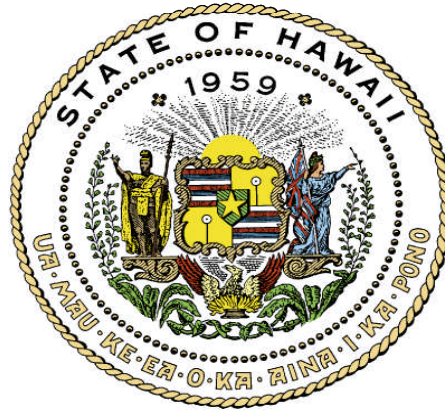


**HOUSE OF REPRESENTATIVES
STATE OF HAWAII**



HOUSE ADMINISTRATIVE

AND
FINANCIAL MANUAL

Twenty-fourth
Legislature
2007 - 2008

**HOUSE ADMINISTRATIVE
AND
FINANCIAL MANUAL**

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Twenty-fourth
Legislature
2007-2008

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**PART I
LEGISLATOR'S SALARY AND GENERAL ALLOWANCES;
HOUSE CONTINGENCY FUND; POSTAGE/MAILING POLICY**

INTRODUCTION

This part concerns the salary and general allowances that are payable to legislators under the State Constitution and statutes. It also covers the use of the statutorily provided contingency fund.

Chapter 1 Legislator's Salary and General Allowances

Sec. 1.1. Scope of chapter. Article III, section 9, of the State Constitution provides that each legislator is to receive allowances as prescribed by law. Article XVI, section 3.5, of the State Constitution provides that the salaries of legislators, among others, shall be reviewed and recommended by a Commission on Salaries. Not later than the fortieth legislative day of the 2007 Regular Session and every six years thereafter, the Commission shall submit its recommendations to the Legislature and then dissolve. The recommended salaries submitted shall become effective as provided in the recommendation, unless the Legislature disapproves the entire recommendation as a whole by adoption of a concurrent resolution prior to adjournment sine die of the legislative session in which the recommendation is submitted. Any change in salary which becomes effective shall not apply to the Legislature to which the recommendation for the change in salary was submitted.

Sec. 1.2. Legislator's salary. A legislator's salary shall be paid in equal amounts beginning with the first pay period for state employees in November of the year the legislator is elected.

Sec. 1.3. Legislator's annual allowance. Each legislator is allowed such amount as provided by statute for incidental expenses connected with legislative duties. "Incidental expenses connected with legislative duties" is defined to include, but is not limited to, expenses for meals, automobile mileage (beyond the mileage that the legislator necessarily incurs going to and from work), increase in home telephone bills, postage and mailings, and other miscellaneous expenditures.

The use of the allowance is subject to reporting and accounting on House Form No. 1, "Claim for Disbursement from Legislative Allowance Fund". The allowance shall be made available no later than ten calendar days after the effective date of legislation appropriating funds for the operation of the House. In the case of a legislator who fills a vacancy after the specified ten-day period, the allowance shall be made available no later than ten calendar days after the legislator is appointed by the Governor.

The allowance for each legislator shall be retained by the House. Each legislator shall be entitled to receive advances or be reimbursed for incidental expenses connected with legislative duties out of the allowance covering the legislator's incidental expense account maintained by the House.

The Chief Clerk of the House, as the representative of the Speaker, shall not make any advance to or reimburse any legislator unless the legislator first completes a Claim for Disbursement from Legislative Allowance Fund form and certifies, with information sufficient to substantiate the amount, date, and description of the expenditures, that the expenditures are for incidental expenses connected with legislative duties. "Information sufficient to substantiate" shall include such information that will enable the Chief Clerk to identify the specific nature of each expense and to conclude that the expense is attributable to incidental expenses connected with legislative duties.

Upon receipt of a certification from a legislator, with information sufficient to substantiate that the amount, date, and description of the expenditure is for incidental expenses connected with legislative duties, the Chief Clerk shall pay the amount requested as an advance or reimbursement and shall charge the amount to the legislator's incidental expense account. Reimbursement shall be made within 30 days after the expense is substantiated by the Chief Clerk.

Advances made by the Chief Clerk shall be made within 30 days before the date the expenditure is expected to be made and shall not exceed an amount reasonably calculated to cover the amount of the anticipated expenditure based on the information sufficient to substantiate the amount, date, and description of the expenditure for incidental expenses connected with legislative duties. Any advance for expense allowed shall be made payable to the vendor or provider of the service or item for which the advance was authorized; provided that receipts verifying the actual purchase must be submitted to the Chief Clerk within two weeks of the receipt or delivery of the service or item; and except that each legislator shall be allowed to maintain a petty cash fund of no more than \$50.00 which may be replenished upon presentation to the Chief Clerk of receipts or other verification of expenditures made from the fund. Amounts remaining in the petty cash fund at the end of the fiscal period for the annual allowance shall be returned to the Chief Clerk.

The amount of any advance that exceeds the amount of the incidental expenses connected with legislative duties shall be returned to the House not later than 60 days from the date that the expense was paid or incurred.

All nonperishable items, the expenditure of which is covered by the annual allowance, shall be inventoried as property of the House.

Sec. 1.4. Non-Oahu legislator's session allowance. When the Legislature is in session, each non-Oahu legislator is allowed such amount per day as provided by statute for lodging, subsistence, and other incidental expenses necessitated by the legislator's presence on Oahu. The use of the allowance is not subject to reporting or accounting, and the amount of the allowance is not subject to reduction or adjustment by reason of the receipt of any other allowance provided by statute or under any other section of this manual. The allowance is payable for each day during the session, including Saturdays, Sundays, holidays, and days of a recess when the recess is not longer than three days, but excluding days of unexcused absence from a meeting of the House and days of a recess when the recess is longer than three days. It is payable weekly on Friday of each pay period. A pay period begins on Sunday and ends the following Saturday.

Chapter 2 House Contingency Fund

Sec. 2.1. Scope of chapter. Section 24-7, Hawaii Revised Statutes (HRS), provides for the establishment of a House contingency fund. This chapter summarizes and implements the provisions of section 24-7.

Sec. 2.2. Amount and purpose of fund. The House contingency fund shall not exceed \$15,000 per year. The amount of the fund shall be included in the appropriation made by the Legislature for the expenses of the House. The fund is to be used to cover the expenses of social occasions hosted by the House as a whole and other social occasions authorized by the Speaker. "Other social occasions" include social functions and protocol demands that the Speaker is expected to fulfill as the presiding officer of the House.

Sec. 2.3. Expenditure authorization. No monies are to be expended from the contingency fund except upon the approval of the Speaker.

Sec. 2.4. Accounting. A report on the expenditures from the fund shall be made at least annually to the members of the House, and such report shall be included as a part of the financial report on the expenditures of the House as a whole.

Chapter 3 Postage/Mailing Policy

Sec. 3.1. Scope of chapter. This postage and mailing policy establishes a standard to guide the use of public funds for postage and mailing purposes. This policy seeks to maintain general flexibility for members of the House to accomplish their official functions and duties while providing accountability for this use of public funds by House members.

Sec. 3.2. Public funds for postage and mailing. Public funds for postage and mailing shall be used solely for the mailing of official material such as public notices and official correspondence. The use of public funds for the mailing of personal material not reasonably related to the legislator's official legislative work is prohibited.

Sec. 3.3. Accounting. The House Sergeant-at-Arms Office shall maintain records and accounts for each House member listing the amounts of public funds spent by the members for postage, subject to the following maximums:

- (a) \$1,000/month during regular and special sessions for the Speaker, the Vice-Speaker, and the chairs of the Committees on Finance, Judiciary, and Consumer Protection and Commerce;
- (b) \$750/month during regular and special sessions for the Majority Leader, the Minority Leader, and the chairs of all other standing committees;
- (c) \$500/month during regular and special sessions for all other House members; and
- (d) \$250/month for all members regardless of position when not in session.

For mailing over 50 pieces, a copy shall be left with the Sergeant-at-Arms Office.

Sec. 3.4. Approval of Speaker. Approval of the Speaker shall be required whenever a member seeks to use public funds in excess of the ceiling established in section 3.3. Approval shall be given only where the legislative business nature of the matter is well justified.

CLAIM FOR DISBURSEMENT FROM LEGISLATIVE ALLOWANCE FUND

NAME OF LEGISLATOR: _____

AMOUNT REQUESTED: \$ _____

DESCRIPTION OF ITEM(S) PURCHASED:*

JUSTIFICATION OF EXPENDITURE:*

PAYABLE TO: _____

- Reimbursement requested.
Receipts are attached

- Advance payment requested.
Amounts requested for advance payments will be made payable to merchants and/or vendors only. Receipts verifying the actual purchase must be submitted to the Chief Clerk within 2 weeks of the receipt or delivery of the item(s).

Each Legislator shall be allowed to maintain a petty cash fund of no more than \$50.00 which may be replenished upon presentation to the Chief Clerk of receipts or other verification of expenditures made from the fund. Amounts remaining in the petty cash fund at the end of the fiscal period shall be returned to the Chief Clerk.

I certify that the above information is correct and true.

Signature of Legislator

Date

<input type="checkbox"/> APPROVED	<input type="checkbox"/> DISAPPROVED
_____ Chief Clerk	_____ Date

Distribution: Accounting SGT TSS

*see back of form

GUIDELINES MEMORANDUM FOR ANNUAL ALLOWANCE

The purpose of this memorandum is to serve as guide and provide a basis for the legislator in requesting advances or reimbursements from the annual allowance for incidental expenses connected with legislative duties.

Under Article III, Section 9 of the State Constitution, each member of the legislature shall receive allowance reasonably related to expenses as provided by law. Section 24-1 of the Hawaii Revised Statutes provides that each member is entitled to receive an annual allowance of \$7,500.00 which amount is to cover incidental expenses connected with legislative duties.

Incidental expenses connected with legislative duties shall include all expenditures incurred in connection with carrying out of official duties or in connection with representational activities the nature of which will assist the legislator in: (i) developing the legislator's accessibility to, and communication with, the community and constituents concerning subjects of legislation and community concerns; (ii) educating the community and constituents on matters relating to the legislature, legislative process, and subjects of legislation; and (iii) carrying out the public's expectations of a legislator's role to the community and constituents.

The annual allowance may not be used for any personal, political or campaign related expenses, nor expenses related to the conduct of other than official duties and representational activities of a legislator.

Each member is personally responsible for the payment of any expenses incurred in support of the conduct of official duties and representational activities which exceed the provided allowances.

In the context of the general purposes aforesaid for which the incidental expenses connected with legislative duties are intended, guideline examples of allowable expenses are:

1. Food, beverage, and temporary hotel lodgings expenses incurred by the legislator for the legislator's own person may be reimbursed when necessitated by circumstances in the conduct of the legislator's official duties and representational activities.
2. The food and beverage expenses incurred by the legislator for other persons may be reimbursed when necessitated by circumstances in the conduct of the legislator's official duties and representational activities and only if the presence of the persons was necessary and appropriate for the legislator's conduct of the legislator's official duties and representational activities.
3. Postage for the mailing of informational or survey material that the legislator may wish to send to the legislator's constituents or to members of the community, so long as the communication does not advocate or support the election or nomination for election of any candidate or advocates or supports any candidate's defeat, or which does not advocate or support the passage or defeat of a question or issue on a ballot for election may be reimbursed.
4. Admission expenses of dinners, conferences, conventions, and meetings which the legislator attends or is invited as a legislator, including but not limited to special events for foreign dignitaries, professional seminars, annual charitable events, and retirement dinners for persons of distinction may be reimbursed.
5. Expenditure for furniture, equipment, or similar non-perishable item where such item enhances the professionalism of the legislator's office may be reimbursed. The item shall be inventoried as property of the respective house.

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PART II TRAVEL AND TRAVEL ALLOWANCES

INTRODUCTION

The nature of legislative business requires legislators and legislative employees from time to time to travel, both intrastate and out-of-state. This part details how and when such travel may be allowed and specifies what expenses of such travel may be paid for by the House and how such expenses are to be paid. The foundation for all policies and procedures related to legislative travel is public accountability and the need to balance the prudent expenditure of taxpayer dollars with the value of travel as a means of improving government effectiveness.

Chapter 4 General Provisions

Sec. 4.1. Scope of chapter. This chapter contains provisions of general applicability to travel in conducting official legislative business and to the payment of travel expenses.

Sec. 4.2. "Official legislative business" defined. As used in this part, "official legislative business" means an activity authorized by the Speaker on behalf of the House and performed or conducted pursuant to the business of the House or any House committee. It includes, when authorized, the following: attending a meeting of the House, the House leadership, the House minority leadership, or a House committee; participating in a seminar or conference sponsored in whole or in part by the House; attending, either as a representative of the House or as a participant, a meeting, seminar, or conference of a state, national, regional, or international organization of which the House or the State Legislature is a member; attending any seminar, conference, or session on a subject matter of direct concern to the House or any House committee; participating in any training program to maintain or improve the skills of legislators or legislative employees in the performance of their duties; and conducting studies and investigations on matters before the House or a House committee. It excludes activities which are of primary benefit to the individuals performing or conducting such activities, even though such activities are performed or conducted because of one's status as a legislator or legislative employee. Among the excluded activities is a service rendered by a legislator to the legislator's individual constituent. Travel plans submitted to the Speaker for authorization shall specify the type of benefit (i.e., potential legislation, information pertinent to issues pending before the Legislature, etc.) to be gained by the member and the House of Representatives as a result of the authorized travel.

Sec. 4.3. Allowance for expenses payable by the House. Except as otherwise provided by statute or in this part, all reasonable and necessary personal expenses while traveling in conducting official legislative business are payable by the House. Personal expenses include the costs of meals, lodging, laundry, tips, and other personal expenditures reasonably and necessarily incurred while traveling; and incidental expenses reasonably and necessarily incurred in the conduct of official legislative business.

Sec. 4.4. Travel authorization. Travel for purposes of official legislative business, even in instances where the expenses of which are not to be paid for by the House, must be approved by the Speaker.

For out-of-state travel approved by the Speaker, a travel plan shall be submitted in duplicate on House Form No. 2, "Request for Out-of-State Travel Authorization", signed by the legislator or employee concerned. Whenever two or more legislators or employees are included

in a travel plan, a single submission, signed by the legislator or employee in charge of the group, is sufficient. One copy shall be filed with the House Accountant. The Speaker's signature on House Form No. 2 confirms that the business to be conducted has been authorized and constitutes authority for the issuance of purchase orders, as may be necessary, and for the House Accountant to pay the expenses of the travel.

For inter-island travel approved by the Speaker, House Form No. 2A, "Inter-Island Travel Authorization", shall be signed and submitted by the legislator or employee concerned. One copy shall be filed with the House Accountant. The Speaker's signature on House Form No. 2A confirms that the business to be conducted has been authorized and constitutes authority for the issuance of purchase orders or airline coupons, as may be necessary, and for the House Accountant to pay the expenses of travel.

For inter-island travel approved by the Speaker, House Form No. 3, "Inter-Island Car Rental Authorization", shall be signed and submitted by the legislator or employee concerned, as appropriate. One copy shall be filed with the House Accountant. The Speaker's signature on House Form No. 3 confirms authority for the issuance of purchase orders, as may be necessary, and for the House Accountant to pay the expenses of the travel.

Sec. 4.5. Payment of travel expenses. To the extent feasible and practical, the cost of transportation to and from points of destination and, in case of travel intrastate, the cost of reasonable and necessary car rental at a point of destination, shall be paid directly to the vendor by the House Accountant upon the Accountant's receipt of a written invoice covering said cost and upon approval thereof by the Speaker. All other allowable travel expenses may be paid directly by the House to the vendors whenever convenient, feasible, and practical to do so upon presentation of a written invoice to and approval thereof by the Speaker. Unless paid by the House directly to the vendors, the costs of such other allowable travel expenses are payable to the legislator or employee engaged in travel. Other allowable travel expenses shall include the cost of limousine, taxi, car rentals, bus, and other means of travel at a point of destination; registration; telephone and fax transmissions; secretarial services; baggage transfers; currency exchanges or traveler's checks for out-of-state travel to the extent that the currency or checks do not exceed the amount of per diem and allowable expenses; passports and visas; photographs; certificates of birth; health certificates; identity affidavits; and inoculations as may be reasonably and necessarily incurred while traveling in the conduct of official legislative business. The payment to the legislator or employee may be by way of a cash advance prior to travel or by way of a reimbursement upon return from travel upon approval of the Speaker.

Sec. 4.6. Accounting. Within 15 days after completion of travel, each legislator or employee shall account to the House on House Form No. 4, "Claim for or Settlement of Travel Expenses", and House Form No. 5, "Statement of Completed Travel", the travel expenses incurred for which a cash advance was made or for which a reimbursement is sought. In calculating the amount expended for lodging, meals, and other personal travel expenses, the calculation based on the amount of per diem allowed is sufficient; no detailed itemization of such expenses is required. For all other expenses, a detailed expenditure statement shall be attached to House Form No. 4 supported by receipts where receipts are issued in the normal course of business. If mileage reimbursement is sought for the use of a personal automobile, House Form No. 8, "Personal Automobile Mileage Voucher", shall also be completed and attached to House Form No. 4. House Form No. 4 and House Form No. 5 shall be signed by the legislator or employee concerned. The completed forms shall be submitted to the Speaker. Once approved the Speaker's office shall then transmit the form to the House Accountant. If the travel expenses total less than the amount of any advance, the legislator or employee shall refund the difference to the House at the time of the submission of the forms. Per diem and mileage allowances exceeding federally allowable rates are subject to withholding taxes. Information for the computation of taxable allowance is available in the House Accounting Office.

If travel is out-of-state, and the transportation expense, per diem allowance, or other expenses are paid by the House, a completed travel report on House Form No. 6, "Travel Report Form", on the business conducted accompanying House Form No. 4, "Claim for or Settlement of Travel Expenses", shall be submitted to the Speaker within 15 days after completion of travel. The "Travel Report Form" shall summarize the nature of the business conducted. All travel reports submitted shall be available for public review.

Chapter 5 Transportation

Sec. 5.1. Scope of chapter. This chapter concerns the mode and class of transportation, other than the use of a personally owned automobile. Provisions with respect to the use of a personally owned automobile are contained in chapter 7 of this part. Except as otherwise provided by statute or in this part, all costs of transportation reasonably and necessarily incurred in the conduct of official legislative business is payable by the House, except the cost of transportation incurred in traveling to and from the State Capitol during the period that the House is in session. The exception does not apply when the House is in recess for more than three days.

Sec. 5.2. Routing. The travel itinerary shall be by the most direct routes available. Allowable travel time is the time necessary to travel by the most direct route to and from the points specified in the approved travel plan, plus the time necessary to conduct the required official business. Any additional cost incurred in deviating from the most direct and convenient route shall be borne by the legislator or employee concerned.

Sec. 5.3. Air transportation. Except in case of travel between points on any island in the State, travel between any two points shall be by a regularly scheduled commercial airline whenever it is available and its use is feasible and appropriate. Air travel by a legislator or employee shall be by the most economical class available, unless otherwise authorized by the Speaker. If at any time before or during the travel the legislator or employee alters the mode or class of travel to a more economical mode or class, the House shall be refunded the difference in the fares. The use of frequent flier points accrued in the course of travel related to official legislative business shall be consistent with state practices.

Sec. 5.4. Ground transportation. Travel on any of the islands within the state, at a point of destination out-of-state, and between points of destination out-of-state when not serviced by a regularly scheduled commercial airline or when otherwise appropriate may be by limousine, taxi, train, car rental, bus, personal automobile, or any other suitable means. To the extent feasible, the most economical means shall be used.

Sec. 5.5. Arrangements for transportation. Whenever feasible, all arrangements for transportation to and from a destination point and between destination points shall be approved by the Speaker's office prior to departure and the costs of such transportation paid by the House directly to the vendor. Whenever feasible, all arrangements for car rentals shall also be made in advance and approved by the Speaker's office and, if travel is within the state, the costs of such rentals paid by the House directly to the vendor.

Chapter 6 Per Diem Allowance

Sec. 6.1. Scope of chapter. The costs of personal expenses such as board, lodging, and incidental expenses but not travel expenses are payable by the House through a per diem

allowance to the legislator or employee. Sections 24-3 to 24-5, HRS, provide the statutory basis for the payment of the per diem allowance. This chapter delineates how the statutory provisions are to be implemented.

Sec. 6.2. Per diem computation. Whenever in this chapter a maximum per diem allowance is specified, the maximum amount is the limit of the allowance. The maximum amount is payable for any day involving an overnight stay at the point of destination. An overnight stay on any given day is permissible only if:

- (1) Official legislative business concludes at such an hour when transportation back on that day to the point of origin is unavailable or infeasible;
- (2) Official legislative business is to continue or other official legislative business is to be conducted at the same destination on the following day and it is more feasible or economical to remain overnight at the destination than to return to the point of origin and to embark on another trip to the destination on the following day;
- (3) Travel to and an overnight stay at the destination on that day is necessary because the conduct of official legislative business is scheduled for the following morning at an hour that makes transportation in the morning to the point of destination unavailable or infeasible; or
- (4) The point of destination constitutes but one of two or more destination points in an approved, planned itinerary and it is more economical to stay overnight at the destination point than to return to the point of origin and embark on another trip on a subsequent day.

A per diem allowance is payable for every day included in the travel, from the date of departure to the day of return, including those days when no official legislative business is involved, except that no per diem allowance is payable in case of travel intrastate on the day of return to the point of origin when no official legislative business is conducted. For the purposes of this chapter, "day" means a twenty-four-hour period beginning at 6:00 a.m.

Sec. 6.3. Multiple official legislative business. Whenever on a single day two or more activities constituting official legislative business is conducted for each of which a different per diem allowance is provided in this chapter, only that per diem allowance which is the greatest of the several allowances is payable.

Sec. 6.4. Legislator's per diem allowance intrastate during session. During any session of the Legislature, while conducting official legislative business within the State but on an island other than Oahu and other than the legislator's island of residence, the maximum per diem allowance payable to a legislator shall be equal to the maximum per diem allowance payable to any public officer or employee. No per diem allowance is payable to a legislator if the official legislative business is conducted on Oahu or on the legislator's island of residence.

Sec. 6.5. Legislator's per diem allowance intrastate during off-session. During the interim between sessions and during a session recess of more than three days, while conducting official legislative business within the state, the per diem allowance payable to a legislator is _____ if the official legislative business is conducted on the island of the legislator's residence and the maximum per diem allowance payable to a legislator shall be equal to the maximum per diem allowance payable to any public officer or employee if the official legislative business is conducted on an island other than the island of the legislator's residence.

Sec. 6.6. Legislator's per diem allowance out-of-state. At any time during session or during the interim between sessions or during any session recess, while conducting official

legislative business out-of-state, the maximum per diem allowance payable to a legislator shall be equal to the maximum per diem allowance payable to any public officer or employee.

Sec. 6.7. Employee's per diem allowance. At any time during session or during the interim between sessions or during any session recess, while conducting official legislative business within or without the State, other than on the island of the employee's residence, the maximum per diem allowance payable to an employee shall be equal to the maximum per diem allowance payable to any public officer or employee while conducting such business within or without the State, as the case may be. No per diem allowance is payable for legislative business conducted on the employee's island of residence.

Section 6.8. Overnight stay on island of residence. Whenever a legislator or employee, while conducting official legislative business on the island of the legislator's or employee's residence, stays overnight at the point of destination for which no per diem allowance to cover both lodging and meals is payable, the House may, with the approval of the Speaker, pay for the actual cost of lodging and meals incurred by the legislator or employee, provided that the stay overnight is necessitated by the exigencies of the business conducted or is unavoidable due to the distance between the legislator's or employee's home and the destination point and the lateness of the hour at which the business concludes.

Section 6.9. Accounting. Within 15 days after completion of inter-island travel, each legislator or employee shall submit House Form No. 7, "Inter-Island Per Diem Authorization", to the Speaker for the payment of a per diem allowance payable by the House.

Chapter 7 Mileage and Mileage Allowance

Sec. 7.1. Scope of chapter. Legislators and employees frequently utilize their personal automobiles in the conduct of official legislative business. In addition, there are some employees who by necessity are required to utilize their personal automobiles in the discharge of their duties. This chapter prescribes the conditions under which legislators and employees may claim for reimbursement for such use of their personal automobiles.

Sec. 7.2. "Personal automobile" defined. "Personal automobile" means a vehicle owned, leased, or rented by a legislator or an employee for the legislator's or employee's own personal use.

Sec. 7.3. Entitlement to mileage reimbursement. A legislator or employee may claim for cash reimbursement from the House for any reasonable and necessary use of a personal automobile in the conduct of official legislative business and, in case of an employee, for the use of the personal automobile in the discharge of duties, except that no such claim will be allowed for the following uses of a personal automobile:

- (1) By a legislator in traveling between the legislator's place of abode (permanent or temporary) and the State Capitol during the period that the House is in session, unless the House is in recess for more than three days;
- (2) By an employee in traveling between the employee's residence and the State Capitol for any purpose; or
- (3) By an employee in discharging any duty unrelated to the business of the House as a whole or of a House committee.

Sec. 7.4. Authorization to use personal automobile. No claim for reimbursement for the use of a personal automobile in the conduct of official legislative business or, in case of an employee, in the discharge of the employee's duties, is allowed unless the use of such personal automobile has first been approved by the Speaker. If the use of a personal automobile is for the purpose of conducting official legislative business, the contemplated use of such automobile shall be included in the travel itinerary submitted on House Form No. 8.

Sec. 7.5. Reimbursement amount. Reimbursements for the use of a personal automobile is on a mileage basis. The rate of reimbursement to a legislator shall be equal to the maximum rate payable to any public officer or employee. Whenever during a session, in case of a legislator, and at any time, in case of an employee, it is more practical for the legislator or employee to travel directly between the legislator's or employee's place of abode and the place at which official legislative business is to be conducted or, in the case of an employee, at which a duty is to be discharged, rather than to travel first to the State Capitol and then to proceed to the place of business, the miles traveled between the abode and the place of business shall be reduced by the number of miles normally traveled between the abode and the State Capitol in calculating the amount of the reimbursement. In no case is reimbursement allowed for the miles traveled directly between the abode and the place of business if they are less than the miles normally traveled between the abode and the State Capitol.

Sec. 7.6. Claim filing. All claims for reimbursement shall be filed on House Form No. 8, "Personal Automobile Mileage Voucher". If the use of the personal automobile had been authorized in writing prior to its actual use, House Form No. 8 shall be submitted directly to the House Accountant for settlement and payment. In all other cases, House Form No. 8 shall first be submitted for approval to the Speaker before routing to the House Accountant.

Sec. 7.7. Mileage allowance for employees. Where extensive and frequent use is made by an employee of the employee's personal automobile in the normal discharge of duties, the Speaker may, in consultation with the Chair of the Committee on Legislative Management, authorize the payment to the employee of a monthly allowance for such use, not exceeding \$300 per month. Such monthly allowance is in lieu of reimbursements on the mileage basis. The monthly allowance is subject to adjustment from time to time, depending on the frequency of use of the employee's automobile in discharge of the employee's duties.

Request for Out-of-State Travel Authorization

This form is MANDATORY for all legislative Out-of-State travel even if reimbursement requests are not contemplated. Prior to travel, complete sections below and submit to Speaker's Office in room 431.

Name: _____ Date: _____

Purpose of Travel: _____

Date(s) of Conference, meeting and/or site visit: _____

This section to be completed by House Chief Clerk's Office for travel advances.						
Departure Date	Departure Point	Destination Points	Return Date	Per Diem		Total Advance
				Days	Rate	

Reimbursement(s) is anticipated for the following travel expenditure(s):

- Lodging Air transportation Ground transportation Other (specify) _____
 Registration fee Car rental or Taxi/bus

Monetary travel advance requested: Yes No _____
 Signature of Applicant

This section to be completed by Speaker's Office

Proposed funding source(s) for reimbursement purposes:

- House general funds Legislative allowance Other (specify) _____

Approved: _____
 Speaker

INTER-ISLAND TRAVEL AUTHORIZATION

PART A. For travel authorization, complete section below and submit to Speaker's Office in room 431 prior to travel.

NAME(S): _____ DATE OF REQUEST: _____

For Neighbor Island members weekly roundtrip to "home island":

Week of: _____

OR

For Neighbor Island members additional roundtrip to "home island":

Purpose: _____ Date of travel: _____

For Oahu members:

Purpose: _____ Date of travel: _____

SIGNATURE: _____

(Representative/Agency Head)

I certify that the corresponding interisland travel reservations made, or to be made, will be used during the week or on the date approved. Reservation modification(s) or flight cancellation(s) shall be made in a timely manner to avoid additional charges or penalties, to the extent possible.

APPROVED: _____

Speaker, Hawaii State House

PAYMENT AUTHORIZATION

PART B. Upon completion of authorized travel, enter information below and attach **ALL** of the following to the Chief Clerk's Office in room 027 for reimbursement.

- Original boarding pass stub(s) Credit Card Statement (if applicable)
 E-ticket Confirmation Receipt(s)

If boarding pass dates differ from original itinerary approved by the Speaker, state reason.

Reimbursement payable to: _____

Amount to be reimbursed: _____

Approved: _____

House Chief Clerk

CAR RENTAL AUTHORIZATION

PART A. For car rental authorization, complete sections below and submit to Speaker's Office in room 431.

Name(s): _____ Date of Request: _____

Designated Driver(s): _____

Purpose of Travel: _____

Date(s) of Car Rental: _____

No. of Days Car Needed: _____

Signature: _____ Approved: _____
Representative or Agency Head Speaker, Hawaii State House

PAYMENT AUTHORIZATION

PART B. Upon completion of car rental, enter information below and attach receipt(s) for reimbursement. Submit to the Chief Clerk's Office in room 027.

Reimbursement payable to: _____

Amount to be reimbursed: _____

Approved: _____

House Chief Clerk



**HOUSE OF REPRESENTATIVES
STATE OF HAWAII
STATE CAPITOL
HONOLULU, HAWAII 96813**

Claim for or Settlement of Travel Expenses

Name _____ Date _____

Departure Date _____ Departure Time _____

Return Date _____ Return Time _____

ITINERARY:

My itinerary while on official legislative business was as follows:

Date	Flight Class*	From	Destination
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

* First class (F); Business (B); Coach (C)

The above itinerary differs from the itinerary approved by the Speaker on "Request for Out-of-State Travel Allowance Authorization", dated _____ in the following manner and for the reasons stated. (Indicate "none" if itinerary does not differ from approved itinerary.)

TRAVEL EXPENSES:

Per diem claimed \$ _____
(_____ days x \$ _____ per diem rate)

Registration Fee \$ _____

Educational Materials \$ _____

Ground Transportation \$ _____

Air Transportation \$ _____

Class of service used:

Coach Business* First Class*

Other Allowable Travel Expenses \$ _____

Per attached statements

TOTAL TRAVEL EXPENSES \$ _____

Less: Advances received and expenses paid through House P.O. \$ _____

AMOUNT OF CLAIM DUE ME \$ _____

OR

AMOUNT DUE TO THE HOUSE \$ _____

(attach check payable to the State House of Representatives)

*If traveled by Business or first Class, please state reason: _____

NOTE: All air travel by a legislator or staff member shall be by the most economical class available for the required flights unless authorized by the Speaker. Travel in a class of service other than coach shall be reimbursed under the following circumstances:

- (1) It is the only service offered or available between two points;
- (2) Reasonable efforts to obtain coach service have been made and no coach space is available;
- (3) Air travel consists of eight or more hours of continuous travel; and
- (4) The upgraded class of service is necessary for health and security purposes or is being provided without cost to the State.

Signature of Claimant Date

Submit the completed "Claim for or Settlement of Travel Expenses" with accompanying House "Travel Report Form" to the Speaker within 15 days of completed travel.

Changes in the itinerary and travel expenses from "Request for Out-of-State Travel Allowance Authorization" are approved:

Speaker Date

STATEMENT OF COMPLETED TRAVEL

Department: _____ Payroll #: _____ Y20

Division/Program: _____ Date: _____

Check One: Within State Out-of-State

In accordance with law, I certify that I traveled from _____ to _____ on official business.

Date of Departure: _____ Time: _____

Date of Return: _____ Time: _____

This travel was authorized by _____ on _____ on a memorandum request from _____ dated _____.

The following is an accounting of funds advanced to me for travel expenses:

Advanced by State check _____ \$ _____

Voucher No. N/A Date: _____ App'n Symbol N/A

Per Diem: _____	Quarter day(s) _____	\$ _____
_____	Full days(s) _____	\$ _____

Allowable Expenses (see attached statement)	\$ _____
Due State of Hawaii	\$ _____
Reimbursement Due to Me	\$ _____

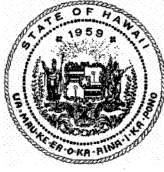
_____	XXX-XX-	N/A
(Signature of Claimant)	(Social Security Number)	BU No.

Approved: _____

Speaker, Hawaii State House

Computation of departure and return dates

	<u>Departure Date</u>	<u>Return Date</u>
12:01 A.M. – 6:00 A.M.	1 day	¼ day
6:01 A.M. – 12:00 Noon	¾ day	½ day
12:01 P.M. – 6:00 P.M.	½ day	¾ day
6:01 P.M. – Midnight	¼ day	1 day



HOUSE OF REPRESENTATIVES

STATE OF HAWAII
STATE CAPITOL
HONOLULU, HAWAII 96813

TRAVEL REPORT FORM	
Name:	Date:
Position:	Office:
Meeting/Sponsor:	
Dates of the Event:	
Location(s) of the Event:	
Summary	
1. How did you participate in this event? <i>Please check/fill in appropriate blanks.</i>	
<input type="checkbox"/> Member of the Executive Committee of the sponsoring organization.	
<input type="checkbox"/> Member of a section committee of the sponsoring organization.	
<input type="checkbox"/> Invited to be a panelist/speaker for the event dealing with the subject of	
<input type="checkbox"/> Attended or observed the event relating to the subject of _____	
<input type="checkbox"/> Other, specify: _____	

<p>2. Explain how your attendance at this event benefited the House of Representatives and the State of Hawaii. <i>If more space is needed, please attach additional sheets of paper.</i></p>
<p>a. Did your attendance at this event help you in working on current or upcoming legislation you are working on or sponsoring?</p>
<p>b. Did your attendance at this event relate to a specific committee, subcommittee, task force, commission, or leadership position that you hold?</p>
<p>c. Other comments:</p>
<p>3. If pertinent, please attach copies of any material describing the meeting or event (e.g., agendas, schedules, itineraries, brochures, etc.).</p>

I certify that my participation at this event directly relates to and substantially enhanced my performance of duties as a member or staff of the House of Representatives.

 Signature of Applicant

Submit the completed House "Travel Report Form" with accompanying Claim for or Settlement of Travel Expenses Form to the Speaker within 15 days of completion of travel.



HOUSE OF REPRESENTATIVES

STATE OF HAWAII
STATE CAPITOL
HONOLULU, HAWAII 96813

**INTER-ISLAND
PER DIEM AUTHORIZATION**

DATE OF REQUEST: _____

NAME(S): _____

NUMBER OF DAYS: _____

DATE(S): _____

PURPOSE OF PER DIEM: _____

SIGNATURE: _____
(Representative or Authorized Personnel)

APPROVED: _____
Speaker of the House of Representatives

STATE OF HAWAII
HOUSE OF REPRESENTATIVES

Personal Automobile Mileage Voucher

Date: _____

For the month of: _____

Date	From	To	Explanation	Miles

Total Mileage: \$ _____

Rate: \$.14 for first 400 miles \$ _____

\$.10 (over 400 miles) \$ _____

TOTAL \$ _____

Claimant: _____

Date: _____

Approved: _____

Speaker

PART III PURCHASING

INTRODUCTION

This part establishes the policies and procedures governing the purchase of goods and services by the House. It covers all activities commencing from the request to purchase to the filing of a vendor's claim for payment.

Chapter 8 General Provisions

Sec. 8.1. Scope of chapter. This chapter contains matters of general applicability to all purchases. It defines terms and prescribes general procedures and standards of conduct in purchasing.

Sec. 8.2. "Purchase" defined. As used in this part, "purchase" means the acquisition of goods and services by the payment of money. It includes the acquisition of the right to the use of property under a lease or rental agreement.

Sec. 8.3. Chief procurement officer. The Speaker shall be the Chief Procurement Officer and shall:

- (1) Procure or supervise the procurement of all goods, services, and construction;
- (2) Exercise general supervision and control over all inventories of goods;
- (3) Sell, trade, or otherwise dispose of surplus goods; and
- (4) Establish and maintain programs for the inspection, testing, and acceptance of goods, services, and construction.

The Speaker may delegate any authority or duty conferred upon the Speaker as the Chief Procurement Officer to designees or any official.

Sec. 8.4. Purchase approving authority. No purchase shall be made unless the purchase has first been approved by the Speaker. The authority to approve the purchase may be delegated as follows:

- (1) To the Chief Clerk, if the amount of the purchase is \$25,000 or less;
- (2) To the Sergeant-at-Arms, if the purchase is within budgetary limits and is for office and other supplies including postage, or for repair and maintenance services and miscellaneous expenses costing not more than \$250; or
- (3) To the Chair of the Committee on Legislative Management, if the purchase is within budgetary limits and is for a purpose other than professional services or any of those specified in paragraph (2) above.

Such delegation of authority may be general or confined to specific instances.

Sec. 8.5. Categories of purchases. For convenience, the various kinds of purchases made by the House are categorized as follows:

- (1) Office supplies. Expendable goods or goods that are normally used up or consumed in the process of use and goods that are more economically replaced than salvaged. Goods costing \$25 or less per item are presumed to be more economically replaced than salvaged. Office supplies include paper, pens, pencils, paper clips, rubber bands, and staplers;
- (2) Office furnishings. Nonexpendable goods that are necessary, useful, or desirable in an office. Office furnishings include desks, filing cabinets, waste baskets, and bookshelves;
- (3) Office equipment. Nonexpendable goods that are necessary, useful, or desirable in performing duties and activities. Office equipment include calculators, typewriters, reproducing machines, printing devices, accounting machines, fax machines, and computer hardware;
- (4) Repair and maintenance services. Services that are rendered to keep and maintain office furnishings or equipment in good working order;
- (5) Printing and binding services. Services that are rendered in the reproduction and binding of House publications such as the House Journal;
- (6) Professional services. Personal services that are rendered by professional personnel or by a firm of professional personnel as an independent contractor. Professional services do not include the personal services of individuals hired as employees; and
- (7) Computer software.

Sec. 8.6. Standards of conduct. Chapter 84, HRS, prescribes certain standards of conduct to be observed by state officials and employees, including legislators and legislative employees. House purchases shall be made in conformance with those standards.

Sec. 8.7. Confirming purchases. "Confirming purchases" means a purchase in which an order is placed with a vendor before a purchase document is prepared, approved, and issued. The practice of confirming purchase is prohibited, except in the case of an emergency when time does not permit the prior preparation, approval, and issuance of a purchase order and at least a verbal approval to purchase has been secured from the appropriate approving authority.

Sec. 8.8. Purchase document. Authorization to purchase any goods or services shall be evidenced by either a purchase order or a contract. No payment for goods or services shall be made by the House Accountant without a purchase order or contract.

Sec. 8.9. Signing purchase order or contract. The Chief Clerk or Sergeant-at-Arms may sign any purchase order or contract whenever the Speaker or the appropriate approving authority, as may be designated by the Speaker, has authorized the purchase by some other written document (for example, House Form No. 2 or 2A for travel expenses). In all other cases, the purchase order or contract must be signed by the Speaker or the appropriate approving authority.

Sec. 8.10. Purchase order form. House Form No. 9 constitutes the House purchase order form. All printed, unused forms shall be in the custody and under the control of the Chief Clerk. The purchase orders shall be issued in a numerical sequence and may be prenumbered.

Sec. 8.11. Purchase order preparation, distribution. The Chief Clerk shall prepare and, upon proper execution, shall issue all purchase orders. Each purchase order shall be prepared in four copies. The copies shall be distributed as follows:

- (1) Original to the vendor;
- (2) One copy retained by the Chief Clerk;
- (3) One copy to the House Accountant; and
- (4) One copy to the Speaker.

The copy of the purchase order retained by the Chief Clerk shall be filed in the purchase order file and shall be used as the receiving document for the goods or services ordered as provided in chapter 11. The copy of the purchase order distributed to the House Accountant shall be used to confirm the validity of the vendor's invoice as provided in chapter 11. The copy of the purchase order distributed to the Speaker shall be for the Speaker's record of purchases of goods and services by the House.

Sec. 8.12. Purchase order file. The Chief Clerk shall maintain a purchase order file. The file constitutes the House purchase order log. A copy of each purchase order issued and, if the purchase order forms are prenumbered, all spoiled or voided purchase order forms shall be placed in the file. The file shall be maintained in numerical order.

Sec. 8.13. Contract preparation. Whenever goods or services are to be purchased under a contract, the Speaker, in consultation with the Chair of the Committee on Legislative Management, is responsible for ensuring that a proper contract document is prepared; provided that, whenever professional services are deemed desirable, the Speaker shall consult with the officer of the House, the Chair of the Committee on Legislative Management or the Chair of the respective committees assigned to carry out the responsibilities as may be affected by such professional services. In the preparation of the contract document, as necessary, the advice and counsel of the House attorney and the Committee on Legislative Management or its Chair should be sought. A contract for the purchase of goods and services shall be executed in four copies. The copies shall be distributed as follows:

- (1) Original to vendor;
- (2) One copy to the Chief Clerk;
- (3) One copy to the House Accountant; and
- (4) One copy to the Speaker.

The copy distributed to the Chief Clerk shall be used to monitor the performance of the contract terms by the vendor. The copy distributed to the House Accountant shall be used to confirm the validity of the vendor's invoice as provided in chapter 11.

Chapter 9 General Purchasing Guidelines

Sec. 9.1. Scope of chapter. Chapter 103D, HRS, sets forth general statewide provisions applicable to the procurement of all goods, services, and construction by the executive, legislative, and judicial branches of the State, including the Office of Hawaiian Affairs, and the several counties of the state. This chapter outlines certain standards to be followed in purchasing goods and services by the House. Some of these standards relate to statutory provisions; others are based on good business practices.

Sec. 9.2. Lowest cost. As a general rule, purchases are to be made at the lowest possible cost consistent with reasonable standards of quality. Thus, although a purchase may not be subject to the statutory bidding requirements, every effort should nevertheless be made to secure price quotations from at least three vendors prior to purchase.

Sec. 9.3. DAGS central price list. The Department of Accounting and General Services (DAGS) periodically issues a list of vendors who have agreed to supply to state agencies certain specific goods at the unit prices quoted on the list. The vendors on the list are those who have submitted the lowest quotation on each item enumerated in response to a public advertisement for bids. In all House purchases, the DAGS central price list shall be consulted and, whenever an item to be purchased is included in the list, it shall be purchased from the vendor named, provided the goods offered by the vendor are consistent with the quality standards of the House and the price quoted is the lowest price obtainable.

Sec. 9.4. Bids, when required. Chapter 103D, HRS, requires that all contracts shall be awarded by competitive sealed bidding except for:

- (1) Contracts requiring competitive sealed proposals;
- (2) The procurement of professional services;
- (3) Small purchases;
- (4) Sole source procurement; and
- (5) Emergency procurements.

Chapter 10 Procurement of Professional Services

Sec. 10.1. Scope of chapter. This chapter outlines certain standards to be followed in the purchase of professional services. The standards of this chapter shall be consistent with provisions of Chapter 103D, HRS.

Sec. 10.2. When allowed. The Speaker, in consultation with the Chair of the Committee on Legislative Management, may secure professional services in the following situations:

- (1) When the desired services require professional or technical competencies beyond those possessed by the House staff and the legislative agencies; or

- (2) When the personnel work force of the House staff and the legislative agencies is insufficient or simply unavailable to perform the desired services within the time required.

Sec. 10.3. Specifications. Before a professional services contract is awarded, written specifications shall be prepared by the Speaker in consultation with the Chair of the Committee on Legislative Management. The specifications shall contain at least the following:

- (1) The specific objective(s) of the work for which the services of a professional are desired;
- (2) The nature and scope of the required professional services; including a description of the tasks to be performed, the specific concerns to be investigated, the facts to be gathered, and the questions to be answered;
- (3) The specific approach desired, if any, in performing the services;
- (4) The time period within which performance of the services is to be performed;
- (5) A statement as to whether a written report is to be submitted as part of the services; and
- (6) A statement of the budgetary limitations, if any, on the contract price and the method of payment for the services.

In addition, if the services to be provided are investigatory, analytic, or research in nature, resulting in a written report, the specifications may include the following statements, as appropriate:

- (1) That all workpapers developed by the professional, including computations and notes, shall be available at any time during the course of performing the services and at its conclusion to the Speaker for inspection and review, and that the Speaker may cause a copy of any of the workpapers to be made for the House;
- (2) That the professional shall be available upon reasonable demands to discuss the progress of the work while it is being performed;
- (3) If a preliminary draft of a written report is desired, that the professional shall prepare such preliminary draft, in a specified number of copies, and that the professional shall be available to discuss the draft with the Speaker and with such other persons as the Speaker may designate;
- (4) That the final draft of the report acceptable to the Speaker shall be submitted in a specified number of copies; and
- (5) That the professional shall be available, upon completion of the contract services, for attendance at legislative hearings and meetings to discuss the findings and recommendations contained in the report submitted.

A copy of the final draft of the professional's report accepted by the Speaker shall be filed with the House Clerk for inspection and review.

Sec. 10.4. Proposals. As a general rule, no professional contract shall be awarded without providing an opportunity to as many known, qualified, and interested persons and firms as practicable to submit proposals or bids to perform the work called for in the specifications. Unless a call for bids is otherwise required by Chapter 103, HRS, the following are exceptions to the general rule:

- (1) Sole source: when the competencies required in performing the work called for in the specifications are special, unique, or peculiar and apparently possessed only by a particular person or firm; or when the approach desired to be taken in performing the work called for in the specifications has been developed and is thus exclusively owned or controlled by a particular person or firm; and
- (2) Emergency: when the work required by the specifications is of such urgency that time does not permit following the route of securing proposals or bids.

Chapter 11 Receipt of and Payment for Goods and Services

Sec. 11.1. Scope of chapter. This chapter outlines the steps to be followed in receiving and paying for goods and services.

Sec. 11.2. Receipt of goods and services. The Chief Procurement Officer or the Officer's designee, in the case of a purchase under a contract, and in the case of a purchase under a purchase order, are responsible for the receipt of the goods or services purchased. When goods are purchased, they shall inspect the goods upon receipt to ensure that they are in good condition and conform to the terms of the purchase. When services are purchased, they shall ensure that the vendor performs the required services in accordance with the terms of the purchase.

Sec. 11.3. Receiving document. When goods or services are satisfactorily delivered in accordance with the terms of the purchase, the Chief Procurement Officer or the Officer's designee as the case may be, shall generate a receiving document for delivery to the House Accountant. The receiving document constitutes authority for the House Accountant to process for payment the vendor's invoice for the purchase when the invoice is received. If the purchase is by purchase order, one of the copies of the purchase order initially retained by the Sergeant-at-Arms shall be used as the receiving document. If the purchase is by contract, the vendor's invoice, when received, shall be used as the receiving document. When a copy of the purchase order is used as the receiving document, the purchase order shall be marked, "received", dated, and signed by the Sergeant-at-Arms. When an invoice is used as the receiving document, the invoice shall be marked, "received", dated, and signed by the Sergeant-at-Arms or the Chief Clerk. The receiving document, when completed, shall be promptly sent to the House Accountant, together with all other documents evidencing receipt of the goods or services and the affidavits, certificates, and other documents required by statute to be completed prior to payment.

Sec. 11.4. Payment of vendor's invoice. All invoices received by the House are to be routed to the House Accountant. A copy of all invoices received by the House shall be transmitted to the Speaker. The House Accountant shall observe the following procedure in processing an invoice for payment:

- (1) If an invoice is for purchase made under a contract and is not otherwise supported by a purchase order, the House Accountant shall send the invoice to the Chief Procurement Officer or the Officer's designee for the preparation of a receiving document;
- (2) The invoice shall be matched against the copy of the purchase order or contract in the possession of the House Accountant and against the receiving document and other documents relating to the purchase and payment of the invoice to determine whether the invoice is proper and whether it can legally be paid;
- (3) If any discrepancy appears in or between and among the invoice, purchase order, contract, receiving document, and other documents, the House Accountant shall investigate and resolve such discrepancy. A record shall be maintained on the manner in which such discrepancy has been investigated and resolved; and
- (4) If the invoice is proper in all respects and payment can legally be made, the House Accountant shall prepare a check for the payment of the invoice.

HOUSE OF REPRESENTATIVES
 STATE OF HAWAII
 State Capitol, Room 027
 Honolulu, Hawaii 96813

PURCHASE ORDER NO. 2006-«PO_Number»
DATE: _____

Instruction to Vendors:

1. Prices include delivery charges unless otherwise stated.
2. Deliver to House Sergeant-at-Arms Office.
PH: (808) 586-6500
3. Send invoices in triplicate to:
House of Representatives
State of Hawaii
State Capitol, Room 027
Honolulu, Hawaii 96813
4. Show purchase order number, date, discounts, and taxes on all invoices.

Qty.	Description	Unit price	Amount

Subtotal _____
 Tax _____
 Shipping & Handling _____
 Total _____

 Approved by Date

General Fund Computer Fund Contingency Fund Other _____

PART IV PAYMENTS AND RECEIPTS

INTRODUCTION

This part establishes the policies and procedures governing the payment of House obligations and the deposit of House receipts. It covers all activities associated with the various types of payments, i.e., vendor, petty cash, payroll and allowances, and depositing of receipts.

Chapter 12 Payment to Vendors

Sec. 12.1. Scope of chapter. This chapter prescribes the controls and procedures to be followed in making payments to vendors.

Sec. 12.2. General control of checks. To facilitate accountability, House checks shall be prenumbered at the time of printing. Unissued checks are to be adequately safeguarded, and spoiled checks are to be marked "VOID" and properly accounted for by the House Accountant.

Sec. 12.3. Preparation of checks and remittance advice. Checks in payment of vendors' invoices are to be prepared by the House Accountant and mailed within 30 days after receipt of invoices from the vendors, provided that the terms of purchase have been satisfied. The checks prepared are to be listed on House Form No. 10, "Remittance Advice", which form is to be prepared in triplicate. The word "END" shall be entered immediately after the last entry on the remittance advice to prevent unauthorized additions. The remittance advice serves as a record of all checks prepared and issued by the House. It is also used to inform certain state agencies of the authorized checks issued by the House.

Sec. 12.4. Review and approval for payment. The Chief Clerk shall be responsible for reviewing the checks, remittance advice, and documents supporting the expenditures. In conducting this review, the Chief Clerk shall: (a) ascertain that all checks presented for review are listed on the remittance advice; (b) ascertain that the checks are properly substantiated by supporting documents, i.e., purchase orders, vendors' invoices, and delivery documents; and (c) account for the sequential numbering of the checks presented for review. Upon satisfactory completion of the above review, the remittance advice shall be approved by the Chief Clerk.

Sec. 12.5. Signing of checks. The Speaker and the Chair of the Committee on Legislative Management are the persons authorized to sign checks. Except as may otherwise be necessary, a facsimile signature machine shall be used to affix the authorized signatures on the checks. Checks are to be processed for signature after the remittance advice has been approved by the Chief Clerk. Access to the facsimile signature machine shall be limited to the Chief Clerk or such employee as the Chief Clerk may designate, except that such designee shall not be the House Accountant. The facsimile signature plate, when not in use, shall be removed from the machine and kept under lock and key. A log on the use of the facsimile signature machine shall be maintained. The log shall be substantially in the form as presented in House Form No. 11, "Check Signature Machine Log". The House Accountant shall periodically reconcile the total checks signed and issued as shown by the House Accountant's records with the total number of checks processed as shown by the check signature machine log.

After the signing of checks, the Chief Clerk shall ensure that all supporting documents are cancelled with a paid date stamp or other similar markings. The approved remittance advice, cancelled supporting documents, and signed checks shall be routed to the House Accountant for disposition.

Sec. 12.6. Mailing of checks and distribution of remittance advice. The House Accountant shall prepare the checks for mailing and deliver the envelopes to the mailroom for mailing by the Sergeant-at-Arms. The three copies of the remittance advice shall be distributed by the House Accountant as follows: the first copy to DAGS for the recording of the House disbursements in the statewide accounts; the second copy to the Department of Budget and Finance to be used as the basis for honoring checks issued by the House against the State treasury; and the last copy is to be retained by the House Accountant for the House files.

Sec. 12.7. Outstanding checks. Checks outstanding for more than 90 days may be voided by the House Accountant. After diligent efforts are made to contact the payees, the House Accountant shall be relieved from further investigation of checks that continue to be outstanding for more than 180 days. When new checks are issued to replace the old outstanding checks, DAGS and the Department of Budget and Finance are to be notified of such action.

Chapter 13 Petty Cash

Sec. 13.1. Scope of chapter. This chapter contains the policies and procedures relating to the establishment, use, and replenishment of petty cash.

Sec. 13.2. Establishment of petty cash. A petty cash of \$200 shall be established to pay for purchases and expenses of low dollar values. The petty cash shall be used only for the payment of House obligations. Any other use, such as cashing of personal checks, is prohibited. The Sergeant-at-Arms shall be the custodian of the petty cash and as such shall be responsible for the safekeeping, safeguarding, and control of the petty cash.

Sec. 13.3. Petty cash voucher. A petty cash voucher is a form used to account for each disbursement made from petty cash. Petty cash vouchers shall be numbered sequentially and must be signed by the recipient of the cash and the custodian. Whenever possible, petty cash vouchers shall be supported by invoices, receipts, or other similar documents. House Form No. 12, "Petty Cash Voucher", shall constitute the House petty cash voucher form.

Sec. 13.4. Shortage or overage. The cash on hand plus the amounts of the petty cash vouchers should total \$200. The custodian shall periodically count the petty cash. Should the total exceed or be less than \$200, the custodian shall prepare a petty cash voucher for the amount of the shortage or overage with a full explanation for the variance. The Chief Clerk shall immediately be notified of any shortage or overage. Vouchers prepared for shortages and overages are to be processed along with all other vouchers when petty cash is replenished.

Sec. 13.5. Petty cash counts. Periodic, unannounced petty cash counts shall be conducted by the House Accountant. Any discrepancies shall be reported to the Speaker and the Chair of the Committee on Legislative Management.

Sec. 13.6. Replenishment of petty cash. Petty cash shall be replenished under the following procedures:

- (1) The custodian shall prepare House Form No. 13, "Request for Replenishment of Petty Cash," in duplicate;

- (2) The original of House Form No. 12, along with the petty cash vouchers and other supporting documents, shall be routed to the House Accountant. A copy shall be retained by the custodian and kept with the petty cash until the check for the replenishment of petty cash is received and cashed;
- (3) Upon receipt of House Form No. 13, the House Accountant shall prepare a check payable to the custodian for the amount of the request; and
- (4) The check issued for the replenishment of petty cash shall be processed in the same manner and subject to the same controls as checks issued for vendor payments (See chapter 12).

Chapter 14 Payroll

Sec. 14.1. Scope of chapter. This chapter outlines the controls and procedures governing the payroll of legislators, permanent employees, and temporary employees.

Sec. 14.2. "Permanent employee" and "temporary employee" defined. "Permanent employees" are employees hired on a permanent basis, i.e., employees who are expected to be employed throughout the year and for an indefinite period, and who qualify for all benefits afforded regular state employees. "Temporary employees" are employees hired on a temporary basis, i.e., employees who are not expected to be employed throughout the year but are employed only for a limited period such as during legislative sessions, and who do not qualify for all the benefits afforded regular state employees.

Sec. 14.3. Payroll of legislators and permanent employees. The following provisions shall govern the payroll of legislators and permanent employees:

- (1) Pay period. Permanent employees and legislators shall be paid their monthly salary in two equal installments;
- (2) Personnel action form. State Form SF-5, "Notification of Personnel Action", shall be used for initiating and authorizing personnel actions affecting the payroll of legislators and permanent employees. Personnel actions include the initial placement of the name on the payroll, changes in the rate of pay, and the discontinuance of pay because of termination of employment. The SF-5 shall be prepared by the House Accountant and signed by the Speaker for personnel actions affecting legislators or by the appointing authority for personnel actions affecting permanent employees. The certification of the Director of Human Resources as noted on the SF-5 need not be obtained. Distribution of the SF-5 shall be in accordance with the state accounting manual;
- (3) Services of DAGS. The services of DAGS shall be used for the preparation of the payroll register, which is a listing of individuals entitled to pay and the amount of gross pay, deductions, and net pay for each; preparation of the pay check and earnings statement for each individual listed on the payroll register; and the preparation and filing of the required payroll tax returns and forms;

- (4) Payroll change schedule. At the beginning of each pay period, DAGS furnishes the House Accountant with a copy of the payroll register of the previous pay period. Any changes to the payroll for the current pay period are to be noted on the payroll register by the House Accountant. The payroll register, with the changes, is known as the "Payroll Change Schedule." This schedule shall be signed by the Speaker or the Speaker's designee before its submission to DAGS; and
- (5) Distribution of pay check and earnings statement. The House Accountant shall pick up the pay checks and earnings statements the day before each pay day from DAGS. The House Accountant shall seal the checks or earnings statements in envelopes and deliver them to the Sergeant-at-Arms for distribution or mailing.

Sec. 14.4. Payroll of temporary employees. The following provisions shall govern the payroll of temporary employees:

- (1) Pay period. Temporary employees shall be paid their monthly salary in two equal installments;
- (2) Attendance report. Each legislator, committee chair, or administrative superior shall submit an attendance report to the House Accountant for all temporary employees under their supervision. House Form No. 14, "Employee Attendance Report", shall be used for this purpose. The attendance report serves as the record upon which the payroll for temporary employees is prepared;
- (3) Preparation of payroll. The House Accountant shall prepare the following items relating to payroll:
 - (a) A payroll register;
 - (b) A pay check and earnings statement for each temporary employee entitled to pay; and
 - (c) A remittance advice listing all pay checks to be issued;
- (4) Review and approval for payment. The Chief Clerk shall be responsible for the review of the pay checks and the accompanying remittance advice. In conducting this review, the Chief Clerk shall:
 - (a) Ascertain that pay checks presented for review are listed on the remittance advice;
 - (b) Ascertain that the names listed on the remittance advice include only authorized hires; and
 - (c) Account for the sequential numbering of all pay checks presented for review.

Upon the satisfactory completion of the above review, the remittance advice shall be approved by the Chief Clerk;

- (5) Signing of pay checks and distribution of remittance advice. The procedures for the signing of pay checks and distribution of remittance advice forms shall be the same as the procedures for vendor payment outlined in sections 12.5 and 12.6, respectively, of this part; and
- (6) Distribution of pay checks and earning statement. Individual pay checks and earnings statements shall be sealed in envelopes by the House Accountant and delivered to the Sergeant-at-Arms for distribution or mailing.

Chapter 15 Allowances

Sec. 15.1. Scope of chapter. This chapter covers the general provisions and the process for the payment of allowances.

Sec. 15.2. General provisions. Provisions governing when and the conditions under which allowances are to be paid and the amount of allowances are contained in sections 1.3 and 1.4 of part I for the general allowances that are payable to legislators and part II for travel allowances that are payable to legislators and legislative employees.

Sec. 15.3. Payment process. The payment process for allowances shall be the same as the vendor payment process detailed in sections 12.3 through 12.6 of this part, except that House Form Nos. 2, 2A, 3, 4, and 6 shall serve as the supporting documentation whenever applicable.

Chapter 16 Receipts

Sec. 16.1. Deposit of receipts. House receipts shall be deposited in the state treasury no later than weekly by the House Accountant. State accounting Form B-I 3, "Treasury Deposit Receipt", shall be used for this purpose. Whenever possible, only money orders or checks payable to the House should be accepted.

**STATE OF HAWAII
HOUSE OF REPRESENTATIVES**

Petty Cash Voucher

No. _____

Date _____

Cash paid to _____ Amount \$ _____

For: _____

Custodian's signature

Signature of recipient

**STATE OF HAWAII
HOUSE OF REPRESENTATIVES**

Request for Replenishment of Petty Cash

Petty cash Voucher no.	Date	Recipient	Description	Amount	
Total replenishment				\$	

Date _____

Requested by _____
Custodian, Petty Cash

HOUSE OF REPRESENTATIVES
STATE OF HAWAII

Employee Attendance Report

Last Name:		First Name:	
Office:		Position:	
Pay Period Starting Date:		Pay Period Ending Date:	
<input type="checkbox"/> Full-time	<input type="checkbox"/> Part-time: ____ hrs. Maximum work hours scheduled for pay period (*must be consistent with staff appointment form previously submitted.)		
Total compensable hours WORKED (including state holidays) during pay period: *not to exceed ____ hrs. maximum work hours scheduled for pay period.			

I certify that the above information is true and correct.

Date

Employee

Date

Legislator/Chair/Agency Administrator

INSTRUCTIONS

1. Changes or erasures must be initialed by the person approving this attendance report.
2. Session only employees do not accrue vacation or sick leave.

NOTE: "Notice of Employee Termination" House form must be completed and submitted to the House Accounting Office for employees terminating during pay period.

PART V BUDGETING, FINANCIAL ACCOUNTING, AND REPORTING

INTRODUCTION

This part concerns the development and control of a House budget, the accounting system, and financial reporting.

Chapter 17 Budgeting

Sec. 17.1. Scope of chapter. This chapter outlines the procedures to be followed in the budgetary process from initial preparation to the adoption of the budget by the House and specifies the budgetary controls to be exercised. The format of the budget document is also prescribed in this chapter.

Sec. 17.2. Development of budget. The annual budget for the House shall be developed by the Speaker in consultation with the Chair of the Committee on Legislative Management. A budget year begins on the first day of a regular session and ends the day preceding the first day of the ensuing year's regular session.

Sec. 17.3. Approval of budget. The Speaker shall notify the Committee on Finance of the total funding requirements recommended in the House budget for its incorporation in the bill providing for the expenses of the legislature. Should the appropriation amount(s) differ from that originally proposed in the recommended budget, the House budget shall be revised by the Speaker in consultation with the Chair of the Committee on Legislative Management to reflect the change.

Sec. 17.4. Budget structure. The budget of the House shall be organized by budget categories as set forth in House Form No. 15, "General Operating Budget".

Sec. 17.5. Budget format. The budget shall contain an estimate of the total expenditures for the year. The budget shall contain the budget categories described as set forth in House Form No. 15 and the appropriate cost elements under each budget category. In the development and preparation of a budget, the Speaker in consultation with the Chair of the Committee on Legislative Management shall ascertain whether circumstances and conditions require revisions to the budget format, including changes to budget categories.

Sec. 17.6. Budgetary control. The Speaker and the Chief Clerk shall be responsible for monitoring expenditures to ensure that total expenditures do not exceed budgetary limits.

Chapter 18 Financial Accounting

Sec. 18.1. Scope of chapter. This chapter establishes the policies and procedures governing the recording of financial transactions. It prescribes the method of accounting and the manner in which financial records are to be maintained.

Sec. 18.2. Method of accounting. The accounting records of the House shall be maintained on a cash basis of accounting. Under this method, expenditures are recorded when paid and receipts are recorded when received. Encumbrances and accounts payable, although not recorded in the formal accounting records, are to be taken into account for financial reporting purposes.

Sec. 18.3. Maintenance of records. The House Accountant shall be responsible for maintaining the accounting records of the House. A separate set of accounts shall be maintained for each appropriation. The accounting records shall be kept in a manner which will ensure control over expenditures. At a minimum, a separate account shall be maintained for each budgetary cost element. A description of the various types of cost elements follows:

- (1) Salaries--permanent positions. Amount of gross salaries and wages paid for the services of permanent employees;
- (2) Salaries--temporary positions. Amount of gross salaries and wages paid for the services of temporary employees;
- (3) Professional services. Includes payment for professional services rendered to the House under agreement or contract by independent contractors. Examples of expenses to be included in this cost element would be auditing fees and legal fees;
- (4) Office and maintenance supplies. Includes expenditures for materials and supplies required for office use and the cost of articles and products used in keeping buildings and equipment in a sanitary and efficient condition. Freight and delivery costs directly applicable to these supplies are to be included in this cost element;
- (5) Printshop supplies. Includes expenditures for supplies used by the printshop such as paper, ink, and solutions. Freight and delivery costs directly applicable to these supplies shall be included in this element;
- (6) Postage and postal charges. Includes charges for postage stamps, stamped envelopes, stamped post cards, postage meter settings, postal permit deposits, box rentals, and postal registry and insurance fees;
- (7) Communications. Includes charges for telephone rentals and long distance calls, and FAX services;
- (8) Travel--intrastate. Includes charges normally associated with travel between the islands such as air fare, ground transportation, per diem allowances, and other travel-related expenses;
- (9) Travel--out-of-state. Includes charges normally associated with travel out-of-state including air fare, ground transportation, per diem allowances, and other travel-related expenses;
- (10) Training. Includes charges related to the training of legislators and employees such as registration fees, lecture fees, cost of training materials and supplies, facility rentals, and travel costs;
- (11) House contingency fund. Includes expenses for social occasions hosted by the House as a whole and the costs of other social functions and protocol demands that the Speaker is expected to fulfill as the presiding officer of the House;

- (12) General allowances--legislators. Includes the annual allowance paid to each legislator and the allowance paid to non-Oahu legislators for lodging, subsistence, and other incidental expenses during a session;
- (13) Printing and binding. Includes expenditures associated with the printing and binding of the House Journal and any other costs of printing, duplicating, engraving, and other expenses for publications issued by the House;
- (14) Repairs and maintenance. Includes charges for equipment maintenance service contracts and other repair and maintenance services;
- (15) Furniture and equipment rentals. Includes charges for rental of all furniture and equipment such as typewriters, copy machines, and the postage meter;
- (16) Furniture and equipment purchases. Includes the purchase cost of equipment and items of tangible personal property such as tables, desks, modular units, chairs, and filing cabinets. Freight and delivery costs directly applicable to these purchases shall be included in this cost element;
- (17) Software/Systems development services. Includes payment for licensed software and professional computer services rendered to the House under agreement or contract by independent contractors;
- (18) Computer supplies. Includes expenditures for materials and supplies required for office computer use and the cost of articles and products used for keeping computer equipment in efficient condition;
- (19) Computer hardware repair. Includes charges for computer repair contracts and other maintenance services;
- (20) Computer hardware rentals. Includes charges for the rental of all computer hardware. Freight and delivery costs directly applicable to these rentals shall be included in this cost element;
- (21) Computer hardware and peripherals. Includes the purchase cost of computer hardware and peripherals. Freight and delivery costs directly applicable to these purchases shall be included in this cost element;
- (22) Computer hardware maintenance. Includes charges for hardware maintenance contracts and other maintenance services;
- (23) Computer software maintenance. Includes charges for software maintenance contracts and other maintenance services;
- (24) Constitutional Amendment(s). Includes expenditures for statutory and/or constitutional publication costs, and any other notification requirement; and
- (25) Other miscellaneous expenses. Includes operating expenditures which cannot be properly classified in any other cost element.

Chapter 19 Financial Reporting

Sec. 19.1. Scope of chapter. This chapter contains policies relating to the preparation of financial reports and the types of financial reports to be prepared.

Sec. 19.2. Preparation of reports. The House Accountant shall prepare the financial report specified in section 19.3 of this chapter and such other financial reports requested by the Speaker or the Chair of the Committee on Legislative Management. These reports are to be submitted to the Speaker or the Chair of the Committee on Legislative Management within ten working days after the end of each month. A copy of the financial reports shall be made available to each legislator and shall be made available for public inspection.

Sec. 19.3. Types of reports. At a minimum, the financial report of the House shall consist of House Form No. 16, "Statement of Appropriation and Expenditures". The statement summarizes the financial status of the appropriations. It shows the amount of the appropriation, accumulated expenditures, and encumbrances as of the date of the financial statement.

HOUSE OF REPRESENTATIVES
STATE OF HAWAII

GENERAL OPERATING BUDGET
Year _____

Personnel:			
	Session Employees	\$	_____
	Regular Employees	\$	_____
	Consultant Services	\$	_____
	Annual Allowance	\$	_____
	Per Diem:		
	Session	\$	_____
	Intra-State	\$	_____
	Out-of-State	\$	_____
	Travel:		
	Session	\$	_____
	Intra-State	\$	_____
	Out-of-State	\$	_____
	Stationery, Office & Other Supplies	\$	_____
	Communications:		
	Postage	\$	_____
	Telephone	\$	_____
	Delivery & Hauling	\$	_____
	Rentals – Equipment	\$	_____
	Repairs – Equipment	\$	_____
	Office Equipment & Furniture	\$	_____
	Miscellaneous	\$	_____
	Renovation	\$	_____
	Moving Expense	\$	_____
	Education:		
	Conference Fees	\$	_____
	Training/Classes	\$	_____
	Majority Caucus	\$	_____
	Minority Caucus	\$	_____
	Constitutional Amendment	\$	_____
	Printing of Journal	\$	_____
	Contingency Fund	\$	_____
	TOTAL	\$	_____

HOUSE OF REPRESENTATIVES
STATE OF HAWAII
2006 GENERAL APPROPRIATION

Statement of Appropriations and Expenditures
As of _____

	<u>Expenditures for the Month</u>	<u>Accumulated Expenditures to Date</u>
Personnel:		
Session Employees	\$ _____	\$ _____
Regular Employees	\$ _____	\$ _____
Consultant Services	\$ _____	\$ _____
 Annual Allowance	 \$ _____	 \$ _____
 Per Diem:		
Session	\$ _____	\$ _____
Intra-State	\$ _____	\$ _____
Out-of-State	\$ _____	\$ _____
 Travel:		
Session	\$ _____	\$ _____
Intra-State	\$ _____	\$ _____
Out-of-State	\$ _____	\$ _____
 Stationery, Office & Other Supplies	\$ _____	\$ _____
Communications:		
Postage	\$ _____	\$ _____
Telephone	\$ _____	\$ _____
 Delivery & Hauling	\$ _____	\$ _____
 Rentals – Equipment	\$ _____	\$ _____
 Repairs – Equipment	\$ _____	\$ _____
 Office Equipment & Furniture	\$ _____	\$ _____
 Miscellaneous	\$ _____	\$ _____
Renovation	\$ _____	\$ _____
Moving Expense	\$ _____	\$ _____
Education:		
Conference Fees	\$ _____	\$ _____
Training/Classes	\$ _____	\$ _____
 Majority Caucus	\$ _____	\$ _____
Minority Caucus	\$ _____	\$ _____
 Constitutional Amendment	\$ _____	\$ _____
 Printing of Journal	\$ _____	\$ _____
 Contingency Fund	\$ _____	\$ _____
 TOTAL	 \$ _____	 \$ _____

PART VI EMPLOYEE CLASSIFICATION

INTRODUCTION

This part sets forth the duties, responsibilities, and minimum qualifications of the various employee classifications in the House.

Chapter 20 Appointing Authority and Class Specifications

Sec. 20.1. Scope of chapter. This chapter describes the appointing authority for the various employee classifications and brief descriptions of the various employee classifications in the House, including the duties, responsibilities, and minimum qualifications associated with each position.

Sec. 20.2. Individual legislators. Each legislator is authorized to appoint one permanent legislative office manager, and session-only staff to serve at the pleasure of the legislator as authorized by the Speaker. Staff shall provide administrative, research, clerical, and other support services to assist in meeting the legislator's responsibilities.

Sec. 20.3. Committee chairs and vice chairs. Each Committee Chair and Vice Chair is authorized to appoint session-only committee clerks, assistant committee clerks, committee secretaries, legislative attorneys, researchers, assistant researchers, and legislative interns, as necessary and as authorized by the Speaker.

Sec. 20.4. Finance committee. The Finance Committee Chair is authorized to appoint a committee clerk, a budget chief, a research chief, researchers, assistant researchers, and an administrative services manager to provide the services needed to fulfill the Finance Committee Chair's responsibilities, as necessary and as authorized by the Speaker.

The Finance Committee Chair is also authorized to appoint fiscal analysts, program analysts, legislative attorneys, committee secretaries, secretaries, and clerk typists, as necessary and as authorized by the Speaker.

Sec. 20.5. Legislators in leadership positions. Legislators in leadership positions, including the Speaker, Vice Speaker, Majority Leader, Minority Leader, Majority Floor Leader, Minority Floor Leader, and Majority Whip, may appoint administrative and clerical staff, as necessary and as authorized by the Speaker.

Sec. 20.6. Administrative services. Administrative support services for the House shall be provided by permanent and session-only employees in the Office of the Chief Clerk and the Office of the Sergeant-at-Arms, as necessary and as authorized by the Speaker.

Sec. 20.7. Research and legal services. Research and legal services for the House shall be provided by permanent and session-only employees in the partisan offices of the House, as authorized by the Speaker.

Sec. 20.8. General appointing authority. The Speaker shall not be limited to appointing individuals to only those positions described in this chapter. The Speaker may prescribe additional positions to meet the needs of the House.

Sec. 20.9. General employee class specifications. The employee class specifications of the House are listed in alphabetical order and are described as follows:

Account Clerk

Duties and responsibilities: The Account Clerk shall be appointed by the Chief Clerk to assist the Accountant in performing accounting work for the House, subject to the approval of the Speaker. Under the general supervision and direction of the Accountant, the Account Clerk shall assist the Accountant in preparing financial statements, processing payroll and vendor's invoices for payment, and performing other bookkeeping functions.

Minimum qualifications: The minimum qualifications of the Account Clerk shall include bookkeeping experience, an understanding of the procedures governing payroll and purchasing, and familiarity with general office procedures and methods.

Accountant

Duties and responsibilities: The Accountant shall be appointed by the Chief Clerk to perform accounting work for the House in accordance with established policies and procedures, subject to the approval of the Speaker. Under the general supervision and direction of the Chief Clerk, the Accountant shall assist in the preparation of the House budget, maintain books of accounts, prepare financial statements, perform other duties required in this manual, and perform related duties as requested by the Speaker or the Chief Clerk.

Minimum qualifications: The minimum qualifications of the Accountant shall include accounting or auditing experience; knowledge of state statutes and rules applicable to accounting work; the ability to supervise other accounting personnel; and a thorough knowledge of office procedures and methods.

Administrative Aide

Duties and responsibilities: An Administrative Aide may be appointed by a legislator to work during the session only. Under the general supervision and direction of the legislator, the Administrative Aide shall provide administrative assistance to a legislator, including:

- (1) Responding to constituent inquiries and handling constituent-related activities;
- (2) Coordinating the legislator's public and constituent communication activities;
- (3) Keeping track of legislative measures introduced by the legislator; and
- (4) Performing related assignments as required.

Minimum qualifications: The minimum qualifications of an Administrative Aide shall include the ability to maintain confidentiality; the ability to draft business correspondence; the ability to fulfill general research requests; familiarity with government services and programs; and the ability to deal with government officials and the general public.

Administrative Services Manager

Duties and responsibilities: Administrative Services Managers may be appointed by legislators in Majority leadership positions, the Finance Chair, the Chief Clerk, the Sergeant-at-Arms, and other agencies of the House as deemed appropriate to serve as confidential assistants, subject to the approval of the Speaker. An Administrative Services Manager actively participates in the management of a major office of the House by assuming full responsibility for the administrative, personnel, and clerical details of the office.

Minimum qualifications: The minimum qualifications of an Administrative Services Manager shall include knowledge of supervisory principles and practices; general administrative principles and procedures applicable to large, complex organizations; general office practices and procedures; and the operation and maintenance of various office appliances and equipment. In addition, an Administrative Services Manager shall be able to supervise, plan, and organize a broad range of secretarial and office functions; develop a working knowledge of responsibilities and practices of the Legislature and the House; comprehend and implement the policies of the agency or office served; work effectively under pressure and meet deadlines; proof and edit legislative documents, legal memoranda, and complex correspondence requiring judgment as to appropriate format and conformance to the rules of grammar and style; communicate clearly, concisely, and effectively; exercise considerable tact and judgment; and maintain confidentiality.

Assistant Chief Clerk

Duties and responsibilities: The position of Assistant Chief Clerk shall be filled in accordance with the "Rules of the House of Representatives." Under the general supervision and direction of the Chief Clerk, the Assistant Chief Clerk shall assist the Chief Clerk in all duties charged to the Chief Clerk. In the absence of the Chief Clerk, the Assistant Clerk shall perform all of the duties of the Chief Clerk.

Minimum qualifications: The minimum qualifications of the Assistant Chief Clerk shall include knowledge of legislative operations and the legislative process; the ability to supervise and manage large, complex organizations; familiarity with modern business practices and procedures; the ability to work effectively under pressure and meet deadlines; and the ability to exercise considerable tact and judgment.

Assistant Committee Clerk

Duties and responsibilities: When authorized for particular committees, Assistant Committee Clerks may be appointed by the respective Committee Chairs or Vice Chairs to work during the session only. Under the general supervision and direction of the Committee Chair, Vice Chair, or designee, an Assistant Committee Clerk shall assist the Committee Clerk in coordinating and overseeing the activities of the committee.

Minimum qualifications: The minimum qualifications of an Assistant Committee Clerk shall include familiarity with government services and programs; the ability to deal with government officials and the general public; some understanding of how bills and committee reports are drafted and the legislative process; and some knowledge of office procedures and practices.

Assistant Researcher

Duties and responsibilities: Assistant Researchers may be appointed by legislators as required by the House to work during the session only, subject to the approval of the Speaker. Under the general supervision and direction of the Committee Chair, Vice Chair, or designee, the Assistant Researcher shall assist in the gathering of information fundamental to legislative research and analysis.

Minimum qualifications: The minimum qualifications of the Assistant Researcher shall include research experience, familiarity with State and county programs, and an understanding of the legislative process and operations.

Assistant Sergeant-at-Arms

Duties and responsibilities: The position of Assistant Sergeant-at-Arms shall be filled in accordance with the "Rules of the House of Representatives." Under the general supervision and direction of the Sergeant-at-Arms, the Assistant Sergeant-at-Arms shall assist the Sergeant-at-Arms in all duties charged to the Sergeant-at-Arms. In the absence of the Sergeant-at-Arms, the Assistant Sergeant-at-Arms shall perform all of the duties of the Sergeant-at-Arms.

Minimum qualifications: The minimum qualifications of the Assistant Sergeant-at-Arms shall include knowledge of legislative operations; the ability to supervise employees; and some experience and knowledge in facility security, property management, and office procedures and practices.

Budget Chief

Duties and responsibilities: The Budget Chief shall be appointed to work in the Finance Committee by the Finance Committee Chair, subject to the approval of the Speaker. Under the general supervision and direction of the Finance Committee Chair and Finance Committee Clerk, the Budget Chief shall supervise and coordinate the work of fiscal analysts and perform related duties.

Minimum qualifications: The minimum qualifications of the Budget Chief shall include research experience in governmental financing including taxation; an understanding of public financial administration concepts; familiarity with the State's revenue system; general understanding of planning-programming-budgeting concepts; general understanding of economic and statistical theories as they apply to governmental finances; and familiarity with State and county programs and the legislative process and operations.

In addition, the Budget Chief shall have planning, supervisory, and organizational skills; work effectively under pressure and meet deadlines; communicate clearly, concisely, and effectively; exercise considerable tact and judgment; and maintain confidentiality.

Chief Attorney

Duties and responsibilities: The Chief Attorney shall be appointed by the Speaker to:

- (1) Supervise and participate in rendering legal advice and counsel to the House;
- (2) Interpret state and federal laws requiring considerable legal experience and the exercise of a considerable degree of independent judgment;

- (3) Conduct and supervise subordinates in conducting complex legal research activities involving the preparation of trial briefs, pleadings, and oral arguments for civil and criminal cases and appeals;
- (4) Conduct trials and appeals in state and federal courts and may supervise other attorneys assigned to assist with such work;
- (5) Prepare and draft contracts, agreements, and legal opinions;
- (6) Draft legislation where a thorough knowledge of existing statutes and statutory regulations and requirements is required;
- (7) Conduct legal reviews of legislation; and
- (8) Perform related duties as required.

Minimum qualifications: The minimum qualifications of the Chief Attorney shall include a graduate degree (J.D.) from an accredited law school, successful completion of the Hawaii Bar examination, and a license to practice law in the state and the federal district court.

The Chief Attorney shall be familiar with the legislative process; bill drafting techniques; and federal, state, and county laws, rules, organization, functions, operations, policies, programs, and procedures.

In addition, the Chief Attorney shall have the ability to supervise subordinates; maintain confidentiality; deal effectively with government officials; apply ingenuity and inventiveness in devising solutions to problems of unusual difficulty and precedent-establishing nature; work effectively under pressure and meet deadlines; train and develop the skills of legislative attorneys; and write and communicate clearly, concisely, persuasively, and effectively.

Chief Clerk

Duties and responsibilities: The position of Chief Clerk shall be filled in accordance with the "Rules of the House of Representatives." The Chief Clerk shall be responsible for the safekeeping of all records of the House. Under the general direction of the Speaker, the Chief Clerk shall be responsible for overseeing the administrative and ministerial operations of the House. In assuming this responsibility, the Chief Clerk shall:

- (1) Maintain records of House proceedings;
- (2) Provide data with respect to the status of bills and resolutions;
- (3) Ensure that the records of the various committees are filed with the State Archives at the end of each legislative session;
- (4) Perform duties as outlined in the "Rules of the House of Representatives" and the "House Administrative and Financial Manual";
- (5) Be responsible for the publishing of the House Journal;
- (6) Participate in or coordinate studies directed toward improving legislative operations;

- (7) Supervise the Assistant Chief Clerk, Accountant, Information Resources Coordinator, Information Resources Specialists, Journal Clerk, Chiefs of Records and Engrossing, Printshop Manager, and other administrative service personnel;
- (8) Serve as the procurement, contract, and personnel administrator for the House; and
- (9) Perform duties related to House proceedings as requested by the Speaker.

Minimum qualifications: The minimum qualifications of the Chief Clerk shall include a substantial knowledge of the legislative process; the ability to supervise and manage large, complex organizations; and familiarity with modern business practices and procedures.

Chief of Engrossing

Duties and responsibilities: The Chief of Engrossing shall be appointed by the Chief Clerk, subject to the approval of the Speaker. Under the general supervision and direction of the Chief Clerk, the Chief of Engrossing shall:

- (1) Supervise the engrossing of all bills, resolutions, and related matter;
- (2) Prepare official transmittal communications of engrossed measures to the Governor and state agencies;
- (3) Plan, direct, and supervise the work of subordinates; and
- (4) Perform related duties as required.

Minimum qualifications: The minimum qualifications of the Chief of Engrossing shall include the ability to work effectively under pressure and meet deadlines; considerable knowledge of the management and supervisory techniques of the clerical aspects of the legislative process; knowledge of office procedures and methods; and the ability to supervise and manage employees.

Chief of Records

Duties and responsibilities: The Chief of Records shall be appointed by the Chief Clerk, subject to the approval of the Speaker. Under the general supervision and direction of the Chief Clerk, the Chief of Records shall:

- (1) Manage and supervise the recording of floor action;
- (2) Prepare legislation for permanent archiving;
- (3) Coordinate the routing of bills and resolutions;
- (4) Plan, direct, and supervise the work of subordinates; and
- (5) Perform related duties as required.

Minimum qualifications: The minimum qualifications of the Chief of Records shall include the ability to work effectively under pressure and meet deadlines; considerable knowledge of the management and supervisory techniques of the clerical aspects of the legislative process; knowledge of office procedures and methods; and the ability to supervise and manage employees.

Chief of Staff

Duties and responsibilities: The Chief of Staff shall be appointed by and serve at the pleasure of the Speaker. Under the general supervision and direction of the Speaker, the Chief of Staff shall:

- (1) Perform a variety of administrative functions to ensure the smooth functioning of the House;
- (2) Provide professional and technical services to the Speaker;
- (3) Advise the Speaker on issues and other technical areas;
- (4) Serve as the Speaker's intermediary with legislative committees and other staff members;
- (5) Represent the Speaker at meetings and functions when assigned;
- (6) Review correspondence and formulate replies; and
- (7) Perform related duties as required.

Minimum qualifications: The minimum qualifications of the Chief of Staff shall include the ability to maintain confidentiality; work effectively under pressure and meet deadlines; interact well with a diverse group of people; communicate effectively, clearly, and precisely; and handle complex or unusual problems.

In addition, the Chief of Staff shall have substantial experience and knowledge of the legislative process and operations, as well as the areas of specialization assigned by the Speaker.

Clerk-Typist

Duties and responsibilities: Clerk-Typists may be appointed by a legislator, the Chief Clerk, the Sergeant-at-Arms, or a director of a partisan office to provide general office support and clerical services, subject to the approval of the Speaker. Depending on which office the Clerk-Typist is assigned to, these duties may include any or all of the following:

- (1) Providing general typing and clerical services;
- (2) Providing receptionist services; and
- (3) Performing related duties as directed by the administrative superior.

Minimum qualifications: The minimum qualifications of a Clerk-Typist shall include the ability to type accurately at an acceptable rate of speed; the ability to learn quickly and independently; being detail-oriented and flexible; having good verbal skills; and knowledge of general office procedures and practices.

Committee Clerk

Duties and responsibilities: Committee Clerks shall be appointed by the respective Committee Chairs or Vice Chairs to carry out their respective duties and responsibilities, as authorized by the Speaker. Committee Clerks shall be responsible for coordinating and overseeing the activities of committees and such subcommittees as may be formed. Under the general supervision and direction of the Committee Chair or Vice Chair, the Committee Clerk shall:

- (1) Coordinate meetings, hearings, and site visits;
- (2) Process a variety of correspondence;
- (3) Assemble and prepare bills and testimonies for hearings;
- (4) Draft resolutions and committee reports;
- (5) Digest legislation referred to the committee;
- (6) Review reports and recommend courses of action to the Committee Chair or Vice Chair;
- (7) Handle inquiries concerning the status of legislation referred to the committee; and
- (8) Perform related duties as required.

Minimum qualifications: The minimum qualifications of the Committee Clerk shall include familiarity with the legislative process and government services; the ability to deal with government officials and the general public; knowledge of office procedures and practices; and the ability to review and draft legislative documents.

Committee Secretary

Duties and responsibilities: Committee Secretaries shall be appointed by the respective Committee Chairs or Vice Chairs, as authorized by the Speaker to work during the session only. Under the general supervision and direction of the Committee Chair, Vice Chair, or designee, a Committee Secretary shall provide clerical and secretarial services, including:

- (1) Maintaining correspondence and report files pertaining to a committee's activities;
- (2) Providing typing and clerical services in support of the committee's work;
- (3) Handling inquiries concerning the status of legislation referred to the committee; and
- (4) Performing related duties as directed.

Minimum qualifications: The minimum qualifications of the Committee Secretary shall include the ability to type accurately at an acceptable rate of speed; knowledge of office procedures and practices; and the ability to deal with a variety of secretarial tasks and to solve problems as they arise.

Director of Research

Duties and responsibilities: The partisan caucus leaders, subject to the approval of the Speaker, shall appoint their respective Directors of Research to administer and manage the operations of their respective partisan research and legal service offices in the House. The Directors shall:

- (1) Perform highly responsible administrative and coordination functions, including legislative and governmental consultation and research, liaison, and drafting support for the House;
- (2) Assist in the formulation of internal policy;
- (3) Identify issues, trends, and problems of significance;
- (4) Undertake important studies of various subjects;
- (5) Coordinate training sessions for legislators and legislative staff;
- (6) Review and evaluate final work products of subordinates to determine conformance with stated objectives, assess the adequacy and quality of the work performed, and make revisions as necessary; and
- (7) Perform related duties as required.

Minimum qualifications: The minimum qualifications of the Director shall include a graduate or bachelor's degree from an accredited law school, college, or university; or equivalent relevant work experience.

The Director shall be very familiar with the legislative process; legislative drafting techniques; and federal, state, and county laws, rules, organization, functions, operations, policies, programs, and procedures.

In addition, the Director shall have the ability to supervise subordinates; maintain confidentiality; deal effectively with government officials; apply ingenuity and inventiveness in devising solutions to problems of unusual difficulty and precedent-establishing nature; work effectively under pressure and meet deadlines; train and develop the skills of professional and clerical personnel; and write and communicate clearly, concisely, and effectively.

Fiscal Analyst

Duties and responsibilities: Fiscal Analysts shall be appointed to work during the session only by the Finance Committee Chair, subject to the approval of the Speaker. Under the general supervision and direction of the Budget Chief and the Finance Committee Clerk, Fiscal Analysts shall assist the House in the research and analysis of financial information including:

- (1) Performing review and analysis of state budget documents and funding requests submitted by state departments, agencies, and legislative committees;
- (2) Presenting findings and recommendations to the Finance Committee Chair and committee members for decision-making;

- (3) Preparing budget documents, committee reports, and related worksheets for review and approval by the Legislature; and
- (4) Performing related duties as directed.

Minimum qualifications: The minimum qualifications of a Fiscal Analyst shall include research experience in governmental financing including taxation; an understanding of public financial administration concepts; familiarity with the State's revenue system; a general understanding of planning-programming-budgeting concepts; a general understanding of economic and statistical theories as they apply to governmental finances; and familiarity with state and county programs and the legislative process and operations.

In addition, Fiscal Analysts shall be able to learn quickly and work independently; be highly motivated and detail-oriented; and possess good verbal and writing skills.

Information Resources Coordinator

Duties and responsibilities: Information Resources Coordinators shall be appointed by the Chief Clerk, subject to the approval of the Speaker. Information Resources Coordinators shall be responsible for the administration, planning, and coordination of staff services relating to information systems in the House. Under the general supervision and direction of the Chief Clerk, Information Resources Coordinators may receive work assignments that:

- (1) Involve the analysis and automation of legislative systems where the design involves specified requirements and a fairly direct translation of existing work methods to computer processes;
- (2) Involve the development and coordination of user training programs and other user support systems; and
- (3) Require the application of technical knowledge, skill, and sound judgment in the use of fundamental data processing system analyses principles, techniques, standards, and guides.

Minimum qualifications: The minimum qualifications of an Information Resources Coordinator shall include knowledge of computers, data storage media or devices, and other peripheral equipment, their capabilities and general processes; a thorough knowledge of records and information management technology; in-depth knowledge of the legislative process and in the processing of information relating to legislative operations; the ability to think logically, analyze data, and draw logical conclusions; the ability to work in close cooperation with personnel and legislators in the Legislature; and strong verbal and written communication skills.

Information Resources Specialist

Duties and responsibilities: Information Resources Specialists shall be appointed by the Chief Clerk, subject to the approval of the Speaker. Under the general supervision and direction of an Information Resources Coordinator, Information Resources Specialists may provide user support services to the agencies and offices of the House and may be assigned to activities and projects that compile and disseminate information of the automated systems of the House. The duties of an Information Resources Specialist may include:

- (1) Serving as a liaison with legislative staff offices and assisting staff members in their operation and use of hardware issued;
- (2) Serving as a liaison with legislative staff offices to obtain data for the production of the status database;
- (3) Responding to assistance inquiries from legislative staff members, and assisting in the resolution of problems;
- (4) Assisting in the training of legislative staff and in the compilation of user support manuals and other materials;
- (5) Supervising data entry operations;
- (6) Planning and coordinating the indexing of bills and resolutions introduced during the legislative session; and
- (7) Performing related duties as required.

Minimum qualifications: The minimum qualifications of an Information Resources Specialist shall include knowledge of computers, data storage media or devices, and other peripheral equipment, their capabilities and general processes; familiarity with the legislative process and the processing of information relating to legislative operations; the ability to respond to user assistance requests; the ability to think logically and draw logical conclusions; the ability to communicate effectively and courteously; and the ability to adapt to changing circumstances and situations quickly.

Journal Clerk

Duties and responsibilities: The Journal Clerk shall be appointed by the Chief Clerk, subject to the approval of the Speaker. Under the general supervision and direction of the Chief Clerk, the Journal Clerk shall be responsible for recording actions taken in the House for publication in daily and permanent Journals.

Minimum qualifications: The minimum qualifications of the Journal Clerk shall include the ability to work effectively under pressure and meet deadlines; considerable knowledge of the management and supervisory techniques of the clerical aspects of the legislative process; proficiency in grammar, spelling, and office practices and procedures; and the ability to supervise and manage employees.

Legislative Administrative Assistant

Duties and responsibilities: Legislative Administrative Assistants may be appointed by the respective partisan Directors of Research or legislators in leadership positions, subject to the approval of the Speaker. Under the general supervision and direction of an Administrative Services Manager, Director of Research, legislator, or designee, Legislative Administrative Assistants may be required to:

- (1) Review, edit, and format various legislative and administrative documents and publications;
- (2) Assist in the research and drafting of legislative documents, including conducting statutory checks;
- (3) Maintain internal documents and databases;

- (4) Assist in the maintenance of various office equipment and machines;
- (5) Exercise courtesy, tact, and judgment in dealing with callers, other employees and officials, members of the Legislature, and the general public; and
- (6) Perform other duties as assigned.

Minimum qualifications: The minimum qualifications of a Legislative Administrative Assistant shall include good knowledge of grammar, spelling, and the principles and practices of office management; good verbal skills; computer and Internet research skills; knowledge in the operation and maintenance of various office appliances and equipment; the ability to learn quickly and work independently; and the ability to be flexible, thorough, dependable, and work well with staff.

In addition, a Legislative Administrative Assistant shall have the ability to plan, organize, and carry out a broad range of office-related functions; develop a working knowledge of legislative procedures and practices; work effectively under pressure and meet deadlines; type accurately at an acceptable rate of speed; prepare and edit legislative documents, legal memoranda, and complex correspondence requiring judgment as to appropriate format and conformance to the rules of grammar and style; maintain confidentiality; communicate effectively and deal tactfully with others; and have the willingness to learn new programs and procedures.

Legislative Analyst

Duties and responsibilities: Legislative Analysts shall be appointed by the respective partisan Directors or legislators in leadership positions, subject to the approval of the Speaker. Under the general supervision and direction of the Director, legislator, or designee, Legislative Analysts may be required to:

- (1) Perform legislative research and analysis, including the preparation of memoranda, legislation, and related documents;
- (2) Prepare comprehensive reports and studies; and
- (3) Perform related duties as required.

Minimum qualifications: The minimum qualifications of the Legislative Analyst shall include knowledge of state and county laws, organization, functions, operations, policies, and programs; knowledge of principles of public administration and finance; familiarity with research and statistical methodology; familiarity of trends and developments pertinent to a broad range of subject areas; and the ability to write and communicate clearly, concisely, and effectively.

Legislative Attorney

Duties and responsibilities: Legislative Attorneys shall be appointed by the Chief Attorney, the respective partisan caucus leaders, Committee Chairs, or the Majority Director of Research subject to the approval of the Speaker. Under the general supervision and direction of the Chief Attorney, partisan caucus leaders, Committee Chair, or the Majority Director of Research, Legislative Attorneys may be required to:

- (1) Conduct varied research requiring legal expertise and the exercise of independent judgment in evaluating state statutes or in preparing trial briefs, pleadings, and oral arguments for cases brought before state or federal courts;
- (2) Prepare and draft contracts, agreements, legislation, and related documents;
- (3) Supervise and/or coordinate legislative research on legal matters;
- (4) Conduct legal reviews of legislation; and
- (5) Perform related duties as directed.

Minimum qualifications: The minimum qualifications of the Legislative Attorney shall include a graduate degree (J.D.) from an accredited law school, successful completion of the Hawaii Bar examination, and a license to practice law in the state and federal district court.

In addition, the Legislative Attorney shall demonstrate familiarity with federal, state, and county laws, rules, organization, functions, operations, policies, programs, and procedures; knowledge of legislative drafting techniques; familiarity with precedent setting opinions rendered by courts that may have an impact on state and county government; the ability to maintain confidentiality; and the ability to write and communicate clearly, concisely, and effectively.

Legislative Office Manager

Duties and responsibilities: Legislative Office Managers shall be appointed by individual legislators to manage the affairs of the legislator's office. Under the general supervision and direction of a legislative member, a Legislative Office Manager shall:

- (1) Perform a variety of information gathering fundamental to all varieties of legislative research;
- (2) Participate intensively in the management and day-to-day operations of the office; and
- (3) Perform related duties as assigned by the member.

Minimum qualifications: The minimum qualifications of the Legislative Office Manager shall include knowledge of office practices and procedures as they relate to legislative operations; the operation and operational maintenance of various office appliances and equipment; basic principles, methodology, and techniques of legislative research; government programs and policies; and the legislative process and operations.

In addition, the Legislative Office Manager shall have the ability to plan, organize, and carry out a broad range of functions, including preparing for public hearings or informational briefings; preparing correspondence, summaries, and congratulatory certificates requiring judgment as to appropriate format and conforming to all the rules of grammar and style; communicating effectively and dealing tactfully with others; maintaining confidentiality; and, for some positions, typing accurately and doing word processing at an acceptable rate of speed.

Printshop Assistant Manager

Duties and responsibilities: Printshop Assistant Managers shall be appointed by the Chief Clerk to work during the session only, subject to the approval of the Speaker. Under the general supervision and direction of the Printshop Manager, the Printshop Assistant Managers shall assist the Printshop Manager to:

- (1) Plan, direct, and supervise the work of printshop operators;
- (2) Ensure that reproduced material meet the standards requested;
- (3) Supervise the collation and binding of reproduced material;
- (4) Develop and maintain a filing system of reproduced material;
- (5) Requisition, issue, and maintain the printshop inventory of supplies; and
- (6) Perform other duties as directed.

Minimum qualifications: The minimum qualifications of Printshop Assistant Managers shall include the ability to supervise employees and to operate, adjust, and care for printshop and copy machines.

Printshop Manager

Duties and responsibilities: The Printshop Manager shall be appointed by the Chief Clerk, subject to the approval of the Speaker. Under the general supervision and direction of the Chief Clerk, the Printshop Manager shall plan, direct, and supervise the work of Printshop Operators. The Printshop Manager shall:

- (1) Ensure that reproduced material meet the standards requested;
- (2) Supervise the collation and binding of reproduced material;
- (3) Develop and maintain a filing system of reproduced material;
- (4) Requisition, issue, and maintain the printshop inventory;
- (5) Plan, direct, and supervise the work of subordinates; and
- (6) Perform related duties as directed.

Minimum qualifications: The minimum qualifications of the Printshop Manager shall include experience in the operation, adjustment, and care of printshop and copy machines; and the ability to effectively supervise employees.

Printshop Operator

Duties and responsibilities: Printshop Operators shall be appointed by the Chief Clerk to work during the session only, subject to the approval of the Speaker. Under the general supervision and direction of the Printshop Manager, Printshop Operators shall assist in printshop operations. Printshop Operators shall:

- (1) Assist in the reproduction of legislative documents;

- (2) Operate paper-cutting and stapling machines;
- (3) Collate reproduced materials;
- (4) Maintain printing facilities and equipment in good operating condition; and
- (5) Perform related duties as required.

Minimum qualifications: The minimum qualifications of the Printshop Operator shall include being physically fit to assume the duties assigned.

Program Analyst

Duties and responsibilities: Program Analysts shall be appointed to work during the session only by the Finance Committee Chair, subject to the approval of the Speaker. Under the general supervision and direction of the Research Chief and the Finance Committee Clerk, Program Analysts shall identify issues, trends, and problems of significance to the House. Program Analysts shall:

- (1) Review and digest proposed legislative measures;
- (2) Monitor public hearings and track legislative measures that are referred to the Finance Committee;
- (3) Draft bills, resolutions, and committee reports; and
- (4) Perform related duties as directed.

Minimum qualifications: The minimum qualifications of the Program Analyst shall include knowledge of government policies and programs; an understanding of public financial administration concepts; familiarity with research and statistical methodology; and familiarity with the legislative process.

In addition, Program Analysts shall be able to learn quickly and work independently; be highly motivated and detail-oriented; and possess good verbal and writing skills.

Receptionist

Duties and responsibilities: Receptionists may be appointed by a legislator, the Chief Clerk, the Sergeant-at-Arms, or a director of a partisan office to provide general office support and clerical services, subject to the approval of the Speaker. Depending on which office the Receptionist is assigned to, these duties may include any or all of the following:

- (1) Provide general typing and clerical services;
- (2) Provide receptionist services and exercise tact and good judgment in dealing with callers, visitors, other employees and officials, members of the Legislature, and members of the general public; and
- (3) Perform related duties as directed by the administrative superior.

Minimum qualifications: The minimum qualifications of a Receptionist shall include the ability to learn quickly and work independently; being detail-oriented and flexible; having good verbal skills; and knowledge of general office procedures and practices.

Research Chief

Duties and responsibilities: The Research Chief shall be appointed to work in the Finance Committee by the Finance Committee Chair, subject to the approval of the Speaker. Under the general supervision and direction of the Finance Committee Clerk and Finance Committee Chair, the Research Chief shall supervise and coordinate the work of program analysts and perform related duties.

Minimum qualifications: The minimum qualifications of the Research Chief shall include knowledge of government policies and programs; an understanding of public financial administration concepts; familiarity with research and statistical methodology; and familiarity with the legislative process.

In addition, the Research Chief shall have excellent planning, supervisory, and organizational skills; work effectively under pressure and meet deadlines; communicate clearly, concisely, and effectively; exercise considerable tact and judgment; and maintain confidentiality.

Researcher

Duties and responsibilities: Researchers may be appointed by legislators as required by the House to work during the session only, subject to the approval of the Speaker. A Researcher shall assist in the gathering of information fundamental to all varieties of legislative research. The work requires the ability to conduct rudimentary research and analyses, and to communicate information accurately in a written or oral form.

Minimum qualifications: Researchers shall have knowledge of basic principles of research, methodology, and techniques of legislative research (including the use of state statutes and county ordinances); government programs and policies; and the legislative process and operations.

Secretary

Duties and responsibilities: Secretaries may serve in the offices of legislators, the Chief Clerk, the Sergeant-at-Arms, and partisan offices, as required by the House and subject to the approval of the Speaker. A Secretary shall assist in the management of the office served. Under the general supervision and direction of an Administrative Services Manager or immediate supervisor, Secretaries shall:

- (1) Provide general secretarial and clerical services;
- (2) Exercise tact and judgment in dealing with callers, visitors, other employees and officials, members of the Legislature, and members of the general public; and
- (3) Perform other related duties as assigned.

Minimum qualifications: The minimum qualifications of a Secretary shall include knowledge of grammar, spelling, general office practices and procedures; the ability to operate and maintain various office appliances and equipment; and knowledge of secretarial principles and practices.

In addition, a Secretary shall have the ability to plan, organize, and carry out a broad range of secretarial and clerical functions; develop a working knowledge of legislative procedures and practices; work effectively under pressure and meet deadlines; type accurately at an acceptable rate of speed; prepare and edit legislative documents, legal

memoranda, and complex correspondence requiring judgment as to appropriate format and conformance to the rules of grammar and style; maintain confidentiality; and communicate effectively and deal tactfully with others.

Sergeant-at-Arms

Duties and responsibilities: The position of Sergeant-at-Arms shall be filled in accordance with the "Rules of the House of Representatives." Under the general direction of the Speaker, the Sergeant-at-Arms shall be responsible for supervising property control and the custodial, messenger, security, and postal services of the House. The Sergeant-at-Arms shall also:

- (1) Coordinate the assignment of office space, conference rooms, and parking stalls;
- (2) Assume responsibility for the purchase of office supplies;
- (3) Be responsible for House inventory control systems;
- (4) Distribute keys to authorized House personnel;
- (5) Operate an identification program, including the issuance of badges to all authorized House personnel and volunteers;
- (6) Perform the duties outlined in the "Rules of the House of Representatives" and the "House Administrative and Financial Manual"; and
- (7) Perform related duties as directed by the Speaker.

Minimum qualifications: The minimum qualifications of the Sergeant-at-Arms shall include a substantial knowledge of legislative operations; the ability to supervise and manage large, complex organizations; and experience in and knowledge of facility security, property management, and office procedures and practices.

Service Aide

Duties and responsibilities: Service Aides shall be appointed by the Sergeant-at-Arms to work during the session only, as authorized by the House and subject to the approval of the Speaker. Under the general supervision and direction of the Sergeant-at-Arms, Service Aides assist the Sergeant-at-Arms in providing necessary custodial, security, and messenger services to the House. These duties may include:

- (1) Providing general custodial services;
- (2) Running errands;
- (3) Providing security for buildings and personnel;
- (4) Directing traffic;
- (5) Providing messenger services;
- (6) Controlling the distribution of office supplies; and
- (7) Performing related duties as directed.

Minimum qualifications: The minimum qualifications of the Service Aide shall include being physically fit to assume the duties assigned.

Supply Manager

Duties and responsibilities: The Supply Manager shall be appointed by the Sergeant-at-Arms, subject to the approval of the Speaker. Under the general supervision and direction of the Sergeant-at-Arms, the Supply Manager shall manage and coordinate the provision and inventory of materials, equipment, supplies, and distribution services for the House. The Supply Manager shall also perform related duties as required.

Minimum qualifications: The minimum qualifications of the Supply Manager shall include knowledge of procurement and supply principles, methods, and practices; applicable federal, state, and county laws, rules, and standards; nature, content, and applicability of reference material and other informational data required in the execution of assignments; principles, procedures, techniques, and practices in inventory management and property control; office and storekeeping practices and procedures; and supervisory principles and practices.

In addition, the Supply Manager shall be able to plan, schedule, and organize procurement activities; secure necessary information to provide adequate specifications; initiate and maintain effective relationships with representatives of other governmental agencies, subject-matter specialists, contractors, vendors, and others; and prepare clear and comprehensive reports, records, and correspondence.

Sec. 20.10. Volunteer services. Although volunteers are not employees of the House, House members and agency heads on occasion use the services of volunteers. The Speaker is responsible for the security of the House and the use of volunteers may have legal and financial consequences. Before engaging the services of a volunteer, a House member or agency head shall obtain the prior approval of the Speaker using House Form No. 16A, "Volunteer Working Policy", and House Form No. 16B, "Volunteer Registration", which shall be filed with the Chief Clerk. A copy of House Form No. 16B, "Volunteer Registration", shall be filed with the Sergeant-at-Arms.

In addition to other provisions designated by the Speaker, the following chapters shall apply to volunteers:

- (1) Chapter 3 relating to postage and mailing;
- (2) Chapter 26 relating to the Code of Conduct;
- (3) Chapter 27 relating to the policy on reporting and eliminating disruptive behavior;
- (4) Chapter 28 relating to nondiscrimination on the basis of disability;
- (5) Chapter 30 relating to office supplies, postage, and copy machines; and
- (6) Chapter 32 relating to telephones.

**HOUSE OF REPRESENTATIVES
STATE OF HAWAII**

SAA - VOLUNTEER WORKING POLICY
2007 SESSION (December 1, 2006 to May 3, 2007)

HOUSE MEMBER/AGENCY HEAD acknowledges the responsibility:

1. To provide an orientation to the volunteer regarding the Member's/Agency's office and operations;
2. To assign a supervisor to the volunteer who will be responsible for training, supervision, and evaluation of the volunteer;
3. To specify the duties and responsibilities of the volunteer;
4. To evaluate the volunteer's performance on a regular basis;
5. To accept the volunteer as part of the office team; and
6. To provide the volunteer with appropriate recognition for the volunteer's services and to provide letters of recommendation when requested and warranted by performance.

VOLUNTEER acknowledges that the VOLUNTEER is expected:

1. To work a specified number of hours or to notify the supervisor in advance if unable to work;
2. To be prompt and reliable in reporting to work;
3. To follow guidelines and policies established by the Member/Agency and to honor confidentiality of information;
4. To perform duties specified by the supervisor without receipt of monetary compensation; and
5. To accept the Member's/Agency's right to dismiss any volunteer when the volunteer is no longer needed or for poor performance, including poor attendance.

We acknowledge that we have read and understand these policies of the House of Representatives.

Signature of HOUSE MEMBER/AGENCY HEAD

Signature of VOLUNTEER

Print Name of House Member/Agency Head

Print Name of Volunteer

Date

Date

VOLUNTEER SERVICES ACKNOWLEDGED:

SPEAKER OF THE HOUSE OF REPRESENTATIVES

**HOUSE OF REPRESENTATIVES
STATE OF HAWAII**

SAA - VOLUNTEER REGISTRATION

2007 SESSION (December 1, 2006 to May 3, 2007)

DATE:
MEMBER/AGENCY:
NAME OF VOLUNTEER:
HOME ADDRESS:
HOME PHONE NO.:
CELL/PAGER NO.:
VOLUNTEER IS 18 YEARS OF AGE OR OLDER: YES <input type="checkbox"/> NO <input type="checkbox"/>

IN CASE OF EMERGENCY, CONTACT:

NAME:
PHONE NO.:
ALTERNATE PHONE NO.:

PART VII PERSONNEL ADMINISTRATION

INTRODUCTION

This part establishes the policies and procedures relating to personnel administration. It covers staff appointments, hours of work, leaves of absence, employee welfare, terminations, and code of conduct. Personnel matters relating to employee classification are discussed in this manual.

Chapter 21 Staff Appointments

Sec. 21.1. Appointments; general. Appointments to positions authorized in the budget shall be made by the appointing authority designated in this manual. A dependent child of a House legislator shall not be eligible for appointment to a position in the legislator's office.

Sec. 21.2. Reporting of staff appointments. The appointing authority shall report staff appointments on House Form No. 17, "Staff Appointments". The word "END" should be entered immediately after the last entry on House Form No. 17 to prevent the addition of unauthorized names. The completed House Form No. 17 is to be forwarded to the House Accountant. The House Accountant shall review the form to ensure that the appointments are within budgetary dollar and position limits. Any deviations shall be brought to the attention of the Speaker.

Sec. 21.3. Preparation of personnel forms. All new employees are required to contact the House Accountant to complete the following personnel forms:

- (1) Employee's Withholding Allowance Certificate (Federal Form W-4);
- (2) Employee's Withholding Allowance Exemption and Status Certificate (State Form HW-4);
- (3) Employment Eligibility Verification (Federal Form I-9); and
- (4) House Form No. 18, "Personnel Data".

In addition to the above forms, permanent employees shall complete the personnel forms necessary for enrollment in the employee benefit programs covered in section 24.1 of this part.

Chapter 22 Hours of Work

Sec. 22.1. General. The normal hours of work for full-time permanent and temporary employees of the House are from 8:00 a.m. to 5:00 p.m., Monday through Friday; provided that the Speaker may establish other normal hours of work for any or all employees of the House as the Speaker shall deem necessary and proper for the purposes of the House; and provided further that employees shall be expected to work additional hours to meet workload or legislative demands. Permanent and temporary employees shall not be paid additional compensation for work in excess of the normal working hours, except as may be required by federal wage and hour laws.

Sec. 22.2. Holidays. Employees shall not be required to work on those state holidays designated in section 8-1, HRS, except when workload or legislative demands require them to do so. Special holidays granted to State employees by the Governor may be granted to employees at the discretion of the Speaker. Employees shall be entitled to pay for holidays. Part-time employees shall be entitled to pay for holidays that fall on their scheduled workday.

Chapter 23 Leaves of Absence

Sec. 23.1. Scope of chapter. This chapter establishes the policies and procedures governing vacation, sick leave, funeral leave, and other types of leave for employees.

Sec. 23.2. Vacation. Full-time permanent employees of the House shall earn vacation credits with pay at a rate of one and three-quarters working days for each month of service. Employees shall take workload and legislative demands into consideration when scheduling their vacations. No vacations will be permitted when the Legislature is in session unless approved by the Speaker.

Sec. 23.3. Sick leave. Permanent employees of the House shall earn sick leave credits with pay at the rate of one and three-quarters working days for each month of service.

Sec. 23.4. Family leave. Employees are entitled to a total of four weeks of family leave during any calendar year upon the birth of a child of the employee or the adoption of a child, or to care for the employee's child, spouse, reciprocal beneficiary, or parent with a serious health condition in a manner consistent with Chapter 398, HRS.

Sec. 23.5. Funeral leave. Employees shall be granted three days' leave with pay upon the death of any member of their immediate families. The definition of "immediate family" shall include the spouse, children, parents, siblings, father-in-law, mother-in-law, and grandparents, of the officer or employee. Part-time employees shall be granted funeral leave with pay only when such leave falls on their scheduled workdays.

Sec. 23.6. Other leaves. Permanent employees of the House shall be granted military, jury, and other types of leave allowable by law for other State employees.

Sec. 23.7. Leave requests. Whenever a permanent employee requests a leave of absence or returns to work after an illness, the employee shall complete House Form No. 19, "Application for Leave of Absence". The request shall be submitted to the Speaker through the administrative superior of such employee for approval by the Speaker and forwarded to the House Accountant. In reviewing each employee's request, the Speaker shall verify with the House Accountant that the employee has sufficient leave credits accumulated to cover the number of days of leave requested. The Speaker may delegate the Speaker's authority to approve leave of absence to an administrative superior.

Sec. 23.8. Leave extensions or early returns. Whenever an employee on leave wishes to extend the employee's leave or returns to work prior to the expiration of the employee's approved leave period, the following provisions shall be applicable:

- (1) The employee shall contact the employee's administrative superior and obtain approval, and the administrative superior shall, in writing, submit justification for such approval to the Speaker;
- (2) Upon returning to work, the employee shall complete another House Form No. 19 reflecting the actual days of leave taken. This request shall be marked

"Amended". The amended request shall be approved by the Speaker or the administrative superior, if the authority to approve has been delegated, and forwarded to the House Accountant; and

- (3) The House Accountant shall adjust the employee's leave records to reflect the change in the number of leave days taken due to an extension or early return.

Sec. 23.9. Maintenance of leave records. The House Accountant shall maintain a leave record for each permanent employee of the House. The formal leave records such as those kept for permanent employees need not be maintained for temporary employees.

Chapter 24 Benefit Programs

Sec. 24.1. Employee benefit programs. In accordance with the provisions of section 22-4, HRS, a permanent employee of the House is entitled to participate in the employee benefit programs afforded all government employees of the State. These programs and the applicable statutory provisions are as follows:

- (1) Retirement system (mandatory participation) – Chapter 88, HRS;
- (2) Health insurance – Chapter 87A, HRS;
- (3) Dental insurance (employee/spouse) – Chapter 87A, HRS;
- (4) Dental insurance (children of employees) – Chapter 87A, HRS;
- (5) Drug insurance – Chapter 87A, HRS;
- (6) Vision insurance – Chapter 87A, HRS;
- (7) Group life insurance – Chapter 87A, HRS;
- (8) Premium conversion plan;
- (9) Credit union;
- (10) U.S. Savings bonds payroll deduction plan;
- (11) Deferred compensation plan;
- (12) Island Flex Flexible Spending Accounts for dependent care and medical spending;
and
- (13) Long-term care benefits plan.

Information on the programs shall be on file with the House Accountant. The House Accountant is responsible for the preparation and processing of the appropriate state documents in enrolling all eligible employees in these benefit programs.

Chapter 25 Termination

Sec. 25.1. Involuntary termination. The employment of an employee, who is insubordinate or is derelict in the performance of duties or whose work has not met the standards required, may be terminated by:

- (1) The legislator, if the employee is an employee appointed by and under the supervision of the legislator;
- (2) The Speaker, in consultation with the Chair of the Committee on Legislative Management, if the employee is a temporary employee not under the direct supervision of a legislator; or
- (3) The Speaker, if the employee is a permanent employee and not an employee appointed by and under the direct supervision of a legislator.

A permanent employee shall be given at least two weeks' notice. The amount of advance notice given to a temporary employee shall be at the discretion of the person authorized to terminate the employment.

Sec. 25.2. Voluntary termination. A permanent employee who voluntarily terminates employment shall give a minimum of two weeks' notice to the employee's appointing authority. A temporary employee terminating prior to the end of the scheduled termination date is expected to provide sufficient advance notice so as to enable the appointing authority to find a suitable replacement.

Sec. 25.3. Reporting of staff termination. Whenever an employee termination occurs, the appropriate appointing authority shall complete House Form No. 20, "Notice of Employee Termination", and forward it to the House Accountant. The House Accountant shall remove the terminated employee from the House payroll and make the necessary pay adjustments.

Sec. 25.4. Disposition of employee benefits—permanent employees. A permanent employee shall contact the House Accountant prior to the effective date of the employee's termination to settle the final disposition of matters such as vacation pay or transfer and continuation of membership in the retirement system and health fund. The House Accountant shall be responsible for preparing and processing the appropriate personnel forms required to settle the personnel affairs of the terminating employee.

Chapter 26 Code of Conduct

Sec. 26.1. Confidential and privileged information. No employee shall attempt to take personal advantage of the employee's position or divulge to others information which might be considered confidential or privileged in nature. When any doubt exists, an employee is encouraged to discuss the matter with the employee's administrative superior before any problems arise.

Chapter 27 Policy on Reporting and Eliminating Disruptive Behavior

Sec. 27.1. Policy statement. It is the policy of the House to promote a safe environment for all members and employees. The House is committed to working with its members and employees to maintain a work environment free from violence, threats of violence, harassment, intimidation, and other disruptive behavior. Each member and employee shall receive a copy of the House's policy on reporting and eliminating disruptive behavior.

Sexual harassment is always considered disruptive behavior, and the House will not tolerate it. Sexual harassment includes harassment that involves the conditioning of employment or its benefits on sexual favors as well as harassment involving conduct of a sexual nature that creates a hostile, disruptive, or offensive working environment.

Violence, threats, harassment, intimidation, and other disruptive behavior in our workplace will not be tolerated. All reports of incidents will be taken seriously and dealt with appropriately.

Sec. 27.2. Reporting disruptive behavior. (a) An employee who witnesses conduct that is offensive to public order shall report such disruptive behavior immediately to:

- (1) The employee's immediate supervisor;
- (2) The employee's next higher level supervisor; or
- (3) The Speaker or the Speaker's designee.

(b) Conduct that is offensive to public order includes, but is not limited to, behavior that is perceived to be violent, threatening, harassing, intimidating, or in any way disruptive to the workplace.

(c) All House members have and every supervisor has a duty to ensure that no employee who reports or complains of any disruptive behavior is subject to any type of retaliation or reprisal.

(d) In an emergency situation, an employee shall report the disruptive behavior directly to Capitol Security at 586-1352 or to the police at 911.

(e) Each employee who receives a protective or restraining order is required to provide the Chief Clerk's Office with a copy of such order.

Sec. 27.3. Eliminating disruptive behavior. All reports of disruptive behavior shall be investigated promptly and in a confidential manner. Supervisors who receive complaints about disruptive behavior shall immediately report the complaint to the Speaker or to the Speaker's designee.

Upon notification of a complaint, the Speaker or the Speaker's designee shall immediately begin an investigation. The House may utilize an independent investigator. The Speaker or the Speaker's designee shall obtain from the independent investigator engaged a written summary of the guidelines for the investigation of the complaint.

If a complaint is found to be valid, the Speaker or the Speaker's designee shall take appropriate corrective action to discipline the offender, and to prevent the recurrence of the disruptive behavior. The type of disciplinary action taken will vary depending upon the severity of the conduct but shall be significant enough to deter recurrence. Corrective actions may range from counseling and reprimand to termination of employment. For House members, sanctions may include loss of committee assignments, or other disciplinary action by the House, including expulsion. If the source of the disruptive behavior is a member of the public, corrective action to be taken may include barring the person from the premises, terminating business relationships with that individual, and/or prosecution of the person involved.

Chapter 28 Nondiscrimination on the Basis of Disability

Sec. 28.1. Policy statement. It is the intent of the House to effectuate the Americans with Disabilities Act of 1990. No employee shall be discriminated against in hiring, promotion, discharge, pay, fringe benefits, or other aspects of employment on the basis of disability. Nor shall any individual be discriminated against on the basis of disability in the full and equal enjoyment of the services, programs, and activities of the House.



HOUSE OF REPRESENTATIVES

STATE OF HAWAII
STATE CAPITOL
HONOLULU, HAWAII 96813

PERSONNEL DATA

Mr./Ms. _____
Last First Middle

Residence Address: _____

Mailing Address: _____

Home Phone Number: _____

Cell Phone: _____

Are you a retired from the State or City & County? Yes _____ No _____

IN CASE OF EMERGENCY, NOTIFY:	
Name	Phone
1.	
2.	
3.	

Please notify the House Accounting Office of any future changes regarding your personnel data.

APPLICATION FOR LEAVE OF ABSENCE

Date: _____

I, _____, apply for a leave of absence as follows:
(PRINT YOUR NAME CLEARLY)

a. WITH PAY, charged to _____ of _____ working hours
(TYPE OF LEAVE)*

for the calendar period from _____
(MONTH) (DAY) (YEAR)

to _____
(MONTH) (DAY) (YEAR)

b. WITHOUT PAY, for the purpose of _____ of _____ working hours
(TYPE OF LEAVE)*

for the calendar period from _____ to _____
(MONTH) (DAY) (YEAR) (MONTH) (DAY) (YEAR)

(SIGNATURE OF EMPLOYEE)

Date: _____ Approval _____ recommended.
(IS) (IS NOT)

(SIGNATURE OF SUPERVISOR)

Date: _____ Approval _____ recommended.
(IS) (IS NOT)

(SIGNATURE OF SPEAKER)

THE USE OF THIS SECTION IS NOT MANDATORY. THE HOUSE WILL UTILIZE THIS SECTION AT LEAST ONCE A YEAR.

LEAVE STATUS OF EMPLOYEE

VACATION

SICK LEAVE

1. Credits accumulated as of Jan. 1, this year.....	_____	_____
2. PLUS credit earned from Jan. 1 to date	_____	_____
3. Total credits to date.....	_____	_____
4. LESS leave taken from Jan 1. to date	_____	_____
5. NET or unused leave credit as of this date.....	_____	_____
6. Number of days leave taken LAST YEAR	_____	_____

INSTRUCTIONS

1. This form is to be retained by the House for its use.
2. One copy of this form will be given to the employee who has taken a leave.
3. Submit the signed and completed application form to the Accounting Office.

All full-time permanent employees requesting sick leave for more than five (5) consecutive work days, must obtain a physician's note that must accompany this form for processing.

* Types of leaves: vacation, sick, family leave, funeral, military, education, sabbatical, etc.

HOUSE OF REPRESENTATIVES
State of Hawaii

NOTICE OF EMPLOYEE TERMINATION

The following employee(s) will be terminating their employment as of the date listed below:

<u>Name of Employees</u>	<u>Date of Termination</u>
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____
7. _____	_____

REASON FOR TERMINATION: _____

Legislator/Chair/Administrative Superior

Date

PART VIII PROPERTY CONTROL

INTRODUCTION

This part covers the policies and procedures establishing controls over supplies and equipment and furnishings owned by or leased to the House. The controls are intended to safeguard House property and supplies from theft or unauthorized use.

Chapter 29 Equipment and Furnishings

Sec. 29.1. Scope of chapter. This chapter specifies procedures to be followed in the maintenance of inventory records, the disposal and transfer of House equipment and furnishings, and the accounting for all items under the custody of the House. House equipment includes items such as: calculators, typewriters, copy machines, printing devices, accounting machines, and computer hardware. Furnishings include items such as: desks, file cabinets, bookshelves, and chairs.

Sec. 29.2. Inventory records and reports. The Sergeant-at-Arms shall be responsible for maintaining a complete and accurate inventory listing of equipment and furnishings under the custody of the House. The computer services provided by DAGS shall be used to update and record inventory transactions. All changes to the inventory records resulting from acquisitions, disposals, and transfers during a year shall be reported quarterly to DAGS. DAGS forms shall be used to report changes or transactions for the first three quarters of each state fiscal year. Changes for the fourth quarter are to be included in an annual inventory report, Form AGS 17 (Detail Inventory of Property), to be filed with DAGS. The annual inventory report shall be filed no later than September 15. Instructions for completing the inventory forms are contained in the Comptroller's circulars and addenda.

Sec. 29.3. Identification tag. An identification tag shall be affixed to each item of equipment and furnishing of the House. The identification tag shall have a number and appropriate marking to show that the item is House property. The Sergeant-at-Arms shall maintain a numerical record of the identification numbers used and other pertinent information for the item for House inventory records.

Sec. 29.4. Disposals and transfers. No equipment or furnishing shall be disposed of or transferred unless the disposal or transfer has first been approved by the Speaker. The term "disposal" means sale, trade-in, destruction, or discarding of any House equipment or furnishing. The term "transfer" means a transfer of equipment or furnishing from the House to a state agency or the Senate or a transfer from a state agency or the Senate to the House. Transfer also means the removal of an item of equipment or furnishing from one office location to another within the House. A recommendation for the disposal or transfer of any item shall be accompanied by a full explanation of the reasons and circumstances underlying the recommendation. An inventory item may be removed from one office location to another within the House without the prior approval of the Speaker when the item removed is expected to be returned within a short period of time. A notation of the temporary transfer shall be kept on file in the office from which the item was removed.

Sec. 29.5. Care and safeguard. Legislators, committee chairs, and administrative superiors are responsible for the proper care and safeguard of all House equipment and furnishings located in offices under their control. These individuals are expected to exercise the necessary precautions to prevent or minimize the occurrence of theft, burglary, loss, destruction, or unauthorized use of House property. The Sergeant-at-Arms shall provide legislators, committee chairs, and administrative superiors with a list of all equipment and furnishings under their control and they shall sign such list as acknowledgement of custody. Should any item be discovered to be missing, the Sergeant-at-Arms is to be notified immediately. A report on the missing item shall be made to the Speaker. The report shall include, at a minimum, a description of the item, the office where the item was located, and an explanation of the circumstances surrounding the loss of the item.

Sec. 29.6. Equipment maintenance and repair. The Sergeant-at-Arms has the general responsibility of ensuring that all equipment and furnishings are in proper working condition. Items requiring repair or service shall be brought to the attention of the Sergeant-at-Arms as soon as possible.

Sec. 29.7. Physical count. The Sergeant-at-Arms shall conduct on an annual basis a physical count of all equipment and furnishings of the House. In addition to the annual physical count, the Sergeant-at-Arms shall from time to time take a physical count of equipment and furnishings in specific offices. Any discrepancies shall be reported to the Speaker.

Sec. 29.8. Leased equipment and furnishings. The Sergeant-at-Arms shall maintain a record of equipment and furnishings leased to the House.

Chapter 30 Office Supplies, Postage, Copy Machines, and Certificates

Sec. 30.1. Scope of chapter. This chapter establishes the controls relating to office supplies, postage, and the use of copy machines. It also contains special provisions on the control of office supplies stored in and distributed through the supply room and the use of the postage machine.

Sec. 30.2. General. Office supplies, postage, and the use of copy machines cannot be subjected to exact controls. This is because usage requirements may vary from legislator to legislator and from committee to committee. The use of supplies, postage, and copy machines shall be limited to purposes pursuant to the business of the House, a House committee, or the business of a legislator reasonably related to the legislator's exercise of the legislative functions. Office supplies, postage, and copy machines shall not be used by a legislator for:

- (1) Matters and activities related to election campaigns;
- (2) Personal correspondence and materials such as newsletters; or
- (3) Distribution of materials to the public for survey purposes.

Sec. 30.3. Supply room. The Sergeant-at-Arms shall be responsible for the care and safeguarding of office supplies stored in the supply room; ensuring that an adequate supply of items is on hand at all times, especially during the legislative session; investigating seldom-used items and determining the reasons for such; and making recommendations for the disposal of obsolete supplies to the Chief Clerk.

Office supplies, which include items such as stationery, pens, pencils, staplers, paper clips, and rubber bands, shall be issued from the supply room only upon presentation of a properly completed House Form No. 21, "Supply Request Form". House Form No. 21 must be signed by the legislator, committee chair, or the administrative superior requesting the supplies, and by the employee receiving the supplies. The completed House Form No. 21 shall be filed in a separate folder for each legislator or office by the Sergeant-at-Arms. The Chair of the Committee on Legislative Management may request periodic reports on supply room issues.

Sec. 30.4. Postage machine. The Sergeant-at-Arms shall be responsible for control of the postage machine. Only employees designated by the Sergeant-at-Arms shall have access to and operate the postage machine. The key for the postage machine shall be removed whenever the machine is not in use.

A daily log of postage meter usage shall be maintained by the Sergeant-at-Arms. The format for this log and instructions for maintaining the log are presented in House Form No. 22, "Daily Postage Meter Usage Log". The Chair of the Committee on Legislative Management may request periodic reports on use of postage.

Sec. 30.5. Copy machines. The Sergeant-at-Arms shall be responsible for monitoring the proper use and control of copy machines in custody of the House and shall assign an "access code account" to each legislator's office and staff office of the House to enable its use. Only employees of the House shall have access to coded accounts and operate copy machines.

An accounting of copy machine use shall be maintained by the Sergeant-at-Arms. The Sergeant-at-Arms shall submit a monthly report to the Speaker. The Chair of the Committee on Legislative Management may request periodic reports on the use of copy machine accounts.

Sec. 30.6. Certificates. Certificates are congratulatory documents suitable for framing that are usually presented to worthy individuals during special occasions (e.g., banquet honoring an awardee or contest winner, 60th wedding anniversary, ethnic centennial celebrations, or athletic team honors). The size of the certificate may be either 8 ½" x 11" or 11" x 14".

Each member shall be limited to twenty-five certificates per month, except as approved by the Speaker. Members requesting certificates in excess of the limit shall be charged 80 cents or \$1.50 for each 8 ½" x 11" or 11" x 14" certificate, respectively, in excess of the limit. The costs may be charged against a member's annual allowance.

Chapter 31 Printshop

Sec. 31.1. Scope of chapter. This chapter contains the policies and procedures relating to the control of printshop supplies and printing and distribution of bills from the printshop.

Sec. 31.2. Printshop supplies. The Sergeant-at-Arms shall be responsible for the care and safeguarding of printshop supplies. Printshop supplies include items such as paper, ink, and solutions.

During legislative sessions, detailed records of printshop supplies delivered to the printshop shall be maintained by the Printshop Manager. The Printshop Manager shall periodically verify the balances shown on these records.

Sec. 31.3. Printing and distribution of bills. Printing and distribution of copies of bills shall be limited to a number set by the Speaker. Each legislator desiring extra copies shall complete and submit House Form No. 23, "House Printshop Distribution Request Form", to the

Chief Clerk for approval by the Speaker. Each legislator requesting extra copies shall, upon approval by the Speaker, be responsible for the distribution of such copies.

Sec. 31.4. Record of all matters printed. The Printshop Manager shall maintain a record of all matter printed.

Chapter 32 Telephones

Sec. 32.1. Scope of chapter. This chapter contains the policies and procedures concerning interisland and out-of-state telephone calls.

Sec. 32.2. Interisland calls. To the extent possible, interisland calls shall be placed through the State's CENTREX system. Discretion should be exercised by legislators and employees to keep the number of interisland calls outside the State's CENTREX system to a minimum. Each legislator or employee placing an interisland call outside the State's CENTREX system shall complete and submit to the Speaker's Office House Form No. 24, "Log of Long Distance Charges (Out of State, Inter-Island* & FAX)" at the end of each month that long distance calls are made.

Sec. 32.3. Official legislative business. Interisland calls with charges, out-of-state calls and FAX transmissions, and calls charged to long-distance calling cards issued by the House, made at the expense of the House, shall be allowed only when such calls are made or received pursuant to the conduct of official legislative business when such business cannot be effectively or economically conducted through other means of communication. Each legislator or employee placing or receiving allowable calls or FAX transmissions incurring long-distance charges shall immediately complete House Form No. 24 and submit the form to the House Accountant.

The House Accountant shall ascertain that long-distance or transmission charges listed on the telephone billing are supported by a completed House Form No. 24. Any discrepancies shall be reported to the Speaker and to the member or agency director. The member or agency director shall have 30 days from the date of the notification to clear up the discrepancies. If the discrepancies are not resolved to satisfaction of the Speaker within the 30-day period, the member or agency director shall be personally responsible for reimbursement of the long-distance charges. If the House is not appropriately reimbursed, long-distance privileges for the offending office shall be discontinued. Members shall not use legislative allowance funds for reimbursement.

HOUSE OF REPRESENTATIVES

SAA – Supply Request Form (2007)

Requested by Representative or Office		Date	
QUANTITY	DESCRIPTION	QUANTITY	DESCRIPTION
Ea.	Binder – 3 Ring	Rm.	Paper, 8 ½ x 14, White
Ea.	Calendar Refill, Desk	Ea.	Pen – Ball point-black
Ea.	Calendar Stand	Ea.	Pen – Felt-Black (F)(M)
Bx	Clips, Binder – Sml. or Med.	Ea.	Pen – Felt-Blue (F)(M)
Bx	Clips, Paper – Large or Jumbo	Ea.	Pen – Felt-Red (F)(M)
Bx	Computer – CD-R, 700MB (10)	Ea.	Pen – Marker
Bx	Computer – 3.5 Floppy, 1.44MB (10)	Ea.	Pen – Signature Black.
Ea.	Computer – Iomega Zip Disk, 100MB	Bx.	Pencil #2
Ea.	Correction Liquid	Pad	Post-It-Notes - Small or Large
Ea.	Correction Tape	Ea.	Ribbon-Selectric II or III Typewriter
Bx.	Envelopes	Ea.	Ribbon-Xerox Typewriter
Ea.	Envelopes, Manila Clasp	Bx.	Rubber Bands
Bx.	Fasteners Complete	Ea.	Rubber Cement or Glue Stick
Bx.	Fasteners Bases	Ea.	Ruler
Ea.	Fax Toner	Ea.	Scissors
Bx.	Folders, Hanging	Ea.	Stapler
Bx.	Folders, Manila	Bx.	Staples
Ea.	High Liters	Ea.	Staple Remover
Set	Index, Binder	Ea	Steno Notebook
Pkg.	Index Cards 3 x 5	Ea.	Tablet – Yellow
Pkg.	Index Cards 4 x 6	Pkg.	Tabs – Index – Small or Large
Pkg.	Index Cards 5 x8	Bx.	Tabs, Plastic
Bx.	Labels – File Folder	Ea.	Tape, Masking
Bx.	Labels, Address 30400	Ea.	Tapes, Scotch
Rm.	Letter Head – House of Rep.	Ea.	Telephone Message Book
Ea.	Moisteners	Ea.	Twine (Cone of String)
Rm.	Paper, 8 ½ x 11, White		
Rm.	Paper, 8 ½ x 11, Color		

AUTHORIZED BY REPRESENTATIVE or DIRECTOR _____

RECEIVED BY _____

STATE OF HAWAII
 HOUSE OF REPRESENTATIVES
 DAILY POSTAGE METER USAGE LOG

Date _____

Beg. Unused Balance _____

End Unused Balance _____

Total Usage \$ _____

Operator's Initials	Unused Balance				Total Cost	Charge to
	Beginning Reading		Ending Reading			

Printshop

Distribution Request Form

Request for House Printshop Box distribution services.

Organization

Address

Phone Fax

E-mail

Contact Person

Title

I would like one copy of the following put in my box:

- BILLS/RESOLUTIONS**
- COMMITTEE REPORTS**
- ORDERS OF THE DAY**
- REFERRAL SHEETS**
- JOURNAL**

Do you also have a Senate Printshop Box? YES NO

***NOTE:** Copies of hearing notices are now available via fax or e-mail transmission. To be placed on the fax mailing list, contact the House Sergeant-at-Arms office at 586-6500 (phone) or 586-6501 (fax). To sign up for e-mail, register at www.capitol.hawaii.gov.

All legislative documents may be viewed and/or printed from www.capitol.hawaii.gov.

Please return this form to:

Ms. Patricia Mau-Shimizu, Chief Clerk
House of Representatives
State Capitol, Room 027
Honolulu, HI 96813
Telephone: (808) 586-6400 Fax: (808) 586-6401

Assigned Box

No. _____

**STATE OF HAWAII
HOUSE OF REPRESENTATIVES**

**Log of Long Distance Charges
(International, Out-of-State, Inter-Island *
(Lanai and Molokai only), and FAX)**

Representative/Agency: _____ Month/Year: _____

Call Date	Call Time	House Phone # Call was placed or received	Party Called (Name, Title, Organization)	Area Code & Number called	Purpose of Call	Printed Name of Authorized Caller

CERTIFICATION: I hereby certify that these call(s) were for official legislative business, *All calls made to Lanai and Molokai and that such business could not have been effectively or economically and Inter-island calls using "9-1-808-000-0000" format. conducted through other means of communication.

Authorized by: _____ Legislator or agency director Approved by: _____ Speaker

Refer to House Manual, Page 80, Sec. 32.3, for policies and procedures concerning out-of-state telephone calls and taxes.

**PART IX
UTILIZATION OF PHYSICAL FACILITIES**

INTRODUCTION

This part establishes the policies and procedures governing the utilization of certain physical facilities at the State Capitol.

Chapter 33 Parking

Sec. 33.1. General. Assignment of available parking stalls shall be restricted to legislators and legislative employees. The Sergeant-at-Arms shall be responsible for assigning specific parking stalls to all legislators and eligible employees and shall maintain a record of all parking assignments.

Sec 33.2. Legislators. Each legislator shall be entitled to a reserved parking stall in the State Capitol basement. The parking stall shall be reserved for the legislator's exclusive use during the legislator's term of office.

Sec. 33.3. Employees. Permanent employees requesting a parking stall shall be assigned a reserved parking stall. Temporary employees shall be assigned available parking stalls on the basis of parking allotments made to legislators, committee chairs, and other House offices by the Sergeant-at-Arms. Each legislator, committee chair, or administrative superior shall submit to the Speaker's designee the names of the temporary employees who are to be assigned parking. The Sergeant-at-Arms is responsible for ensuring that each legislator, committee chair, or administrative superior does not exceed the appropriate allotment of parking spaces.

Employees who are assigned parking shall not transfer this privilege to others. Parking fees are to be borne by the employee. The Sergeant-at-Arms shall notify the House Accountant of all parking assignments for the purpose of collecting parking fees through payroll deductions.

Chapter 34 Legislator's Office and Telephone

Sec. 34.1. Legislator's office. Each legislator's office at the State Capitol shall be available for the legislator's use at any time during the legislator's term of office. Legislators are expected to limit the use of their offices to the conduct of legislative business.

Sec. 34.2. Telephone. Telephone service shall be available at all times in each legislator's office for legislative business purposes. The Chief Clerk has the general responsibility of ensuring that all inventoried telephone instruments are in proper working condition. For telephone instruments requiring repair or service, House Form No. 25, "Telephone Repair Request Form", should be filled out and submitted to the Chief Clerk's Office.

Chapter 35 Assignment and Use of Conference Rooms

Sec. 35.1. General. Assignment and use of conference room facilities at the State Capitol shall be limited to legislators; legislative, executive, and judicial departments or agencies; state and county agencies; and individuals or organizations involved with matters pertaining to state and county government. The Speaker shall be responsible for specific assignments and use of conference room facilities for legislative committees. The Sergeant-at-Arms shall be responsible for coordinating and maintaining a conference room schedule and for monitoring the proper use of these facilities. House Form No. 26, "Conference Room Request Form", shall be used for this purpose.

Sec. 35.2. Guidelines. The following are general guidelines on the use of conference rooms:

- (1) The Speaker shall assign conference room use for each committee during the legislative session;
- (2) Legislative committee work has first priority for the use of legislative conference rooms during the legislative session; and
- (3) During the legislative session when a committee chair needs additional conference room time, the committee chair should first negotiate facility availability with the respective bracket chairs utilizing the conference room assigned to the committee chair's bracket. If additional conference room use cannot be negotiated with the bracket chairs, then the requesting chair should negotiate facility availability with the chairs in other brackets.

TELEPHONE REPAIR REQUEST FORM HOUSE OF REPRESENTATIVES

1. Complete sections 1 through 7 of this form.
2. Send the completed form to the House Chief Clerk's Office.
3. One form per request.

1. Requesting Office/Agency:		2. Date of Request:
3. Contact Person:	4. Room Number:	5. Contact Phone Number:
6. Problem Phone Number:		
7. Detailed Description of Problem:		
<hr/> <hr/> <hr/>		

DO NOT WRITE IN THE AREA BELOW

Date Received:	Received by:
Reported to ICSD Yes <input type="checkbox"/> No <input type="checkbox"/>	ICSD Report taken by:
Reference Number:	Date Completed:
Action Taken:	
<hr/> <hr/> <hr/>	
Approval:	
<hr/> Patricia Mau Shimizu	

HOUSE OF REPRESENTATIVES
SAA - CONFERENCE ROOM REQUEST FORM (2007)

DATE: _____

TO: Sergeant at Arms

FROM: _____

ADDRESS: _____

CONTACT PERSON: _____ PH. #: _____ FAX #: _____

REQUESTING USE OF CONFERENCE ROOM / AUDITORIUM:

#309 #312 #325 #329 #423 Auditorium

Date of Use: _____ Event Time Start: _____ Time End _____
Set-up Time _____ End of Break-down _____
Number of Persons Attending: _____

Purpose: _____

Signature: _____
Speaker of the House, or other Legislator

Special requests: 1. *Air conditioning: Yes or No

Specific time: _____ to _____

* * * * *

Note: All requests will be subject to availability of services and/or equipment **All room requests are NOT guaranteed. First priority is given to House Legislative business and all others are subject to be bumped and reassigned if room is available** The Sergeant-at-Arms Office may sit in all meetings (See provisions on back: #7, in any)
*There may be an hourly charge for air conditioning if requested after regular office hours (Monday-Friday, 6:00 p.m.-5:00 a.m.), Saturday, Sunday and holidays.

* * * * *

Approved: _____ Reassigned to Room No.: _____
Not Approved: _____ Penciled-in Initials _____

Reason _____

Date: _____
Sergeant at Arms (or Authorized Personnel)

NOTE: THE REQUESTOR ASSURES FULL COMPLIANCE WITH THE HOUSE OF REPRESENTATIVES AND DEPARTMENT OF ACCOUNTING AND GENERAL SERVICES' RULES AND REGULATIONS GOVERNING THE OPERATIONS OF STATE FACILITIES AND THE **PROVISIONS LISTED ON THE REVERSE SIDE OF THIS PERMIT**, AND SHALL BE RESPONSIBLE FOR CANCELLATION OR CHANGES. PLEASE NOTIFY OUR OFFICE (PHONE: 586-6500 - FAX: 586-6501) AS SOON AS POSSIBLE TO MAKE THE NECESSARY CORRECTIONS.

SAA – Conference Room Request Form (2007)

SPECIAL PROVISIONS

1. The requestor or requestor's staff must be present at all functions especially if scheduled after hours, weekends and or holidays and responsible for the room and all equipment. Movement of equipment and furniture is prohibited unless authorized by the House Sergeant at Arms. The requestor assumes responsibility for the orderly assembly and use of facilities and will be responsible for any damages done in connection with the activity. Areas will be left clean and all litter created by the group will be collected and removed from the area. In case of damages or clean up not to the satisfaction of the House of Representatives, the House may bill the responsible person to correct deficiencies.

2. The requestor shall at all time with respect to its activities and use of the facilities, use due care for public safety and shall defend and hold harmless and indemnify the House of Representatives, its officers, agents, and employees from and against all claims and demands for damages including claims for property damage, bodily injuries or death arising from, growing out of or caused by any act or omission on the part of the requestor, its officers, agents, or employees in connection with the privileges granted herein.

The requestor further assures the State that all activities are in full compliance with the laws, rules and regulations of the State of Hawaii and the City and County of Honolulu. To assure the requestor proper use of the facilities in compliance with the Code of Ethics, the Sergeant at Arms Office shall have the authority to monitor and attend all meetings and or functions held.

3. Food and other refreshments shall not be prepared, served or consumed in the Auditorium.

4. Soliciting, the sale of gifts, money, goods, or services, are prohibited.

5. The requestor shall provide all necessary equipment and personnel. The approval of this request form does not obligate the House of Representatives in any way to provide these services. All House equipment is to be used by the House of Representatives and must be signed by the Representative only. Staff will **not** be permitted to sign the equipment request form. **NO** Representative signature, **NO** equipment.

6. The requestor shall be responsible for contacting Department of Accounting and General Services, Central Services Division, for air conditioning after normal working hours, week-ends and holidays

7. The Hawaii State Capitol Hours of Operation during Interim are as follows:
> Mondays thru Fridays 6:00 am. To 6:00 p.m.
> Saturdays 8:00 a.m. to 2:00 p.m.
(Elevators shut down to Rotunda)
> Sundays & Holidays CLOSED ALL HOURS

8. Other provisions:

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