must be scheduled in the school calendar and must be taken as scheduled.
- (b) **Approval:** All annual vacation leave taken by a public school employee must be with the authorization of the employee's immediate supervisor and must conform to policies established by the State Board of Education and the local board of education.
- (c) **Units of annual vacation leave:** Annual vacation leave may be used in one-half days, whole days, or hours as determined for earning purposes by the local board.
- (d) **Restrictions on use by instructional personnel and teacher assistants:** Classroom teachers who require a substitute, school media coordinators who require a substitute and teacher assistants who require a substitute may not take annual vacation leave at any time that students are scheduled to be in attendance except as provided in Section 3.2 (Leave for Catastrophic Illness), or Section 3.3 (Leave for New Parents) of this manual. However, local school boards of education may adopt policies permitting instructional personnel employed for 11 or 12 months in year-round schools to, with the approval of the principal, take annual vacation leave at a time when students are in attendance; local funds shall be used to cover the cost of substitute teachers.  
  
Instructional personnel who do not require a substitute may, with their supervisor's approval, take annual vacation leave on any day school is in session.
- (e) **Annual vacation leave in lieu of sick leave:** Annual vacation leave may be used in lieu of sick leave. Instructional personnel who require substitutes are subject to the restrictions set forth in paragraph (d) above.
- (f) **Adverse weather:** Employees may elect to use annual vacation leave for absences due to adverse weather conditions only on days when students are not required to attend school due to the adverse weather conditions.
- (g) **Disability:** Employees may elect to exhaust annual vacation leave during the 60-day waiting period or in lieu of short-term disability benefits. Instructional personnel who require substitutes may use this leave only on days that students are not scheduled to be in regular attendance or in accordance with the provisions of Section 3.2 (Leave for Catastrophic Illness), or Section 3.3 (Leave for New Parents) of this manual. This election does not extend the 365-day duration of short-term disability.

- (h) **Use of annual vacation leave by interim or temporary employees:** An employee who had previously earned annual vacation leave may not use this leave while employed in an interim position of less than six months, a temporary position, or a position of less than 20 hours per week except as provided in Section 1.1.2.
- (i) **Accumulation and use during summer employment:** Any employee who earned annual vacation leave in the regular school term will continue to earn annual vacation leave during the summer if employed at least 20 hours per week in the same school system. The rate will be pro rata if the summer employment is less than full-time. Annual vacation leave may be used under the same conditions as during the regular term.
- (j) **Scheduling annual vacation leave and workdays in the calendar:** Local calendars must be designed to allow all employees an opportunity to take annual vacation leave. This applies to summer school calendars as well as calendars for the regular term. Days not scheduled in the calendar for student attendance, holidays, annual vacation leave, or optional workdays may be designated by the local board of education as mandatory workdays. (See Sections 15.1.2 and 15.1.3 for assignment of days).
- (k) **Leave deficit:** An employee who has neither earned nor will earn sufficient annual vacation leave to cover any annual vacation leave day scheduled in the school calendar will be placed on leave without pay.
- (l) **Military caregiver:** An employee may choose to exhaust available sick and/or vacation/bonus leave, or go on leave without pay to care for an injured family member. (An employee's ability to substitute accrued paid leave is determined by the terms and conditions of the employer's normal leave policy.)
- (m) **Qualifying Exigency:** When necessitated by one of the qualifying exigency reasons, employee may use available vacation/bonus leave, or go on leave without pay. (An employee's ability to substitute accrued paid leave is determined by the terms and conditions of the employer's normal leave policy.) (See Section 8.2.2 - Qualifying Exigency Explanation)

#### 3.1.4 **Accumulation/Conversion to Sick Leave**

Annual vacation leave may be accumulated without any applicable maximum until June 30 of each calendar year. On June 30 or upon retirement accumulated annual vacation leave in excess of 30 days will be converted to sick leave so that only 30 workdays of annual vacation leave are carried forward.

Upon separation in order to retire, annual vacation leave over 30 days may be converted to sick leave for creditable service toward retirement.

Upon separation from service due to service retirement, resignation, dismissal, reduction in force or death, an employee shall be paid in a lump sum for accumulated annual vacation leave not to exceed a maximum of 30 days. Employees going onto disability may exhaust annual vacation leave rather than be paid in a lump sum.

### **3.1.5 Advancement**

An employee may be advanced the amount of annual vacation leave that may be earned in the remainder of the fiscal year at the discretion of the local administrative unit. The local superintendent must assume full responsibility for use in excess of earnings.

### **3.1.6 Transfer of Leave**

- (a) **Transfer between LEAs:** An employee who transfers between local administrative units must have all unused annual vacation leave transferred to the new administrative unit. Leave to be accepted by a school system must not result in leave being accrued at a greater rate than the rate afforded to school employees as set forth in Section 3.1.2.
- (b) **Transfer to and from other state agencies:** If the agency is willing to accept it, leave may be transferred to and from a state agency or institution, community college, technical institute, or a position covered by the State Personnel Act in county agencies of mental health, public health, social services, or emergency management.

All or any portion of the unused annual vacation leave may be accepted. Leave to be accepted from a state agency must not result in leave being accrued at a greater rate than the rate afforded to school employees as set forth in Section 3.1.2.

If a receiving agency refuses to credit the employee with the unused annual vacation leave or any portion thereof, the employee must be paid in a lump sum for up to 30 days or 240 hours of accumulated annual vacation leave.

- (c) When an employee transfers between LEAs or to a state agency, if the new employment is obtained within 31 calendar days from the date of separation, the leave balances will transfer rather than being paid out.
- (d) There is no provision for public school employees to transfer leave to or from charter schools.

\* NOTE: Upon Separation from employment with an LEA to work in a charter school, any vacation leave balance (up to 30 days) is paid by the LEA.



### 3.1.7 Separation from Employment

- (a) **Lump sum payment:** An employee must be paid in a lump sum for accumulated annual vacation leave, not to exceed a maximum of 30 days or 240 hours, upon separation from service. Separation from service includes resignation (unless the employee is transferring to another LEA or state agency), dismissal, reduction-in-force, death, service retirement, beginning long-term disability benefit or change to temporary status.
- (b) **Leave deficit:** If an employee separating from service is overdrawn with respect to annual vacation leave, a deduction in the appropriate amount must be made from the employee's final paycheck.
- (c) **Retirement:** A deduction for retirement must be made from all lump-sum payments of annual vacation leave. Receipt of lump-sum leave payment and retirement benefits is not considered to be dual compensation.
- (d) **Claims on behalf of deceased employee:** In the case of a deceased employee, unused annual vacation leave up to a maximum of 30 days or 240 hours must be paid to the deceased employee's administrator or executor upon the establishment of a valid claim. The claim must be made to the Clerk of Superior Court in the county of the deceased employee's residence.
- (e) **Accounting procedure:** When an employee separates from service, payment for leave may be on the regular payroll or on a supplement payroll. The number of leave days and amount of payment must be specified. Payment must be charged to the annual vacation leave budget codes provided for this purpose and from the same source of funds and in the same prorate amount from which the employee's salary is paid (local, federal or state funds).

### 3.1.8 Leave Records

Local administrative units must maintain leave records for each employee. It is the responsibility of the employee to record his or her leave time and the responsibility of the employee's immediate supervisor to verify that the leave record is accurate.

The local administrative unit must notify employees of leave balances at least once a year.

Leave records must be retained for a period of at least five years from the date of the employee's separation from service.

**Legal Reference(s)**

G.S. 115C-84.2

G.S. 115C-272

G.S. 115C-285

G.S. 115C-302.1

G.S. 115C-316

G.S. 115C-336(c)

Session Law 1997-443, Section 8.6

16 NCAC 6C.0401

Code of Federal Regulations, Title 29, Part 825, The  
Family and Medical Leave Act of 1993, as amended

Finance Newsletter No. 030-10/11, March 25, 2011

Annual Vacation Leave Earning Rates

**History Note:** Prior to January 2011, the Vacation Leave Earning Rates were:

<b>Years of State Service</b>	<b>Days of Leave Earned Per Month of Employment</b>
Less than 2 years	1.00
2 but less than 5 years	1.15
5 but less than 10 years	1.40
10 but less than 15 years	1.65
15 but less than 20 years	1.90
20 years or more	2.15

## **3.2 - Annual Vacation Leave for Catastrophic Illness**

### **3.2.1 Benefit**

Instructional personnel who require substitutes and may take annual vacation leave at a time when students are scheduled to be in attendance if the leave is due to a catastrophic illness of the employee and if all the employee's available sick leave has been exhausted.

This leave is available only for the employee's personal illness.

### **3.2.2 Determining Eligibility**

The local superintendent or a committee designated by the superintendent shall determine whether an illness is catastrophic by considering such factors as:

- (a) The debilitating nature of the condition,
- (b) The life-threatening potential of the condition,
- (c) The duration of the condition,
- (d) The monetary hardship incurred because of the condition,
- (e) The expected length of the leave, and
- (f) Other options available to the employee, such as state disability.

### **Legal Reference(s)**

G.S. 115C-302.1(c)  
G.S. 115C-336(c)  
16 NCAC 6C.0401

### **3.3 – Annual Vacation Leave for New Parents**

#### **3.3.1 Annual Vacation Leave for New Parents**

- (a) Employees, including teachers, may use annual vacation leave, personal leave if applicable, or leave without pay to care for a newborn child or for a child placed with the employee for adoption or foster care. Use of annual vacation leave for this purpose is not limited to days when students are not scheduled to be in attendance. (An employee may also use up to 30 days of earned sick leave to care for a child placed with the employee for adoption. See section 4.1.2(a).
- (b) The leave must be for consecutive workdays during the first 12 months after the date of birth or placement of the child, unless the employee and local board of education agree otherwise.

#### **Legal Reference(s)**

G.S. 115C-302.1(j)  
G.S. 115C-336.1

### **3.4 - Bonus Vacation Leave**

#### **3.4.1 Purpose**

The purpose of the bonus vacation leave is to provide a leave benefit to employees whom the General Assembly designated in the 2002-2003, 2003-2004, and/ or 2004-2005 fiscal years.

#### **3.4.2 Eligibility and Rate of Earning**

Bonus vacation leave was received in three special distributions. For the 2002-2003 fiscal year, only full-time and part-time permanent employees who were eligible to earn leave on September 30, 2002 were eligible to receive bonus vacation leave. School employees who received salary increases based on the salary schedules approved in the 2001 modified budget (S.B. 1115) were not eligible for bonus vacation leave.

For the 2003-2004 and the 2004-2005 years, additional bonus vacation leave was awarded to certain employees (those eligible to earn paid leave that were not paid from a teacher or administrator salary schedule).

In each of the three special distributions, eligible employees in permanent full-time 12-month positions received the full amount of bonus vacation leave. The leave was received pro rata if employed less than full-time and/or less than 12-months.

The bonus vacation leave balance is tracked separately and carried forward each year until used or paid out at retirement or separation. (It is not included in the 30 day limit of the annual vacation leave which can be carried forward on June 30 each year and does not roll into sick leave.)

#### **3.4.3 Use of Bonus Vacation Leave**

Bonus vacation leave can be used under the same circumstances and provisions as annual vacation leave (See Section 3.1.3).

#### **3.4.4 Transfer of Bonus Leave**

An employee who transfers between LEAs or to or from a state agency or a community college, can have all unused bonus vacation leave transferred providing that the new agency accepts the bonus vacation leave.

### **3.4.5 Payout of Bonus Vacation Leave**

When an employee transfers between LEAs or to a state agency or a community college, if the new employment is obtained within 31 calendar days from the date of separation, the bonus leave balance can be transferred rather than being paid out providing that the new agency accepts the bonus vacation leave.

### **3.4.6 Separation from Employment or Transfer to a Position Not Eligible for Leave**

- (a) Upon separation from employment, any unused bonus vacation leave balance will be paid out at the daily rate at the time of separation. This payment is in addition to the annual vacation leave balance (up to 30 days) that is paid at separation (Section 3.1.7).
- (b) If an employee transfers to a position where the employee is unable to earn or use vacation leave, the bonus leave balance is paid in a lump sum. This bonus vacation leave payment is in addition to any payment for an annual vacation leave balance (Section 3.1.7).

### **3.4.7 Donation of Bonus Vacation Leave**

Bonus vacation can be donated under the same rules and provisions as annual vacation leave is donated (See Section 4.3.4).

### **Legal Reference(s)**

NCGA 2001, S.B. 1115 Section 28.3 as amended by technical corrections in S.B. 1217 Section 82  
NCGA 2003, H.B. 397 Section 30.12  
NCGA 2005, S.B. 622 Section 29.14A

## 4.1 - Sick Leave

### 4.1.1 Eligibility and Rate of Earning

- (a) **Full-time employees:** All permanent, full-time employees working or on paid leave (including paid holidays and workers' compensation) for one-half or more of the workdays in any monthly pay period earn one sick day per month or the number of hours worked daily by a full-time employee in that class of work up to a maximum of eight hours.
- (b) **Part-time employees:** All permanent, part-time employees working or on paid leave (including paid holidays and workers' compensation) for one-half or more of the workdays in any monthly pay period earn sick leave computed on a pro rata basis of the amount earned by a full-time employee in that class of work.

Permanent, part-time employees previously employed in a full-time position retain the balance of sick leave earned in the prior position upon transferring to a part-time position.

- (c) **Units:** Sick leave must be used in one-half days, whole days, or hours as determined for earning purposes by the local board. Only sick leave taken on an employee's workday shall be deducted from the employee's sick leave balance.
- (d) **Accumulation:** Sick leave may be accumulated indefinitely.

### 4.1.2 Purposes for Which Sick Leave May Be Used

Sick leave may be used for:

- (a) Any actual period of temporary disability caused by or contributed to by personal illness or injury, which prevents an employee from performing his or her usual duties. Sick leave due to pregnancy, miscarriage, abortion, childbirth, or postnatal recovery must be treated in the same manner as any other temporary disability. Sick leave may be used during the 60-day waiting period for short-term disability or in lieu of short-term disability benefits. Sick leave may also be used in lieu of workers' compensation to maintain 100% salary (see Section 9.2).
- (b) Up to 30 days of earned sick leave may also be used to care for a child placed with an employee for adoption. (These days should be consecutive and within the first 12 months following the adoption, unless otherwise agreed upon between the employee and the LEA administration.)
- (c) Medical appointments of the employee.
- (d) Illness in the immediate family (see Section 1.1.12) and medical appointments related to the illness that necessitates the employee's attendance.



- (e) Death in the immediate family (see Section 1.1.12).
- (f) The length of leave granted for illness or death in the immediate family is determined by the local administrative unit based on individual employee need.
- (g) Whenever possible, employees should give 30 days advance notice of plans to take sick leave for elective medical or surgical procedures or for childbirth.
- (h) Military caregivers may choose to exhaust available sick and/or vacation/bonus leave, or  
any portion, or go on leave without pay to care for an injured family member.
- (i) Employees may use vacation/bonus leave, or go on leave without pay for military exigencies subject to the terms and conditions of the employer's normal leave policy. Military exigencies do not qualify for the use of sick leave, unless medically necessary. (See Section 8.2.2 - for an explanation of Qualifying Exigency) (Only the NC General Assembly may give Bonus Leave)

#### **4.1.3 Verification of Need for Sick Leave**

The superintendent may require a statement from a medical doctor or other acceptable proof that the employee was unable to work due to personal illness, medical appointment, illness or death in the family, or adoption.

#### **4.1.4 Accumulation and Use During Summer Employment**

Any employee who earned sick leave during the regular school term will continue to earn sick leave during the summer if employed in the same school system at least 20 hours per week, even if employed in a temporary or interim position for the summer. The rate will be pro rata if the summer employment is less than full-time. The employee may use sick leave during the summer for the same reasons permitted during the regular term.

#### **4.1.5 Limitations on Sick Leave**

Sick leave may not be used while on leave without pay or on holidays and annual vacation leave days scheduled in the school calendar. An absence covered by workers' compensation is not considered to be a leave without pay.

Sick leave may be used on any workday or student day including the first day employees in permanent positions report to work.

An employee, who is not eligible to earn leave, cannot use previously accumulated leave.

#### **4.1.6 Advancement of Sick Leave**

An employee may have advanced to his or her credit at the beginning of each school year the number of days or hours of sick leave to which he or she is entitled for that school year. The

local superintendent shall assume full responsibility for the decision to advance sick leave to an employee.

#### **4.1.7 Reinstatement Following Sick Leave**

When the period of temporary disability does not exceed 30 working days, the employee shall be reinstated to his or her position at the termination of the period of temporary disability. When the period of temporary disability exceeds 30 working days, the local superintendent shall determine when the employee is to be reinstated based on a consideration of the welfare of the students and the need for continuity of instruction. See Section 8.2 of the Benefits and Employment Manual for additional information.

#### **4.1.8 Sick Leave Upon Separation**

- (a) In the event an employee separates from service before earning sick leave which has been advanced, a deduction will be made from the final salary check for the total unearned sick leave used.
- (b) Pay for unused sick leave is not permitted, except when an employee has been approved for long-term disability.
- (c) Accumulated sick leave counts as creditable service towards retirement. One month of credit is allowed for each 20 days of unused sick leave upon retirement. One more month is allowed for any part of 20 days left over. Sick leave converted from excess annual vacation leave is also creditable.
- (d) From the date an employee resigns or moves to a temporary position, the sick leave balance is retained for 60 or 63 months. (In order to have 63 months, the individual must have separated under a 10 months contract and returned to employment under a 10 months contract.) If the person is re-employed in a full-time or part-time permanent position, or retires within this 60 or 63 months, the sick leave balance is reinstated. After this point, the sick leave balance cannot be reinstated.

#### **4.1.9 Transfer of Sick Leave**

- (a) **Between school systems:** Unused sick leave must be transferred between local school administrative units. Leave to be accepted by a school system must not result in leave being accrued at a greater rate than the rate set forth in Section 4.1.1 of this manual.
- (b) **To and from other state agencies:** Sick leave may be transferred in whole or in part to and from a state agency, institution, community college, technical institute, or position covered by the State Personnel Act in county agencies of mental health, public health, social services or emergency management if the receiving agency is willing to accept the leave. Leave to be accepted by a school system must not result in leave being accrued at a greater rate than the rate set forth in Section 4.1.1 of this manual.

If the government agency refuses to accept sick leave earned by a school system employee, there is no lump-sum payout to the employee.

- (c) **Charter Schools:** There is no provision for public school employees to transfer leave to or from charter schools.\*

\* NOTE: Upon Separation from employment with an LEA to work in a charter school, any vacation leave balance (up to 30 days) is paid by the LEA, and the sick leave balance is retained by the LEA for 60 months (63 months for 10 month employees). See Section 4.1.8.

#### **4.1.10 Reinstatement of Accumulated Sick Leave**

- (a) **Within or between LEAs:** A former employee must be credited with all sick leave accumulated up to the time of separation from an LEA provided the employee is reinstated as a permanent employee within 60 or 63 calendar months from the date of separation. (In order to have 63 months, the individual must have separated under a 10 months contract and returned to employment under a 10 months contract.)
- (b) **From other state agencies:** Sick leave may be reinstated from a state agency or institution, community college, technical institute or position covered by the State Personnel Act in county agencies of mental health, public health, social services or emergency management when an individual is employed within 60 calendar months of separation from one of these. Leave to be accepted by an LEA must result in leave being accrued at a greater rate than the rate at which the LEA employees earn leave.

#### **4.1.11 Payout of Sick Leave**

With one exception, payout of sick leave is not allowed. The exception is, prior to receiving long-term disability benefits, if an employee is unable to apply the sick leave toward retirement, the employee approved for long-term disability must be paid in lump-sum for any accumulated, unused sick leave. Contact the Teachers' and State Employees' Retirement System to determine whether the sick leave balance can be applied to retirement.

At retirement, unused sick leave is credited to retirement service as described in Section 4.1.8(c), but there is no payment.

#### **4.1.12 Accounting and Reporting**

The State Board of Education shall establish procedures necessary for reporting and accounting of sick leave.

**Legal References**

G.S. 115C-12(8)

G.S. 115C-12.2

G.S. 115C-336

G.S. 115C-302.1(j)

SL2009-144, H.B. 482

G.S. 135-4(e)

16 NCAC 6C.0402

Code of Federal Regulations, Title 29, Part  
825, The Family and Medical Leave Act  
of 1993, as amended

## 4.2 – Extended Sick Leave

### 4.2.1 **Eligibility and Rate of Earning**

Extended sick leave is available to classroom teachers and media coordinators who require substitutes if they are absent due to their own personal illness or injury and have exhausted all available accumulated paid leave (sick leave, annual vacation leave, and bonus leave). In order to be eligible, the employee must be in a permanent full- or part-time position. Those qualifying are allowed extended sick leave of up to 20 workdays throughout the regular (annual) term of employment.

### 4.2.2 **Use of Extended Sick Leave**

- (a) In order for a newly hired employee to be eligible for extended sick leave, he or she must have reported to work.
- (b) The local school system may request appropriate medical verification of the need for extended sick leave.
- (c) Extended sick leave days do not have to be used consecutively.
- (d) Unused extended sick leave days do not carry forward to succeeding school years.
- (e) Extended sick leave is not available beyond the waiting period of Workers' Compensation or Short Term Disability.

### 4.2.3 **Deduction**

Employees on extended sick leave receive full salary less the required substitute deduction. The deduction is mandatory whether or not a substitute is employed. The standard deduction is \$50 per day.

### **Legal Reference(s)**

G.S. 115C-12(8)  
G.S. 115C-336  
16 NCAC 6C.0402(I)  
16 NCAC 6C.0101(3)  
16 NCAC 6C.0101(9)

### 4.3 – Voluntary Shared Leave

#### 4.3.1 **Purpose**

The purpose of voluntary shared leave is to provide economic relief for employees who are likely to suffer financial hardship because of a prolonged absence or frequent short-term absences caused by a serious medical condition.

#### 4.3.2 **Eligibility**

Only full-time and part-time permanent employees who have exhausted all available accumulated paid leave (sick leave, annual vacation leave, and bonus leave, if applicable) are eligible to receive donated leave. An employee need not exhaust personal leave and the 20 days of extended sick leave to be eligible for voluntary shared leave. Only employees in permanent (leave earning) status can participate in the voluntary shared leave program.

An employee who is receiving benefits or is eligible to receive benefits from the Disability Income Plan is not eligible to receive donated leave. Voluntary shared leave may be used only during the required waiting period.

The superintendent shall approve or deny all requests for receipt of donated leave.

#### 4.3.3 **Application for Voluntary Shared Leave**

An employee who, due to a serious medical condition of self or of his or her immediate family (see Section 1.1.12), faces prolonged or frequent absences from work may apply to the superintendent of the LEA for donated leave. Application may also be made by a third person acting on the employee's behalf, if the employee is unable to make application.

An employee may make application for shared leave at such time as medical evidence is available to support the need for leave beyond the employee's available accumulated leave.

The following items must be included in the application:

1. A doctor's statement, and
2. An authorization for release of medical information signed by the person who is suffering the medical condition (or parent or guardian of a minor). This release may also be signed by any legally authorized party.

#### 4.3.4 **Donation and Receipt of Leave**

**(a) What Immediate Family Members May Donate.**

An employee of a public school system (Local Education Agency) may donate vacation/bonus or sick leave to an immediate family member, who is eligible to receive shared leave, in any public school, state agency, or community college. An eligible employee of a public school system (LEA), may receive vacation/bonus and/or sick leave from an immediate family member in any public school system, state agency, or community college. See definition of Immediate Family in Section 1.1.12.

Bonus leave may also be donated. (See Bonus Leave, Section 3.4.)

There is no provision for public school employees to donate leave to or receive leave from employees or family members in charter schools, or in county agencies of mental health, public health, social services or emergency management including those covered by the State Personnel Act.

Employees who donate sick leave shall be notified in writing of the State retirement credit consequences of donating sick leave.

Donors may not reduce their leave balance(s) below one-half of what can be earned in a year.

**(b) What Non-Family Members May Donate.**

An LEA employee may donate the following leave to a non-family member:

1. An employee may donate vacation or bonus leave to an employee of the same or another LEA. (Sick leave can be donated under the provisions of 3 below.)
2. An employee may donate vacation or bonus leave to a coworker's immediate family who is an employee in a state agency or community college.
3. An employee of an LEA may donate sick leave to a nonfamily member in the same or another LEA under the following provisions:
  - i. The donor shall not donate more than five days of sick leave per year to any one nonfamily member;
  - ii. The combined total of sick leave donated to a recipient from a nonfamily member donors shall not exceed 20 days per year;

- iii. Donated sick leave shall not be used for retirement purposes,
- iv. Donors may not reduce their sick leave balances below one-half of what can be earned in a year
- v. Employees who donate sick leave shall be notified in writing of the State retirement credit consequences of donating sick leave.

There is no provision for public school employees to donate leave to or receive leave from employees in charter schools, or in county agencies of mental health, public health, social services or emergency management including those covered by the State Personnel Act.

**(c) Receiving Donated Leave.**

Approved LEA employees may receive sick leave from both family members and non-family in LEAs. The combined total of sick leave received from nonfamily members shall not exceed 20 days per year. Approved LEA employees may receive sick leave only from immediate family members in community college institutions and state agencies. Donated sick leave shall not be used for retirement purposes.

Approved LEA employees may receive vacation/bonus leave from employees of their own or other LEAs and from immediate family and their coworkers in community college institutions and state agencies (see Section 1.1.12).

- (d)** All leave donations must be to a designated employee approved for receipt of donated leave and may not be made to a pool or bank.
- (e)** All donations must be in writing and must be signed by the donating employee. The employee receiving the leave must be named and the amount and type of leave donated must be specified.
- (f)** For the purposes of voluntary shared leave, all leave donated will be credited to the recipient's sick leave account.
- (g)** The minimum amount of leave donated must be one-half of a day.
- (h)** The donating employee may not receive compensation in any form for the donation of leave. Local boards shall adopt policies stating that acceptance of remuneration for donated leave will result in dismissal.



#### **4.3.5 Length of Leave**

- (a) The superintendent of the LEA will determine the length of the leave. The leave granted may not exceed the maximum described below in (b). Under no circumstances may the use of voluntary shared leave exceed the employee's period of treatment and recovery.
- (b) An employee may normally receive no more than 130 workdays of donated leave, either continuously or for the same condition on a recurring basis. After 130 workdays have been used, the superintendent may extend this limit on a month-to-month basis until the maximum number of working days occurring between the first day of use of donated leave and twelve months have been used. (This provision is only available for those that are not eligible for short term disability).

#### **4.3.6 Earning Leave While Using Voluntary Shared Leave**

Holidays occurring while the employee is using donated leave will be paid. Annual vacation and sick leave will continue to be earned by the employee while he or she is using donated leave. Available earned leave accrued during this period must be used by the employee prior to continued use of any voluntary shared leave.

#### **4.3.7 Unused Leave**

At the expiration of the period approved for voluntary shared leave as determined by the superintendent of the LEA, any unused donated leave must be returned on a pro rata basis to the donors.

#### **Legal Reference(s)**

G.S. 115C-12(8)  
G.S. 115C-12.2  
NCSL 2010-139, HB 213

## **4.4—Voluntary Sick Leave Bank**

### **4.4.1 Establishing a Voluntary Sick Leave Bank**

An LEA may establish a voluntary sick leave bank for its employees. Any employee of an LEA that establishes a voluntary sick leave bank may, but is not required to, participate in the voluntary sick leave bank.

### **4.4.2 Factors Used to Develop a Sick Leave Bank**

The LEA shall develop and implement a plan for participation that shall include the factors listed in G.S. 115C-336(b)(i)-(vii) and the following:

- (a) A uniform number of days to be contributed to the bank by participants,
- (b) Provisions for legitimate use of days by participants,
- (c) Means to protect against overdraft of total contributed days, and
- (d) Safeguards to prevent abuse by participants.

### **4.4.3 Sick Leave Bank Committee**

The LEA shall establish a sick leave bank committee to administer the sick leave bank, subject to the following requirements:

- (a) The LEA shall assure that all local personnel are equitably represented on the committee.
- (b) The LEA shall develop operational rules for the efficient and effective functioning of the bank.
- (c) The LEA shall develop procedures for participants' use of days based upon requirements of the plan.
- (d) The LEA shall specify the limits of the committee's authority.
- (e) The committee shall notify all participating employees of the ways in which their participation will affect their state retirement account.

### **4.4.4 Required Operational Procedures**

The LEA shall ensure that its operational procedures meet the following requirements:

- (a) State funds for substitute teachers shall be used to pay for substitute teachers on days that teachers use sick leave from voluntary sick leave banks.
- (b) The reporting to the division of School Business Services of the number of employees participating, itemized by job classification, the number of sick leave days withdrawn, the cost of the leave, and other data required for fiscal and programmatic accountability.

### **Legal Reference(s)**

G.S. 115C-336

16 NCAC 6C.0402

## **4.5 – Disability Income Plan**

### **4.5.1 Plan Administration**

The Disability Income Plan of North Carolina is administered by the North Carolina Department of the State Treasurer and the Board of Trustees of the Teachers' and State Employees' Retirement System within the terms and conditions of the Plan as set forth in the North Carolina General Statutes.

For employees vested in the Teachers' and State Employees' Retirement System after July 1, 2003, definitions of disability and disabled have been revised. Employees and employers need to contact the Retirement System to determine whether situations meet the requirements for the Disability Income Plan.

The information in this section is provided as a brief overview of the Disability Income Plan and does not substitute for or in any way alter the detailed provisions of the Retirement System law.

### **4.5.2 Short-Term Disability Benefits**

Employees with at least one year of contributing membership service with the Teachers' and State Employees' Retirement System earned within 36 calendar months preceding the disability are eligible for short-term disability benefits.

After a waiting period of 60 continuous calendar days from the onset of a disability, an eligible employee may receive a monthly short-term benefit equal to 50% of 1/12<sup>th</sup> of his or her annual base rate of compensation plus 50% of 1/12<sup>th</sup> of his or her annual longevity payment, if any, to a maximum of \$3,000 per month.

A person in receipt of short-term disability benefits is covered under the Teachers' and State Employees' Comprehensive Major Medical Plan, with the State contributing the cost of employee-only coverage, provided the person had contributed to the Retirement System at least five years as a public school or state employee at the time of disability. A person in receipt of benefits who did not meet the five year requirement at the time of disability may elect to continue coverage under the Major Medical Plan by paying the full premium required.

Short-term disability benefits may be extended for as many as 365 days beyond the original short-term period in cases where the Medical Board finds that the disability continues to be temporary and is likely to end during the extended period.

### 4.5.3 **Long-Term Disability Benefits**

Employees with at least five years of contributing membership service with the Teachers' and State Employees' Retirement System, earned within 96 calendar months prior to the end of the short-term disability period, are eligible for long-term disability benefits.

Long-term disability payments are payable after the conclusion of the short-term disability period. During the first 36 months of the long-term disability period, the monthly long-term benefit will equal 65% of 1/12<sup>th</sup> of the employee's annual base rate of compensation that was last payable prior to the beginning of the short-term benefit period plus 65% of 1/12<sup>th</sup> of the annual longevity payment, if any, to a maximum of \$3,900 per month. After the first 36 months of the long-term disability period, the long-term benefit is reduced by an amount equal to the primary Social Security disability benefit to which the employee might be entitled had he or she been awarded Social Security disability benefits.

A person in receipt of long-term disability benefits is covered under the Teachers' and State Employees' Comprehensive Major Medical Plan, with the State contributing the cost of employee-only coverage.

An employee approved for long-term disability benefits must terminate employment as a permanent employee prior to receiving long-term disability benefits.

An employee approved for long-term disability benefits who has not exhausted accumulated sick leave must be paid a lump sum for any available sick leave, if the employee is unable to apply the sick leave toward retirement. See Section 4.1.11. (Note: This does not include extended sick leave, and this is the only time an employee may be paid in lump sum for unused sick leave.)

### 4.5.4 **More Information**

Detailed information on the Disability Income Plan is available in the booklet Your Retirement Benefits published by the State Retirement System (919) 733-4191).

### **Legal Reference(s)**

G.S. 135-100 to G.S. 135-114  
NCGA 2003, H.B. 397, Sections 30.20(k) and 30.20(l)

## 5.1 – Personal Leave

### 5.1.1 Eligibility and Rate of Earning

Personal leave is earned by classroom teachers and school media coordinators who require substitutes. In order to be eligible, the teacher must be in a permanent full- or part-time position. Personal leave is earned at the rate of .20 days for each full month of employment not to exceed two days per year. Part-time personnel earn a pro rata share of the rate for full-time teachers. Unused personal leave may be carried forward from one year to another and may be accumulated without limitation until June 30<sup>th</sup>. On June 30, personal leave in excess of 5 days is converted to sick leave so that a maximum of 5 days of personal leave are carried forward to July 1<sup>st</sup>. Upon retirement, any personal leave may also be converted to sick leave.

Note: As used in this section the term “teacher” applies to classroom teachers and media coordinators who require substitutes.

### 5.1.2 Use of Personal Leave

- (a) Personal leave may be used only upon the authorization of the immediate supervisor.
- (b) A teacher shall not take personal leave on the first day the teacher is required to report for the school year, on a required teacher workday, on days scheduled for State testing, or on the day before or the day after a holiday or scheduled vacation day, unless the request is approved by the principal.
- (c) A teacher who requests personal leave at least five days in advance shall be automatically granted the request subject to the availability of a substitute teacher. A teacher making the request cannot be required to provide a reason for the request if the request is made at least five days in advance.
- (d) Personal leave may be used on any instructional day or workday except as noted in paragraph (b) above.
- (e) Teachers using personal leave receive full salary less the required substitute deduction, except for teachers using personal leave on teacher workdays. Teachers using personal leave on teacher workdays shall receive full salary. Teachers may use up to their accrued amount of personal leave on teacher workdays in accordance with paragraphs a, b, c and d above.

### **5.1.3 Limitations on Personal Leave**

- (a) Personal leave should be used with due and proper consideration given to the welfare of the students and teachers alike and shall not be advanced.
- (b) Personal leave may not be used during summer employment.
- (c) When a teacher is no longer eligible to earn personal leave, that teacher may not use previously accumulated personal leave.
- (d) When a teacher resigns or separates from service, personal leave cannot be paid out in lump sum.

### **5.1.4 Personal Leave Increments**

Personal leave must be used in one-half or whole day units.

### **5.1.5 Deduction**

Teachers using personal leave receive full salary less the required substitute deduction with the following exceptions:

- (a) Teachers using personal leave on teacher workdays shall receive full salary.
- (b) Teachers may use up to their accrued amount of personal leave on teacher workdays in accordance with paragraphs 5.1.3 a, b, and c above.

### **5.1.6 Transfer of Personal Leave**

Personal leave must be transferred between local administrative units.

### **5.1.7 Reinstatement of Personal Leave**

A teacher must be credited with all personal leave accumulated up to the time of reassignment or separation provided that the teacher is reinstated as an eligible permanent full-time or part-time teacher within 60 calendar months from the date of separation or reassignment.

### **Legal Reference(s)**

G.S. 115C-302.1(d)	S.L. 2007-378
16 NCAC 6C.0403	S.L. 2008-107
G.S. 115C-325(a)(6)	S.L. 2008-209

**History Note:** Until July 1 2007, Personal Leave earning was capped at 5 days. When the teacher accumulated 5 days s/he stopped earning Personal Leave so the teacher would have a personal leave balance of 5 days on July 1, 2007. Effective July 1, 2007 teachers continued to accumulate Personal Leave beyond 5 days and the excess balance rolls to Sick Leave each June 30.

## **6.1– Educational Leave**

### **6.1.1 Eligibility**

Only full-time and part-time permanent employees are eligible for educational leave.

### **6.1.2 In-Service School Projects**

Permanent public school employees assigned by the local superintendent to participate in in-service school projects conducted by the school administrative unit retain full salary for such absences. Proper provisions must be made for the continuation of the employee's regular work either by the employment of a substitute or by making satisfactory arrangements within the school. Substitutes employed for absences under these conditions must be paid from the same funding source (local, federal, or state) as the employee's salary.

### **6.1.3 State-Sponsored Staff Development Activities**

Permanent public school employees attending staff development activities sponsored by the state and for which state funds have been budgeted for substitutes will retain full salary for such absences. Substitutes employed for these absences will be paid from the appropriate budgeted state funds.

### **6.1.4 North Carolina Center for Advancement of Teaching (NCCAT)**

Employees may be allowed to attend NCCAT seminars with pay upon the approval of the local superintendent. Pay for substitutes must be provided by the Center.

### **6.1.5 Other Educational Leave**

Local boards of education may grant educational leave to permanent public school employees in accordance with local policies. State funds may not be used for this purpose.

### **Legal Reference(s)**

NC Constitution, Article IX, Section 5  
G.S. 115C-154(5)  
G.S. 115C-47(20)  
16 NCAC 6C.0404(5)  
16 NCAC 6C.0405(3)



## **6.2 – Professional Leave**

### **6.2.1 Eligibility**

Only full-time and part-time permanent employees are eligible for professional leave.

### **6.2.2 Professional Leave with Deduction**

Permanent certified public school employees who have professional responsibilities or who need to attend meetings of professional associations may be absent with pay minus a salary deduction for substitute teachers. The deduction is mandatory whether or not a substitute is employed. Such absences may be approved by the local superintendent and may be allowed for a period not exceeding three successive days for in-state meetings and five successive days for out-of-state meetings. Absences for this purpose may not exceed ten days for the school year. The limitation shall not apply to a person who is a local or district president or president-elect, state or national officer of a professional education association, or a person selected as the National Teacher of the Year. The Office of the Deputy State Superintendent shall upon request determine the eligibility of the professional association.

### **6.2.3 Professional Leave Without Deduction**

Permanent public school employees attending meetings or performing duties as a member of the State Board of Education, the State Textbook Commission, the Board of Governors of the Governor's Schools, or required attendance at a case manager's hearing shall receive full salary. Permanent public school employees completing assignments for, or serving on a commission or committee appointed by the Governor, the State Superintendent, the State Board of Education, or the General Assembly shall receive full salary. Substitutes for these persons will be paid from the same source of funds as the employee being replaced.

### **6.2.4 Officers of Professional Organizations**

Upon the recommendation of the local superintendent, local boards of education may grant leave with pay for elected officers of professional organizations, provided the organization pays the full salary and all benefit costs for the employee on leave. During such leave with pay, the employee will earn sick, personal, and annual vacation leave and receive paid holidays. Employees will be eligible to use leave as they would when in active status with the school system.

### **Legal Reference(s)**

NC Constitution, Article IX, Section 5  
G.S. 115C-300  
16 NCAC 6C.0404(5)

G.S. 115C-154(5)  
G.S. 115C-325(h1)  
16 NCAC 6C.0405(3)

## 7.1 – Community Responsibility

### 7.1.1 Community Responsibility

Upon approval of the supervisor, full-time or part-time public school employees may be granted leave to represent the school or administrative unit at community functions such as the funeral of a school child or his parent. Employees absent for these reasons shall retain full salary during the days absent.

Proper provision shall be made for the continuation of the employee's regular work by making satisfactory arrangements within the system or by employment of a substitute. Substitutes employed for these absences shall not be paid from state funds.

#### **Legal Reference(s)**

16 NCAC 6C.0404

## 7.2 – Jury Duty

### 7.2.1 Jury Duty

Full-time or part-time public school employees retain full salary when absent from work to serve on a jury. The employee is entitled to regular compensation in addition to payment for jury duty.

Substitutes employed for these absences shall be paid from the same source of funds as the employee's salary (local, federal, or state).

### Legal References(s)

16 NCAC 6C.0404

## 7.3 – Court Attendance

### 7.3.1 Court Attendance

- (a) **Attendance by duty or subpoena:** Full-time or part-time public school employees retain full salary for absences from school due to court attendance related to their official duty. The employee also will receive full salary when subpoenaed, except as noted in section (b). Out-of-state subpoenas are not binding on North Carolina residents, unless that state and North Carolina have an interstate subpoena agreement.

Any fees except travel reimbursement received by a school employee serving in an official capacity as a witness shall be returned to the employing school administrative unit to be credited to the same fund from which the employee is paid.

Substitutes employed for these absences shall be paid from the same source of funds as the employee's salary (local, federal, or state).

- (b) **Attendance for personal reasons:** Full-time or part-time public school employees who are absent for appearance in court as plaintiffs, defendants, or witnesses for personal matters, even if subpoenaed, shall not be entitled to receive any salary payment for those days, unless they are using appropriate, approved earned leave. (NOTE: School personnel who are responding to subpoenas for civic responsibilities, such as a witness to a crime, are eligible for paid court attendance leave.)

### Legal Reference(s)

16 NCAC 6C.0404

## 7.4 – Elected Officials

### 7.4.1 Elected Officials

Full-time or part-time public school employees serving as elected government officials may, with their supervisor's approval, choose to use appropriate earned leave to attend to the responsibilities of their elected office.

### 7.4.2 Precinct Election Officials

Precinct Election Officials may not be discharged or demoted because of serving on election day or canvas day provided they have given proper notice (at least 30 days). Full-time or part-time public school employees serving as precinct election officials may, with their supervisor's approval, choose to use appropriate earned leave in order to serve.

### Legal Reference(s)

16 NCAC 6C.0404  
G.S. 163-41.2

## **8.1 – Parental Leave Without Pay**

### **8.1.1 Eligibility**

All full-time permanent or part-time permanent employees may take a leave of absence without pay for up to one calendar year from the date of birth or adoption to care for a newborn child or a newly adopted child.

### **8.1.2 Leave**

The employee may elect to use appropriate earned leave during the time of the leave (See Annual Vacation Leave - Section 3.3 and Sick Leave - Section 4.0). For the purposes of educational continuity, with the approval of the local board, the unpaid leave of absence may be extended for the remainder of the school year when the leave would otherwise end in the latter half of the school year.

A husband and wife who are both employed by the same school system are limited to a combined total of 12 months of parental leave during the year following the birth or adoption.

Whenever possible, an employee should give written advance notice of request for leave of absence. Local boards of education may establish procedures for giving such notice. The local board may also determine when the leave will begin or end, based on a consideration of the welfare of the students and the employee and the need for continuity of service.

### **8.1.3 Effect on Career Status**

Tenured employees approved for a leave of absence retain career status upon return from the authorized leave. Probationary teachers must begin a new probationary period if a leave of absence, paid or unpaid, prevents the probationary teacher from completing four consecutive years of 120 workdays in each year in the same school system. Unless, the probationary teacher in a full-time, permanent position did not work for at least 120 workdays in a 215 day school year because the teacher was on sick leave, disability leave or both, that school year shall not be deemed to constitute:

- (a) A consecutive year of service for the teacher, or
- (b) A break in the continuity in consecutive years of service for the teacher.

### **Legal Reference(s)**

G.S. 115C-325  
16 NCAC 6C.0405

## 8.2 – Family Medical Leave Act of 1993 (FMLA)

### 8.2.1 Overview

The Family and Medical Leave Act of 1993 (FMLA) as amended, allows eligible employees to take 12 workweeks of unpaid, job-protected leave for their own serious medical condition or that of an immediate family member (parent, spouse or child). In addition the FMLA allows eligible employees to take the same job-protected leave for the birth of a child or the placement of a child with the employee through adoption or foster care. Employers must maintain any employer-paid health benefits while the employee is on FMLA leave.

The summary in this section does not in any way alter the requirements of the Family and Medical Leave Act. If any part of this section is inconsistent with the Act, the Act takes precedence. School systems should not rely exclusively on this summary for administration of their legal responsibility under the FMLA. More information is available on the Internet at <http://www.dol.gov/esa/whd/fmla/>

### 8.2.2 Definitions

Term	Definition
<b>Parent</b>	A biological, adoptive, step or foster father or mother or an individual who stood in loco parentis (a person who is in the position or place of a parent) to an employee when the employee was a child.
<b>Child</b>	A son or daughter who is: <ul style="list-style-type: none"> <li>• under 18 years of age, or</li> <li>• is 18 years of age or older and incapable of self-care because of a mental or physical disability and who is: <ul style="list-style-type: none"> <li>• a biological child,</li> <li>• an adopted child,</li> <li>• a foster child (a child for whom the employee performs the duties of a parent as if it were the employee's child),</li> <li>• a step-child (a child of the employee's spouse from a former marriage),</li> <li>• a legal ward (a minor child placed by the court under the care of a guardian), or</li> <li>• a child of an employee standing in loco parentis.</li> </ul> </li> </ul>
<b>Spouse</b>	A husband or wife recognized by the State of North Carolina.

<b>Covered Service Member for Military Caregiver Leave</b>	A covered service member is a member or veteran of any branch of the military who sustained a serious injury or illness while on active duty. The covered member who is undergoing medical treatment, recuperation, or therapy, is in outpatient status, or is otherwise on the temporary disability retired list, must have received treatment for the injury or illness within the past 5 years.
<b>Covered Service Member for Exigency Leave</b>	An employee's spouse, son, daughter, or parent who is a member of any branch of the Armed Forces who was deployed or called to active duty in a foreign country.
<b>Active Duty or Call to Active Duty for Exigency Leave</b>	A call or order to active duty (or notice of an impending call) of any branch of the Armed Forces to be deployed or called to active duty in a foreign country.
<b>Service member's Next of Kin</b>	<p>The nearest blood relative of the service member, other than spouse, parent, son, or daughter, 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, in which case the designated individual shall be deemed to be the next of kin.</p> <p>(To confirm that the employee and service member share one of the familial relationships or to confirm that the employee has been specifically designated as the service member's next of kin, the LEA may request a statement from the service member outlining the familial relationship or indicating that the employee has been designated as the "next of kin.")</p>



<p><b>Serious Health Condition</b></p>	<p>An illness, injury, impairment, or physical or mental condition that involves:</p> <ol style="list-style-type: none"> <li>1. inpatient care (i.e., an overnight stay) in a hospital, hospice or residential medical facility, including any period of incapacity (defined to mean inability to work, attend school or perform other regular daily activities due to the serious health condition, treatment for or recovery from), or any subsequent treatment in connection with such impairment; or</li> <li>2. continuing treatment by a health care provider involving one or more of the following: <ol style="list-style-type: none"> <li>a. a period of incapacity as defined above of more than three consecutive calendar days, and any subsequent treatment or period of incapacity relating to the same condition that also involves:</li> <li>b. any period of incapacity due to pregnancy or for prenatal care, even when the employee or family member does not receive treatment from a health care provider during the absence and even if the absence does not last more than three days (prenatal examinations, severe morning sickness)</li> <li>c. any period of incapacity or treatment due to a “chronic serious health condition,” even when the employee or family member does not receive treatment from a health care provider during the absence and even if the absence does not last more than three days, which is defined as one: <ul style="list-style-type: none"> <li>• treatment two or more times (within 30 days of the beginning of the period of incapacity and the first visit must take place within seven days of the first day of incapacity) by a health care provider, by a nurse or physician’s</li> </ul> </li> </ol> </li> </ol>
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<p><b>Serious Health Condition</b></p>	<p>assistant under the direct supervision of a health care provider, or a provider of health care services (e.g., physical therapist) under orders of, or on referral by a health care provider, or</p> <ul style="list-style-type: none"> <li>• treatment on at least one occasion resulting in a regime of continuing treatment (the first visit must take place within seven days of the first day of incapacity) under the supervision of the health care provider (course of prescription medication, i.e., antibiotic, or therapy requiring special equipment to alleviate the health condition, i.e., oxygen)</li> <li>• requiring periodic visits (at least two visits per year) for treatment by a health care provider, or by a nurse or physician's assistant under the direct supervision of a health care provider,</li> <li>• continuing over an extended period of time (including recurring episodes of a single underlying condition), and</li> <li>• which may cause episodic rather than continuing period(s) of incapacity (e.g., asthma, diabetes, epilepsy, etc.)</li> </ul> <p>d. incapacity for a permanent or long-term condition for which treatment may not be effective (Alzheimer's, a severe stroke or terminal stages of a disease)</p> <p>e. multiple treatments for restorative surgery or incapacity for serious conditions that would likely result in a period of incapacity of more than three consecutive calendar days in the absence of medical intervention or treatment (chemotherapy, radiation, dialysis, etc.)</p>
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<b>Serious Health Condition</b>	f. in case of a member of the Uniformed Services, “serious injury or illness” means an injury or illness incurred by the member in line of duty on active duty in the Uniformed Services or of an existing or pre-existing injury that may render the member medically unfit to perform the duties of the member’s office, grade, rank or rating.
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**Advisory Note: Treatment includes, but is not limited to, examinations to determine if a serious health condition exists and evaluations of the condition. Treatment does not include routine physical examinations, eye examinations, or dental examinations. Ordinarily, unless complications arise, the following are examples of conditions that do not meet the definition: common cold, flu, ear aches, upset stomach, minor ulcers, headaches other than migraine, routine dental or orthodontia problems, periodontal disease, cosmetic treatments, etc. The following may meet the definition if all other conditions of this section are met: restorative dental or plastic surgery after an injury or removal of cancerous growths, mental illness resulting from stress or allergies, treatment from substance abuse.**

<b>Outpatient Status of Covered Service Member</b>	“Outpatient status,” with respect to a covered service member, means the status of a member of the Uniformed Services assigned to a military medical treatment facility as an outpatient or a unit established for the purpose of providing command and control of the Uniformed Services receiving medical care as outpatients.
<b>Qualifying Exigency</b>	The reasons for which an employee may take leave because of a qualifying exigency are divided into seven general categories. (1) Short-notice deployment, (2) Military events and related activities, (3) Childcare and school activities, (4) Financial and legal arrangements, (5) Counseling, (6) Rest and recuperation, (7) Post-deployment activities and (8) Additional activities. <b>For an expanded definition of these reasons, see the paragraph at the end of the definitions.</b>

<b>Heath Care Provider</b>	<p>A Doctor of medicine or osteopathy who is authorized to practice medicine or surgery in the State of North Carolina, or any other person determined by statute, credential or licensure to be capable of providing health care services which include:</p> <ul style="list-style-type: none"> <li>• Physician assistants</li> <li>• Podiatrists</li> <li>• Dentists</li> <li>• Clinical psychologists</li> <li>• Clinical social workers</li> <li>• Optometrists</li> <li>• Nurse practitioners</li> <li>• Nurse midwives</li> <li>• Chiropractors</li> <li>• Health care providers from whom state approved group and HMO health plans will accept certification of a serious health condition to substantiate a claim for benefits</li> <li>• Foreign health care providers in above stated areas who are authorized to practice in that country and who are performing within the scope of the laws</li> <li>• Christian Science practitioners listed with First Church of Christian Scientists in Boston, MA.</li> </ul> <p>(Note: In this situation, the employee cannot object to an LEA requirement to obtain a second or third certification other than a Christian Science practitioner.)</p>
<b>Workweek</b>	The number of hours an employee is regularly scheduled to work each week, including holidays
<b>Reduced Work Schedule</b>	A work schedule involving less hours than an employee is regularly scheduled to work
<b>Intermittent Work Schedule</b>	A work schedule in which an employee works on an irregular basis and is taking leave in separate blocks of time, rather than for one continuous period of time, usually to accommodate some form of regularly scheduled medical treatment.

<b>12-Month Period</b>	<p>(a) For Military Caregiver Leave, the 12-month period measured forward from the date any employee's family and medical leave begins.</p> <p>(b) For other FMLA leave, see Section 8.2.4)</p>
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### **Qualifying Exigency Explanation**

When an absence is necessary because a member of any branch of the Armed forces was deployed or called to active duty in a foreign country the following is a list of reasons for which an employee may take leave because of a qualifying exigency.

- (1) Short-notice deployment – leave to address any issue that arises from the fact that the employee is notified of an impending call or order to active duty seven or less calendar days prior to the date of deployment. This leave can be used for a period of seven calendar days beginning on the date the employee is notified.
- (2) Military events and related activities – leave to attend any official ceremony, program or event sponsored by the military and to attend family support and assistance programs and informational briefings sponsored or promoted by the military, military service organizations, or the American Red Cross that are related to the active duty or call to active duty status of the employee.
- (3) Childcare and school activities – leave to arrange alternative childcare when the active duty or call to active duty status necessitates a change in the existing childcare arrangement, to provide childcare on an urgent, immediate need basis when the need arises from the active duty or call to active duty, to enroll the child in or transfer the child to a new school or day care facility when necessitated by the active duty or call to active duty, and to attend meetings with staff at a school or a day care facility when such meeting are necessary due to circumstances arising from the active duty or call to active duty status.
- (4) Financial and legal arrangements – leave to make or update financial or legal arrangements to address the employee's absence such as preparing and executing financial and healthcare powers of attorney, transferring bank account signature authority, enrolling in DEERS, obtaining military identification cards, or preparing or updating a will or living trust.
- (5) Counseling – leave to attend counseling provided by someone other than a healthcare provider for oneself, for the covered military member, or for the child provided that the need for counseling arises from the active duty or call to active duty status of a covered military member.
- (6) Rest and recuperation – leave to spend time with a covered military member who is on short-term, temporary rest and recuperation leave during the period of deployment. Eligible employees may take up to five days of leave for each instance of rest and recuperation.

(7) Post-deployment activities – leave to attend arrival ceremonies, reintegration briefings and events, and any other official ceremony or program sponsored by the military for a period of 90 days following the termination of the employee's active duty and to address issues that arise from the death of a covered military member while on active duty status, such as meeting and recovering the body of the military member and making funeral arrangements, and

(8) Additional activities where the LEA and employee agree to the leave – leave to address other events which arise out of the covered military member's active duty or call to active duty status provided the LEA and employee agree that such leave shall qualify as an exigency, and agree to both the timing and duration of such leave.

### 8.2.3 Covered Employees and Eligibility

An employee's eligibility for family and medical leave shall be made based on the employee's months of service and hours of work as of the date leave is to commence.

An employee is eligible if:

<p><u>Full Time</u> (at least 30 hours per week or the number of hours established as full-time for the class of work)</p> <ul style="list-style-type: none"> <li>• Permanent Status</li> <li>• Interim Status (if more than 6 months) or</li> </ul> <p><u>Part Time</u> (at least 20 hours per week)</p> <ul style="list-style-type: none"> <li>• Permanent Status</li> <li>• Interim Status (if more than 6 months)</li> </ul>	<ul style="list-style-type: none"> <li>• Has been employed for at least 12 months (need not be consecutive)</li> <li>• Has been employed for at least 1,250 hours of service during the 12-month period immediately preceding the commencement of the leave</li> </ul>
<p><u>Full Time</u> (at least 30 hours per week or the number of hours established as full-time for the class of work)</p> <ul style="list-style-type: none"> <li>• Temporary* (less than 6 months of employment)</li> </ul> <p><u>Part Time</u> (less than 20 hours per week)</p> <ul style="list-style-type: none"> <li>• Temporary*</li> </ul> <p><b>Note: *This leave is without pay.</b></p>	<ul style="list-style-type: none"> <li>• Has been employed for at least 12 months (need not be consecutive)</li> <li>• Has been employed for at least 1,250 hours of service during the 12-month period immediately preceding the commencement of the leave</li> </ul>

<sup>(1)</sup> Employment periods prior to a break in service of seven years or more need not be counted in determining whether the employee has been employed by the LEA for at least 12 months.

<sup>(2)</sup> Time spent in the National Guard or reserves count as time worked to determine eligibility for Family Medical Leave (FML)

#### **8.2.4 Determining the 12-Month Leave Period**

The employer may choose any one of the following methods for determining the 12-month period in which the 12 weeks of leave entitlement occur. The alternative chosen must be applied consistently and uniformly to all employees.

- (a) The calendar year.
- (b) Any fixed 12-month year such as a fiscal year or a year starting on an employee's anniversary date.
- (c) The 12-month period measured forward from the date an employee's first FMLA leave begins.
- (d) A rolling 12-month period measured backward from the date an employee uses any FMLA leave.

#### **8.2.5 Amount of Leave and Qualifying Reasons for Leave**

(1) An eligible employee is entitled to a total of 12 workweeks, paid or unpaid, leave during any 12-month period: An employee's ability to substitute accrued paid leave is determined by the terms and conditions of the employer's normal leave policy.

**Advisory Note:** A husband and wife who are eligible for FMLA leave and are employed by the same employer are limited to a combined total of 12 weeks during any 12-month period with the exception of leave needed to care for a child with a serious health condition. In this case, a husband and wife may each take 12 weeks of FMLA leave if needed to care for their newborn child with a serious health condition, even if both are employed by the same employer, provided they have not exhausted their entitlements during the applicable 12-month FMLA leave period.

- (a) for the birth of a child and to care for the newborn child after birth, provided the leave is taken within a 12-month period following birth, or

**Note: An expectant mother may also take FMLA leave before the birth of the child for prenatal care or if her condition makes her unable to work, or requires a reduced work schedule.**

- (b) for the placement of or to care for a child placed with the employee for adoption or foster care, provided the leave is taken within a 12-month period following placement, or

**Note: FMLA leave must also be granted before the actual placement or adoption of a child if an absence from work is required for the placement for adoption or foster care to proceed.**

- (c) for the employee to care for the employee's child, spouse, or parent, where that child, spouse, or parent has a serious health condition, or
- (d) because the employee has a serious health condition that prevents the employee from performing one or more essential functions of the position, or
- (e) because of any qualifying exigency arising out of the fact that the spouse, or a son, daughter, or parent is a covered military member on active duty (or has been notified of an impending call or order to active duty) in a foreign country.

(2) **Military Caregiver Leave (Covered Service Member Leave)** – An eligible employee who is the spouse, son, daughter, parent, or next of kin of a covered service member shall be entitled to a total of up to 26 workweeks of leave during a single 12-month period (commencing on the on the date the employee first takes leave) to care for a covered service member who has a serious injury or illness incurred in the line of duty while on active duty for which he or she is undergoing medical treatment, recuperation or therapy; or otherwise in outpatient status; or on the temporary disability retired list. Qualifying events are serious illnesses and injuries, incurred in the line of duty, for which the service member has received treatment within the past 5 years.

If an eligible employee does not take all of his or her 26 workweeks of leave entitlement to care for a covered service member during this “single 12-month period,” the remaining part of his or her 26 workweeks of leave entitlement to care the covered service member is forfeited. The 26-workweek entitlement is to be applied as a per-covered service member, per-injury basis such that an eligible employee may be entitled to take more than one period of 26 workweeks of leave if the leave is to care for different covered service members or to care for the same service member with a subsequent serious injury or illness.

During the single 12-month period, an eligible employee shall be entitled to a combined total of 26 workweeks of leave under (1) and (2) above.

### **8.2.6 Determining the 12 or 26 weeks of leave**

**Paid or Unpaid Leave** - All approved periods of paid leave and periods of leave without pay (including leave without pay while drawing short-term disability benefits) count towards the 12 (or 26, as appropriate) workweeks to which the employee is entitled. This includes leave taken under the Voluntary Shared Leave Policy. An employee's ability to substitute accrued paid leave is determined by the terms and conditions of the employer's normal leave policy.

Holidays occurring during a FMLA period of a full week count toward the FMLA leave entitlement. Holidays occurring during a partial week of FMLA leave does not count against the FMLA leave entitlement, unless the employee was otherwise scheduled and expected to work during the holiday.



If the LEA closes for one or more weeks, the days that the LEA is closed do not count against the employees' FMLA leave entitlement (e.g. a school closing two weeks for the Christmas holidays, spring break or summer vacation).

**Workers' Compensation Leave** - If an employee is out on workers' compensation leave drawing temporary total disability, the time away from work is considered as a part of the FMLA entitlement.

**Breaks** – Weeks when other employees in the job classification do not work are not counted against the FMLA leave entitlement

**Compensatory Time** – Compensatory time can be used during the FMLA leave entitlement. When used, it runs concurrent with FMLA leave. (See Sections 3.1, 4.1, 5.1).

### **8.2.7 Intermittent Leave or Reduced Work Schedule**

Leave may be taken intermittently or on a reduced schedule for the following:

- (1) When medically necessary, to care for the employee's child, spouse, or parent who has a serious health condition, or because the employee has a serious health condition. (This would also apply to next of kin to care for a service member.)
- (2) Because of any qualifying exigency arising out of the fact that the spouse, son, daughter, or parent is on active duty or has been notified of an impending call or order to active duty.
- (3) When leave is taken after childbirth or for adoption/foster care, the employee may take leave intermittently or on a reduced schedule only if the LEA agrees.

There is no minimum limitation on the amount of leave taken intermittently; however, the LEA may not require leave to be taken in increments of more than one hour.

If leave is foreseeable, based on planned medical treatment, the LEA may require the employee to transfer temporarily to an available alternative position for which the employee is qualified and that has equivalent pay and benefits and better accommodates recurring periods of leave.

Only the time actually taken as leave may be counted toward the leave entitlement.

**Example: An employee normally works 40 hours each week. The employee is on a reduced work schedule of 20 hours per week. The FMLA leave may continue for up to 24 calendar weeks.**

**Procedure: If an employee works a reduced or intermittent work schedule and does not use paid leave to make up the difference between the normal work**

**schedule and the new temporary schedule to bring the number of hours worked up to the regular schedule, the LEA must submit a personnel action form showing a change in the number of hours the employee is scheduled to work. This will result in an employee earning pay and leave at a reduced rate. The LEA remains responsible for paying the employee's medical premium.**

#### **8.2.8 Limitations on Taking Leave Near the End of an Academic Term**

(1) An instructional employee begins leave more than five weeks before the end of a term. The employer may require the employee to continue taking leave until the end of the term if (i) the leave will last at least three weeks, and (ii) the employee would return to work during the three-week period before the end of the term.

(2) The employee begins leave during the five-week period before the end of a term because of the birth of a son or daughter; the placement of a son or daughter for adoption or foster care; to care for a spouse, son, daughter, or parent with a serious health condition; or to care for a covered service member. The employer may require the employee to continue taking leave until the end of the term if (i) the leave will last more than two weeks, and (ii) to employee would return to work during the two-week period before the end of the term.

(3) The employee begins leave during the three-week period before the end of a term because of the birth of a son or daughter; the placement of a son or daughter for adoption or foster care; to care for a spouse, son, daughter, or parent with a serious health condition; or to care for a covered service ember. The employer may require the employee to continue taking leave until the end of the term if the leave will last more than five working days.

For purposes of these provisions, “academic term” means the school semester, which typically ends near the end of the calendar year and the end of spring each school year. In no case may a school have more than two academic terms or semesters each year for purposes of FMLA. An example of leave falling within these provisions would be where an employee plans two weeks of leave to care for a family member which will begin three weeks before the end of the term. In that situation, the employer could require the employee to stay out on leave until the end of the term.

### **LEA RESPONSIBILITIES**

#### **8.2.9 Notification of FMLA Provisions**

Each LEA is required to post and keep posted in conspicuous places a notice explaining the Act's provisions and providing information concerning the procedures for filing complaints of violations of the Act with the Wage and Hour Division. The notice must be posted prominently where it can be readily seen by employees and applicants for employment.

In addition to posting the FMLA provisions, handbooks and other written materials must include the general notice information. Where such materials do not exist, the LEA must provide the general notice to new employees upon being hired, rather than requiring that it be distributed to all employees annually.

Agencies are permitted to distribute the handbook or general notice to new employees through electronic means so long as all of the information is accessible to all employees, that it is made available to employees not literate in English (if required), and that the information provided includes, at a minimum, all of the information contained in the general notice.

**Note: LEAs may duplicate and provide the employee a copy of the FMLA Fact Sheet available from the Wage and Hour Division.**

<http://www.blr.com/samples/31500900/newsletter%20sample.pdf>

### **8.2.10 Notice of Eligibility**

When an employee requests FMLA leave, or when the LEA knows that an employee's leave may be for an FMLA-qualifying reason, the employee must be notified of the employee's eligibility to take FMLA leave within five business days, absent extenuating circumstances. Employee eligibility is determined (and notice must be provided) at the commencement of the first instance of leave for each FMLA-qualifying reason in the applicable 12-month period. All FMLA absences for the same qualifying reason are considered a single leave if the reason for the leave does not change during the applicable 12-month period.

If the employee is not eligible for FMLA leave, the notice must state at least one reason why the employee is not eligible. Notification of eligibility may be oral or in writing.

If, at the time an employee provides notice of a subsequent need for FMLA leave during the applicable 12-month period due to a different FMLA-qualifying reason, and the employee's eligibility status has not changed, no additional eligibility notice is required. If, however, the employee's eligibility status has changed the LEA must notify the employee of the change in eligibility status within five business days, absent extenuating circumstances.

The LEA shall provide written notice detailing the specific expectations and obligations of the employee and explaining any consequences of a failure to meet these obligations. This notice shall be provided to the employee each time the eligibility notice is provided. If leave has already begun, the notice should be mailed to the employee's address of record.

Such specific notice must include, as appropriate:

- That the leave may be designated and counted against the employee's annual FMLA leave entitlement;

- Requirements for the employee to furnish certifications;
- The employee's right to substitute paid leave;
- An employee's ability to substitute accrued paid leave is determined by the terms and conditions of the employer's normal leave policy.
- Requirement for the employee to make any premium payments to maintain health benefits and the arrangements for making such payments;
- The employee's status as a "key employee" if applicable and the potential consequence that restoration may be denied following FMLA leave, explaining the conditions required for such denial;
- The employee's rights to maintenance of benefits during the FMLA leave and restoration to the same or an equivalent job upon return from FMLA leave; and
- The employee's potential liability for payment of health insurance premiums paid by the LEA during the employee's unpaid FMLA leave if the employee fails to return to work after taking FMLA leave.

### **8.2.11 Designation of Leave as FMLA Leave**

It is the responsibility of the LEA to:

- determine that leave requested is for a FMLA qualifying reason, and
- designate leave, whether paid or unpaid, as FMLA leave even when an employee would rather not use any of the FMLA entitlement. An employee's ability to substitute accrued paid leave is determined by the terms and conditions of the employer's normal leave policy.

The LEA must give notice of the designation to the employee within five business days absent extenuating circumstances. The notice may be oral or in writing, but must be confirmed in writing no later than the following payday.

If the LEA determines that the leave will not be designated as FMLA-qualifying (e.g., if the leave is not for a reason covered by FMLA or the FMLA leave entitlement has been exhausted), the LEA must notify the employee of that determination.

For military caregiver leave that also qualifies as leave taken to care for a family member with a serious health condition, the LEA must designate such leave as military caregiver leave first. The leave cannot be counted against both an employee's entitlement of 26 workweeks of military caregiver leave and 12 workweeks of leave for other qualifying reasons.

The key in designating FMLA leave is the qualifying reason(s), not the employee's election or reluctance to use FMLA leave or to use all, some or none of the accrued leave. The LEA's designation must be based on information obtained from the employee or an employee's representative (e.g., spouse, parent, physician, etc.).

If the LEA will require the employee to present a fitness-for-duty certification to be restored to employment, the LEA must provide notice of such requirement with the designation notice. If the LEA will require that the fitness-for-duty certification

address the employee's ability to perform the essential functions of the employee's position, the LEA must so indicate in the designation notice, and must include a list of the essential functions of the employee's position.

The LEA must notify the employee of the amount of leave counted against the employee's FMLA leave entitlement.

The LEA may retroactively designate leave as FMLA leave with appropriate notice to the employee provided that the LEA's failure to timely designate leave does not cause harm or injury to the employee. In all cases where leave would qualify for FMLA protections, the LEA and employee can mutually agree that leave be retroactively designated as FMLA leave.

#### **8.2.12 Designation of Paid Leave as FMLA Leave**

When an employee is on paid leave but has not given notice of the need for FMLA leave, the LEA shall, after a period of 10 workdays, request that the employee provide sufficient information to establish whether the leave is for a FMLA-qualifying reason. This does not preclude the LEA from requesting the information sooner, or at any time an extension is requested.

If an absence which begins as other than FMLA leave later develops into an FMLA qualifying absence, the entire portion of the leave period that qualifies under FMLA may be counted as FMLA leave.

#### **8.2.13 Designation of FMLA Leave After Returning to Work**

The LEA may not designate leave that has already been taken as FMLA leave after the employee returns to work, with two exceptions:

- if an employee is out for a reason that qualifies for FMLA leave and the LEA does not learn of the reason for the leave until the employee returns to work, the LEA may designate the leave as FMLA leave within two business days of the employee's return; or
- if the LEA has provisionally designated the leave under FMLA leave and is awaiting receipt from the employee of documentation. Similarly, the employee is not entitled to the protection of the FMLA if the employee gives notice of the reason for the leave later than two days after returning to work.

### **EMPLOYEE RESPONSIBILITIES**

#### **8.2.14 Notice**

The employee shall give notice to the supervisor of the intention to take leave under this policy unless the leave is a medical emergency. The notice must follow the LEA's usual and customary call-in procedures for reporting an absence. The employee must explain the reasons for the needed leave in order to allow the LEA to determine that the leave qualifies under the Act.

<b>If the reason for leave is foreseeable and is:</b>	<b>the employee shall:</b>
For Birth/Adoption/Foster Care	Give the LEA not less than a 30-day notice, in writing. If the date of the birth or adoption requires leave to begin in less than 30 days, the employee shall provide such notice as is practicable, which means within one or two business days of when the need for leave becomes known to the employee.
For Planned Medical Treatment	(1) Make a reasonable effort to schedule the treatment so as not to disrupt unduly the operations and (2) Give not less than a 30-day notice. If the date of the treatment requires leave to begin in less than 30 days, the employee shall provide such notice as is practicable.
Due to Active Duty of Family Member	Provide such notice as is reasonable and practicable.

If the employee will not return to work after the period of leave, the LEA shall be notified in writing. Failure to report at the expiration of the leave, unless an extension has been requested, may be considered as a resignation.

## **CERTIFICATION REQUIREMENTS FOR FAMILY AND MEDICAL LEAVE**

### **8.2.15 Certification**

The employee shall provide certification in accordance with the provisions listed below. If the employee does not provide medical certification, any leave taken is not protected by FMLA.

The LEA should request medical certification within five business days after the employee provides notice of the need for FMLA leave.

The employee shall provide a copy of the health care provider's certification within the time frame requested by the LEA (which must be at least 15 calendar days) unless it is not practicable under the particular circumstances to do so despite the employee's diligent, good faith efforts.

### **8.2.16 Certification Requirements**

Certification shall be sufficient if it states the following:

- (1) The date on which the serious health condition commenced;

- (2) The probable duration of the condition;
- (3) The appropriate medical facts within the knowledge of the health care provider regarding the condition;
- (4) When caring for a child, spouse or parent, a statement that the employee is needed and an estimate of the amount of time that such employee is needed;
- (5) When for the employee's illness, a statement that the employee is unable to perform the functions of the position;
- (6) When for intermittent leave, or leave on a reduced work schedule, for planned medical treatment, the dates on which treatment is expected and the duration;
- (7) When for intermittent leave, or leave on a reduced work schedule for the employee's illness, a statement of the medical necessity for the arrangement and the expected duration;
- (8) When for intermittent leave, or leave on a reduced work schedule, to care for a child, parent or spouse, a statement that the arrangement is necessary or will assist in their recovery and the expected duration.

**Note: Medical Certification Form - Form WH-380, developed by the Department of Labor as an optional form for use in obtaining medical certification, including second and third opinions, may be used. Another form containing the same basic information may be used; however, no information in addition to that requested on Form WH-380 may be required.**

#### **8.2.17 Validity of Certification**

If an employee submits a complete certification signed by the health care provider, the LEA may not request additional information; however, a health care provider, human resource professional, a leave administrator, or a management official representing the LEA may contact the employee's health care provider, with the employee's permission, for purposes of clarification and authenticity of the medical certification. In no case, may the employee's direct supervisor contact the employee's health care provider.

If an LEA deems a medical certification to be incomplete or insufficient, the LEA must specify in writing what information is lacking, and give the employee seven calendar days to cure the deficiency.

**Second Opinion** - An LEA that has reason to doubt the validity of a medical certification may require the employee to obtain a second opinion with the following conditions:

- The LEA bears the expenses, including reasonable "out of pocket" travel expenses.
- The LEA may not require the employee or family member to travel outside normal commuting distance except in very unusual circumstance.
- Pending receipt of the second (or third) opinion, the employee is provisionally entitled to FLMA leave.

- If the certifications do not ultimately establish the employee's entitlement to FMLA leave, the leave shall not be designated as FMLA leave.
- The LEA is permitted to designate the health care provider to furnish the second opinion, but the selected health care provider may not be employed on a regular basis by the LEA unless the LEA is located in an area where access to healthcare is extremely limited.

**Third Opinion** - If the opinions of the employee's and the LEA's designated health care providers differ, the LEA may require the employee to obtain certification from a third health care provider, again at the LEA's expense. This third opinion shall be final and binding. The third health care provider must be designated or approved jointly by the LEA and the employee.

The LEA is required to provide the employee, within two business days, with a copy of the second and third medical opinions, where applicable, upon request by the employee.

#### **8.2.18 Recertification of Medical Conditions**

An LEA may request recertification no more often than every 30 days unless:

- an extension is requested,
- circumstances described by the previous certification have changed significantly, or
- the LEA receives information that casts doubt upon the employee's stated reason for the absence.

If the minimum duration specified on a certification is more than 30 days, the LEA may not request recertification until that minimum duration has passed unless one of the conditions above is met.

When the duration of a condition is described as "lifetime" or "unknown," the LEA may request recertification of an ongoing condition every six months in conjunction with an absence.

The employee must provide the requested recertification to the LEA within the time frame requested by the LEA (which must allow at least 15 calendar days after the LEA's request), unless it is not practicable under the particular circumstances.

Any recertification requested by the LEA shall be at the employee's expense unless the LEA provides otherwise. No second or third opinion on recertification may be required.



## **CERTIFICATION REQUIREMENTS FOR MILITARY CAREGIVER LEAVE**

### **8.2.19 Certification for Military Caregiver Leave**

#### **Required information from the health care provider:**

When leave is taken to care for a covered service member with a serious injury or illness, an LEA may require an employee to obtain a certification completed by an authorized health care provider of the covered service member. If the authorized health care provider is unable to make certain military-related determinations outlined below, the authorized health care provider may rely on determinations from an authorized DOD representative (such as a DOD recovery care coordinator). An LEA may request that the health care provider provide the following information:

- (1) The name, address, and appropriate contact information (telephone number, fax number, and/or email address) of the health care provider, the type of medical practice, the medical specialty
- (2) Whether the covered service member's injury or illness was incurred in the line of duty on active duty;
- (3) The approximate date on which the serious injury or illness commenced, and its probable duration;
- (4) Information sufficient to establish that the covered service member is in need of care and whether the covered service member will need care for a single continuous period of time, including any time for treatment and recovery, and an estimate as to the beginning and ending dates for this period of time;
- (5) If an employee requests leave on an intermittent or reduced schedule basis for planned medical treatment appointments for the covered service member, whether there is a medical necessity for the covered service member to have such periodic care and an estimate of the treatment schedule of such appointments;
- (6) If an employee requests leave on an intermittent or reduced schedule basis to care for a covered service member other than for planned medical treatment (e.g., episodic flare-ups of a medical condition), whether there is a medical necessity for the covered service member to have such periodic care, which can include assisting in the covered service member's recovery, and an estimate of the frequency and duration of the periodic care.

#### **Required information from employee and/or covered service member:**

In addition the LEA may also request that such certification set forth the following information provided by an employee and/or covered service member:

- (1) The name and address of the LEA of the employee requesting leave to care for a covered service member, the name of the employee requesting such leave, and the name of the covered service member for whom the employee is requesting leave to care;
- (2) The relationship of the employee to the covered service member for whom the employee is requesting leave to care;
- (3) Whether the covered service member is a current member of the Armed Forces, the National Guard or Reserves, and the covered service member's military branch, rank, and current unit assignment;

- (4) Whether the covered service member is assigned to a military medical facility as an outpatient or to a unit established for the purpose of providing command and control of members of the Armed Forces receiving medical care outpatients (such as a medical hold or warrior transition unit), and the name the medical treatment facility or unit;
- (5) Whether the covered service member is on the temporary disability retired list;
- (6) A description of the care to be provided to the covered service member and an estimate of the leave needed to provide the care.

The Department of Labor has developed an optional form (WH-385) for employees' use in obtaining certification that meets FMLA's certification requirements. This optional form reflects certification requirements so as to permit the employee to furnish appropriate information to support his or her request for leave to care for a covered service member with a serious injury or illness. WH-385, or another form containing the same basic information, may be used by the LEA; however, no information may be required beyond that specified in this section. In all instances the information on the certification must relate only to the serious injury or illness for which the current need for leave exists. An LEA may seek authentication and/or clarification of the certification. However, second and third opinions are not permitted for leave to care for a covered service member. Additionally, recertifications are not permitted for leave to care for a covered service member.

## **CERTIFICATION REQUIREMENTS FOR QUALIFYING EXIGENCIES LEAVE**

### **8.2.20 Certification for Leave for Qualifying Exigencies**

The LEA may require an employee to provide a copy of the covered military member's active duty orders or other documentation issued by the military which indicates that the covered military member is on active duty (or has been notified of an impending call or order to active duty) in a foreign country, and the dates of the covered military member's active duty service.

An LEA may require that leave for any qualifying exigency be supported by a certification from the employee that sets forth the following information:

- (1) A statement or description, signed by the employee, of appropriate facts regarding the qualifying exigency for which FMLA leave is requested. The facts must be sufficient to support the need for leave. Such facts should include information on the type of qualifying exigency for which leave is requested and any available written documentation which supports the request for leave; such documentation, for example, may include a copy of a meeting announcement for informational briefings sponsored by the military, a document confirming an appointment with a counselor or school official, or a copy of a bill for services for the handling of legal or financial affairs;
- (2) The approximate date on which the qualifying exigency commenced or will commence;
- (3) If an employee requests leave because of a qualifying exigency for a single, continuous period of time, the beginning and end dates for such absence;

- (4) If an employee requests leave because of a qualifying exigency on an intermittent or reduced schedule basis, an estimate of the frequency and duration of the qualifying exigency; and
- (5) If the qualifying exigency involves meeting with a third party, appropriate contact information for the individual or entity with whom the employee is meeting (such as the name, title, organization, address, telephone number, fax number, and e-mail address) and a brief description of the purpose of the meeting.

DOL has developed an optional form (Form WH-384) for employees' use in obtaining a certification that meets FMLA's certification requirements. This optional form reflects certification requirements so as to permit the employee to furnish appropriate information to support his or her request for leave because of a qualifying exigency. Form WH-384, or another form containing the same basic information, may be used by the LEA; however, no information may be required beyond that specified in this Policy.

**Verification:** If an employee submits a complete and sufficient certification to support his or her request for leave because of a qualifying exigency, the LEA may not request additional information from the employee. However, if the qualifying exigency involves meeting with a third party, the LEA may contact the individual or entity with whom the employee is meeting for purposes of verifying a meeting or appointment schedule and the nature of the meeting between the employee and the specified individual or entity. The employee's permission is not required in order to verify meetings or appointments with third parties, but no additional information may be requested by the LEA. An LEA also may contact an appropriate unit of the Department of Defense to request verification that a covered military member is on active duty or call to active duty status; no additional information may be requested and the employee's permission is not required.

#### **8.2.21 Intent to Return to Work**

An LEA may require an employee on FMLA leave to report periodically on the employee's status and intent to return to work. The LEA's policy regarding such reports may not be discriminatory and must take into account all of the relevant facts and circumstances related to the individual employee's leave situation.

If an employee gives unequivocal notice of intent not to return to work, the LEA's obligations under FMLA to maintain health benefits (subject to COBRA requirements) and to restore the employee cease. However, these obligations continue if an employee indicates he or she may be unable to return to work but expresses a continuing desire to do so.

It may be necessary for an employee to take more leave than originally anticipated. Conversely, an employee may discover after beginning leave that the circumstances have changed and the amount of leave originally anticipated is no longer necessary.

An employee may not be required to take more FMLA leave than necessary to resolve the circumstance that precipitated the need for leave. In both of these situations, the LEA may require that the employee provide the LEA reasonable notice (i.e., within two business days) of the changed circumstances where foreseeable. The LEA may also obtain information on such changed circumstances through requested status reports.

#### **8.2.22 Fitness-For-Duty Certifications**

Agencies may enforce uniformly-applied policies or practices that require all similarly-situated employees who take leave to provide a certification that they are able to resume work. An LEA may require that the certification specifically address the employee's ability to perform the essential functions of the employee's job. Where reasonable job safety concerns exist, an LEA may require a fitness-for-duty certification before an employee may return to work when the employee takes intermittent leave.

### **EMPLOYMENT AND BENEFITS PROTECTION**

#### **8.2.23 Reinstatement**

The employee shall be reinstated to the same position held when the leave began or one of like pay grade, pay, benefits, and other conditions of employment. The LEA may require the employee to report at reasonable intervals to the LEA on the employee's status and intention to return to work. The LEA may require that the employee provide certification that the employee is able to return to work.

Reinstatement is not required if an employee is reduced in force during the course of taking FMLA leave. The LEA has the burden of proving that the reduction would have occurred had the employee not been on FMLA leave.

#### **8.2.24 Benefits**

The employee shall be reinstated without loss of benefits accrued when the leave began. All benefits accrue during any period of paid leave; however, no benefits will be accrued during any period of leave without pay.

#### **8.2.25 Health Benefits**

The LEA shall maintain coverage for the employee under the State's Health Plan for the duration of leave at the level and under the conditions coverage would have been provided if the employee had continued employment. Any share of health plan premiums which an employee had paid prior to leave must continue to be paid by the employee during the leave period. The LEA must give advance written notice to employees of the terms for payment of premiums during FMLA leave. The obligation to maintain health insurance coverage stops if an employee's premium payment is

more than 30 days late. The LEA shall provide 15 days notice that coverage will cease.

If the employee's failure to make the premium payments leads to a lapse in coverage, the LEA must still restore the employee, upon return to work, to the health coverage equivalent to that which the employee would have had if leave had not been taken and the premium payments had not been missed without any waiting period or preexisting conditions.

**Advisory Note: Even if the employee chooses not to maintain group health plan coverage for dependents or if coverage lapses during FMLA leave, the employee is entitled to be reinstated on the same terms as prior to taking leave, including family or dependent coverage, without any qualifying period, physical examination, exclusion of pre-existing condition, etc. Therefore, the LEA should assure that health benefits coverage will be reinstated; otherwise, the LEA would need to pay the premium and recover it after the employee returns to work.**

The LEA may recover the premiums if the employee fails to return to work after the period of leave to which the employee is entitled has expired for a reason other than the continuation, recurrence, or onset of a serious health condition or other circumstances beyond the employee's control. For this purpose, return to work is defined as 30 calendar days; therefore, if the employee resigns any time within 30 days after the return to work, the insurance premium may be recovered unless the reason for the resignation is related to the continuation, recurrence, or onset of a series health condition or other circumstances beyond the employee's control.

## **INTERFERENCE WITH RIGHTS**

### **8.2.26 Actions Prohibited**

It is unlawful to interfere with, restrain, or deny any right provided by this policy or to discharge or in any other manner discriminate against an employee for opposing any practice made unlawful by this policy.

### **8.2.27 Protected Activity**

It is unlawful to discharge or in any other manner discriminate against any employee because the employee does any of the following:

- files any civil action, or institutes or causes to be instituted any civil proceeding under or related to this policy;
- gives, or is about to give, any information in connection with any inquiry or proceeding relating to any right provided by this policy; or
- testifies, or is about to testify, in any inquiry or proceeding relating to any right provided under this policy.

## **ENFORCEMENT**

### **8.2.28 Violations**

Denial of leave requested pursuant to the Family and Medical Leave Act can be appealed to the LEA following its grievance procedure. The employee also has a choice of:

- (a) filing a complaint to the U. S. Secretary of Labor or
- (b) filing a private lawsuit pursuant to section 107 of FMLA.

Note: If the employee files a private lawsuit, it must be filed within two years after the last action which the employee contends was in violation of the Act, or three years if the violation was willful.

## **POSTING AND RECORDKEEPING REQUIREMENTS**

### **8.2.29 Posting**

LEAs are required to post and keep posted, in a conspicuous place, a notice explaining the FMLA provisions and providing information concerning the procedures for filing complaints of violations of the Act with the U. S. Department of Labor, Wage and Hour Division.

**Note: Copies of the required notice may be obtained from local offices of the Wage and Hour Division.**

### **8.2.30 Records**

LEAs are required to keep records for no less than three years and make them available to the Department of Labor upon request.

In addition to the records required by the Fair Labor Standards Act, the LEA must keep records of:

- dates FMLA leave is taken,
- hours of leave if less than a full day,
- copies of employee notices,
- documents describing employee benefits,
- premium payments of employee benefits, and
- records of any disputes.

Records and documents relating to medical certifications, recertifications or medical histories of employees or employees' family members, created for purposes of FMLA, shall be maintained as confidential medical records in separate files/records from the usual personnel files, and if ADA is also applicable, such records shall be maintained in conformance with ADA confidentiality requirements, except that:

- Supervisors and managers may be informed regarding necessary restrictions on the work or duties of an employee and necessary accommodations.

- First aid and safety personnel may be informed (when appropriate) if the employee's physical or medical condition might require emergency treatment.
- Government officials investigating compliance with FMLA (or other pertinent law) shall be provided relevant information upon request.

#### **8.2.31 New and Revised Forms:**

[WH-380-E Certification of Health Care Provider for Employee's Serious Health Condition \(PDF\)](http://www.dol.gov/esa/whd/forms/WH-380-E.pdf) <http://www.dol.gov/esa/whd/forms/WH-380-E.pdf>

[WH-380-F Certification of Health Care Provider for Family Member's Serious Health Condition \(PDF\)](http://www.dol.gov/esa/whd/forms/WH-380-F.pdf) <http://www.dol.gov/esa/whd/forms/WH-380-F.pdf>

[WH-381 Notice of Eligibility and Rights & Responsibilities \(PDF\)](http://www.dol.gov/esa/whd/fmla/finalrule/WH381.pdf) <http://www.dol.gov/esa/whd/fmla/finalrule/WH381.pdf>

[WH-382 Designation Notice \(PDF\)](http://www.dol.gov/esa/whd/forms/WH-382.pdf) <http://www.dol.gov/esa/whd/forms/WH-382.pdf>

[WH-384 Certification of Qualifying Exigency For Military Family Leave \(PDF\)](http://www.dol.gov/esa/whd/forms/WH-384.pdf) <http://www.dol.gov/esa/whd/forms/WH-384.pdf>

[WH-385 Certification for Serious Injury or Illness of Covered Servicemember -- for Military Family Leave \(PDF\)](http://www.dol.gov/esa/whd/forms/WH-385.pdf) <http://www.dol.gov/esa/whd/forms/WH-385.pdf>

#### **Legal Reference (s)**

Code of Federal Regulations, Title 29, Part 825, The Family and Medical Leave Act of 1993, as amended

### **8.3 – Parental Involvement in Schools Leave**

#### **8.3.1 Eligibility and Rate of Earning**

In accordance with G.S. 95-28.3, any employee who is a parent, guardian or person in loco parentis may take up to four hours per fiscal year to attend or otherwise be involved at his or her child's school.

There is no requirement that the employer pay an employee while taking this leave. However, the local school district may allow the employee to use eligible accrued leave in lieu of non-paid parental involvement leave.

#### **8.3.2 Conditions for Leave**

Leave granted for this purpose is subject to the following conditions:

- (a) The leave shall be at a mutually agreed upon time between employer and employee,
- (b) The employer may require an employee to provide a written request at least 48 hours before the time desired for the leave, and
- (c) The employer may require that the employee furnish written verification from the child's school that the employee attended or was otherwise involved at the school during the time of leave.

#### **8.3.3 Definition of School**

For the purpose of this policy, "school" is defined as any:

- (a) Public school,
- (b) Private church school, church of religious charter, or nonpublic school that regularly provides a course of instruction,
- (c) Preschool, or
- (d) Child day care facility.

#### **Legal Reference(s)**

G.S. 95-28.3



## **9.1 – Compensatory Leave (FLSA)**

### **9.1.1 Eligible Employees**

Employees classified as nonexempt under the Fair Labor Standards Act (FLSA) who work more than 40 hours in a workweek must be paid overtime pay. Compensatory time off in lieu of overtime pay may be given if agreed to by the employee and employer before the performance of the work. Note that hours paid may include holidays, sick leave, and vacation and may not equate to hours worked.

Examples of nonexempt employees are bus drivers, cafeteria workers, custodians, maintenance workers, secretaries, and teacher assistants. Teachers and certified professional staff are examples of exempt employees.

### **9.1.2 Regulations for the Use of Compensatory Time**

When compensatory time off is used in lieu of overtime pay, it must be at the rate of one and one-half hours of compensatory time for each hour of overtime worked.

Compensatory leave may be accumulated to a maximum of 240 hours (160 hours actually worked). When hours of compensatory leave have accrued to the maximum of 240, all additional overtime hours worked must be paid at the overtime rate.

An employee must be permitted to use accrued compensatory leave within a reasonable time after it is requested, unless to do so would unreasonably disrupt operations. Although the LEA may adopt a policy that sets a time limit within which an employee should use accrued compensatory leave, an employee who fails to use the compensatory time within the designated time frame cannot lose the time earned.

There is no FLSA requirement that compensatory time be used in the same pay period in which it is earned.

### **9.1.3 Employment Agreements**

The agreement to provide compensatory time off in lieu of cash overtime compensation may be used as a condition of employment if the employee knowingly and voluntarily agrees to it as a condition of employment and the employee is aware of the conditions for use of compensatory time, as outlined in this policy.

**9.1.4 Payment Upon Termination**

Upon termination of employment, a nonexempt employee must be paid for unused compensatory time earned at a rate not less than:

- (a) The average regular rate received by such employee during the last three years of the employee's employment, or
- (b) The final regular rate received by the employee, whichever is higher.

**Legal Reference(s)**

Code of Federal Regulations, Title 29, Part 553 – Application of the Fair Labor Standards Act to Employees of State and Local Governments.  
Legislative Session 2001, Senate Bill 1005, Section 28.42

## **9.2 – Workers’ Compensation Leave**

### **9.2.1 Eligibility**

The provisions of the Workers’ Compensation Act are applicable to all school employees. The State is responsible for this compensation to the extent that the employee’s salary is paid from state funds. The LEA is responsible for a pro rata share of any locally funded part of the salary, and any federally funded proportion must be paid from federal funds.

### **9.2.2 Use of Leave During Required Waiting Period**

The workers’ compensation law provides medical benefits and a weekly compensation benefit equal to 66 2/3 percent of the employee’s average earnings up to a maximum established by the Industrial Commission each year. When an employee is injured on the job or contracts an occupational disease, he or she is able to use begin workers’ compensation benefits after the required waiting period of seven calendar days. During the waiting period the employee may:

- (a) Elect to use appropriate earned leave, or
- (b) Elect to go on leave without pay.

**Note:** Extended Sick Leave may not be used beyond the waiting period.

### **9.2.3 Seven-day Waiting Period**

No workers’ compensation weekly benefit is allowed for the first seven calendar days of disability resulting from an injury on the job or contracting an occupational disease, except the medical benefits provided for in G.S. 97-25. However, if the injury results in disability of more than 21 days, the compensation will be allowed from the date of the disability. Nothing in this section shall prevent an employer from allowing an employee to use appropriate earned leave or disability benefits provided directly by the employer during the first seven calendar days of disability.

### **9.2.4 Use of Leave to Supplement Weekly Compensation**

Sick and annual vacation leave (whole and half days), earned prior to going on workers’ compensation may be used while an employee is receiving workers’ compensation weekly benefits. Use of sick and annual vacation leave, regardless of the amount charged to use, shall not result in compensation greater than the usual full salary. Employees receiving workers’ compensation benefits are not paid for holidays scheduled in the calendar. Any salary increases are received upon reinstatement. (See the Workers’ Compensation Section of the Finance Policies and Procedures Manual for additional information.)

### **9.2.5 Earning Leave Under Workers' Compensation**

While on workers' compensation leave, the employee will continue to earn sick leave, annual vacation leave, and, if applicable, personal leave. Leave earned must be credited to the employee's account for use upon his or her return. If the employee does not return to active employment, a maximum of one year's vacation leave earnings will be added to the employee's unused vacation leave balance prior to going on workers' compensation leave and accumulated annual vacation leave will be paid in a lump sum to a maximum of 30 days or 240 hours.

### **9.2.6 Earning Longevity Under Workers' Compensation**

While receiving workers' compensation benefits, the employee will continue to earn longevity credit, if applicable. If the employee's anniversary date occurs during the period while the employee is receiving workers' compensation, longevity is paid on the employee's anniversary date. Teachers do not earn experience credit while on workers' compensation, except when they are using sick leave, extended sick leave, personal leave, or any other eligible paid leave.

### **9.2.7 Coordinating Benefits**

In order to coordinate possible benefits, the school system should notify their approved unemployment benefits contractor.

### **Legal Reference(s)**

G.S. 97-6  
G.S. 97-7  
G.S. 97-25  
G.S. 97-28  
G.S. 97-92  
G.S. 115C-337

## 9.3 – Episode of Violence

### 9.3.1 **Eligibility**

Any permanent full-time employee who suffers an injury or disability while engaged in the course of his or her employment shall receive full salary if the injury or disability arose from an episode of violence and the employee did not participate in or provoke the violence.

### 9.3.2 **Benefit**

The salary shall continue for one year, the continuation of the disability, or the time during which the employee is unable to engage in his or her employment because of the injury, whichever period is shortest.

While receiving regular salary under this provision, the employee is not eligible to receive weekly salary benefits under workers' compensation. However, the employee may receive medical, hospital, drug and related expense payments from workers' compensation if applicable.

If the employment of another person to replace the injured employee is necessary for the continuation of services, the new employee shall be paid from the same source of funds as the injured employee (local, federal, or state).

The employee is not required to use any paid leave (sick, annual, personal, etc.) if absence is due to an episode of violence.

### 9.3.3 **Notification**

An LEA must notify in writing the Department of Public Instruction's Division of School Business how many months the employee was absent in the initial fiscal year due to the incidence of violence. The LEA must also notify in writing the Department of Public Instruction's Division of School Business in the second fiscal year if needed. Allotments will **not** be made for prior fiscal years.

### **Legal Reference(s)**

G.S. 115C-338

## **9.4 – Contagious Disease**

### **9.4.1 Contagious Disease**

When a director of a county health department, in order to control the spread of contagious disease or to protect the health of an employee, orders an employee to leave his or her work environment, the local superintendent shall:

- (a) Reassign the employee to a safe work environment under conditions agreed to by the director of the county health department, or
- (b) Place the employee on leave with pay for the period of time set by the medical director. Leave shall not be charged to the employee's sick leave or other available paid leave. A substitute employed for this reason shall be paid from the same source of funds as the employee (local, federal, or state).

### **Legal Reference(s)**

G.S. 115C-12(8)

## 9.5 – Suspension with Pay

### 9.5.1 Suspension with Pay

If a superintendent believes that cause may exist for dismissing or demoting any employee covered by G.S. 115C-325 or G.S. 115C-287.1, the superintendent may suspend the employee with pay for a reasonable period of time not to exceed 90 days if:

- (a) Additional investigation of the facts is necessary, and
- (b) Circumstances are such that the employee should be removed immediately from his or her duties.

A person employed to replace the suspended employee shall be paid a salary based on the replacement's certification and shall be paid from the same source of funds as the individual suspended.

The superintendent must notify the Office of Financial and Personnel Services, Division of School Business Services, of the suspension and the replacement person employed.

### Legal Reference(s)

G.S. 115C-287.1  
G.S. 115C-325

## **9.6 – Other Leaves Without Pay**

### **9.6.1 Other Leaves Without Pay**

An employee may be granted a leave of absence without pay at the discretion of the superintendent and subject to rules and regulations adopted by the local board of education. With the exception of military leave, the local board of education may determine the beginning and/or ending date of such leaves based on a consideration of the welfare of the students and the need for continuity of service.

### **9.6.2 Effect on Career Status**

Tenured employees approved for a leave of absence retain career status upon return from the authorized leave. Probationary teachers must begin a new probationary period if a leave of absence, paid or unpaid, prevents the probationary teacher from completing four consecutive years of 120 workdays each in the same school system. Unless the probationary teacher in a full-time, permanent position does not work for at least 120 workdays in a 215 day school year because the teacher is on sick leave, disability leave or both, that school year shall not be deemed to constitute:

- (a) A consecutive year of service for the teacher, or
- (b) A break in the continuity in consecutive years of service for the teacher.

### **9.6.3 Continuation of Health Insurance**

- (a) If an eligible employee goes on approved, unpaid leave of absence, the employee may retain medical insurance provided the employee pays both the employer's and the employee's portions of the insurance premium.

### **Legal Reference(s)**

G.S. 115C-12  
G.S. 115C-325



## 10.1 - Short-Term Military Leave

### 10.1.1 **Eligibility**

Full-time or part-time permanent employees are eligible for short-term military leave.

If any part of this policy is inconsistent with Federal law, the Federal law takes precedence. Public schools should not rely exclusively on this summary for administration of their legal responsibility. LEAs and charter schools should review their responsibilities under the Uniformed Services Employment and Reemployment Rights Act of 1994 (USERRA).

[http://www.dol.gov/vets/programs/userra/Final\\_USERRA\\_Poster.pdf](http://www.dol.gov/vets/programs/userra/Final_USERRA_Poster.pdf)

### 10.1.2 **Short-Term Military Leave with Pay**

Leave with pay shall be granted to members of Reserve Components of the U.S. Armed Forces for periods of active duty training.

Reserve components of the U.S. Armed Forces are the National Guard, the Army Reserve, the Naval Reserve, the Marine Corps Reserve, the Air Force Reserve and the Coast Guard Reserve. The National Guard serves both as a federal reserve component and as the State Militia.

(a) **Periods of entitlement for all reserve components:**

- (i) Military Leave with Pay: Leave with pay shall be granted for up to 15 workdays during the federal fiscal year (October 1 to September 30).
- (ii) Differential Pay: If paid leave is not available and the military pay is less than the pay with the LEA or charter school, the employee is eligible for differential pay. The employee must provide military pay vouchers or other documentation and the LEA or charter school determines the difference between the military pay and pay with the LEA or charter school. Differential pay is made from the same source of funds as the employee's salary.
- (iii) Local Supplement: If a local supplement is paid to employees on the job and the employee is eligible for differential pay, the local supplement is to be paid as a part of the differential pay to employees on short-term military leave

(b) **Physical examination for military service:**

An employee shall be granted necessary time off when the employee must undergo a required physical examination relating to membership in a reserve component (included in the 15 days paid leave per federal fiscal year).

(c) **Scheduled unit assemblies:**

Regularly scheduled unit assemblies usually occur on weekends and are referred to as “drills”. If an employee is required to leave on a workday, the employee may be allowed to use military leave with pay or other eligible paid leave. This military leave with pay is included in the 15 days allowed each federal fiscal year for training.

(d) **Additional periods of entitlement for National Guard only:**

- (i) Military leave with pay shall be granted for infrequent special activities in the interest of the State when so authorized by the Governor or his designee. This leave is in addition to the 15 days allowed for military training.
- (ii) For active duty in excess of 30 days , employees shall be entitled to military leave with differential pay between military pay and regular pay if the military pay is less than the employee’s regular pay.
- (iii) Military leave for active state duty is in addition to military leave which may be granted for other purposes.

(e) **Periods ineligible for paid military leave:**

- (i) Duties resulting from disciplinary actions imposed by military authorities.
- (ii) Inactive duty training (drills) performed for the convenience of the members such as equivalent training, split-unit assemblies, make-up drills, etc.

Employing agencies are not required to excuse an employee for unscheduled or incidental military activities such as volunteer work at military facilities and unofficial military activities.

### **10.1.3 Orders and Leave Documentation**

The employee must give advance notice to the employer of absence for military service and apply for reemployment following leave of more than 30 days. The notice and application may be either written or verbal.

The school system may request that the employee submit a copy of the orders or other appropriate documentation of required military duty.

### **10.1.4 Resolution of Scheduled Conflicts**

If a scheduled military leave creates a problem for the school system, supervisors are encouraged to contact the commanding officer at the military unit to which the employee reports and request a schedule accommodation.

**10.1.5 Retention of Benefits**

Paid military leave is treated like any other paid leave. The employee shall continue to accumulate leave and receive health insurance for self, etc.

**Legal Reference(s)**

Public Law 103-353 Uniformed Services Employment and Reemployment Rights Act of 1994 (USERRA) and its regulations found in Title 38, United States Code, Chapter 43—Employment and Reemployment Rights of Members of the Uniformed Services.

G.S. 115C-12(8)

G.S. 115C-302.1(g1)

G.S. 127A-116

16 NCAC 6C.0404

16 NCAC 6C.0406

25 NCAC 1E.0800

NCGA 2003, SB 714

## 10.2 – Military Leave For Extended Active Duty

### 10.2.1 Employee Eligibility

All permanent, probationary and trainee employees who enter active military service are eligible for military leave for extended active duty.

If any part of this policy is inconsistent with Federal law, the Federal law takes precedence. Public schools should not rely exclusively on this summary for administration of their legal responsibility. LEAs and charter schools should review their responsibilities under the Uniformed Services Employment and Reemployment Rights Act of 1994 (USERRA).

[http://www.dol.gov/vets/programs/userra/Final\\_USERRA\\_Poster.pdf](http://www.dol.gov/vets/programs/userra/Final_USERRA_Poster.pdf)

### 10.2.2 Service Schools and Reserve Training

All or any portion of an employee's 15 days paid military leave or regular vacation leave may be used in lieu of or in conjunction with unpaid military leave for:

- (a) Attendance at Service Schools, or
- (b) Attendance at Active Duty Training in a Reserve Unit.

### 10.2.3 Extended Active Duty

Leave without pay shall be granted as outlined below for periods of active duty in the armed forces of the United States. At the start of extended active duty, an employee may use eligible (see Section 3.1.3(d)) paid leave.

- (a) **“Extended active duty” is defined as:**
  - (i) Any active military service for a period not to exceed five years plus any period of additional service imposed by law.
  - (ii) All active military service during declared state or national emergency or during time of war.
  - (iii) Any mobilization or order to Federal active duty of an employee in the National Guard or one of the other reserve components.
- (b) **Leave before and after active duty:** Permanent, trainee, and probationary employees who enter active military service may also use unpaid military leave for the following reasons:
  - (i) **While awaiting entry into active duty,** to allow the employee to settle any personal matters or if the delay is not the employee's fault. This period shall be for up to 30 days and can be extended in exceptional cases.

- (ii) **Following active military service** while employee's reinstatement is pending. The employee must apply for reinstatement within 90 days following release from active duty of more than 180 days, or within 14 days following active duty of 30 to 180 days.
- (iii) **Involuntary extensions:** Unpaid military leave shall be granted for any involuntary extension of military service. The employee may be required to present evidence that the extension was involuntary.
- (iv) **Hospitalization:** Unpaid military leave shall be permitted for extensions of enlistment due to hospitalization for service-connected disability certified by the attending physician.

In addition, the employee is entitled to leave without pay from the time of release by the physician until actually reinstated, provided the employee applies for reinstatement within the time limits described above.

- (c) **Employee responsibility:**
  - (i) Notice: The employee or an appropriate military officer shall give advance notice of the military service to the superintendent of the school system or charter school administrator.
  - (ii) Differential Pay: If military pay is less than the pay with the LEA or charter school, the employee is responsible for providing military pay vouchers or other documentation and requesting differential pay within 12 months from the date of separation or discharge.
  - (iii) Reinstatement: The employee is responsible for making application for reinstatement within the appropriate time limit.
- (d) **Employer responsibility:**
  - (i) Eligibility for Leave: It is the responsibility of the employer to ascertain that the employee is eligible for available paid leave and/or unpaid military leave.
  - (ii) Explaining Benefits: The superintendent or designee shall explain to the employee the rights and benefits concerning leave, salary increases, medical insurance options, retirement status, the possibility of differential pay and reinstatement from military leave.
  - (iii) Differential Pay: If the employee's military pay is less than his/her pay with the LEA or charter school, the LEA or charter school determines the differential pay using the military pay documentation provided by the employee and pays the difference (including any local supplement) from the same source of funds as the employee's salary.

- (e) **Retention and continuation of benefits:** An employee going on extended active duty may choose to have accumulated vacation leave paid in a lump sum, exhaust eligible leave, or retain all or part of the accumulated leave until he or she returns to work. The maximum accumulation of 30 days or 240 hours applies to a lump-sum payment.

The employee retains all accumulated sick leave and continues to earn state service credit and time toward salary increases.

An employee will receive full retirement membership service credit for all active duty service in the armed forces if he or she is honorably discharged. Enlistment up to five years is creditable. The employee should contact the Retirement System for instructions.

- (f) **Reinstatement from leave without pay for military service:** Employees on leave without pay and honorably discharged from military service who apply for reinstatement within the appropriate time limit must be reemployed in a position equivalent in status, seniority, and pay and as if employment had not been interrupted.

If an employee is disabled during military service to the extent that he or she cannot perform the duties of the original position, the employee shall be reinstated to a position with duties compatible with the disability. In no case will the reinstated employee's salary be less than his or her salary prior to military leave.

Employees who resign without knowledge of their eligibility for military leave and reinstatement of benefits, but who are otherwise eligible for the reinstatement under military leave provisions, shall be reinstated from military service just as if they had applied for and been granted leave for active military duty.

### **Legal Reference(s)**

Public Law 103-353 Uniformed Services Employment and Reemployment Rights Act of 1994 (USERRA) and its regulations found in Title 38, United States Code, Chapter 43—Employment and Reemployment Rights of Members of the Uniformed Services

G.S. 115C-12(8)

G.S. 115C-302.1(g1)

G.S. 127A-116

16 NCAC 6C.0404

16 NCAC 6C.0406

25 NCAC 1E.0800

NCGA 2003, SB 714

## **10.3 – Civil Air Patrol**

### **10.3.1 Periods of Entitlement for Duty with the Civil Air Patrol**

Members of the Civil Air Patrol are not required to participate in missions or training exercises. Employees attending these regularly scheduled unit training assemblies are not eligible for military leave with pay; however, school systems are encouraged to arrange work schedules to allow employees to attend this training.

If missions or training exercises are authorized by the Air Force, the Governor, or the Secretary of the Department of Crime Control and Public Safety, members who wish to participate are entitled to military leave with pay not to exceed 15 days in any calendar year. This leave is included in the 15 days of paid military leave to which full-time employees are entitled. The 15 days of leave are prorated for part-time employees.

LEA or charter school employees on leave of absence for State or federal military duty for required training or special emergency management service shall be paid the difference in military base pay and public school salary, (including non-performance based bonuses) when the military pay is less than the public school salary. Only honorable service is eligible for differential pay. Differential pay is paid from the same source of funds as the public school salary. (See Sections 10.1 and 10.2 for additional information on differential pay).

Service may be verified by the Secretary of the Department of Crime Control and Public Safety.

#### **Legal Reference(s)**

G.S. 115C-302.1(g1)  
G.S. 127A-116  
G.S. 143A-241  
16 NCAC 6C.0404  
16 NCAC 6C.0406  
25 NCAC 1E.0800  
NCGA 2003, SB 714

## **10.4 – State Defense Militia**

### **10.4.1 Periods of Entitlement for Members of the State Defense Militia**

Only when called out by the Governor are school employees who are members of the State Defense Militia entitled to paid military leave. This paid military leave cannot exceed 15 days during any calendar year and is included in the annual entitlement of paid military leave.

The State Defense Militia is a reserve to the National Guard, but it is not a reserve component of the U.S. Armed Forces. Duty status may be verified by the Vice Chief of Staff-State Operations in the Office of the Adjutant General, North Carolina National Guard.

LEA or charter school employees on leave of absence for State or federal military duty for required training or special emergency management service shall be paid the difference in military base pay and public school salary, (including non-performance based bonuses) when the military pay is less than the public school salary. Only honorable service is eligible for differential pay. Differential pay is paid from the same source of funds as the public school salary. (See Sections 10.1 and 10.2 for additional information on differential pay).

School employees who are members of the State Defense Militia are not entitled to paid military leave when volunteering for support of activities sponsored by civic or social organizations even when such support has been authorized by the Governor or his designee.

Members of the State Defense Militia attending regularly scheduled unit training assemblies are not eligible for paid military leave; however, school systems are encouraged to arrange work schedules to allow the employee to attend this training if possible.

#### **Legal Reference(s)**

G.S. 115C-302.1(g1)  
G.S. 127A-116  
16 NCAC 6C.0404  
16 NCAC 6C.0406  
25 NCAC 1E.0800  
NCGA 2003, SB 714



## 11.1 – Teacher Substitutes

### 11.1.1 Employment of Substitutes

The local board of education is encouraged to make every effort to hire licensed teachers to serve as substitutes in the local school system. Substitutes may be employed on all workdays, including optional teacher workdays (unless the regular teacher is using annual vacation leave on the optional workday). Substitutes may not be employed on holidays and on annual vacation leave days scheduled in the calendar. A substitute teacher is defined as an individual who fills in for a permanent teacher who is still on payroll and is using paid leave.

### 11.1.2 Teacher Assistants as Substitutes

- (a) **Resolution required:** When a local board of education has adopted a resolution authorizing the use of employed teacher assistants as substitute teachers, a principal who feels it appropriate to do so may assign a teacher assistant to serve as a substitute teacher.
- (b) **Salary rate A-0:** When a teacher assistant acts as a substitute teacher, the salary for the day shall be the same as the daily salary of an entry-level teacher with an “A” (Standard Professional 1 or Standard Professional 2) license.

### 11.1.3 Units of Employment

Employment of substitute teachers will be in units of half-days or full days. If teaching responsibilities are for one-half day or less, the deduction for a substitute will be for a half-day.

### 11.1.4 Salary Rates

Local boards of education may adopt substitute teacher rates allowing different pay rates for a substitute depending upon long-term versus short-term assignment, type of subject, training, etc. Substitute pay rates must comply with the rules listed in 11.1.4 (a) and 11.1.4 (b).

Beginning January 1, 1999, local boards of education may use state funds allocated for substitute teachers to hire full-time substitute teachers. Eligibility for benefits is outlined in Section 1.1.

- (a) **Holder of license:** Beginning January 1, 1999, the minimum pay rate for a substitute teacher who holds a valid North Carolina teacher certification/license must be at least 65% of the daily pay rate of an entry-level teacher with an “A” (Standard Professional 1 or Standard Professional 2) license and can be paid up to their certified daily pay rate (i.e. daily rate based on the teacher’s years of experience).

- (b) **Non-holder of license:** Beginning January 1, 1999, the minimum pay for a substitute teacher who does not hold a valid North Carolina teacher certification/license must be at least 50% of the daily pay rate of an entry-level teacher with an “A” (Standard Professional 1 or Standard Professional 2) license. The pay for a substitute teacher who does not hold a valid North Carolina teaching certificate shall not exceed the pay of a substitute teacher who holds a valid North Carolina teaching certificate.

#### **11.1.5 Deduction from the Teacher’s Salary**

When a deduction is required to be made from the teacher’s salary, the deduction shall be \$50.00 per day.

#### **11.1.6 Source of Funds**

A substitute teacher employed when the regular teacher is absent shall be paid from the same source of funds (local, federal, or state) as the regular teacher, unless otherwise specified in these policies.

#### **11.1.7 Full-time Substitutes**

School systems may employ substitutes on a full-time basis. Full-time substitutes are not to be confused with interim employees. Substitutes are employed to fill in for a regular teacher(s) when that teacher(s) is absent and on paid leave. To qualify, a full-time substitute must work at least 30 hours per week and is expected to be employed at least six consecutive months. Full-time substitutes meeting eligibility requirements earn the same benefits as other full-time employees. Refer to the Salary Manual for proper coding and payment.

#### **Legal Reference(s)**

G.S. 115C-12(8)  
16 NCAC 6C.0403

## **11.2 – Substitutes for Non-Instructional Personnel**

### **11.2.1 Substitutes for Non-Instructional Personnel**

- (a) The local superintendent shall determine the need to employ a substitute for a non-teaching counselor, assistant principal, principal, or supervisor. A substitute employed for a non-teaching counselor, assistant principal, principal, or supervisor must be paid from local funds.
- (b) Substitutes for classified (non-certified) employees, such as secretaries or custodians, must be paid from local funds.

### **11.2.2 Replacements for Principal Under Certain Conditions**

No deduction shall be made from the salary of a teacher who fills in for a disabled principal who does not have an assistant principal. The teacher may be reassigned to fill in for the principal after the principal has been on sick leave for at least ten days. This reassignment shall be allowed until the principal returns to work or exhausts sick leave. A substitute teacher employed for the teacher shall be paid from the same source of funds as the principal (local, federal, or state).

### **Legal Reference(s)**

G.S. 115C-12(8)  
16 NCAC 6C.0403

## 12.1 – Interim Employment

### 12.1.1 Employment

An “interim employee” is a person employed to fill a position that is temporarily vacant and is being held for an incumbent who is expected to return.

**Note:** An interim employee should not be confused with a substitute employee. A substitute employee fills in for a permanent employee who is using paid leave.

**Note:** Interim “employment status” should not be confused with “interim employment contract”, as used in local school districts.

### 12.1.2 Rate of Pay in Positions Requiring Licensure

The interim employee will be paid at his or her certified salary rating if:

- (a) Service in the interim position is more than 10 teaching days, and
- (b) The interim employee is licensed in the area of assignment.

**Note:** Licensed interim employees, unless licensed in the appropriate area and coded to object code 121, do not earn experience credit

However, the interim employee may be paid at substitute rate instead of being paid on his or her certified salary rating if he or she requests to be paid at substitute rate.

The interim must be paid as a substitute if:

- (a) Service in the interim position is 10 teaching days or less, or
- (b) The interim employee is not licensed in the area of assignment.

### 12.1.3 Benefits

An interim employee is not eligible for benefits.

Note: When determined that the assignment will be greater than six months, the employment status should be classified as permanent and provide benefits. (Section 1.1.2)

## Legal References

G.S. 115C-12  
16 NCAC 6C.0403

## **13.1 – Longevity**

### **13.1.1 Eligibility Requirements**

All permanent full-time or part-time (20 hours per week or more) employees who have at least 10 years of total qualifying state service are eligible for longevity payments.

### **13.1.2 Earning State Service**

- (a) Employees will receive full credit for each pay period they are in pay status (working, using vacation, sick, extended sick, or personal leave, on workers' compensation, or on authorized military leave) as a permanent full-time or part-time employee for one-half or more of the regularly scheduled workdays and holidays in the pay period.
- (b) Working the contract length for a complete school year (i.e., 10 months) is equivalent to one full calendar year. Credit for a partial year is given on a month-for-month basis.
- (c) An employee may not earn more than one year of state service in a 12-month period. If an employee did not earn a full year of state service credit during a 12-month period, summer school employment will be included in state service credit for longevity purposes provided that the employee was employed at least permanent part-time (20 hours per week or more).

### **13.1.3 Creditable Service**

- (a) Employment with a North Carolina LEA.
- (b) Employment with a State of North Carolina department, agency, or institution (whether or not subject to State Personnel Act).
- (c) Employment with a University of North Carolina System institution, local mental health, public health, social services or emergency management agency in North Carolina if such employment was subject to the State Personnel Act. (Telephone the personnel office of the former employer to determine if a former employee was subject to the Act.)
- (d) Authorized military leave as outlined in the military leave policies (see Sections 10.1, 10.2, 10.3, and 10.4), provided the employee is reinstated within the time limit as outlined in the military leave section.
- (e) Employment with the General Assembly (except for participants in the Legislative Intern Program and pages). All time, both permanent and temporary, will be counted; and the full legislative terms of members.

- (f) Employment with the county agricultural extension service, if the position was subjects to State Personnel Act.
- (g) Employment with other governmental units which are now state agencies (Examples: county highway maintenance forces, War Manpower Commission, judicial system).
- (h) Employment with the community college system.

See Section 13.2 for examples of employers eligible for creditable state service.

See Section 13.3 for examples of employers not eligible for creditable state service.

#### 13.1.4 **Payment**

- (a) Longevity pay is automatic. Payment shall be made not later than the month following the monthly pay period in which the employee has satisfied all eligibility requirements.
- (b) The amount of annual longevity pay is a percentage of the employee's annual rate of pay on the employee's anniversary date. The annual rate of pay does not include bonuses, or pay for extra duties. The percentage is determined by the length of total state service as follows:

<u>Years of State Service</u>	<u>Longevity Pay Rate*</u>
10 but less than 15 years	1.50 percent
15 but less than 20 years	2.25 percent
20 but less than 25 years	3.25 percent
25 or more years	4.50 percent

\* The only exception to the above is if the employee has a fraction of a year remaining toward the next higher percentage rate and is separating from a school unit, the payment would be based on the higher rate. For example, if a teacher separates from a school unit and has nineteen (19) years and four (4) months of service, the payment rate would be 3.25% rather than 2.25%. This exception applies only when the employee already has more than ten (10) years of service.

NC public school law does not address locally funded positions. The local board of education has the option of determining longevity policy for locally funded positions.

- (c) Leave without pay:

Employees on short-term disability or military leave must be paid the eligible pro rata amount of longevity earned at the beginning of the leave.

An employee on workers' compensation shall be paid longevity as if actively working.

All other employees on leave without pay shall be paid upon return, when they have completed a full year of eligibility.

NOTE: Leave without pay often causes a change in the employee's anniversary date.

- (d) An employee separating from employment shall be paid the amount of longevity pay earned up to termination of employment
- (e) Employees taking a leave of absence to work in a charter school will be paid their accumulated longevity at the time they leave the school system. Upon return from a leave of absence to work in a charter school, the school system will make any adjustments to the employee's anniversary date and to the longevity payment made on the anniversary date to reflect the salary on that date.

**Legal Reference(s)**

G.S. 115C-12  
G.S. 115C-238.29F(4)  
G.S. 115C-302.1

## 13.2 – Creditable Service (List)

### 13.2.1 Creditable Service

See Section 13.1.3 for guidelines to creditable State service. Only permanent, probationary, provisional, or trainee appointments are creditable.

Administrative Office of the Courts – Give service credit if position is subject to State Personnel Act (SPA).

Agriculture – Production Marketing Administration (PMA) – The program was converted from federal to state government in 1962. Give credit for all service while in a SPA position after 1962.

Agriculture Research Stations – Give credit for all time worked, including employee in unclassified position.

Alcohol Treatment Center (Wake County)

Alumni Association of a state supported college or university.

Board of Certified Public Accountant Examiners

Board of Dental Examiners (County and City)

Board of Education (County or City)

Cherry Hospital Canteen Employees – Subject to SPA effective October 1, 1976. If employee employed prior to October 1, 1976, credit can be given.

Chinqua–Penn Plantation – UNC-G: Give credit only for time after initial entry with UNC-G.

Civil Preparedness if subject to State Personnel Act.

Community College System – State supported effective 1963. If college closed prior to 1963, employee cannot receive any credit for that time. Employee will receive credit only if continued with the college beginning 1963 or began working at the college at that time.

Developmental Evaluation Centers – DEC Centers – (Division of DHR – Health Services).  
Effective July 1, 1975, DEC Centers are a division of the Department of Human Resources.  
Give longevity credit for all time worked if person was employed prior to July 1, 1975.

Division of Procurement and Supply (Raleigh City Schools).

Division of Student Financial Aid: Give credit only given for service time subject to the SPA.

ESEA – Titles I, II, III – Same as school systems.

Eastern Carolina Vocational Rehabilitation Center



Eastern Medical Center – Formerly named “Rapid Treatment Center” in 1947. Closed in 1952. Reopened and presently named the North Carolina Memorial Hospital.

Emergency Medical Services, under Facility Services need to verify each case with N.C. Department of Human Resources.

Emergency Relief Administration (ERA) – Same as old Welfare Department.

Exempt Personnel Act Employees (EPAE) – Service in a position exempt from State Personnel Act while employed with a State department, agency, or institution is creditable.

Gaston College

General Assembly – Employment with the General Assembly (except for participants in the Legislative Intern Program and Pages). All time, both permanent and temporary, of the employees will be counted and the full legislative terms of members.

Harbor Island House Marine Science Center – See Agricultural Extension Service.

Headstart (Outreach) – Need to check with each school system to see if program is under the state system.

Highway Department Temporary – Count temporary employment prior to July 1, 1975. All credit given after July 1, 1975, must be permanent employment only.

Hospitals – State Supported under State Personnel Act.

Indian Affairs – under Department of Administration.

Institute of Government – under UNC-CH early 1940’s.

Judicial System – Prior to 1966 credit was not given except to North Carolina Supreme Court. Credit is given to any employee who was employed at the time of court reform (1966-1970) and continued working. All judicial system employees are State employees beginning in 1966.

Liaison Leader

Local Government Commission

Mecklenburg County – Department of Environmental Health

NC Advancement School – Winston Salem (closed July 1, 1976) (Exempt position).

NC Board of Certified Public Accountants

NC Board of Law Examiners

NC Board of Medical Examiners

NC Board of Nurses/NC Board of Nursing Registration

NC Board of Nursing Examiners

NC Board of Registration for Engineer and Land Surveyors

NC Center for Nursing (falls under UNC – General Administration)

NC Employment Service (Old ESC)

NC Home Economics Extension Services (under Agricultural Extension)

NC Licensing Board for Barber Examiners and Cosmetic Arts

NC Licensing Boards

NC Parts Railway Commission

NC Real Estate Commission

NC State Board for Nursing Home Administrators

NC State DAR (G.S. 84-24)

NC Supreme Court

NC Symphony – now under Cultural Resources: Give credit if position was state funded; no credit if private or non-profit.

NCSU Print Shop – All permanent employees.

National Guard Technicians – Credit for service prior to January 1, 1969 at which time they were converted to Federal. Some employees with National Guard are State and some are federal.

Neuse Mental Health Clinic, New Bern, NC

New River Light and Power Co. (with Appalachia State University)

Northwest Regional Education Center

Permanent Improvement and/or Force Account, DHR: employees who worked full-time (hourly rate) in the 1940's & 50's.

Professors and Instructors with Universities – considered full-time if employed 12 or more hours per week (exempt positions).

Rapid Treatment Center – changed from Federal to State in 1947, at which time name changed to Eastern Medical Center (est. 1943).

Region B Planning and Development – under DOA – State Planning

Regional Development Institute (under ECU)

SPA employees – credit is given for permanent part-time (half-time or more), permanent full-time and exempt employment. Flat-rate employees can receive credit if full-time.

School Bus Drivers – who work at least 20 hours per week.

School Food Service – Those who worked in cafeterias did not go under Retirement System until 1967.

School System – If employee works a full 9 or 10 month contract position, give credit for 1 year for the 12 month period. Before July 1, 1973, a public school year was 9 months (Sept. 1–June 1). Effective July 1, 1973, the public school year increased to 10 months.

State ABC Officers – ABC Board members and 3 warehouse employees. Warehouse went private June 1, 1975.

Student Supply Store Employees – If worked 9 months or more, give 1 full year. If worked 8 months or less, give credit for months actually worked.

TEACH–Give credit–(worked in school system, usually paid through University funds-psychology)

UCC – (Old ESC)

USES – (Old ESC; 1941-1946 during World War II)

University Book Exchange and Supply Stores – agency must verify employment; some universities were on a Contractual basis such as States Food, which is not creditable.

University Employees – (State supported universities, 9 or 10 month employment, credit for 1 full year, except WCU – University Resident Counselor)

Upper French Broad Economic Development Commission – under DOA (1966)

Veterans Affairs (NC Vet. Comm.)

Veteran's Farm Training Program – (under school system)

WNCRPC – Western North Carolina Regional Planning Commission – (Went under NRD July 1, 1969: give credit prior to this date if individual was employed at the time it went under State.)

Wake County Alcohol Treatment Center

Wake County Child Support Agency (This agency is under Social Services)

Wake County Juvenile Treatment Center

Workers' Compensation time while employed in a position eligible for creditable state service

Western Regional Center – Foothills Area Program

### **13.2.1 Creditable Service – Area Mental Health Program Facility Names Other than Name of Single County**

**Note:** Most service in county mental health agencies, such as Wake County Mental Health, is creditable for longevity. See Section 13.1.3 for details.

Alamance – Caswell Area Mental Health/Developmental Disabilities/Substance Abuse Services

Albemarle Area Mental Health/Developmental Disabilities/Substance Abuse Services (Pasquotank, Chowan, Perquimans, Camden, Dare, Currituck Counties)

Alcoholism Program of Forsyth County, Winston-Salem  
(Forsyth-Stokes Area Mental Health/Developmental Disabilities/Substance Abuse Services)

Amelia-Bauer-Kahn Psychiatric Unit, Franklin (Smokey Mountain Area Mental Health/  
Developmental Disabilities/Substance Abuse Services)

Blue Ridge Area Mental Health/Developmental Disabilities/Substance Abuse Services (Buncombe, Madison, Mitchell, Yancey Counties)

Child Guidance Clinic of Forsyth Center, Inc.

Crossroads (Surry-Yadkin Area Mental Health/Developmental Disabilities/Substance Abuse Services)

Drug Education Center, Charlotte  
(Mecklenburg Area Mental Health/Developmental Disabilities/Substance Abuse Services)

Duplin-Sampson Area Mental Health/Developmental Disabilities/Substance Abuse Services

Edgecombe-Nash Area Mental Health/Developmental Disabilities/Substance Abuse Services

Family Counseling and Education Center, Hillsborough  
(Orange-Person-Chatham Area Mental Health/Developmental Disabilities/Substance Abuse Services)

Foothills Area Mental Health/Developmental Disabilities/Substance Abuse Services  
(Caldwell, Burke, Alexander, McDowell Counties)

Forsyth-Stokes Area Mental Health/Developmental Disabilities/Substance Abuse Services

Gaston-Lincoln Area Mental Health/Developmental Disabilities/Substance Abuse Services

Henry Wiseman Kendall Center, Greensboro  
(Guilford Area Mental Health/Developmental Disabilities/Substance Abuse Services)

Inner-City Satellite, Raleigh

(Wake Area Mental Health/Developmental Disabilities/Substance Abuse Services)

Jerry Hedrick Mental Health Clinic, Oxford (Vance-Warren-Granville-Franklin Area Mental Health/Developmental Disabilities/Substance Abuse Services)

Lee-Harnett Area Mental Health/Developmental Disabilities/Substance Abuse Services

Neuse Area Mental Health/Developmental Disabilities/Substance Abuse Services  
(Craven, Jones, Pamlico, Carteret Counties)

New River Area Mental Health/Developmental Disabilities/Substance Abuse Services  
(Alleghany, Ashe, Avery, Watauga, Wilkes Counties)

Northern Wake MH Center, Wake Forest  
(Wake Area Mental Health/Developmental Disabilities/Substance Abuse Services)

Open House, Inc., Charlotte  
(Mecklenburg Area Mental Health/Developmental Disabilities/Substance Abuse Services)

Orange-Person-Chatham Area Mental Health/Developmental Disabilities/Substance Abuse Services

Piedmont Area Mental Health/Developmental Disabilities/Substance Abuse Services  
(Stanly, Cabarrus, Union)

Roanoke-Chowan Area Mental Health/Developmental Disabilities/Substance Abuse Services  
(Hertford, Bertie, Gates, Northampton Counties)

Rutherford-Polk Area Mental Health/Developmental Disabilities/Substance Abuse Services

Sandhills Area Mental Health/Developmental Disabilities/Substance Abuse Services  
(Moore, Hoke, Richmond, Montgomery, Anson Counties)

Seventh Street Center, Charlotte  
(Mecklenburg Area Mental Health/Developmental Disabilities/Substance Abuse Services)

Smoky Mountain Area Mental Health/Developmental Disabilities/Substance Abuse Services  
(Jackson, Haywood, Macon, Cherokee, Clay, Graham, Swain Counties)

Southeastern Area Mental Health/Developmental Disabilities/Substance Abuse Services  
(Wilmington and New Hanover, Brunswick, Pender Counties)

Southeastern Area Mental Health/Developmental Disabilities/Substance Abuse Services  
(Lumberton and Robeson, Bladen, Scotland, Columbus Counties)

Surry-Yadkin Area Mental Health/Developmental Disabilities/Substance Abuse Services

Tideland Area Mental Health/Developmental Disabilities/Substance Abuse Services  
(Beaufort, Washington, Tyrrell, Hyde, Martin Counties)

Trend Area Mental Health/Developmental Disabilities/Substance Abuse Services  
(Transylvania, Henderson Counties)

Trentman, W.H. MH Center, Raleigh  
(Wake Area Mental Health/Developmental Disabilities/Substance Abuse Services)

Tri-County Area Mental Health/Developmental Disabilities/Substance Abuse Services  
(Rowan, Iredell, Davie Counties)

Vance-Warren-Granville and Franklin Area Mental Health/Developmental Disabilities/Substance Abuse Services

Western Wake MH Center, Cary  
(Wake Area Mental Health/Developmental Disabilities/Substance Abuse Services)

Wilson-Greene Area Mental Health/Developmental Disabilities/Substance Abuse Services

### **13.2.3 Creditable Service – District Public Health Programs**

**Note:** Most service in county public health departments, such as Alamance County Public Health Department, is creditable for longevity. See Section 13.1.3 for details.

Appalachian District Health  
(Alleghany, Ashe, Watauga District)

Caswell-Chatham-Lee-Person District Health

Granville-Vance District Health

Hertford-Gates District Health

Martin-Tyrrell-Washington District Health

Pasquotank-Perquimans-Camden-Chowan District Health

Rutherford-Polk-McDowell District Health

Toe River District Health  
(Avery, Mitchell, Yancey Counties)

### 13.3 – Non-Creditable Service (List)

#### 13.3.1 Non-Creditable Service

Temporary, emergency, hourly-rate, and intermittent appointments are not eligible for creditable state service.

Albemarle Human Resource and Development Commission

ASC – Agriculture Stabilization Conservation – (Federal)

Buncombe County Child Development

Bureau of Indian Affairs – (Cherokee, Ft. Bragg, Camp LeJeune – Federal)

Camp Butner (Military Camp)

Carteret Community Action, Inc.

Charlotte Council on Alcoholism

Co-op Students

County Constables

County ABC Officers (Clerks who work in stores)

County Council on Aging (Former Wake Co. Council on Aging – Private non-profit)

Credit Union Employees

Colleges and Universities – (Non-State supported)

Deputy Sheriffs – (County)

Drug Action of Wake County

Eastern Carolina Regional Housing Authority

Exempt Positions (Credit is given for State employee exempt positions, but employees cannot receive payment until subject to the State Personnel Act)

Exempt Positions (Credit is not given for employment in Exempt position with a local mental health, public health, social service, or emergency management agency in North Carolina)

Federal Grants – Sometimes are considered State employment and sometimes not (Need to verify)

French Board Criminal Justice Planning Agency

Green Lamp, Inc.

General Assembly Interns and Pages

Halifax County Court Child Care and Family Services Center

Hospitals – (Non-state supported)

Iredell County Veterans Service

Land of Sky Regional Council

Laurel Day Care (Marshall, NC)

Learning Institute of NC

Local Law Enforcement Officers

Metropolitan Planning Board – (Asheville – Buncombe)

National Guard Employees – (Except National Guard Technicians, prior to 12-31-98) – some are State, some Federal

NC Association of Educators

NC Auctioneers Commission

NC Bar Association (This is a private professional association)

NC Board of Pharmacy – (With UNC-CH; self-supported; receives state benefits, but not creditable)

NC Manpower Development

NC Medicaid Review Foundation

NC Medical Peer Review Foundation

NC Nurses Association

NC State Alumni Association (Self-supported)

NC State School Board Association

NC Symphony (Non-profit, Private – Non-creditable – some positions are State funded and are creditable – see creditable section)

NRA – National Recovery Act (Federal)



Neuse River Council of Government

NYA – National Youth Administration (Federal)

Opportunity Corporation

Oxford Orphanage

Pace Make – (Temporary employment)

PEE – PD Council of Governments, same as Regional Planning

Raleigh Durham Airport authority

Regional Planning Commission (Now know as Regional A, B, C, D, etc.)

Register of Deeds (County)

School Bus Drivers who work less than 20 hours per week

Sheriffs – county

Southwestern NC Planning and Economic Development Commission

State Employees Credit Union

Temporary Employment with the State of North Carolina

WPA – Work's Progress Administration (Federal)

Wayne Action Group for Economic Sobrencey – (Private – was Headstart prior to 12-1-66)

Wake County Council on Aging – (Private – was Headstart prior to 12-1-66)

Wake County Juvenile Home – (County supported – no credit)

Wake County Juvenile Restitution Program

Wake County Tax Collectors Office

Wake Opportunities, Inc.

UNC Press

## **14.1 - Probationary Teachers**

### **14.1.1 Overview**

The summary in this section is intended as an overview of probationary teachers. It does not in any way alter the requirements of General Statute 115C-325 or relevant court decisions concerning probationary teachers.

A probationary teacher is defined as a certificated person, other than a superintendent, associate superintendent, or assistant superintendent, who has not obtained career-teacher status and whose major responsibility is to teach or to supervise teaching. Principals, directors, supervisors, and assistant principals are not probationary teachers. They fall under the rules of the Administrator Term Contract Law (see Section 14.3 and G.S. 115C-287.1).

NOTE: An individual who holds an emergency permit to practice, alternative entry license, temporary permit, or lateral entry license is not eligible to be classified as a probationary teacher.

### **14.1.2 Rights of a Probationary Teacher**

#### **(a) During the contract year**

Probationary teachers may not be discharged during the school year except on the same grounds and by the same procedures that apply to the dismissal of a career status/tenured teacher (see G.S. 115C-325(m)(1)).

#### **(b) Contract nonrenewal at the end of the first, second, or third year**

The local board of education, upon recommendation of the superintendent, may refuse to renew the contract of any probationary teacher or to reemploy any teacher who is not under contract for any cause it deems sufficient. However, the cause may not be arbitrary, capricious, discriminatory or for personal or political reasons (G.S. 115C-325(m)(2)).

If the superintendent intends to recommend nonrenewal of a probationary teacher, written notice must be provided to the teacher by May 15. The notice is to include the teacher's right within 10 days from receipt of the recommendation to (i) request written notice of the reasons for the recommendation and the information that the superintendent may share with the board to support the recommendation for nonrenewal; and (ii) request a hearing.

If the probationary contract is not in the final year, the board may grant a hearing regarding the superintendent's recommendation of nonrenewal. The board shall notify the teacher of its decisions whether to grant a hearing.

Any hearing shall be pursuant to the provisions of G.S. 115C-45(c).

The board shall notify a probationary teacher whose contract will not be renewed of its decision by June 15. However, if a teacher submits a request for information or a hearing, the board shall provide the nonrenewal notification by July 1 (or a later date with the written consent of the superintendent and the teacher).

A probationary teacher whose contract is not renewed by the local board of education and who believes that the nonrenewal was for arbitrary, capricious, personal, political or discriminatory reasons may appeal the local board's decision of nonrenewal in superior court in the district in which he or she was employed. The appeal must be filed within 30 days after notification of the local board's decision.

**(c) Probationary teacher nearing the end of final year.**

In order for a teacher to attain career status/tenure the LEA board must vote on the question of granting career status. There are two categories of probationary teachers who are eligible for decisions on granting career status:.

- 1). A probationary teacher who has been employed by a North Carolina public school system for four consecutive years is eligible for career status.
- 2). A teacher who has previously obtained career status in any North Carolina public school system need not serve another probationary period of more than one year. The board may grant career status immediately upon employment, or after the first year of employment. (See Section 14.1.3)

If the superintendent intends to recommend nonrenewal of a probationary teacher, written notice must be provided to the teacher by May 15<sup>th</sup>. The notice is to include the teacher's right within 10 days from receipt of the recommendation to (i) request written notice of the reasons for the recommendation and the information that the superintendent may share with the board to support the recommendation for nonrenewal; and (ii) request a hearing.

If the teacher is eligible for career status (final year) the teacher has a right to a hearing before the board unless the reason is an approved decrease in the number of positions due to district reorganization, decreased enrollment, or decreased funding. (The right to a hearing regarding a recommendation for nonrenewal applies to proceedings initiated after August 31, 2010).

Any hearing shall be pursuant to the provisions of G.S. 115C-45(c).

The board shall notify a probationary teacher whose contract will not be renewed of its decision by June 15. However, if a teacher submits a request for information or a hearing, the board shall provide the nonrenewal notification by July 1 (or a later date with the written consent of the superintendent and the teacher).

If the board fails to vote on granting career status, the teacher shall be entitled to an additional month's pay for every 30 days or portion thereof after June 16 or such later date as provided in G.S. 115C-325(m)(7) if a majority of the board belatedly votes against granting career status.

The teacher is granted career status immediately upon notification of the local board's decision to grant career status. If the local board votes against granting career status, the teacher shall not be employed beyond the current school term.

At least 30 days prior to any local board action granting career status, the superintendent shall submit to the local board a list of the names of all teachers who are eligible to achieve career status. Notwithstanding any other provision of law, the list shall be a public record. The teacher has a right to notice and hearing prior to the board's vote as provided in G.S. 115C-325(m)(3) and G.S. 115C-325(m)(4). The local board must give the teacher written notice of its decision by June 15<sup>th</sup> or later date as provided in G.S. 115C-325(m)(7).

#### **14.1.3 Counting Time for Career Status (Tenure)**

A year for career status purposes is at least 120 workdays as a full-time, permanent teacher within the 215 day school year. Workdays do not include days absent for holidays, annual vacation leave, sick leave, personal leave, suspension or non-paid leave.

If a probationary teacher in a full-time, permanent position does not work for at least 120 workdays in a 215 day school year because the teacher is on sick leave, disability leave or both, that school year shall not be deemed to constitute

1. A consecutive year of service for the teacher, or
2. A break in the continuity in consecutive years of service for the teacher.

If a probationary teacher in a full-time permanent position is nonrenewed because of a decrease in the number of positions due to decreased funding, decreased enrollment, or a district reorganization, and is subsequently rehired by the same school system within three years, the intervening years when the teacher was not employed by the local school administrative unit shall not be deemed to constitute

1. A consecutive year of service for the teacher, or
2. A break in the continuity of years of service.

However, if at the time of the teacher's nonrenewal for the reasons described in this subsection, the teacher was eligible for career status after being employed four consecutive years pursuant to G.S. 115C-325(c)(1), or one year pursuant to G.S. 115C-325(c)(2), and the board subsequently rehires the teacher within three years, the teacher will be eligible for a career status decision after one additional year of employment.

Unless the superintendent unilaterally grants a teacher the benefit set forth in this subsection pursuant to a policy adopted by the board of education for this purpose, the teacher is entitled to such benefit only if the teacher notifies the head of human resources for the local school administrative unit in writing within 60 calendar days after the first day of employment upon being rehired that the teacher was nonrenewed because of a decrease in the number of positions triggered by decreased funding, decreased enrollment, or a district reorganization, and therefore the teacher's nonrenewal did not constitute a break in service for purposes of determining eligibility for career status.

The local school administrative unit shall notify the teacher of the 60-day deadline as described herein in the employment application, contract, or in some other method reasonably calculated to provide the teacher actual notice within 30 calendar days after the first day of employment for the rehired teacher. The burden is on the teacher to submit information establishing that the teacher was nonrenewed because of a decrease in the number of positions triggered by decreased funding, decreased enrollment, or a district reorganization. If the local school administrative unit fails to provide notice to the teacher within this 30-day period, then the teacher's obligation to notify the local school administrative unit within 60 days does not commence until such time that the teacher is notified of the 60-day deadline.

The superintendent or designee will inform the teacher on whether the teacher qualifies for the benefit of this subsection within a reasonable period of time after receiving the information submitted by the teacher. This decision is final and the teacher has no right to a hearing or appeal except that the teacher may petition the board in writing within 10 calendar days after receiving the decision of the superintendent or designee, and the board or board panel shall review the matter on the record and provide the teacher a written decision. Notwithstanding any other provision of law, no appeal to court or otherwise is permitted in regard to the benefits provided under this subsection.

The provisions of this subsection also shall apply to a probationary teacher in a full-time permanent position who resigns effective the end of the school year in good standing after receiving documentation that the teacher's position may be eliminated because of a decrease in the number of positions triggered by decreased funding, decreased enrollment, or a district reorganization, and is subsequently rehired by the same school system."

A "teacher" for the purposes of career status is a person:

1. a) who holds at least a current, not provisional or expired, Class A certificate issued by the North Carolina Department of Public Instruction, or b) who holds a regular, not provisional or expired, vocational certificate issued by the North Carolina Department of Public Instruction; and
2. a) whose major responsibility is to teach, or  
b) whose major responsibility is to directly supervise teaching, or  
c) who is classified by the State Board of Education, or  
d) who is paid as a classroom teacher; and
3. who is employed to fill a full-time, permanent position.

#### **14.1.4 Extracurricular Activities and Noninstructional Duties for Initially Licensed Teachers**

Local boards of education must adopt rules and policies minimizing the noninstructional duties of teachers with initial certification. Teachers with initial certification are not to be assigned extracurricular activities unless they request the assignments in writing. A local board of education may temporarily suspend the rules and policies for individual schools for a compelling reason.

The local board shall determine what activities fall into the categories of extracurricular and noninstructional.

Extracurricular activities could include those duties performed by a teacher involving students that are outside the regular school day and not directly related to the instructional program.

Noninstructional duties could include those that are not directly involved with the instructional program or the implementation of the standard course of study.

#### **14.1.5 Extracurricular Activities and Noninstructional Duties for Teachers with 27 or More Years of Experience**

Local boards of education must adopt rules and policies minimizing the noninstructional duties of teachers with 27 or more years of experience. Teachers with 27 or more years of experience are not to be assigned extracurricular activities unless they request the assignments in writing. A local board of education may temporarily suspend the rules and policies for individual schools for compelling reasons.

The local board shall determine what activities fall into the categories of extracurricular and noninstructional (see Section 14.1.4).

Noninstructional duties required of teachers are to be distributed equitably among employees.

#### **Legal References**

G.S. 115C-45(c)  
G.S. 115C-47(18a)  
G.S. 115C-287.1  
G.S. 115C-307  
G.S. 115C-325  
G.S. 143-318.11(a)(6)  
NCSL 2009-326, SB962  
NCSL 2010-31, SB897

## 14.2 - Career Status (Tenure)

### 14.2.1 Overview

The summary in this section is intended as an overview of career status. It does not in any way alter the requirements of General Statutes 115C-325 or 115C-287.1, or relevant court decisions concerning career status.

### 14.2.2 What is Career Status (Tenure)

A career teacher or career school administrator shall not be subjected to the requirement of annual appointment nor shall they be dismissed, demoted or employed on a part-time basis except for the grounds for dismissal or demotion of a career employee as stated in G.S. 115C-325(e) and procedures set out in G.S. 115C-325.

G.S. 115C-325 states only a teacher as defined by G.S. 115C-325(a)(6) is eligible to obtain career status. (NOTE: Some Principals, Supervisors and Directors attained career status prior to the Administrator Term Contract Law. (See Sections 14.1.1, 14.1.2(c), and 14.2.4)

### 14.2.3 Positions Eligible for Career Status (Tenure)<sup>1</sup>

- (a) Audiologists
- (b) Classroom Teachers
- (c) Guidance Counselors
- (d) School Psychologists
- (e) School Social Workers
- (f) Speech-Language Pathologists
- (g) Career and Technical Education Teachers
- (h) Media Coordinators

### 14.2.4 Positions that May or May Not Have Career Status (Tenure)<sup>1</sup>

- (a) **Assistant Principals** who were granted career status as a teacher by their school system before July 1, 1995 retain teacher career status as long as they remain in that position. All assistant principals are employed under term contracts. If the contract is not renewed, the assistant principal retains teacher career status if he or she earned that career status in that same system before entering the term contract.
- (b) **Directors** who were granted career status by their school system prior to July 1, 1995 retain career status as a director as long as they remain in this position. If a director whose major function includes the direct or indirect supervision of teaching or of any other part of the instructional program did not acquire career status prior to July 1, 1995, they are not eligible for career status. They are employed under term contracts. If the contract is not renewed at the end of the term, the director retains teacher career

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<sup>1</sup> “Local Boards and the Teacher Tenure Law”, Robert P. Joyce, UNC- Chapel Hill, Institute of Government



status if he or she earned that career status in that same system before entering the term contract. All other directors are at-will employees and are never eligible for career status. Examples of at-will directors are director of food services, director of transportation, etc.

(c) **Principals** who were granted career status by their school system as principals before July 1, 1997 retain administrative career status as long as they remain in that position. All newly employed principals are employed under term contracts. If the contract is not renewed, the principal retains teacher career status if he or she earned that career status in that same school system before entering the term contract.

(d) **Supervisors.** There are three types of supervisors and situations:

- 1) Supervisors who directly supervise teaching. If career status was obtained as a supervisor in their school system prior to July 1, 1997, they maintain career status as a supervisor as long as they remain in that capacity. All newly employed supervisors are not eligible for career status. They are to be employed on term contracts. If their contract is not renewed at the end of the contract's term, the supervisor retains teacher career status if he or she earned that career status in that same system before entering the term contract.
- 2) Supervisors who do not directly supervise teaching but whose major function includes the "indirect supervision of teaching or of any other part of the instructional program." These supervisors are employed under term contracts and protected by the Administrator Term Contract Law (see Section 14.3). If their contract is not renewed at the end of the contract's term, the supervisor retains teacher career status if he or she earned that career status in that same system before entering the term contract.
- 3) All other supervisors are at-will employees. Examples of at-will employees are supervisor of food services, supervisor of transportation, etc.

#### **14.2.5 Positions Not Eligible for Career Status (Tenure)<sup>1</sup>**

- (a) Assistant Superintendents
- (b) Associate Superintendents
- (c) Classified Employees
- (d) Eligible positions, but the individual has an alternative entry license, emergency permit, expired license, lateral entry license, provisional license or temporary permit.
- (e) Eligible positions, but the individual is not employed in a full-time permanent status.
- (f) School Finance Officers
- (g) School Nurses
- (h) Superintendents
- (i) Teacher Assistants

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<sup>1</sup> "Local Boards and the Teacher Tenure Law", Robert P. Joyce, UNC- Chapel Hill, Institute of Government

A local board of education has no authority to grant career status to an employee who is not employed in a position that is eligible for career status. Only the General Assembly can designate positions eligible for career status/tenure.

#### **14.2.6 Leave of Absence and Career Status**

A career teacher who has been granted a leave of absence by a local board shall maintain career status if they return to their teaching position at the end of the authorized leave.

#### **14.2.7 Losing Career Status**

A career employee loses career status through one of the following:

- a) When the teacher no longer performs the responsibilities of a teacher as defined in G.S. 115C-325(a)(6)<sup>2</sup> (except as provided in Section 14.3.6),
- b) Resignation,
- c) A request by the employee to reduce employment to part-time,
- d) A request by the employee to be employed in a non-tenurable position (this includes waiver of career status by a career administrator who wishes to be employed under contract as defined in G.S. 115C-287.1),
- e) Due process outlined in G.S. 115C-325 for the reasons outlined in G.S. 115C-325 or
- f) If a teacher or administrator is convicted, pleads guilty, or pleads *nolo contendere* to a serious offense described in G.S. 115C-296(d).

A career employee who is involuntarily reassigned to a nontenable position does not lose career status.

#### **14.2.8 Extracurricular Activities and Non-instructional Duties for Teachers with 27 or More Years of Experience**

Local boards of education must adopt rules and policies minimizing the non-instructional duties of teachers with 27 or more years of experience. Teachers with 27 or more years of experience are not to be assigned extracurricular activities unless they request the assignments in writing and that other non-instructional duties assigned to these teachers are minimized. Local boards may temporarily suspend these rules and policies for individual schools for a compelling reason.

The local board shall determine what activities fall into the category of extracurricular and which fall into non-instructional.

Non-instructional duties required of teachers are to be distributed equitably among employees.

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<sup>2</sup>“Local Boards and the Teacher Tenure Law”, Robert P. Joyce, UNC- Chapel Hill, Institute of Government

**Legal Reference(s)**

G.S. 115C-47(18a)

G.S. 115C-296(d)

G.S. 115C-325

G.S.115C-287.1

G.S.115C-307

1997 Senate Bill 272, “The Excellent Schools Act”

## **14.3 – Administrator Term Contract Law**

### **14.3.1 Definitions**

1. “School administrator” means a Supervisor or Director.
2. “School-based administrator” means a Principal or Assistant Principal.

### **14.3.2 Career Status (Tenure)**

Beginning July 1, 1995, anyone employed as a school administrator is not eligible for career status with the following exceptions:

1. A principal or supervisor who, as of July 1, 1995 was serving as a principal or supervisor and who was eligible to achieve career status on or before June 30, 1997; or
2. Assistant principals or directors who were granted career status in these positions by their school system prior to July 1, 1995.

### **14.3.3 Contracts**

School administrators and school-based administrators who are ineligible for career status must be employed on contracts. All initial contracts with a local board of education must be for two to four years, ending on June 30<sup>th</sup> of the final 12 months of the contract. In the case of an initial contract between a school administrator and a local board of education, the first year of the contract may be for a period of less than 12 months provided the contract becomes effective on or before September 1<sup>st</sup>.

During the term of the contract, the school administrator cannot be dismissed or demoted except for the grounds and by the procedures which a career teacher may be dismissed or demoted in G.S. 115C-325.

### **14.3.4 Extending, Renewing, or Offer of a New Contract**

The local board may, with the written consent of the school administrator, extend, renew, or offer a new school administrator’s contract at any time after the first 12 months of the contract. However, the term of the new, renewed, or extended contract may not exceed four years. Rolling annual contract renewals are not allowed.

If a superintendent intends to recommend to the local board of education that a school administrator be offered a new, renewed, or extended contract, the superintendent shall submit the recommendation to the local board for action. The local board may approve the recommendation or decide not to offer the school administrator a new, renewed, or extended school administrator’s contract. Effective on or after July 1, 2003, all subsequent contracts between school-based administrators (principals or assistant principals) and local boards of education shall be for four years.

If a superintendent decides not to recommend that the local board of education offer a new, renewed, or extended school administrator's contract to the school administrator, the superintendent shall give the school administrator written notice of his or her decision and the reasons for his or her decision no later than May 1<sup>st</sup> of the final year of the contract. The superintendent's reasons may not be arbitrary, capricious, discriminatory, personal, or political. No action by the local board or further notice to the school administrator shall be necessary unless the school administrator files with the superintendent a written request within 10 days of receipt of the superintendent's decision, for a hearing before the local board. Failure by the school administrator to file a timely request for a hearing results in a waiver of the right to appeal the superintendent's decision. If the school administrator files a timely request, the local board shall conduct a hearing pursuant to the provisions of G.S. 115C-45(c) and make a decision as to whether to offer the school administrator a new, renewed, or extended school administrator's contract.

If the local board decides not to offer the school administrator a new, renewed, or extended school administrator's contract, the local board shall notify the school administrator of its decision by June 1<sup>st</sup> of the final year of the contract. A decision not to offer the school administrator a new, renewed, or extended contract may be for any cause that is not arbitrary, capricious, discriminatory, personal, or political. The local board's decision not to offer the school administrator a new, renewed, or extended school administrator's contract is subject to judicial review in accordance with Article 4 of Chapter 150B of the General Statutes.

#### **14.3.5 Failure to Notify School Administrator in the Final Year of Contract**

If the superintendent or the local board of education fails to notify a school administrator by June 1<sup>st</sup> of the final year of the contract that the school administrator will not be offered a new school administrator's contract, the school administrator shall be entitled to 30 days of additional employment or severance pay beyond the date the school administrator receives written notice that a new contract will not be offered.

#### **14.3.6 Retention of Teacher Career Status by School Administrators**

If, prior to appointment as a school administrator, the school administrator held career status as a teacher in the local school administrative unit in which he or she is employed as a school administrator, a school administrator shall retain career status as a teacher if the school administrator is not offered a new, renewed, or extended contract by the local board of education, unless the school administrator voluntarily relinquished that right or is dismissed or demoted pursuant to G.S. 115C-325.

#### **Legal Reference(s)**

G.S. 115C-287.1  
G.S. 115C-325  
NCGA 2003, SB 955

## 14.4 - Contracts

### 14.4.1 Statutes Governing Contracts

Teachers are employed under contracts as defined by General Statute (G.S.) 115C-325.

Principals, assistant principal's, supervisors, and directors are employed pursuant to G.S. 115C-287.1.

Associate superintendents and assistant superintendents are employed under contracts governed by G.S. 115C-278.

Superintendents' contracts are governed by G.S. 115C-271.

#### **Legal Reference(s)**

G.S. 115C-271  
G.S. 115C-278  
G.S. 115C-287.1  
G.S. 115C-325

## 14.5 - At-Will Employment

### 14.5.1 **Definition**

Employees who are not required to be employed under contracts by the statutes referenced in Section 14.4 or who are not offered contracts by local board prerogative are at-will employees.

Example of at-will employees include most non-certified personnel such as custodians, bus drivers, teacher assistants, clerical staff, maintenance supervisors, and transportation coordinators. Administrators not required by statute to be employed under contract are also at-will employees (unless the local board has chosen to offer contracts).

### 14.5.2 **Demotion or Dismissal**

At-will employees serve at the pleasure of the local board of education. General Statute 115C-45 gives employees the right of appeal of all decisions made by school personnel to the local board of education.

At-will employees cannot be dismissed or demoted for illegal reasons. An at-will employee is entitled to all the rights afforded by the United States Constitution (e.g. freedom of speech and religion) and by federal laws such as Title VII of the Civil Rights Act of 1964, the Age Discrimination in Employment Act, and the Americans with Disabilities Act.

At the time of dismissal or demotion, at-will employees have the right to an appeal to the local board of education. Also, at-will employees may request, in writing, a notice outlining the reason(s) for dismissal, demotion, or suspension without pay.

### **Legal Reference(s)**

G.S. 115C-45

## **15.1–School Calendar**

### **15.1.1 Overview**

The summary in this section is intended as an overview of requirements governing school calendars. It does not in any way alter the requirements of General Statute 115C-84.2 or 115C-302.1. It establishes State Board policy in areas not defined in these statutes.

### **15.1.2 Composition of the School Calendar**

- (a) Local boards of education shall determine the dates of opening and closing the public schools. They shall consult with parents and the employed public school personnel in the development of the school calendar. Except for year-round schools, the opening date for students shall not be before August 25, and the closing date for students shall not be after June 10. On a showing of good cause, the State Board of Education may waive this requirement to the extent that school calendars are able to provide sufficient days to accommodate anticipated makeup days due to school closings. A local board may revise the scheduled closing date if necessary in order to comply with the minimum requirements for instructional days or instructional time.

The term "good cause" means either that:

- 1) schools in any local school administrative unit in a county have been closed eight days per year during any four of the last 10 years because of severe weather conditions, energy shortages, power failures, or other emergency situations; or
- 2) schools in any local school administrative unit in a county have been closed for all or part of eight days per year during any four of the last 10 years because of severe weather conditions. For purposes of this subdivision, a school shall be deemed to be closed for part of a day if it is closed for two or more hours.

The State Board may grant a waiver for an educational purpose for that specific school or defined program to the extent that the State Board finds that the educational purpose is reasonable, the accommodation is necessary to accomplish the educational purpose, and the request is not an attempt to circumvent the opening and closing dates set forth in this subsection. The waiver requests for educational purposes shall not be used to accommodate system-wide class scheduling preferences.

The required opening and closing dates under this subsection shall not apply to any school that a local board designated as having a modified calendar for the 2003-2004 school year or to any school that was part of a planned program in the



2003-2004 school year for a system of modified calendar schools, so long as the school operates under a modified calendar.

- (b) The school calendar must be composed of 215 days. All days must fall within the fiscal year. The days are to be distributed as follows:
  - 1. A minimum of 185 instructional days \* for students and a minimum of 1,025 hours of instruction covering at least nine calendar months (a 1,025 hour minimum is not required for Charter Schools). Instructional days for students may vary in length as long as there are at least 1,025 hours of instruction scheduled. Instructional days may be scheduled on any day except Sunday and Veteran's Day.
  - 2. 10 noninstructional workdays for teachers. The number of noninstructional workdays will be reduced if the local board or the principal in consultation with the School Improvement Team increases the number of instructional days for students by converting noninstructional teacher workdays to student days. The total of instructional and noninstructional workdays will be 195, unless Christmas falls on Tuesday, Wednesday, or Thursday, when the total will be 194.
  - 3. 10 annual vacation leave days. The first 10 days of annual vacation leave earned by 10-month employees will be scheduled in the calendar by the local board. These days must be taken as scheduled by 10-month employees. (The first 10 days of annual leave earned by a 10- or 11-month employee during any fiscal year period shall be scheduled to be used in the school calendar adopted by the respective local boards of education for employees covered by NCGS 115C-316.)
  - 4. 10 paid holidays, unless Christmas falls on Tuesday, Wednesday, or Thursday, when there will be 11 paid holidays and one less teacher workday. All holidays are scheduled by the local board with the exception that Veteran's Day must be a holiday for students. (Effective with the 2005-2006 school year, Veteran's Day must be a holiday for students and staff.)
- (c) There must be a period of 42 consecutive calendar days between school years during which teachers are not required to work unless they are employed for more than 10 months or assigned to year-round schools. At the request of the local board of education or of the principal of a school, a teacher may elect to work on one or more of the 42 days when teacher attendance is not required in lieu of another scheduled workday.
- (d) Teachers will receive their salary in 10 checks unless they have elected to be paid in 12 installments, are employed for other than 215 days, or are assigned to year-

round schools. Teachers employed for less than 10 months cannot be paid in 12 installments. The local board will set the pay date. Teachers cannot be prepaid.

- (e) If the State Board of Education finds that it will enhance student performance to do so, the State Board may grant a local board of education a waiver to use up to five instructional days as teacher workdays. For each instructional day waived, the State Board shall waive an equivalent number of instructional hours.

### **15.1.3 Noninstructional Workdays**

- (a) 10 days will be scheduled as noninstructional workdays for teachers. There will be fewer workdays if noninstructional teacher workdays have been converted to additional days for students. In years when Christmas falls on Tuesday, Wednesday, or Thursday, there will be one additional paid holiday (11) and one less noninstructional workday for teachers.
- (b) Local boards shall designate at least 2 of the noninstructional workdays as days on which teachers may take accumulated vacation leave.
- (c) Remaining workdays may be designated by the local board in consultation with each school's principal as teacher workdays, additional instructional days or other lawful purposes. Before scheduling these days, the principal must work with the School Improvement Team to determine the days to be scheduled and the purposes for which they should be scheduled.
- (d) Workdays designated as required by either the local board or by the principal in consultation with the School Improvement Team need not be required for all teachers. Days may be required for some teachers or groups of teachers and optional for others. Teachers may use accumulated annual vacation leave on optional workdays if approved by their immediate supervisor. Teachers will not be eligible to take annual vacation leave on required workdays except as provided in Sections 3.2 and 3.3 of this manual.

### **15.1.4 Instructional Day**

The instructional day includes those hours a student is assigned to a teacher for instruction. Breaks in the instructional day for changing classes, homeroom, lunch, and other such things are not part of the instructional day and may not be counted in the required 1,025 hours of instructional time.

**15.1.5 Inclement Weather**

- (a) The school calendar must include a plan for making up days and instructional hours missed when schools are not opened due to inclement weather.
- (b) On a day that pupils are not required to attend school due to inclement weather, but employees are required to report for a workday, a teacher may elect not to report due to hazardous travel conditions and to take an annual vacation day or to make up the day at a time agreed upon by the teacher and the teacher's immediate supervisor or principal. The day must be made up by the end of the fiscal year.
- (c) On a day that school is closed to employees and pupils due to inclement weather, a teacher shall work on the scheduled makeup day.
- (d) If school closes early or opens late because of inclement weather conditions, the amount of time originally scheduled in the school calendar for that day may be counted toward the required 1,025 hours of instruction.

**Legal Reference(s)**

G.S. 115C-84.2  
G.S. 115C-302.1  
G.S. 115C-316  
NCSL 2011-93, HB 197  
NCSL 2011-145, HB 200

## **16.1 – Employment of Retirees**

### **16.1.1 Overview**

The summary in this section is intended as an overview of employing retirees. It does not in any way alter the requirements of General Statutes relevant to public school employees or other legislation, rules and policies of the Teachers' and State Employees' Retirement System.

NOTE: The provisions for employing retired teachers exempt from the earnings cap expired September 30, 2009.

### **16.1.2 Eligibility**

"Retirement" means the termination of employment and the complete separation from active service with no intent or agreement, express or implied, to return to service. In order for a member's retirement to become effective in any month, the member must render no service, including part-time, temporary, substitute, or contractor service, at any time during the six months immediately following the effective date of retirement.

Anyone who is retired through the Teachers' and State Employees' Retirement System, and completes the 6 month break in service described above, is eligible to be reemployed subject to an earnings cap, as described below.

Service as a member of a school board or as an unpaid bona fide volunteer in an LEA shall not be considered service. (See Definitions 1.1.9 Volunteer).

### **16.1.3 Earnings Cap**

It is the responsibility of the retiree to contact the Teachers' and State Employees' Retirement System to determine their earnings cap. The Teachers' and State Employees' Retirement System determines the earnings cap by the following methods. The method that results in the highest dollar amount becomes the earnings cap.

- (a) 50% of the reported compensation during the final 12 months of service preceding the effective date of retirement excluding terminal payments, or
- (b) \$20,000 adjusted each year for inflation in January. (The 2010 inflation adjusted amount is \$28,860.) (Note that the earnings cap is adjusted for inflation each January.)

The retirement system's earnings cap applies to the 12-month period immediately following the effective date of retirement. At the end of the initial 12-month period following retirement, the cap applies to the calendar year (January 1-December 31).

#### **16.1.4 Consequences of Exceeding the Earnings Cap**

If the earnings cap is exceeded, the retiree forfeits all retirement benefits for the remainder of the retirement year. The retirement year is January 1<sup>st</sup> through December 31<sup>st</sup>. Exceeding the earnings cap during the month of December will not result in forfeiture of retirement benefits.

If you exceed your earnings limitations, your retirement benefit will be suspended the first day of the month following the month in which you exceed the limit for the remainder of the calendar year. Your retirement payment will start again on January 1 of the year after your benefit is stopped. If your earnings exceed the allowable amount in the month of December, your benefit will not be suspended.

#### **16.1.5 Benefits**

Retirees employed in permanent part-time status (working 20 hours per week but less than 30 hours per week) earn pro-rata part-time benefits from the school system and can continue to receive retirement benefits, subject to the earnings cap.

Retirees employed in temporary status are not eligible for LEA employee benefits. When employed in a temporary status, the retiree can continue to receive retirement income and the health plan\* from the Retirement System as long as he or she does not exceed the retirement earnings cap (Section 16.1.3).

Retirees employed less than 20 hours per week are temporary employees and receive no benefits from the LEA.

\* Retirees who are Medicare eligible must be enrolled in the State Health Plan if they are employed for 30 or more hours per week so that the State Health Plan rather than Medicare is the primary payer. The employing LEA must notify the Teachers' and State Employees' Retirement System BOTH when it enrolls a Medicare eligible retiree in the State Health Plan AND when the LEA stops paying because the retiree is no longer employed 30 or more hours per week.

#### **16.1.6 Employer Reporting of Return-to Work**

Employers are required to report to the Teachers' and State Employees' Retirement System each month each reemployed beneficiary, including the terms of the reemployment, the date of the reemployment, and the amount of the monthly compensation. If a report is not received within 90 days, the employer is subject to a penalty of ten percent (10%) of the compensation of the unreported reemployed beneficiaries during the months for which the employer did not report the information.

The Retirement System has developed Form ESRR (Certifying Employee Status under Retirement Reemployment Laws), to assist employers in determining who is a rehired

retiree. This form is located on the Employer Section of the Retirement System's Web site: [www.myncretirement.com](http://www.myncretirement.com). The report is made through the Retirement System's ORBIT system.

### **Legal References**

G.S. 128-24(5)c

G.S. 135-3(8)c

S.L. 2005-276, Section 29.28

S.L. 2007-236, HB 956 (Retired Teacher Provisions expired September 30.2009)

S.L. 2009-11, HB 94

## **17.1 – Job-Sharing for School Employees**

### **17.1.1 Overview**

The purpose of the policy is to promote job sharing among public school employees, and becomes effective January 1, 2004. The State Board of Education policy requires that if the local board wishes to employ job-sharing staff, it designate one or more positions as job-sharing positions. (Before January 2004, job sharing is only permitted for classroom teachers paid on the teacher salary schedule who spend at least 70% of their work time in classroom instruction.)

### **17.1.2 Eligibility**

An employee in a job-sharing position is a person who:

- (1) Is employed by a local board of education less than full-time, **and**
- (2) Is sharing a position with one other employee of the same job classification.

These job-sharing provisions apply to both certified personnel and non-certified personnel.

### **17.1.3 Reemployed Retirees**

Because the benefits for staff employed in job-sharing positions include retirement, retirees can only be employed in temporary job-sharing positions. Retirees employed in temporary job-sharing positions do not earn leave benefits. (See Section 1.1.1)

### **17.1.4 Salary**

Employees in job sharing positions will be paid pro-rata based on the salary schedule for the position. Experience for certified personnel will be credited at the rate prescribed in Licensure Policy. For non-certified employees, experience credited for salary purposes will follow local policy.

Note: The legislation states, “Service rendered by a school employee in a job-sharing position shall be credited at the rate of one-half year for each regular school year of employment.”

### **17.1.5 Benefits**

An employee in a permanent job-sharing position who works at least 20 hours per week shall receive paid legal holidays, annual vacation leave, sick leave, and personal leave on a pro-rata basis. Such an employee also receives service credit under the Teachers' and State Employees' Retirement System as provided in G.S. 135-4(b) and insurance benefits as provided in G.S. 135-40.2. Retirement is earned at a rate of one-half year of retirement credit for each regular school year of employment. Participation in the State Health Plan is an optional benefit. If the employee elects to participate in the State

Health Plan the employing school unit pays 50% of the Plan's total non-contributory premiums and the employee pays the balance.

**Legal Reference(s)**

G.S. 115C-302.1

G.S. 115C-316

G.S. 135-4(b)

G.S. 153-40.2

NCGA 2003, S.B. 701



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Raleigh, NC 27699-6301  
919.807.3200 (phone)  
919.807.4065 (fax)

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