

Southern Ohio Council of Governments
Evaluation for Business Manager Certification
(Path 1: Employed by/under contract with county board in position of Business Manager for one year or longer on 12/31/2018)
(OAC 5123-5-08 – effective 1/1/2019)

Last Name: _____ First Name: _____ Middle Name: _____ SSN: _____

Initial (Duration = 5 years)	Subsequent Renewal(s) (Duration = 5 years)	
<input type="checkbox"/> Met <input type="checkbox"/> Not Met Effective 12/31/2018, employed by or under contract with county board in the position of Business Manager for one year or longer.	<input type="checkbox"/> Met <input type="checkbox"/> Not Met Successfully completed, during each year of the five-year period of the preceding Business Manager certification, at least twenty-five hours of continuing professional education which shall include, but is not limited to: (a) Department-provided annual training in cost report preparation described in paragraph (N)(3)(b) of rule 5123-4-01 of the Administrative Code; (b) Rights of individuals with developmental disabilities set forth in section 5123.62 to 5123.64 of the Revised Code; (c) The requirements of rule 5123.2-17-02 of the Administrative Code including a review of health and safety alerts issued by the department since the previous year's training.	

Please refer to highlighted area above for renewal requirements. If you have completed course work not reflected on this evaluation, please contact your supervisor.

Approved: Effective Date: _____ Expiration Date: _____ Processed by: _____ Date Processed: _____
 Disapproved: Comments: _____ Processed by: _____ Date Processed: _____

Southern Ohio Council of Governments
Evaluation for Business Manager Certification
(Path 2: Employed by/under contract with county board in position of Business Manager for less than one year on 12/31/2018)
(OAC 5123-5-08 – effective 1/1/2019)

Last Name: _____ First Name: _____ Middle Name: _____ SSN: _____

Initial (Duration = 1 year)	First Renewal (Duration = 5 years)	Subsequent Renewal(s) (Duration = 5 years)
<input type="checkbox"/> Met <input type="checkbox"/> Not Met Effective 12/31/2018, employed by or under contract with county board in the position of Business Manager for less than one year.	<input type="checkbox"/> Met <input type="checkbox"/> Not Met During the period of initial Business Manager certification, successfully completed at least forty hours of continuing professional education which shall include, but is not limited to: (a) Budgeting; (b) Financial forecasting; (c) Monthly financial reporting; (d) Day-to-day fiscal operations of the county board; (e) Financial audits of county boards; (f) Department-provided orientation program in cost report preparation described in paragraph (N)(3)(a) of rule 5123-4-01 of the Administrative Code, or department-provided annual training in cost report preparation described in paragraph (N)(3)(b) of rule 5123-4-01 of the Administrative Code; (g) Rights of individuals with developmental disabilities set forth in section 5123.62 to 5123.64 of the Revised Code; (h) The requirements of rule 5123.2-17-02 of the Administrative Code including a review of health and safety alerts issued by the department since the previous year's training.	<input type="checkbox"/> Met <input type="checkbox"/> Not Met Successfully completed, during each year of the five-year period of the preceding Business Manager Certification, at least twenty-five hours of continuing professional education which shall include but is not limited to: (a) Department-provided annual training in cost report preparation described in paragraph (N)(3)(b) of rule 5123-4-01 of the Administrative Code; (b) Rights of individuals with developmental disabilities set forth in section 5123.62 to 5123.64 of the Revised Code. (c) The requirements of rule 5123.2-17-02 of the Administrative Code including a review of health and safety alerts issued by the department since the previous year's training.

Please refer to highlighted area above for renewal requirements. If you have completed course work not reflected on this evaluation, please contact your supervisor.

Approved: Effective Date: _____ Expiration Date: _____ Processed by: _____ Date Processed: _____

Disapproved: Comments: _____ Processed by: _____ Date Processed: _____

Southern Ohio Council of Governments
Evaluation for Business Manager Certification
(Path 3: Persons not employed by/under contract with county board in position of Business Manager on 12/31/2018)
(OAC 5123-5-08 – effective 1/1/2019)

Last Name: _____ First Name: _____ Middle Name: _____ SSN: _____

Initial (Duration = 1 year)	First Renewal (Duration = 5 years)	Subsequent Renewal(s) (Duration = 5 years)
<p>Met <input type="checkbox"/> Not Met <input type="checkbox"/></p> <p>Bachelor's or Master's degree from an accredited college or university in accounting, business administration, finance, public administration or a related field of study, or</p> <p>Met <input type="checkbox"/> Not Met <input type="checkbox"/></p> <p>Bachelor's or Master's degree from an accredited college or university in any field of study and has at least two years of full-time (or equivalent part-time), supervised, paid work experience with demonstrated competency in accounting, financial management, and budgeting, or</p> <p>Met <input type="checkbox"/> Not Met <input type="checkbox"/></p> <p>Is a certified public accountant.</p>	<p>Met <input type="checkbox"/> Not Met <input type="checkbox"/></p> <p>Has education/experience/certification outlined in OAC 5123-5-08 (C)(3)(a)(i).</p> <p>Met <input type="checkbox"/> Not Met <input type="checkbox"/></p> <p>Within 90 calendar days after hire, completed an orientation program of at least eight hours as defined in OAC 5123-5-08 (C)(3)(a)(ii).</p> <p>Met <input type="checkbox"/> Not Met <input type="checkbox"/></p> <p>During the period of initial Business Manager certification, successfully completed at least forty hours of continuing professional education which shall include, but is not limited to:</p> <p>(a) Budgeting;</p> <p>(b) Financial forecasting;</p> <p>(c) Monthly financial reporting;</p> <p>(d) Day-to-day fiscal operations of the county board;</p> <p>(e) Financial audits of county boards;</p>	<p>Met <input type="checkbox"/> Not Met <input type="checkbox"/></p> <p>Successfully completed, during each year of the five-year period of the preceding Business Manager certification, at least twenty-five hours of continuing professional education which shall include, but is not limited to:</p> <p>(a) Department-provided annual training in cost report preparation described in paragraph (N)(3)(b) of rule 5123-4-01 of the Administrative Code.</p> <p>(b) Rights of individuals with developmental disabilities set forth in section 5123.62 to 5123.64 of the Revised Code.</p> <p>(c) The requirements of rule 5123-2-17-02 of the Administrative Code including a review of health and safety alerts issued by the department since the previous year's training.</p>

Please refer to highlighted area above for renewal requirements. If you have completed course work not reflected on this evaluation, please contact your supervisor.

Approved: _____ Effective Date: _____ Expiration Date: _____ Processed by: _____ Date Processed: _____

Disapproved: _____ Comments: _____ Processed by: _____ Date Processed: _____