# BEST PRACTICES FOR ELEMENTARY SCHOOL ADMINISTRATIVE ASSISTANTS

LOS ANGELES UNIFIED SCHOOL DISTRICT
ORGANIZATIONAL EXCELLENCE

MONICA VERGARA, SR. CLASSIFIED REPRESENTATIVE

# **Objectives**

At the end of this workshop, participants will be able to:

Discover Some Best Practices For Elementary School Administrative Assistants To Enable Us To Perform Our Job More Efficiently.

- ➤ Identify Time Saving Techniques By Becoming Familiar With The Benefits Of Being Organized, Organizational Barriers And Organization Techniques.
- Recognize Tips To Strengthen Communication With The Clerical Staff.

Summarize The Evaluation System For Clerical Staff

## Positive Attitude @ - Video



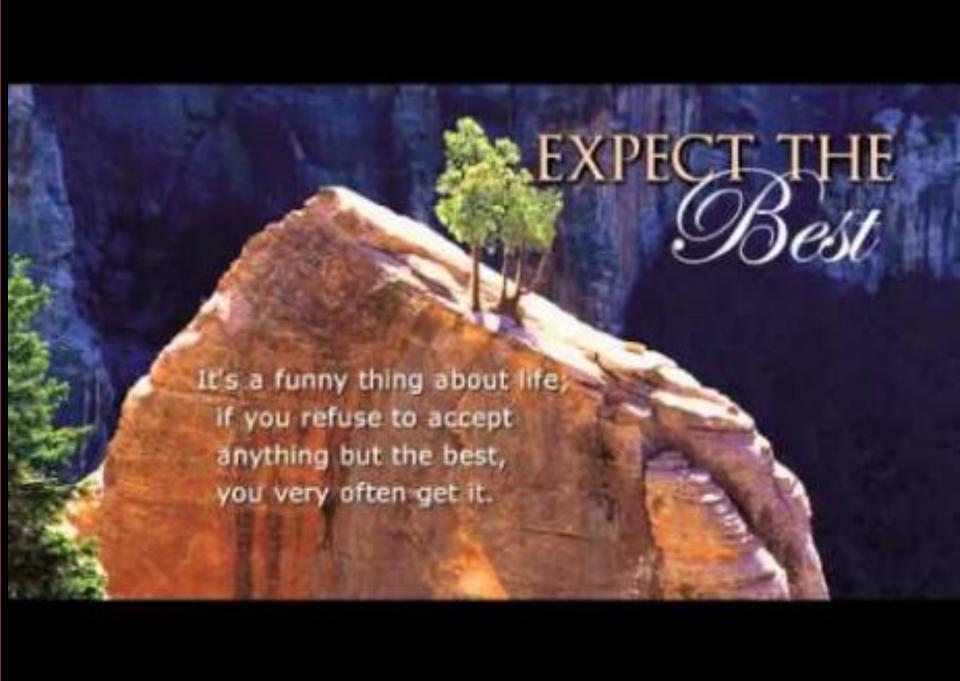
Maya Angelou: American Poet, dancer, producer, playwright, director, actress, author and an important figure in the American Civil Rights Movement

"I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel."



Ralph S. Marston, Jr: Writer and publisher of The Daily Motivator

"You' ve done it before and you can do it now. See the positive possibilities. Redirect the substantial energy of your frustration and turn it into positive, effective, unstoppable determination".



### Administrative Assistance

### Support for School Principal

- Arranges or maintains appointments for principal
- Facilitates all confidential clerical work
- May delegate non-confidential clerical work
- Composes principal's correspondence
- Answers or refers inquiries made by students, parents, staff and community
- Screens principal's phone calls if needed
- Opens and routes school and U.S mail
- Receives visitors



# GREETING CUSTOMERS

- Customer service is #1
  - Lead by example



# **ACTIVITY**

WHAT CUSTOMER
SERVICE MEANS TO
ME.....

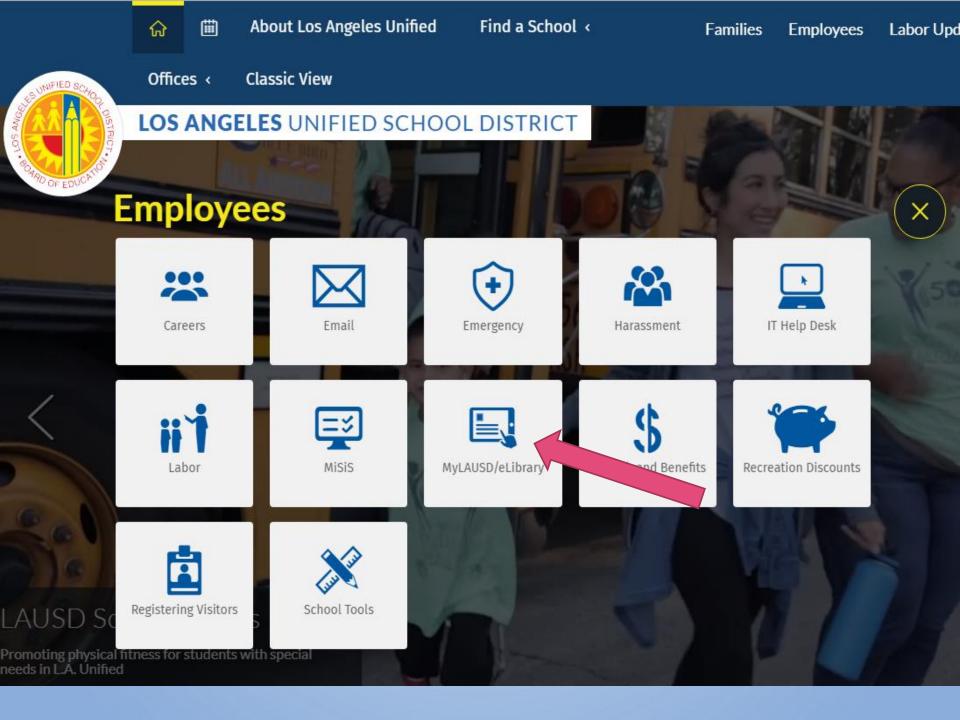
### Customer Service Means.....

- Taking Care Of The Customer Like You Would Take Care of Your Family
- Surprising Yourself With How Much You Can Do
- Going Beyond What's Expected
- Being At Your Best With Every Customer
- Adding Value And Integrity To Every Interaction
- Doing Ordinary Things Extraordinarily Well

# MYLAUSD/E-LIBRARY

- Should be checked on a daily basis
  - District updates website often with memos, guidelines, forms and other types of communications
  - What's new will keep you informed of the latest bulletins, memos and reference guides.
  - What's due will help you meet your deadlines by allowing you to plan with anticipation.









HOME DOCUMENTS **OFFICES** 

TYPE

HELP



#### What's New











Los Angeles Administr...

Classified Employee Fil...

Temporary Closure of ...

Teacher-Initiated Trans...

Non-Routine Payment ...

Release Date	Document Name	
11/14/2018	Los Angeles Administrative Services Credential (LAASC) Program	
11/8/2018	Classified Employee File Request Form	ı
10/30/2018	Temporary Closure of General Stores Distribution (Warehouse) for Annual Physical Inventory	ı
10/23/2018	Teacher-Initiated Transfer Program	
10/23/2018	Non-Routine Payment Request Form (Under \$5000)	
10/23/2018	Non-Routine Payment Request Form (\$5000 and over)	-

# Main Office Responsibilities

#### FOR SCHOOL ADMINISTRATIVE ASSISTANTS



# Support For The Office Technician (S) In The Following Areas:

- O Customer service
- O Answering telephone
- O Registration & enrollment
- O Cumulative Records
- O Provide first aid to students
- O Contact parents for ill or injured students
- O Dispense medication in the absence of the school nurse
- O Oversee students in the main office



# **Appointments**

#### MAY SCREEN PHONE CALLS OR PERSONAL VISITS TO SCHOOL ADMINISTRATOR IF NEEDED

- Always introduce yourself as the school administrative assistant
- Apologize if the administrator is unavailable
- Use the "get info/call back" method

#### MAINTAIN MASTER CALENDAR

- All school events in one calendar
- Coordinate room usage for itinerants who service and test children at home school



### **Bell Schedule**

- Different at every school
  - Testing, professional development, minimum and shortened days, 1<sup>st</sup> day of school.....Etc.
  - Minimum and shortened days must be approved by the local district prior of using those days

 Must be clearly posted and available to all staff – you are the information contact

Useful for teacher/class coverage, and when parents or the public inquire

# New Employee Orientation

- You are often the first person a new employee gets to meet and the most appropriate person to provide information about:
  - Office structure
  - Payroll information/time cards
  - Emergency card
  - Parking
  - Keys
  - Map of the school
  - Work schedule with meal breaks
  - Telephone directory
  - What is expected from the employee
  - Job description

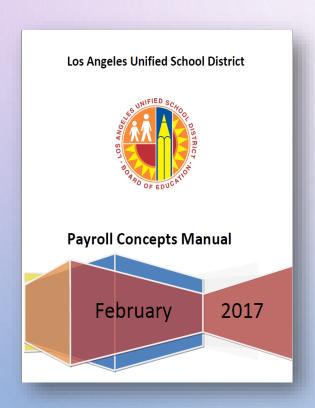


## Personnel File Folders

- Local school employee records confidential
  - Each employee should have one
  - Must be available to principal & SAA
- Organization of files should be:
  - Active
  - Certificated/classified (color coded)
  - Alpha
  - In-active (administrator determines how long these records are kept at the location)
- Principal determines items to be filed



# Payroll Time Reporter





# Payroll Time Reporter

- School Administrative Assistant (SAA) Is Usually The Primary Time Reporter
- ➤ Always Have A Back-up Time Reporter
- ➤ Sign-in/Out (Time) Cards
- Establish A Procedure With The Principal Regarding Employees Signing In Late (I.E. Late Book)
- ➤ Overtime (Employees should not be assigned to work more than 44 hours or overtime per month or more than 528 hours per fiscal year. Overtime must be approved prior to working it)
- Payroll Records (Must Be Kept For 5 Years)

### **Benefit Forms**

When Employees are absent, a benefit form must be completed by the employee and approved by the administrator before entering the benefit into BTS

# Illness/Non Illness Forms

#### Los Angeles Unified School District

#### CERTIFICATION/REQUEST OF ABSENCE FOR ILLNESS, FAMILY ILLNESS, NEW CHILD

EMPLOYEE INFORMATION (Ple		100			. —			
Last Name	First Name	M.I.	Employee N	ia.	П			
Work Location Name	Job Title		Yes No	Employee's Telephone				
The state of the s								
REASON FOR ABSENCE					ıl			
l. Starting date of absence/	Last date of al	hsence (expected)	/_/		П			
Mo. Day 2. Total time (expected) of absence: NOTE: This form does not supersed	days; bours.			HR Form 1065), when				
required.  3. Select appropriate type of leave:					П			
The following types of absence may					П			
California Family Rights Act ("CFRA" LAUSD may also, on its own, designat					П			
A) My Personal Illness/Injury/Disabil					П			
B) My Occupational Illness/Injury or					П			
C) My Pregnancy-related Illness/Disa				Sec #6 below.]	11_			
<ul> <li>D) Illness/Injury/Disability/Accident- (Personal Necessity requested)</li> </ul>	My Family Member (relation	in-Care requested		. [See #6 below.]	11 1			
E) Time-off for New-Born/Newly ado	oted/New foster care	in-Care requested		Provide verification	1			
NOTE: Absences "A" through "C" may		and "E" as Personal N	ecessity; *D* m	ay also be Kin-Care.	il T			
					1			
FMLA/CFRA INFORMATION  4. Is the absence due to a "serious heal	th condition" (one concerts TME	A form for Definitions)		Ves No	ılī			
Note: To confirm serious health cor					1			
<ol><li>Do you request FMLA/CFRA prote</li></ol>					1			
					'  1			
IMPORTANT LAUSD INFORMAT 'Physician Statement' is required if abso		or Wasselland by Admi	nistrator unda	TATIST Pulse (FMT A	ıl.			
Certification of Health Care Provider' in				LACOP RUBE. PHLA	I			
<ol><li>Is the appropriate medical certificati</li></ol>	on submitted with this request?	□ Ves □ No	Not Re	quired (new child)	ΙΙ.			
NOTE: If the answer is "No", the					5			
7. Is the request being made for unpaid		Yes No			II "			
Blookle Substitute/Temporary emol	was so not of the Healthy Worl	Inlanes Healthy Families	Act new SRTS	I time onde	5			
I certify I was/will not be employed elsewi	ere during my regular work hor	ars within the time perior	I claimed on thi	s certification, unless taking	_			
vacation. I certify my absence during this	period was not and is not for pa	rticipating in a strike/wo	rk stoppage or b	ecause of my unwillingness				
to cross picket lines and I would have been during my hours of assigned duty is bee								
Bargaining Agreement. I also agree and a								
a result will be collected from the next pay	check. I declare under the pens	dty of perjury that the fo	regoing is true s	nd correct.				
Employee's Signature:		Date:						
FOR AUBIERUTAION SUPERVISOR. 12 U.S.	realize supporting occurrents	annocere con miles		NO	4			
Is the FMLA approved?  Yes ?					1			
Explanation	-				1			
					1			
Use separate paper, if needed) Administrator/Supervisor's Ackn	ordedoment/Approval-				1			
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	261				1			
Print Name	Signature		ate					

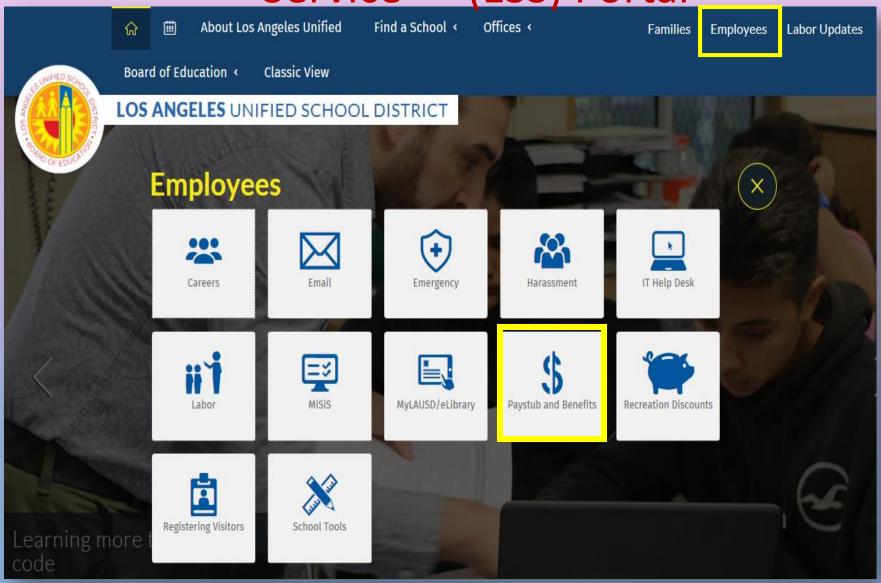
#### Los Angeles Unified School District CERTIFICATION AND/OR REQUEST OF ABSENCE FOR NON-ILLNESS

Exployee'  Exaction Name    Job Title	Employee	Employe	e No.	
Last date of absence   Mo. Day Yr.		•	Employe	r's Telephone
Mo. Day Yr.  Total time (expected) of absence: days; hours.  NOTE: This form does not superside or replace the Leave of Absence Request Form (PC Form 5006 or HR Form 100 required.  Select the appropriate type of absence: Typically, these types of absence of NOT qualify for the Family and Medical Leave Act ("FMLA") and/or the California Fact ("CFRA"). However, if the reason meets legal requirements, you may request such FMLA/CFRA protection. LAUSD s its own, designate an absence as FMLA/CFRA protected, if information indicates that the legal requirements are met.  A) Accident or Imminent Danger to My Property (see rule").  B) Accident to Family Member's Property (see rule").  C) Auto failure (up to 2 hours) if car used for work (see rule").  Explain  D) Registration or Final Exam in Higher Education (see rule").  Explain  E) Religious Holiday of My Faith.  Explain  E) Receivement (see rule").  G) Conference Approved by District.  Provide verification; Explain  H) Jury Duty, or Appearance in Court under Order.  Provide documentation from the Court  I) Vacation (All regular classified employees & Certificated A basis).  Subject to Approval  J) Other Absences (identify and provide district of the shown in a strike/work stoppage or because of my corns picket lines and I would have been available for duty if it had not been for the reason cited above. Furthermore, I certify my shance during this period was not and is not for participating in a strike/work stoppage or because of the above listed reason in accordance with any applicable BoardPC rule argaining Agreement. I also agree and authorize that once the correct benefit usage charged above is processed, any unexmed value will be collected from the next paycheck. I declare under the penalty of perjury that the foregoing is true and correct.  Employee's Signature Date  Date  Provide Ala, approved?   Yes   No Explains on the property must be either your projecty or ignificate family member's (either your family or as as parent, child, grandpasent, grandchild, brothe				
Total time (expected) of absence:	/			
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A Accident to Family Member's Property (see rule')	FRA prot	A/CFRA pro	tection. LAUSD	
B) Accident to Family Member's Property (see rule')			no are mer	
D) Registration or Final Exam in Higher Education (see rule')				
Explain     F) Bereavement (see rule*)   Identify Family Relation     F) Bereavement (see rule*)   Identify Family Relation     F) Conference Approved by District   Provide verification, Explain     H) Jury Duty, or Appearance in Court under Order   Provide documentation from the Court     H) Jury Duty, or Appearance in Court under Order   Provide documentation from the Court     I) Vacation (All regular classified employees & Certificated A basis)   Subject to Approval     J) Other Absences (identify   Explain     NOTE: Absences "A" through "E" may qualify as Personal Necessity.     Additional Evaluation if acoded     Certify I was/will not be employed elsewhere during my regular work hours within the time period claimed on this certification scation. I certify my absence during this period was not and is not for participating in a strike/work stoppage or because of the stowe listed reason in accordance with any applicable Board/PC rule argaining Agreement. I also agree and authorize that once the correct benefit usage charged above. Furthermore, I certify my absence during this period was note the correct benefit usage charged above. Furthermore, I certify my absence of the above histed reason in accordance with any applicable Board/PC rule argaining Agreement. I also agree and authorize that once the correct benefit usage charged above. Furthermore, I certify my absence of the supervisor is processed, and uncarred the penalty of perjury that the foregoing is true and correct.				
F) Bereavement (see rule*)   Identify Family Relation     G) Conference Approved by District   Provide verification, Explain     H) Jury Duty, or Appearance in Court under Order   Provide documentation from the Court     I) Vacation (All regular classified employees & Certificated A basis)   Subject to Approval     J) Other Absences (destify   Explain     NOTE: Absences "A" through "E" may qualify as Personal Necessity.   Additional Evolunation if needed				
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	r's (either employee'	No  mber's (either in employeer if snother re	's immediate hor ationship is clair	sehold).
Rule to #3.D: Upon at least two days notice to their immediate supervisor, a classified employee shall be permitted to take an and to participate in other District employment procedures during working hours without loss of pay or other penalty. If less the	r's (either employee'	mber's (either in employee if another re-	's immediate hor ationship is clair	sehold).

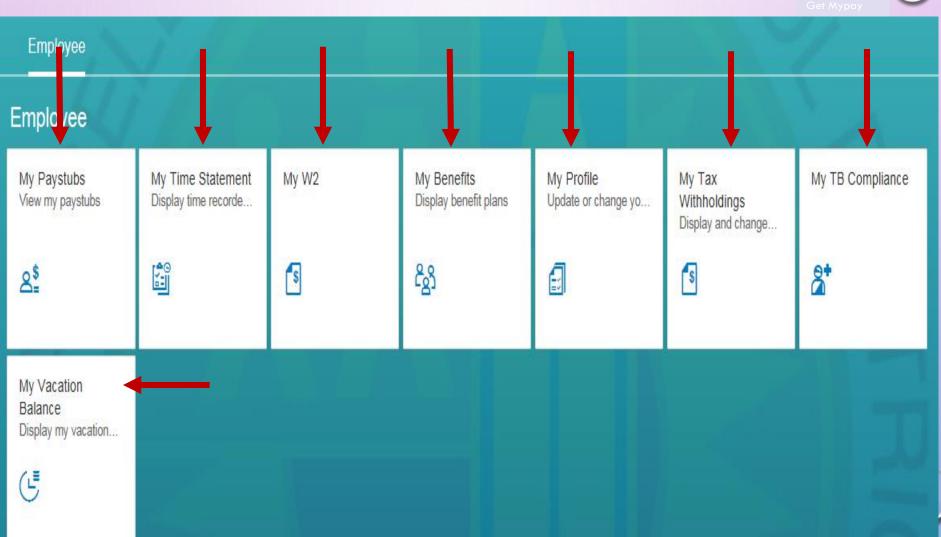
<sup>4</sup> Rule to 43.F: The rule requires that the relationship be an immediate family member meaning under LAUSD's definition for bereavement, either your family or spouse's family, such as parent, child, grandquerin, grandchild, brother, sister, step/foster child or other relative living in employee's immediate household. Reference the specific section of the bargaining agreement or any applicable Board/PC rule if another

relationship is claimed.

Your Pay Statement – Employee Self Service (ESS) Portal



### Your Pay Statement – Employee Self Service (ESS) Portal



### **Employment Verification**

What are Salary Keys and How do I Obtain Them?

A salary key is your authorization for lenders/verifiers to access your employment and salary information. Salary keys are required for all levels of verification.

Go to www.theworknumber.com or Dial 1-800-EMP-AUTH (367-2884)

#### When prompted, enter:

- LAUSD Company Code, 10721
- Your Social Security Number
- Your PIN (last four digits of SSN then last four digits of employee number)

Record the Salary Key reference.

How many Salary Keys Can be Active? How Long are they Valid?

You can have a maximum of 3 keys active at one time. Each key can be used only **once**, by one verifier. The keys deactivate after 6 months. You can cancel a key at any time by going to <a href="https://www.theworknumber.com">www.theworknumber.com</a> or by dialing 1-800-367-2884.

#### What is My Personal PIN?

Your PIN is the last four digits of your SSN followed by the last four digits of your employee number. Example, if your SSN is 123-45-6789 and your employee number is 123456, your PIN would be: 67893456.

DO NOT GIVE YOUR PIN TO VERIFIERS!

#### PIN Information

The Work Number for Everyone<sup>®</sup> is provided by TALX Corp.

The LAUSD Company Code is:

#### 10721

#### To obtain a Salary Key:

- Log into <u>www.theworknumber.com</u> or call 1-800-367-2884
- Enter your SSN and your PIN (last four digits SSN and last four digits of employee number)
- Write down your Salary Key below to give to your verifier for employment and salary verification.

Questions? Problems? Call the Client Service Center at 1-800-996-7566 between 5 a.m. and 6 p.m. Pacific Time.

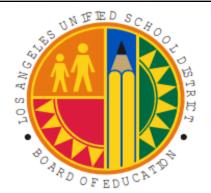
_	our PIN:
Sa	lary Keys:
1.	
2.	
3.	
	Los Angeles Unified

School District

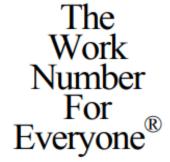
450 North Grand Avenue

Los Angeles, CA 90012

www.lausd.k12.ca.us



#### Introduces



www.theworknumber.com

or

1-800-367-2884

Employment and Salary Verification

# **Budget Overview**



This Photo by Unknown Author is licensed under CC BY-SA-NC

# Budget

#### MIGHT BE REQUESTED TO PERFORM THE CLERICAL PART OF THE BUDGET SUCH AS:

- Keeping the control record sheets for each budget the school has control of
- Keeping control record sheets for salaries budgeted by the location
- Might be asked to process the budget adjustments manually for certain programs and collect all necessary documentation needed to process the budget adjustment
- Might also be required to be the data entry person to process budget adjustments in school front end for required programs
- Records must be retained for 5 years
- TIP: Keep you Hyperlinked control sheets always on your desktop so when you are doing any transactions like Payroll, Budget Adjustments, Shopping Card, Imprest and P-Card you can log the expenditures right away to avoid forgetting to log them at a later time.

## Record Retention

### >P-CARD

- ➤ Procurement Manual Dated April 2017 7th Edition
- ➤ Record Retention 7 years

### >SHOPPING CART

- Procurement Manual Dated April 2017 7th Edition
- ➤ Record Retention 5 years

### >IMPREST ACCOUNT

- Reference Guide 1706.4, Dated September 15, 2015
- Record Retention Until you have a formal audit

### >STUDENT BODY

- Publication 464, Updated August 2006
- > Record Retention Until you have a formal audit

# Organizational, Management Skills and Practices for School Administrative Assistants



# Be Organized

► Plan Multi-tasks To Meet Deadlines

➤ Manage Your Time And Prioritizes

➤ Clutter Free Environment



File It, Don't Pile It

➤ Open All Mail And Develop A Routing System

## BENEFITS OF BEING ORGANIZED

















- > Helps Meet Deadlines And Due Dates
- ► Allows You To Be More Efficient In The Workplace
- ➤ Saves Time Looking For Misplaced Items
- ► Lowers Stress And Frustration
- Creates A Positive Atmosphere And Image To Customers, Supervisors And Co-workers

# Organizational Barriers

- > Procrastination
- > Interruptions
- ➤ Overbooking Projects, Tasks And Assignments
- > Setting Wrong Priorities



# Tips for Staying Organized

- > Plan
- Manage your time
- Open and route all mail
- Paper Designation
- File it, don't pile it
- Clutter free environment





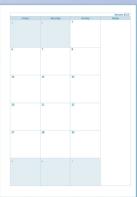






21-27	May 2018			May 2012	21-27
Mon 21	Description	•	•	Task	Done
Tue 22		•	•		
Wed 23		•	•		
Thu 24		•	•		
Fri 25					
26					
27					





### **Absence Communication**

- Administrators should be made aware of teacher/staff absences
  - Collection of attendance data
  - Class coverage
- A form of communication should be established to disseminate this information
  - Clipboard with absence form
  - White board, etc.





# LEADERSHIP HABITS

FOR SCHOOL ADMINISTRATIVE
ASSISTANTS

# Attend SAA Meetings

#### LOCAL DISTRICT LISTINGS

- Contact local district administrative assistants
- Inquire about future SAA meetings
- Role of school services director and administrative secretary

#### SAA MEETINGS PROVIDE:

- Professional development
- Networking opportunities



# Networking

 Maintain A Contact List Of Important Numbers To Navigate Through Central Offices With Ease

Get To Know Other SAA's

Business Cards

Provide A Professional Image When Networking

# Be A Training Advocate

- Trainings like this help you and your clerical staff
- Maximize our training catalog
  - Two catalogs per year
    - Fall and spring
    - Sign up at the learning zone
- Visit our website for updates
   <u>Www.Oetraining.Net</u>



## **Clerical Staff**

- **≻** Supervision
- > Job Descriptions
- > Clerical Schedules
- **≻**Clerical Meetings



## CLERICAL SUPERVISION

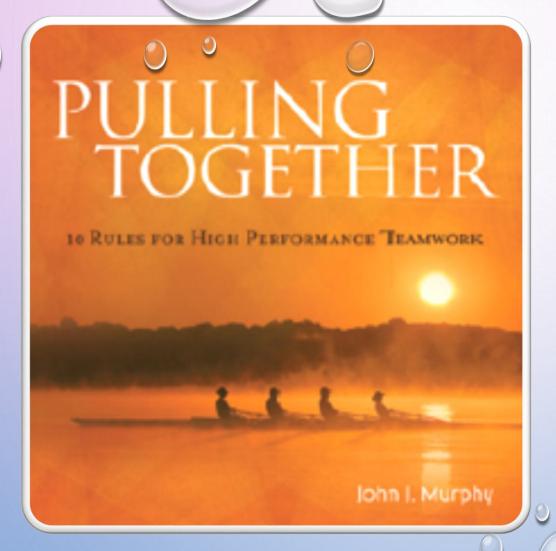
➤ General Supervision – The SAA directly supervises all clerical personnel in his/her office.



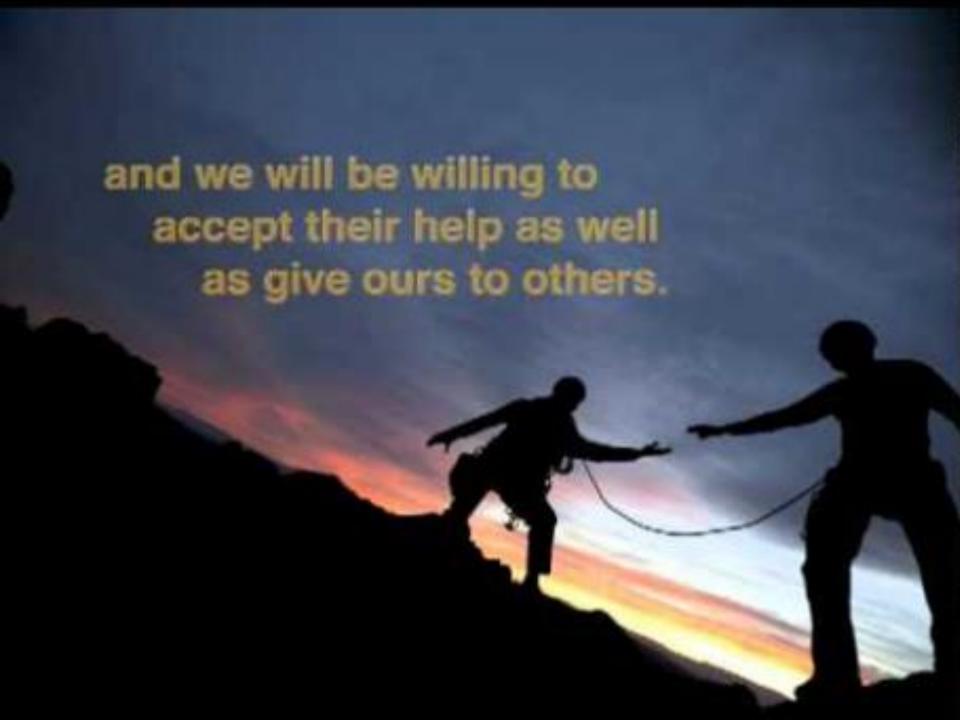
#### Communication Skills

- BE RESPONSIVE
- BE ENGAGING
- BE PLEASANT
- BE PATIENT
- BE CLEAR
- BE POSITIVE
- BE REALISTIC
- BE A PROBLEM SOLVER





Pulling Together Video



## **Hands on Activity**

1. Write down three or four (3 or 4) characteristics of a strong team.

(i.e. What does a great team of clerical staff behave like?).

2. Write down in your own words two or three (2 or 3) "rules" or "principles" to build a great team of clerical staff.

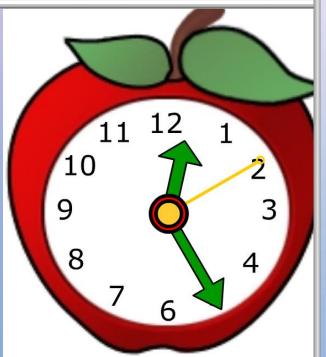


# CLERICAL JOB DESCRIPTIONS

 Set and provide clear expectations for clerical staff members

- Should have one for every clerical staff member
- Create them if you do not have them
  - Use current LAUSD job descriptions to assist you
  - Modify them when needed to ensure smooth and efficient clerical operation at your school





### Clerical Schedules

- Know Where Your Team Is At All Times
  - SAA Reviews All Clerical Staff Schedules
  - Resolve All Schedule Conflicts
  - Approve All Clerical Staff Schedules And Makes
     Sure That Each Office Technician Gets A Copy
  - Provide A Copy Of Clerical Schedules To School Administration

# Clerical Meetings

- ➤ Provide professional development and updates to your clerical team.
- Establishes strong lines of communication.
- ➤ Disseminate important information.
- > SAAs should have one meeting every other month.
- ➤ Meet with Office/Senior Office Technicians every month.
- Encourage leadership development and professional growth.
- Can assist in disseminating information



# **Cross Training**

• Schedule all office technicians to cross train with each other

 This supports the school as a whole when office coverage is needed

 Back up office technician should be cross trained with you to learn the role of an SAA

- Have a back up time reporter at your location
  - A leader inspires future leaders

## Classified Performance Evaluation

#### PERFORMANCE EVALUATIONS ARE:

- A POSITIVE MEANS TO PROVIDE/RECEIVE FEEDBACK
- A POSITIVE MEANS TO OBTAIN INPUT
- A KEY TOOL FOR THE APPRAISAL PROCESS



#### PERFORMANCE EVALUATIONS ARE NOT:

- DISCIPLINARY IN NATURE
- A ONE-SIDED PROCESS
- MEANT TO PROVIDE SURPRISES

https://achieve.lausd.net/Page/11632

	PERFORMANCE I				
		Evaluation Period	2016-2017		
Name	VERGARA, MENECA		Employee)	No. 00	1715896
Job Title	CLASSIFIED TRAINING RE	RESENTATV	Location	W	ERFERCE MONT CLSED TRAINING (1060)
	Report fr	on	То		
- ATTENDANCE	Note the number of hours absent school holidays or recesses.	each day during the	post year, <u>excludins</u>	religious holideys	of the employee's faith, vacations and
	Protected Hours	0 и	Unpro	Comments	4.75 yies
· WORK PRODUCT	Protected Hours  Belon Stare	v Meets	Ecceds	Comments  If "Delaw States Paragrap	4.75 idea  addition* is checked, 0.5.4.0 in the instruction.
WORK PRODUCT Quality of Vivols	Delo	v Meets	Ecceds	Comments  # "Below Sta	adurat" is chacked,
	Design	v Meets Sects Standard	Ecceds 5 Sandards	Comments  If "Delaw States Paragrap	adurat" is chacked,
Quality of Work  Quantity of Work  Consider job knowledge	Bolo Steri	v Meets Standard	Eiseeds Standards	Comments  If "Delaw States Paragrap	adurat" is chacked,

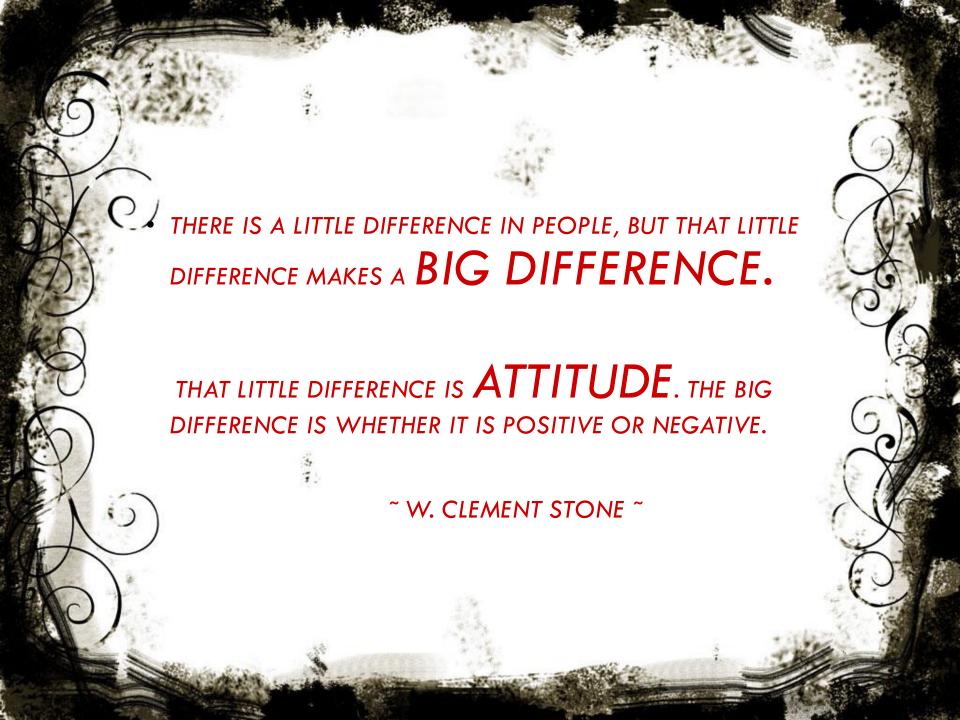
## **District Goals**



Our goals at Los Angeles Unified School District:

- 1. 100 percent student graduation
- 2. Proficiency for all students
- 3. 100 percent attendance
- 4. Parent and community engagement
- 5. School Safety

To reach these goals, LAUSD uses a Performance Meter to measure and guide our performance as a District.



## **CUSTOMER SERVICE**





# We Are Here To Help YOU

Organizational of excellence provides:

- Training classes for classified employees in a variety of subjects
- Senior classified and classified training representatives
  - Trainers who visit your site to provide one-on-one training and assistance















#### COLLEGE PROGRAMS

Employee Resources



## EMPLOYEE RESOURCES



#### Our New Catalog is Here!



Registration for School-Based, Supervisory, &

General Classes

Bookmark our page to quickly search upcoming classes.



Just-in-Time Training Support

Career Resources

TELL US WI

about the qu Personnel C

Tell us your

Professional Role Specific Support

Recognize a Employee Support

**Retirement Resources** 

**Outplacement Resources** 

#### **Just-In-Time Training Support**

#### **Employee Resources**

#### Just-in-Time Training Support (by topic)

Please click on the following links for additional information about our learning topics.

- Just-In-Time Training
   Support
- Career Resources
- Professional Role
   Specific Support
- ▶ Employee Support
- Retirement Resources
- Outplacement Resources

Absence ivianagement

Best Practices for Elementary SAAs

Best Practices for Secondary SAAs

Budget Accounting

**Business Writing** 

Career Preparation

Change Management

Classified Growth & Development Cycle (CGDC)

Communication Skills

Computer Skills

Conflict Management

Cumulative Records for Elementary Schools

Cumulative Records for Secondary Schools

Customer Service Essentials

Customer Service Essentials: Supervisor's Toolkit

Early Childhood Education

# Thank you for having us here today!

Organizational Excellence Classified Training 213 241-3440

www.oetraining.net

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miv5896@lausd.net

