



# OFFICE MANAGER'S MEETING

2022-2023

## DAY 1

August 9, 2022 (1PM – 3PM)

Room 107 – District Office (1015 7<sup>th</sup> Street, Novato CA 94945)

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### WELCOME! (1PM)

Superintendent – [Jan LaTorre-Derby](#)

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### BUSINESS SERVICES (1:05PM – 2:05PM)

Assistant Superintendent of Business & Operations – **Lois Standing** (x 4260)

Executive Assistant to ASBO – **Ashley Albertson** (x 4260)

- ▶ Contracts, MOU & Leases  
*(ALL contracts, MOUs, & leases must go to Lois for review & signature)*
- ▶ [Driver Authorizations – Process](#)
- ▶ [NUSD Approved Drivers Spreadsheet](#)
- ▶ [CA DMV Vehicle Code Violations](#)
- ▶ [Site Incident Reports](#) | [Student Accident Reports](#)
- ▶ **Amazon Business Prime (NUSD)**
  - [NUSD-Amazon User Manual](#)
  - Due to the high volume of individual orders we are requesting that Amazon orders are no less than \$50 per order.
  - NO reimbursements for orders with personal Amazon accounts after 9/30/2022

Director of Fiscal Services – **Unfilled Position** (x 4219)

Business Manager – **Tiffany Tweedie** (x 4212)

- ▶ Business Staff – [Contact Sheet](#)

### Accounts Payable / Purchasing Reminders (Unfilled Position - Derek Low for now)

#### Purchase Orders ([PO Reference Document](#) / [Purchasing Reference Document](#))

- ▶ Do not place orders for supplies or services without having an **Approved Purchase Order** in place
  - ▶ Requisitions should be initiated after a contract for services is approved by the administrator and approved by the Board.
  - ▶ The remit to address is **NUSD attention: Accounts Payable (not directly to a school or individuals email)**.
  - ▶ Ensure PO's have appropriate sales tax (8.25%) and shipping cost (if necessary).
  - ▶ **Invoices MUST reference the site name, address and the PO number** – AP team spends a lot of time tracking down which PO invoices are applied to.
  - ▶ **Outside organizations** (PTA/O & Boosters) must establish their own accounts with vendors and cannot order directly with a vendor using NUSD's account. **These invoices must state they are for PTA/etc...**
  - ▶ Once an order is received or services completed, please sign the **Pink** copy of the Purchase Order and send to Accounts Payable – **the pink authorizes payment of the invoice and finalize the PO.**
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- ▶ Packing slips must be sent to AP for Open ALL Purchase Orders or **Office Managers approval to pay invoices.**
  - ▶ Please manager your PO's and invoices. Advise when PO's are to closed/finalized. Frequently run your open PO list (see attachment) and advise PO's that should be closed.
  - ▶ AP team sends emails inquiring information needed to process invoices. We need a response asap.
  - ▶ Accounts Payable batches are processed on Mondays and Wednesdays.
  - ▶ If a check is needed in advance of an event or conference you must notify the AP office one week in advance

### **Amazon vs. Epylon**

- ▶ Open PO process
- ▶ AP will send all invoices to the OM's for approval to pay.
- ▶ Once items are received, please send the invoice with OM's approval or send it via email for payment.

### **Pay Vouchers**

- ▶ Pay Vouchers should be only be used in special circumstances with pre-approval from Business Office.

### **Expense Claims & Travel / Mileage Reimbursements [\(Expense Claim Form\)](#)**

- ▶ All expense claims must be signed by the claimant and the Principal
- ▶ Budget accounts must be verified to ensure that funds are available
- ▶ All claims relating to workshops/conferences must be accompanied by relevant back-up i.e. conference flyer or agenda
- ▶ Items ordered online must be delivered to the work/school site
- ▶ A Google Maps print-out must accompany claims for mileage re-imbusement
- ▶ All claims for reimbursement must have original, itemized receipts
  
- ▶ **Reimbursable per Diem rates for meals are:**
- ▶ Breakfast \$11.00
- ▶ Lunch \$17.00
- ▶ Dinner \$26.00
- ▶ Daily MAX \$54.00

### **Accounts Receivable Reminders (Samantha Pulley)**

- ▶ Please do not staple checks or cash to anything
- ▶ Send all money (checks & cash) weekly
- ▶ Cash must be accounted for – parent and/or student and amount paid
- ▶ List of parent and/or student and amount paid should accompany each CCV when applicable – for Cash and Checks, preferably on an excel spreadsheet
- ▶ Cash and Checks should be sent on separate CCVs
- ▶ No more than 50 checks/50 names per CCV
- ▶ Coins should be wrapped
- ▶ Chromebook payments should be accompanied by student invoice

### **Attendance (Derek Low) *Possible Attendance Meeting August 12, 2022***

- ▶ [Attendance Calendar 2022-2023](#)
- ▶ [Attendance Notes 2022-2023](#)
- ▶ [Enrollment Count Form](#)
- ▶ [New & Dropped Student Report](#)

### **Payroll Reminders (Mel Malnar)**

- ▶ Must USE current version of timesheets (please toss older versions)
  - ▶ [Certificated Substitute Timesheet](#)
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- ▶ [Monthly/Hourly Timesheet](#) (certificated/classified)
  - ▶ Timesheets must include the following information:
    - Employee Name (legal name)
    - Employee ID (NO social security numbers - ever)
    - Budget Code (account code must exist in QSS & please write legibly)
    - Employee Signature
    - Site/Dept. Admin. Signature
  - ▶ Report hours worked on the quarter hour
  - ▶ Due on the 1<sup>st</sup> working day of the month
  - ▶ Late timesheets will be processed on the following mid-month
  - ▶ Physical Paychecks delivered to school sites – if unclaimed
  - ▶ Paychecks are available for pick-up at the sites by 2 PM on payday
  - ▶ Unclaimed paychecks – sites must return all unclaimed paychecks to District Office by 3 PM on pay day
  - ▶ [Payroll – Timesheet Due Dates](#)

## 2022-2023 Year-End Deadline Calendar

### Budget Monitoring & Resources & Help ☺

- ▶ Training Interests & Opportunities

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## INFORMATION TECHNOLOGY (2:05PM – 2:25PM)

Director of IT – **Tim Rocco** (x 4241)

### Staff and Locations

- ▶ Support Team at the Hill Education Center – **David Reyes**, Tech III
  - [help@nUSD.org](mailto:help@nUSD.org) or extension x 4299. In-person support is available on request. The support team works collaboratively, however, each Tech II has a primary beat:
    - **David Tracy** – NHS, GMO
    - **Erik Briggs** – SMHS, FANS, Transportation
    - **Hassan Fahti** – SMS, HEC, DO
    - **Linda Buckley** – Hamilton, SJIS, Charter
    - **Nicholas Uribe** – OES, LSE, SRE
    - **Teresa Vance** – RES, LVE, LES
    - **Theresa Cook** – PVE, DO
  - The 22/23 school year will continue with a 1:1 student-to-device ratio. Grades 2-12 will be issued a Chromebook and grades TK-1 will be issued an iPad. RES is piloting iPads 1:1 this year.
    - Student technology will be issued in the same manner as school textbooks. Students can drop off broken or damaged devices in their school library where there will be a stock of loaners. Broken or damaged computers will be collected by IT, assessed, repaired, and returned when possible.
    - If a device is willfully defaced, damaged, or lost, parents or guardians will be responsible for the cost of the repair or replacement of the device. IT will supply invoices to office managers as necessary. The cost of common repairs and replacements are as follows:

• Chromebook replacement	\$240
• Chromebook screen repair	\$60
• Chromebook keyboard repair	\$50

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- Chromebook charger replacement \$25
    - iPad replacement \$300
    - iPad screen repair \$100
    - iPad charger replacement \$25
  - Any staff computer older than 5 years is eligible for replacement. Please feel free to let IT know if this is necessary.
  - Infrastructure upgrades and the classroom toolkit have been deployed to PV, Rancho, San Jose, Hamilton, Hamilton K-5 and Loma Verde this summer. Feel free to let IT know if you have any questions, need support, or training.
  - ▶ Analyst Team at the District Office - Supervised by **Open**
    - Personnel:
      - **Dana Luis** – Systems Analyst
      - **Don Nicodemus** – Systems Analyst
      - **Logan Ober** – Systems Analyst
      - **Open** – Systems Analyst
      - **Stella Simon** – Student Data Systems Specialist
      - **Brianna Joyce** – Web Designer
    - Projects:
      - Security, MFA (Multi Factor Authentication), password updates...
        - Email security has been updated over the last couple of years. Last year we improved security by matching our password policy to industry standards. We also enabled a self-service tool that would allow staff to reset their own passwords which will sync their computer login, email, and Google password.
        - Password policy and help guides: <https://nUSD.zendesk.com/hc/en-us/categories/5721647468180-Password-Policy>
      - Phones
        - We are in the process of upgrading our phone system. Staff will keep their current numbers and will receive a new phone. In addition to the new phone, a new program will be installed on your computers that will allow you to answer or make video calls on the computer for virtual meetings. Training will be provided when we are near deployment.
      - Security cameras
        - The board approved new cameras by Verkada to be installed at our high schools this school year. New cameras will be installed and a new easy to use web-based program will be provided to school administrators.
      - ParentSquare
        - We have been working on deploying ParentSquare over the last few months. It will replace Benchmark and Intouch. You can find training materials here: <https://parentsquare.talentlms.com/>
      - Data Steward meetings
        - We will continue to have our Aeries Discussion meetings on the 2<sup>nd</sup> Wednesday of every month at 2:30 pm. An invitation has been sent out to all current members of the Aeries-CALPADS group. Please let us know if you need to be included in the group and need to get a copy of the invitation. Please have at least one staff member from your school attend.
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- Running Agenda:  
<https://docs.google.com/document/d/12eWpn3yUJCVK588pJc3Pu2nGly4M8N83kf14f8V1IMg/edit#>
  - Cloud Migration
    - Microsoft Office- We are moving to use Office365 rather than traditional Office applications. Word, Excel, PowerPoint are still available to you, but through a browser now.
    - Google Drive – We are in the process of replacing mapped network drives (e.g., P: drive) with Google Drive.

Apple IDs – Migration to District owned Apple IDs

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## **MAINTENANCE, OPERATIONS & TRANSPORTATION (2:25PM – 2:50PM)**

Director of MOT – **Tony Albini** (x 4275)  
Operations Manager – **Trevor Smith** (x 4205)

### **Emergencies**

- ▶ Water/gas leak, sewer back up, power outage, anything that poses an immediate health hazard.
- ▶ During Operations work hours (6am to 3pm), call the office first (415-892-1596), then follow up with a work order.
- ▶ If you cannot get a hold of anyone at the office, leave a message and then try the following numbers:
  - Tony Albini 707-696-1275 or Gina Wildman 415-798-4112
  - Trevor Smith (Grounds and Custodial emergencies) 415-798-1528
- ▶ For emergencies that occur after office hours, weekends and holidays, please call the maintenance on-call number 415-798-1765. The Maintenance on-call number is for emergencies only. For afterhours non-emergencies, please leave a message on the Operations main line and we will get back to you on the next business day.

### **Facilitron Procedures**

### **Lost Key Procedure**

### **Work Requests ([schooldude.com](http://schooldude.com))**

- ▶ It is important that you do not call the maintenance staff directly. All requests have to be put into the Schooldude system.
- ▶ Once a work order is entered into Schooldude, it is routed to Tony Albini. Tony will review the work request, prioritize, and assign the work.
- ▶ Please only put in a work order for actual work. Do not put in a work order to ask a question, check on another work order, or to cancel a previously entered work order. These situations should be taken care of through an email or phone call.

### **Facilities Improvement Request** (form also available on NUSD website under staff forms)

- ▶ BEFORE any project is contracted and or items purchased you must get prior approval.
  - ▶ A Facilities Improvement Request Forms must be submitted to the maintenance department with all details i.e., design, materials, location, and who will be performing the work.
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- ▶ Once we have received the form you will be contacted to further discuss the project or for approval of your project.
  - ▶ Project is not approved until you receive a signed Facilities Improvement Request form from Tony Albini.

**Custodial:**

- ▶ Orders and budget
- ▶ Time off requests (you do not put in the time off for them)
- ▶ Covid supplies

**Recology:**

- ▶ [Schedule](#) (Site to call when not picked up)

**Grounds** (see attachment for schedule)

- ▶ [Grounds Site Checklist](#)

Transportation Supervisor - **Melissa Remy** (x 4580)

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**FOOD AND NUTRITIONAL SERVICES** (2:50PM – 3PM)

Director of FANS – **Cody Williams** (x 4451)

Program Specialist – **Cindy Liang** (x 4453)

- All Students Eat for Free in 22-23 School Year ([Flyer](#))
  - Families are still encouraged to fill out F&R apps for additional benefits. Web Link <https://www.nlappscloud.com/>
  - [Free and Reduced Application / Spanish](#)
  - Menu Web Link <https://novatofans.org/index.php?sid=2901132305319613&page=menus>
  - [Field Trip Meal Request Form](#)

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**BOND / FACILITIES TEAM** ([bondinfo@nUSD.org](mailto:bondinfo@nUSD.org))

Executive Director of Facilities and Operations – **Mike Woolard** (x 4588)

Facilities Project Manager - **Melissa Duggan** (x 4231)

Administrative Assistant - **Lisa Casey** (x 4292)

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## DAY 2

August 10, 2022 (1PM – 3PM)  
Room 107 – District Office (1015 7<sup>th</sup> Street, Novato CA 94945)

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### WELCOME DAY 2! (1PM – 1:30PM)

Superintendent – [Jan LaTorre-Derby](#) (x 4244)

Executive Assistant to Superintendent – **Ellen Christensen-Denton** (x 4244)

- [Board Meeting Dates](#)
  - School Presentations at Board Meetings ([schedule](#))
  - Superintendent Site Visits ([schedule](#))
  - School Events Calendar (hand-out by school on August 10)
  - Back-to-School and Open House 2022-2023 ([schedule](#))
  - Admin. Goal Setting with Superintendent ([schedule](#))
  - Principal Meetings @ Sites ([schedule](#))
  - [Field Trips - Board Approval](#)
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### COMMUNICATIONS (1:30PM – 1:40PM)

Director of Communications & Community Engagement – **Leslie Benjamin** (x 4259)

- ▶ Share School News:
    - <https://nUSD.org/graduate-or-school-news/>
  - ▶ Social Media Calendar:
    - <https://docs.google.com/document/d/1IMC3swJiQEDGpbEUYXvE7w0PLz6sT4LK/edit?usp=sharing&oid=103758255509513573809&rtpof=true&sd=true>
  - ▶ COVID NUSD-specific protocol:
    - [https://docs.google.com/document/d/1LH\\_YBo98gT\\_6CKbYCBfnvARL6ggr0J4W9G8ft3r3f9A/edit](https://docs.google.com/document/d/1LH_YBo98gT_6CKbYCBfnvARL6ggr0J4W9G8ft3r3f9A/edit)
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### HUMAN RESOURCES (1:40PM – 2:25PM)

Director of HR – **Francesca (Franny) Whitcomb** (x 4207)

Executive Assistant – **Michelle Gassner** (x 4207)

- ▶ [Workers' Comp](#): Administrator is InterCare. Once you receive a WC email from Michelle Gassner, please forward the DWC-1 form to the injured staff and answer the questions as soon as possible to avoid delay in the WC claim.

HR Specialist Classified – **Marcia Carey** (x 4275)

HR Specialist Certificated – **Jess Joseph** (x 4248)

Benefits Assistance (*Temporarily*) – **Dana Sarubbi**

HR Technician – **Jen Albini** (x 4246)

- ▶ Leaves: (*Transitioning from Dana Sarubbi*) Leaves can be complex due to numerous and ever-changing laws and multiple types of leave that an employee may be entitled to. Any time your staff members need an extended leave from work, please refer them to Human Resources
  - ▶ Substitutes: ALL certificated subs must first be cleared through MCOE before they can go into a classroom to teach. All subs must be on the cleared sub-list AND in Frontline. If you do not see a person that is asking to sub on the sub list or in Frontline, please contact Jen Albini. Do not assume that they are cleared to sub just because they say so.
  - ▶ Frontline: New staff will be entered as soon as Jen Albini starts to build the board agenda. She does not get new hire information as soon as they are hired. She gets it when she creates the board agenda for employee approval. Once she creates the agenda, she can input the employees into Frontline.
  - ▶ Keenan: Same as Frontline – all new employees will be entered as soon as the board agenda is built. Keenan is mandatory. All staff have NUSD emails and must complete the training.
  - ▶ Volunteer Information: Please see the attachment below for the updated Volunteer Packet. Also below is the link to cleared volunteers for NUSD. I pulled the cleared volunteers from the list Lillian had created before me and have added to it starting last school year. Please note that the TB dates are not updated on everyone. So, if you have a volunteer that is on the list, please double check with me to see if they are current on their TB tests. We are also requiring COVID Vaccine Verification. If they are not COVID vaccinated, they cannot volunteer. We are not accepting negative test results. They must be vaccinated or no volunteering. Please follow the protocols in place below.
  - ▶ New Volunteers:
    - They get [Volunteer Packet](#) from school site
    - They turn completed packet with ALL attachments into HR (not the school site)
    - Once HR has cleared fingerprints and/or all completed documents, the volunteers will be placed on the cleared volunteer list.
  - ▶ Returning Volunteers: (Check cleared volunteer list to make sure of the following)
    - Name on list
    - Updated TB
    - COVID Vaccinated
  - ▶ If there is no information on TB tests/COVID tests, please contact Jen Albini so she can double check on the clearance. She will let office managers know if they need to provide us with updated information.
  - ▶ [NUSD Cleared Volunteers](#)
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## EDUCATION SERVICES (2:25PM – 2:45PM)

- ▶ Education Services Team - Supervised by **Jen Larson** (x 4278)
- ▶ Who's Who in Education Services - **Jen Larson** (x 4278)
- ▶ Transfers, registration (DO Related) – **Karina Leoni** (x 4250)
- ▶ Timesheets, reimbursements, Ed Services Related Expenses – **Susie Treanor** (x 4278)
- ▶ Professional Development, Curriculum & Instruction– **Karen Freemantle** (x 4287)
- ▶ Student Services (504, Attendance, Homeless, Foster Youth, Home Hospital) – **Mike Saisi** (x 4247)
- ▶ Wellness Services – **Anna McGee** (x 5327)



- ▶ EL Coordinator – **Karrie Coulter** (x 4214)
    - ELPAC
  - ▶ Assessment and Compliance - **Suzi Hirshfield** (x 4233)
    - Title I Crate
    - Coding questions
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## **SPECIAL EDUCATION (2:45PM – 3PM)**

Director of Special Education – **Angela Williams** (x 4265)

Administrative Assistant – **Sally Carbonaro** (x 4265)

Administrative Assistant – **Helen Hughes-Tome** (x 4234)

### ▶ **Procedures**

- [SpEd Flow Chart](#) - Communication chain starts with Case Manager (RSP/SDC or SLP), then escalates to Special Education Coordinator
- [NUSD Curriculum and Material Purchasing Protocols](#)
- [Scheduling Meetings Find Time Instructions](#)
- [Office Manager Special Education Interpretation and Translation Quick Reference Guide](#)
- **SpEd Related Timesheets Due on the 1st Working Day of the Month - ALL timesheets require prior approval**

### ▶ **Staffing**

- **Site SpEd Staffing and Scheduling - [Anchor Days](#)** - SpEd Staff will update with the "anchor day(s)" the entire IEP will be on campus
- [Classified SpEd \(Para Educator\) Hiring Procedures](#) - Given the high quantity of OPEN ParaEducator positions, HR will be scheduling interview pools

### ▶ **Back to School Essential Information**

- **Case Manager Notification of IEP Team Letter to Families** ( [MS Word](#) / [Insertable PDF](#) )
- **Critical Health Alert Form** ( [English](#) / [Spanish](#) ) - Office Manager will work with Health Clerk to print, distribute, collect, and document
- [Beginning of the Year Checklist Service Providers](#)

### ▶ **CALPADS Codes (SPED) for AERIES - [State SELPA IEP CALPADS Codes](#)**

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## REFERENCE DOCUMENTS:

- ▶ [2022-2023 District Calendar / Spanish Version](#)
- ▶ [Phone Lists](#)
- ▶ [Parent Guide – English & Spanish](#)
- ▶ [AR \(Accounts Receivable\)](#)
- ▶ [Book Disposal Process](#)
- ▶ [Disposal Request Form](#) (send to Ashley Albertson at DO)
- ▶ [Driver Authorization Form / Spanish Version](#)
- ▶ [Van Driver Authorization Form](#) (only NEW Van drivers need to complete the DMV Form)
- ▶ [Site Incident Report](#)
- ▶ [Student Accident Report](#)
- ▶ [Expense Claims](#)
- ▶ [Mileage Refund](#)
  - [NUSD Mileage Chart](#)
- ▶ [North Bay Security Group Schedule](#)
- ▶ Network Forms:
  - [Confidentiality Agreement](#)
  - [Employee Tech Agreement](#)
  - [Student Tech Agreement / Spanish Version](#)
- ▶ [Overtime/Comp-Time Authorization Form](#) – Preapproval REQUIRED
- ▶ [Payroll Calendar 2022-2023](#)
- ▶ [Petty Cash](#)
- ▶ [Purchasing](#)
- ▶ [Purchase Order Process](#)
- ▶ [Run Open PO List 2022-2023](#)
- ▶ [POCO](#)
- ▶ [W-9](#)
- ▶ [New Vendor Request Form](#)
- ▶ [Chart of Accounts](#)
- ▶ [Shredding Schedule 2022-2023](#)
- ▶ [Year-End Schedule 2022-2023](#)
- ▶ [Attendance Calendar 2022-2023](#)
- ▶ [Attendance Notes 2022-2023](#)

**A PDF of this agenda - with links – can be found online at:**

<http://nUSD.org/office-manager-resource/>