

Date: September 27, 2013

Location: Admiralty Room

In Attendance: Anna, Danette, Jane, Anita, Kara, Hope, Dorothy, Anne E., Susan, Nancy, Jennifer, Kristine, Brian, Joni, Angela.

Treats: Kristine & Jane

Game & Door Prize: Kristine

Winner: Anita

New Staff: Danette introduced Anna Bell who has been helping out in Early Learning.

LCC Meeting Review:

Dorothy attended the meeting. Anne Knot is a new member, replacing Kristine. Jerry shared a draft of the new Action Plan. No other business was conducted.

Contract Process Tips: Carol & Kyle have developed an automated contract creation tool for A/R contracts and are working on an A/P version. The Contracts Receivable Template can be found here:

<https://intranet.nwesd.org/Departments/Fiscal/Contracts> and you must Enable Content for it to work. Fill in the boxes and check the optional clauses based on your specifics, click the Create Contract button at the bottom of the page, and a new document will open in Word with all the required clauses. You will need to fill in the red font areas and make final edits to fit your needs.

On the checklist which accompanies contracts, it's okay to just use the paragraph number in the column indicating where a clause is located, as pages sometimes change as a contract is edited. Joni is going to ask for the checklist to be revised to only require the last four digit of contractors' SSN's to eliminate the requirement to redact SSNs before attaching the forms in WESPaC.

There was a discussion of routing of contracts. Specific guidance is available on the intranet, but generally the sequence of approval is:

- a) Program Manager
- b) Wendy / Personnel
- c) Terri / Fiscal
- d) Contractor
- e) Jerry - prefers to sign last

It was also noted that Jerry prefers to sign clean contracts, not ones that have hand written amendments with initials.

Help Desk Discussion: If you are not 100% satisfied with the results of a help desk request, Kyle would like to receive feedback, including comments about being made to feel badly about asking for help. This can come in various forms, depending on how you're most comfortable delivering it.

- a) Feedback on the help desk ticket itself
- b) An email to Kyle, Joni, Susan or Tammy
- c) A note in the Suggestion Box marked TS which will be routed directly to Kyle

Susan noted that when she or Tammy receive feedback, they keep it impersonal by saying "It's been reported that..."

Other:

- Susan - If you have a company phone from Verizon, you will be allowed to upgrade to a new device every two years, not every year as was previously allowed.
- Also, if you have a personal cell phone account with either Verizon or Sprint, they offer discounts to NWESD or other educational employees.
- Nancy – Both a Math and Science Coordinator are needed in Teaching & Learning.
- Anne – Lorali recently had an article published about the Johnson & Johnson fellowship.
- Dorothy will post her schedule on her cubicle wall. She checks for phone calls regarding fingerprinting at the end of each day, and Kristine covers for her in this capacity when she's working with either MERO or AOP.

- Hope – Payroll went very smoothly for the first round of the new school year. Monday is payday and will include raises.
- Kara – Pay sets are still twice a month, but the fiscal year change-over makes assigning invoices to PO's a little complicated. If you have any questions about payments, please ask for her help.
- Anita – She has several big workshops and classes coming up. Paula's hiring has been very helpful for her. Also, she and her husband will be empty nesters shortly when her daughter heads off to school.
- Jennifer – It's all for the love of TPEP
- Kristine has been busy hiring and working on clock hours.
- Brian – Working on year end close outs, JV's and indirect reconciliations.
- Danette – Still working on Starting Strong conference clean-up, including reports to funding sources, Early Learning breakfast, which went well, and P-3 contracts.
- Jane – Medicaid work is extensive. They now have 24 people in their department and will be hiring more. More school districts are requesting behavioral health services. She'll be away next week, in the mountains without cell phone service.
- Joni – Paula is proving to be sharp, efficient, pleasant, and likes to stay busy. Joni created a form to accompany any desk work. It's in the forms list on the intranet, called: Office Assistant Work Request [download](#).

The meeting adjourned for anyone not involved with GoSignMeUp (GSMU).

Go Sign Me Up: Joni, Susan, Kristine, Jennifer and Anita shared helpful information and requests to help streamline use of this program.

- Clockhours: please input mailing addresses when registering clock hour class attendees. This greatly improves the process for Kristine.
- Credit Cards: After Joanie has processed credit cards, Kristine will route the clock hour forms back to the correct department so addresses can be added in GSMU.
- Invoicing:
 - To find PO's to invoice, run reconciliation report in GSMU
 - In WESPaC, use group GSMU 00015
 - Batch # is class ID number
 - Description is also class ID number
 - In Item, scroll down to Registration1 GSMU for a template
 - After creating one invoice, you can clone all additional invoices
 - After invoicing is complete in WESPaC, go back to GSMU to enter invoice data
- Joni demonstrated her use of Excel spreadsheets in conjunction with GSMU. She goes to Grid, then Dashboard and copies email addresses from her spreadsheet to check whether people are already registered in the program.
- Checkout questions: Choose internal registration for people you are registering if you do not have additional information about how they heard about a class / event.
- Tuesday email: Please send ideas to Rachael to include in this weekly mailing.
- Updated email addresses: Susan said GSMU has updated all Bellingham and Ferndale School District email addresses.

Minutes respectfully submitted by Angela Currie