Best Practices for Secondary School Administrative Assistants



Los Angeles Unified School District Personnel Commission Organizational Excellence Classified Training Branch Anna Vargas, Sr. Classified Training Representative

Objectives

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

- Discover some Best Practices for Secondary 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".

EXPECT THE Best

It's a funny thing about life, if you refuse to accept anything but the best, you very often get it.

Administrative Assistance

Support to 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



Hands on Activity

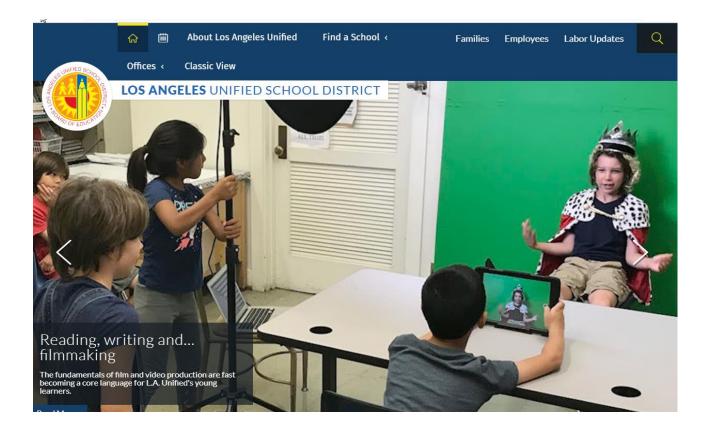
What Customer Service Means to me.....



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.

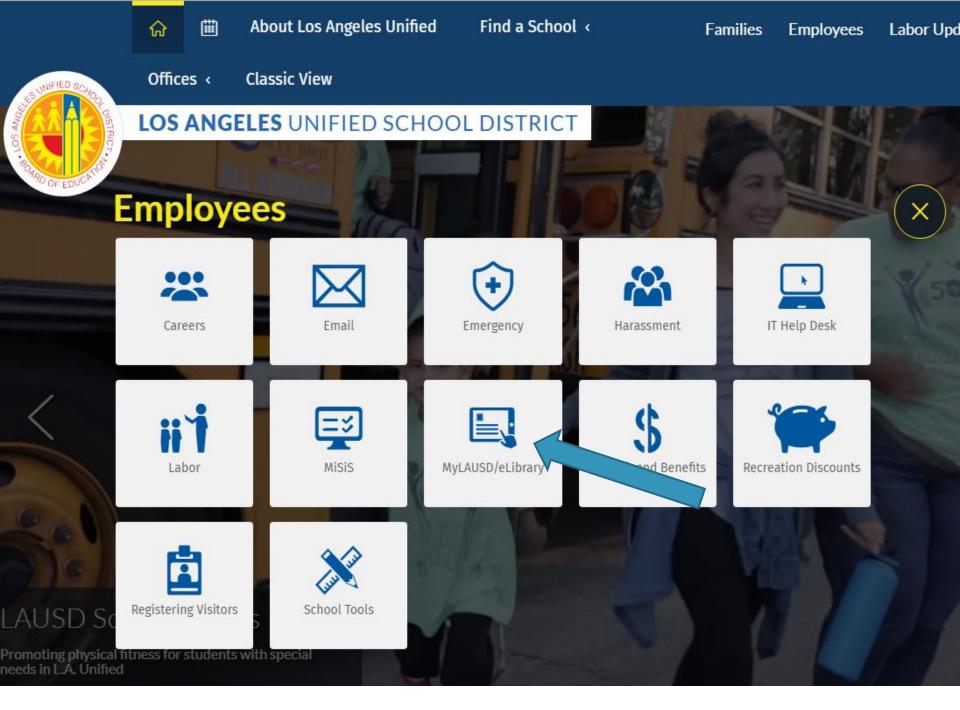
My LAUSD / E-Library



MYLAUSD/E-LIBRARY

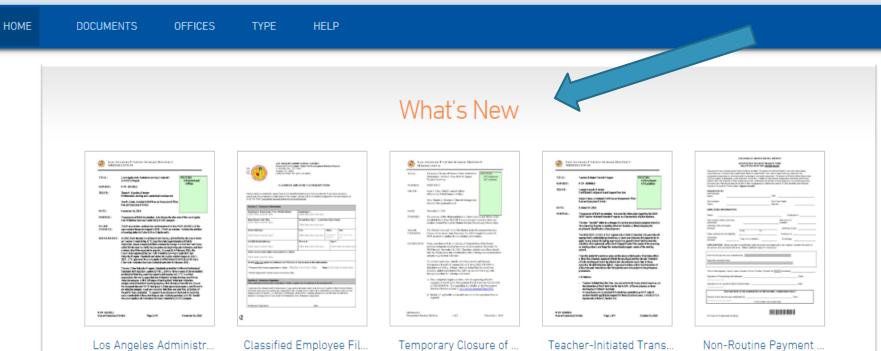
- Should be checked on a daily basis
 - District updates website often with memos, guidelines, forms and other types of communications
 - What's new will keep you informed of the latest bulletins, memos and reference guides.
 - What's due will help you meet your deadlines by allowing you to plan with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











Release Date	Document Name
11/14/2018	Los Angeles Administrative Services Credential (LAASC) Program
11/8/2018	Classified Employee File Request Form
10/30/2018	Temporary Closure of General Stores Distribution (Warehouse) for Annual Physical Inventory
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)

Responsibilities for School Administrative Assistants



Support for the Office Technician(s) in the following areas:

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



Appointments

- May screen phone calls or personal visits to school administration, if needed.
 - > Always introduce yourself as the SAA
 - > Apologize if administrators are unavailable
 - > Use the "Get Info/Call Back" method
- Maintain master calendar
 - > All school events on one calendar
 - Coordinate room usage



Bell Schedules

- Different at every school
 - Testing, Professional Development, Minimum Day, Reverse Minimum Day, 1st 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 an information contact.
- Useful for Payroll, teacher class coverage, and when parents or the public inquire.

New Employee Orientation

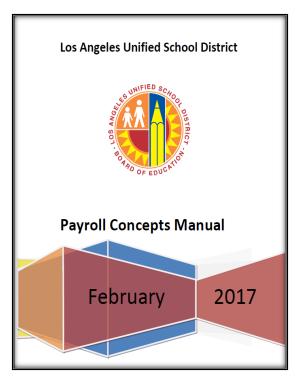
- You are often the first person a new employee gets to meet. Make a great first impression and offer a new employee orientation. Provide information on:
 - > Office Structure
 - > Keys
 - Map of the school
 - > Bell or work schedule with meal breaks
 - > Telephone Directory
 - Payroll Information
 - Parking
 - File an Emergency Card
 - > Employee Self Service
 - 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 and SAA
- > Organization of files should be:
 - > Active / In-active
 - > Certificated / Classified
 - > Alpha
- > Principal determines the items to be filed.
- > In-active (the administrator determines how long these records are kept at the school).



Payroll Time Reporter





Can Stock Photo - csp24517277

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 of 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)

BUL-6638.0 - Time Reporting and Time Approval Policy - April 4, 2016

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.

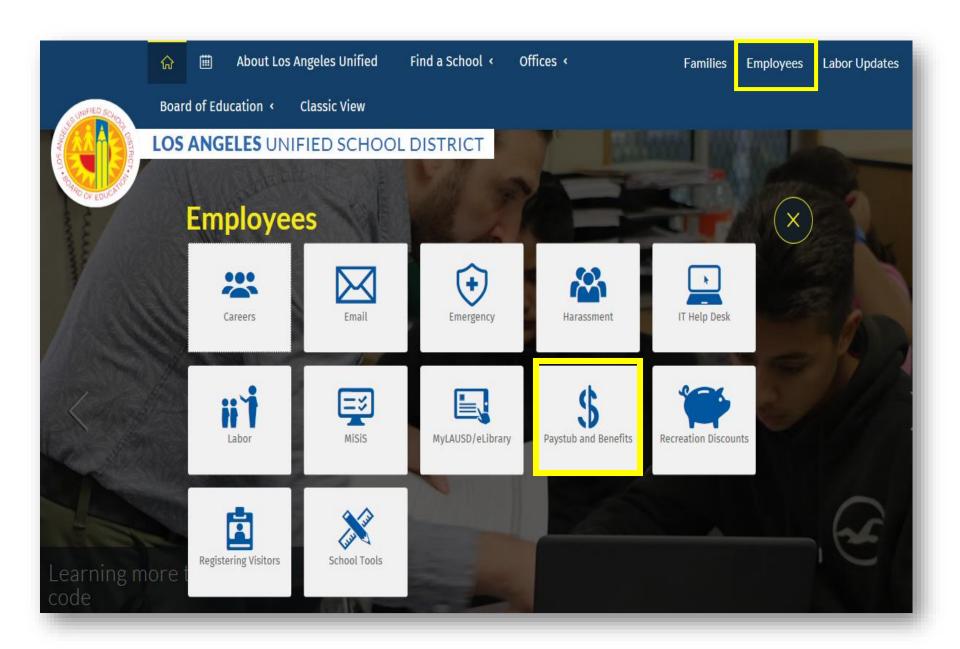
BUL-6307.5 - Certification of Absence Forms - April 2, 2018

Illness/Non Illness forms

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G) School Activity				e Verification	
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Your Pay Statement – Employee Self Service (ESS) Portal



Your Pay Statement – Employee Self Service (ESS) Portal

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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 <u>www.theworknumber.com</u> 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 <u>www.theworknumber.com</u> 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[®] is provided by TALX Corp.

The LAUSD Company Code is:

10721

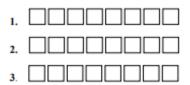
To obtain a Salary Key:

- 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.

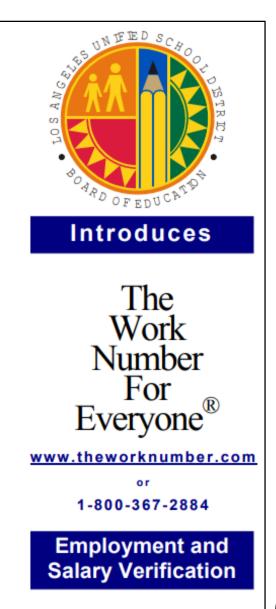
Questions? Problems? Call the Client Service Center at 1-800-996-7566 between 5 a.m. and 6 p.m. Pacific Time.

Your PI	N:

Salary Keys:



Los Angeles Unified School District 450 North Grand Avenue Los Angeles, CA 90012 www.lausd.k12.ca.us



Budget Overview



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
 - > Budget records must be retained for 5 years
 - TIP: Always Keep your Hyperlinked control sheets 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 465, Updated May 2005 Revised January 2009
- Addendum to Publication 465, dated June 3, 2009
 Pilot Schools, New Tech High Schools, Small Learning Communities, Magnet Center and Small Schools Sharing a Campus
- > Record Retention Until you have a formal audit

Absence Communication

- Administrators and offices should be informed of teacher/staff absences.
 - > Collection of Attendance Data
 - > Class coverage
- > A form of communication should be established to disseminate this information.
 - > Daily Absence Form & Coverage Chart
 - > White board for administrative viewing etc.
- > Meet with your Principal to determine who is entitled to receive this daily communication.
- <u>Remember</u>: When employees are absent, a benefit form must be completed by the employee and approved by the administrator before entering the benefit into BTS.

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



- > 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

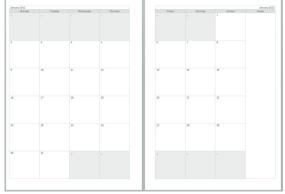
Organizational Barriers

- > Procrastination
- > Interruptions
- > Overbooking projects, tasks and assignments
- > Setting wrong priorities

Tips for Staying Organized







Leadership Habits for School Administrative Assistants



Attend SAA Meetings

- Local District
 - Contact Local District Administrative Assistant
 - > Inquire about future SAA Meetings
 - > Role of School Services Director and Administrative Secretary
- > SAA Meetings provide:
 - > Professional Development
 - > Networking Opportunities



Networking Opportunities

- Maintain a contact list of important numbers to navigate through Central Offices with ease
- Get to know other School Administrative Assistants (SAAs')
- Business Cards
 - Provide a professional image when networking

Be a Training Advocate

- Trainings like this help you and your clerical staff
- Maximize the Training Catalog from our
 Organizational Excellence Classified Training Branch
 - Two catalogs per year
 - ➢ FALL − SPRING
 - Sign up at My Professional Learning Network (MyPLN)!
- Visit our Website for updates
 - http://www.oetraining.net

Clerical Staff

Communication Skills
Clerical Supervision
Job Descriptions
Clerical Schedules
Clerical Meetings



Communication Skills

- > Be responsive
- Be engaging
- Be pleasant
- Be patient
- ▹ Be clear
- > Be positive
- Be realistic
- > Be a problem solver

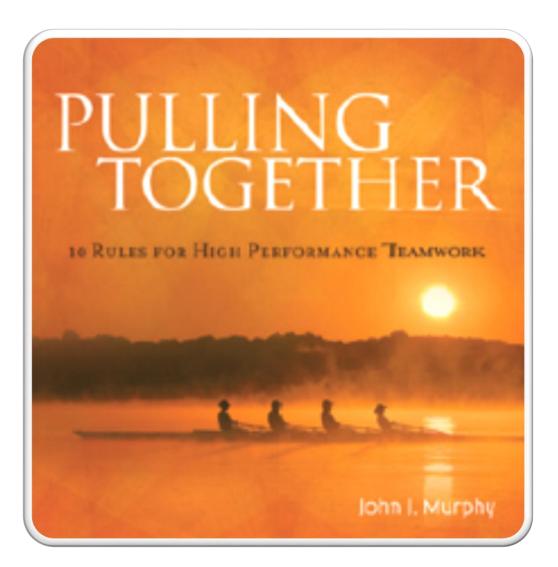


Hands on Activity

 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?).

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

Pulling Together Video



and we will be willing to accept their help as well as give ours to others. Clerical Staff > Communication Skills > Clerical Supervision > Job Descriptions > Clerical Schedules > Clerical Meetings



Clerical Supervision

- General Supervision The SAA directly supervises all clerical personnel in his/her Office.
- Functional Supervision The SAA provides functional supervision over all clerical staff in other offices. An administrator/coordinator usually provides general supervision to clerical staff.

Clerical Job Descriptions

- Set and provide clear expectations for clerical staff members.
- Should have a job description for every clerical staff member.
- > Create job descriptions if you do not have them
 - Use current LAUSD job descriptions to assist you
 - > Modify them as needed to ensure smooth clerical operations at your school
 - > See example provided

Clerical Schedules

- > Know where your team is at all times.
- > SAA reviews all clerical staff schedules.
- May delegate Senior Office Techs to be responsible for scheduling in Attendance/ Counseling/Welcome Center/Small Learning Community if applicable.
- > Resolve all clerical schedule conflicts.
- > Approve all clerical staff schedules.
- Provide a copy of the clerical schedules to school administrators.

Clerical Meetings

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



Cross Training

- Provide Senior and Office Technicians the opportunity to cross train in another office.
- Cross training supports the school as a whole when office coverage is needed.
- Senior and Office Technicians should be cross training with you to learn the role of an SAA and to provide services when you're not available.
- > A leader inspires future leaders!



Office Hours (Most Common)

- Traditional School: 7:00 am for Main Office/Attendance 4:30 pm all Offices close (security)
- Small Learning Community, Welcome Center or Academy

7:00 am for all offices4:30 pm all offices close

- > Official times determined by the local district.
- All Offices will close according to administrative decision.

Classified Performance Evaluation for Clerical Staff

		Evaluat	ion Period	2016-2017				
Name	VERGARA, MENICA			Employee 3	b.	00715896		
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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

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

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.

"There is a little difference in people, but that little difference makes a **big difference".**

"That little difference is **attitude**. The big difference is whether it is positive or negative".

~ W. Clement Stone ~

Customer Service

"I liked what you talked about," he said, "but at first I didn't think I could do anything special for our customers."



After all, I'm just a bagger.





Johnny

We are Here to Help You!

- > <u>Organizational Excellence Classified Training Branch provides</u>:
- Classes for school based clerical staff on a variety of school office procedures and policies, supervisory, etc. resources on a variety of topics on our website at <u>http://www.oetraining.net</u> under Employee Resources – Just In Time Training Support
- OE online webinars are also available in My Professional Learning Network (MyPLN) at <u>https://achieve.lausd.net/mypln#spn-content</u>
- Sr. Classified and Classified Training Representatives available to:
 Provide assessments or training assistance via telephone or email.
 Provide assistance or training via LAUSD Skype for Business Program.





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.

Home

Just-In-Time Training Support Click here

- Professional Role Specific Support
- Employee Support
- Retirement Resources
- Outplacement Resources

Best Practices for Secondary SAAs hr Budget Accounting

Best Practices for Elementary SAAs

Business Writing

Career Preparation

Change Management

Communication Skills

Computer Skills

Conflict Management

Cumulative Records for Elementary Scho

Cumulative Records for Secondary School

Customer Service Essentials

Customer Service Essentials: Supervisor

Retirement Resources

Outplacement Resources



More Critical Documents

JOB AIDS AND OTHER RESOURCES



Sample Job Descriptions for Clerical Staff At Secondary Schools

Employee Personnel Record

Review Conclusion

At the end of this Best Practices for Secondary School Administrative Assistants presentation we are now able to:

- Discover some Best Practices for Secondary 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



Thank you for coming today and especially for all your hard work, dedication, commitment and everything you do every day for your students, parents, school community, teachers, clerical staff and administrators!

Our district can not succeed without your tireless efforts!

Organizational Excellence Classified Training Branch (213) 241-3440 <u>http://www.oetraining.net</u>

Anna Vargas, Sr. Classified Training Representative – Secondary (213) 241-5248

anna.vargas@lausd.net

Rocio Espinoza, Classified Training Representative – Secondary (213) 241- 4954 <u>rge90792@lausd.net</u>