



**Prairie  
Lakes**  
Area Education Agency

# **Secretarial Guidelines**

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## Secretary/Secretaries at PLAEA Offices:

### Basic Job Responsibilities:

- Support all staff officing and/or visiting the office
- Order general supplies for each office
- Greet visitors and provide excellent customer service
- Makes Room Reservations
- Makes Hearing appointments (Algona, Fort Dodge, Spencer, Storm Lake)
- Answer agency phones
- Filing student records
- Handling office Hearts & Flowers

PLAEA is a great place to work and work with. Our secretaries are often the first face of our organization. Good customer service has four key qualities: It's personalized, competent, convenient, and proactive. These four factors have the biggest influence on the customer experience.

- **Personalized:** Good customer service always starts with a human touch. Personalized interactions greatly improve customer service and let customers know that PLAEA cares about them and their problems. Instead of thinking of service as a cost, consider it an opportunity to develop a positive relationship..
- **Competent:** People have identified competency as the element that plays the biggest role in a good customer experience. To be competent, a professional must have a strong knowledge of the organization and its services, as well as the ability to help the person resolve their problems. The more knowledge they have, the more competent they become.
- **Convenient:** People want to be able to get in touch with PLAEA through whichever channel is the most convenient for them. Offer support through the channels of communication the public relies on most, and make it easy for them to contact you.
- **Proactive:** People want PLAEA to be proactive in reaching out to them. If something isn't going to happen as expected proactively reach out to the person and explain the problem. They may not be happy about the situation, but they will be thankful that you kept them in the loop.

## ACHIEVE:

The Iowa ACHIEVE System will meet the needs of managing the significant components of special education/early intervention in the state of Iowa, including Individualized Education Programs (IEPs) and Individualized Family Service Plans (IFSPs). This system will be a fully customized solution to meet our ongoing needs for individualized service and education plans for learners and families as well as improving outcomes. The project includes three self-standing, but connected sections that holistically address the various purposes of serving a learner. These sections include the IEP/IFSP, Differentiated Accountability, and Professional Learning. The first stage of development will focus on the IEP/IFSP.

Our current system is Iowa IDEA / WEB IEP/ IMS/WEB IFSP. Iowa ACHIEVE system has a roll out date of Nov. 1, 2021.

## AEA Manager:

- The AEA Manager, accessible by logging in at <https://www.plaea.org/staff-portal>. It is the current system that our PLAEA agency uses for submitting leaves, timecards, and mileage/expenses. It also has features for staff directory, reservations of PLAEA conference rooms, and Student Evaluations (60 day timeline information for WEB IEP staff).
  - First step is to locate our PLAEA website page. Click on the Staff Portal in the upper right hand corner of the page.
  - Login is your first initial last name. Passwords for this site are received from the tech department of PLAEA.
  - Once you have logged into the Staff Portal, you will click on the AEA manager under the Related Links section on the right hand side of the page.
  - Sections in the AEA manager will be described later in individual sections of this document.

## Agency Online Learning:

Agency Online Learning is available under the Staff Portal - Related links on our PLAEA Website.  
<https://www.aealearningonline.org/>

Listed under this section are the Mandatory and Non-Mandatory Trainings along with course registration. These trainings are required for licensure or work in the AEA or LEA. These courses include Child Abuse, Bloodborne Pathogens, etc.

Carrie Guerin is the contact person for our agency to answer any questions regarding Online Learning for both AEA and LEA staff.

## Agency Calendars:

We need one person overseeing calendars so they are succinct, accurate, consistent and user friendly for public view. This one person can move and adjust meeting spaces due to size and needs of groups.

We have several PLAEA calendars that are used to organize and inform:

- **Room Reservation Calendar** - to secure space in offices for internal and external users.
  - To be maintained only by event coordinators from each office. Reservations for the Pocahontas and Fort Dodge Offices feed directly to the TV monitors.
- **PLAEA Calendar of Events** - for internal and external meetings involving either agency or district staff. Event coordinators from each office should send the reservation information to Deb Gade to be placed on this calendar which can be viewed on the front page of our website or internally on the Google Calendar if they are subscribed. Information needed to list on this calendar is the advertised name of the event, date, location, actual start and end time, registration links and contact name for the event.

Deb Gade will maintain the PLAEA Calendar of Events. The event coordinators will notify Deb Gade of events.

### **Agency Staff Calendar:**

Agency Staff Calendar is created and approved by the Administration each year. This calendar provides staff with the PLAEA office closed dates and the paid holiday dates (if applicable to staff) for each year. Also listed on the calendar are the dates which summer hours occur for the agency. Current year's agency calendar can be found under the staff portal on our PLAEA Website under PLAEA Staff Calendar, Organizational Chart, and Supervisor List. Also in this location are:

- Current year's 256, 230, and 193 staff calendars
- Organizational chart for the agency
- Supervisor list for the agency staff

### **Assessment Checkout:**

Prairie Lakes AEA has several Behavior, Academics, Speech & Language, and OT/PT Assessments available for checkout from the Pocahontas Office. Not every AEA person can use every assessment. Some Assessments are content specific while others are staff licenced specific.

- Assessment kits and forms are centrally located in our Pocahontas office. Assessments are available for specific staff members to checkout from the Pocahontas Front Desk Secretary.
- Assessments are available in the areas of Behavior, Academics, Speech & Language, and OT/PT.
- Assessments will be available to check out in 2 week increments to PLAEA staff
- Assessments are only sent to PLAEA staff in PLAEA buildings by vanmail. They will not be sent to PLAEA staff by vanmail to school locations.
- Each assessment kit will arrive with needed protocols in the kits.
- Some Behavioral Assessment kits/forms are stored at each PLAEA office. Please contact the secretary at your PLAEA office for location of these Assessments. Additional protocols for these behavioral assessments are requested from the behavior department contact within your office. Each office should have a check out sheet for these assessments housed within your office.
- Some assessments used by Speech Language staff are also maintained by some SLP staff. If additional protocols are needed for any of these assessments such as PLS-5, Goldman, etc; please contact the SLP department chairperson (Margo Kitzrow) to order more protocols.

### **Business Cards:**

- Prairie Lakes AEA has official business cards, printed and designed by the AEA Print Shop. Do not create your own version of the business card. Use this form ([Business Card Request Form](#)) and submit to the PLAEA Print and Production Department in the Pocahontas office.

### **Central Files - Special Education Records for Children Ages Birth to 21 yrs. Old:**

At this time, we will maintain our central files system as we have in the past for special education records. We are moving to electronic maintenance of records as of July 1, 2021. This system will store all our Special Education Records in an electronic format where we will no longer have our paper central files. LaserFiche will store our Special Education Records electronically for Prairie Lakes AEA. Tonia Hoch and Brenda Prentice will have license access to these records. All student's special education records that are not electronically stored in the Iowa IDEA WEB IEP/WEB IFSP or the new ACHIEVE system will be stored in LaserFiche. This will include any special education records (IEPs, IFSPs, reports, and signed documents previous to 2010). Any records that

need to be stored in LaserFiche should be emailed as PDF to Tonia Hoch or Brenda Prentice. (More details and guidelines on this process will be updated after June 1, 2021.

#### Central Files for IEP/IFSP (Special Ed) students:

- Maintaining Records (i3 Iowa IDEA Information): Both LEAs and AEAs are responsible for maintaining special education records for eligible individuals, as well as for adhering to FERPA, IDEA, and Iowa Rules regarding confidentiality. AEA support staff shall assist school districts in ensuring that student records are complete.
- Personally identifiable information (PII) must be maintained as long as it is needed to provide educational services to the student or to be available for audit. Iowa Administrative Rules of Special Education specify that special education records must be maintained for five years after special education services end.

#### Best Practice Suggestions for LEAs:

- Maintain special education records separate from a student's permanent and cumulative records and in a locked or secure location.
- Maintain special education records of currently-served students in a locked or secure location (e.g., password-protected computer) in a special educators' classroom or workspace

AEAs are required to maintain individual special education records in a locked or secure location.

At a minimum, the AEA maintains the following special education records:

- **Consents:** Full and Individual Initial Evaluation, Initial Special Education and/or Related Services, Reevaluation
- **Notices:** Meeting Notices, Agreement to Excuse Attendance at IEP Meeting, Prior Written Notices
- Educational Evaluation Reports (EERs)
- Individualized Education Programs (IEPs) and Individualized Family Services Plans (IFSPs)
- Early Childhood Outcomes Summary
- Extended School Year (ESY) Services
- Functional Behavior Assessment (FBA)
- Behavior Intervention Plan (BIP)
- Manifestation Determination (MD)
- Justification for Special School Placement
- Communication Plan for Deaf or Hard-of-Hearing
- Authorization for Exchange of Information and Release of Health and/or Educational Information
- Parent Consent/Parent Refusal or Withdrawal of Consent for an AEA To Share Data and Seek Payment for Individualized Education Program (IEP) Health-Related Services
- Assessment protocols
  - NOTE: *Under Section 504, a student's test protocols are considered "relevant records" to which parents must be afforded access, regardless of whether they are education records within the meaning of the IDEA.*
- Progress or therapy notes (excluding sole possession records)
- Any correspondence meeting the definition of a special education record

Any electronic records (databases, video recordings, emails, etc.) that meet the definition of a special education record or that contain information derived from any or all of the above records are also considered to be special education records and will be maintained by the AEA.

## Central File Reference

### **Destroying Records: (i3 Iowa IDEA Information)**

LEAs and AEAs are allowed to destroy personally identifiable information (PII) at the point it is no longer needed to provide educational services to the student or for audit purposes (e.g., Medicaid records). Per the Iowa Administrative Rules, special education records must be maintained for five years after special education services end for a student.

AEAs and LEAs shall notify the parent(s) and age of majority students when special education records are no longer needed.

Parent(s) and eligible students have the right to request that records be destroyed when no longer needed by the AEA/LEA. This right applies to the period of time, if any, between the point in time that the AEA/LEA has communicated that records are no longer needed and the point in time when actual destruction would occur.

In the absence of the parent(s) or age of majority student's request to destroy the records, an AEA or district may maintain the records indefinitely.

### Cherokee Mental Health Letters/Information:

Letters from Cherokee Mental Health regarding student admission, reports, or discharge.

Sue Berberich will receive these letters in the Spencer office for our agency. She usually receives two letters. One when they are admitted and another when they are discharged. She will hold these until she receives both of them prior to sending to the secretary staff at respective offices. She will scan and email them to the corresponding offices where the files for the district where the child attends are housed within our AEA.

Here are your responsibilities when you receive this letter from Sue:

1. Scan and email the letter to the AEA reps (academic and behavior) for that district whether special education or non-special education
2. Check WEB IEP to see if the student is receiving special education services
  - a. If the child is receiving special education currently or in the past, file the letter in the central file (active or inactive)
  - b. If the child is not receiving special education services currently or in the past, shred the letter.
3. You will not need to send a copy to the school district as they will have also received these letters and will maintain them in the student's cumm file.

(This process was reviewed by Chris Wells and Coletta Jaeger.)



## **Classified Association Handbook:**

Please reference this year's [Classified Association Handbook](#) available on our PLAEA staff portal under the Personnel section under Classified for all questions on leaves, hours, etc.

## **Classified Master Contract:**

Please reference this year's [Classified Master Contract](#) available on our PLAEA staff portal under the Personnel section under Classified section.

## **Communication:**

- [Friday News](#) is used to post important information to be shared with all PLAEA staff. Information should be sent to Connie Johnson ([cjohnson@plaea.org](mailto:cjohnson@plaea.org))
- Communication regarding employees or employee family members should be shared with RA who will share with Connie Johnson to be released to PLAEA staff. Please note this information from the Hearts and Flowers section.
  - Secretaries will continue to monitor events and communicate by email to Brenda Hebert and Connie Johnson. During the initial conversation that the secretary, or the RA, has with the staff member, please ask if it's okay to share the information agency wide. With regard to a funeral, if secretaries can gather other details, such as the name of the person, their relationship to the employee, and the name of the funeral home ect.
  - Connie will continue to inform PLAEA staff and provide details, i.e. funeral arrangements and home addresses so staff can send their personal cards of condolences, recognition, or celebration
- [Communication and Guidelines Tools](#)
  - These guidelines were created to enhance your awareness of the tools available, ideas for use, and how to seek assistance for communication. Any questions can be directed to Connie Johnson, Director of Marketing and Communications, [cjohnson@plaea.org](mailto:cjohnson@plaea.org)
- Communicating with Superintendents & Principals
  - Google Groups have been created for superintendents and principals. To send information to these groups, contact Connie Johnson who will send out information to them.

## **Contracted Services:**

- Contracted Services could be used for services such as interpreters.
- Contracted Services (for a non-AEA employee) are initiated with the business office prior to use as the person will need to complete a background check. These services are all approved prior by the Regional Administrator and Business Office of PLAEA.
- Payment for Contracted Services are initiated with an Invoice of Expense ([linked from secretarial portal](#)) which is entered into the Ereq system.
- When the Invoice of Expense is used, the following information needs to be obtained: name, address, phone number, social security number, date of service, mileage incurred, description of services provided and amount of payment.

## Copier/Printer/Fax Machines:

Our copy machines are all maintained and repaired with Counsel. Each office has at least once copy machines that are also our main fax machine.

Maintenance: repairs or issues with your machine, please contact Counsel at 1-800-888-6186. When contacting them, use your Equipment ID# to reference. The Counsel contact phone number and equipment ID are both located on the front of the copy machines.

Additional supplies for the copy machine such as staple refill and toner cartridges can also be ordered from Counsel at the above phone number. All of the repairs and supplies for the copy machines are covered under our service agreement.

- Toner Cartridge Recycling:
  - We can definitely return copier cartridges for recycling. In some cases, you will find a UPS return label in a cartridge box. This can be placed on the box with the empty toner cartridge and UPS can be contacted for a pickup. If there is not a label on the box, Ricoh provides a way to [get a free UPS return label](#) online. You simply scroll to the bottom of this page and look for the red button that reads "Prepaid Shipping Label". When you click the button, you will be asked to provide some information for the return label. You'll also be asked for the package weight and the EDP Code Number. EDP codes and/or Product Codes are product designations that are used to identify a specific consumable item for Ricoh, Savin and Lanier products. The EDP code and/or "Product code" can be found on the label of the original carton box; in some instances, it can be found on the cartridge or container itself. Enter this information, print your label and affix it to the package for UPS pickup (you may need to call for pickup if you don't get regular UPS delivery/pickup). Counsel and Ricoh ask that we conserve on shipping by consolidating several smaller toner cylinders into one larger box. If you are ordering multiple cartridges and having them arrive in a larger box, you may want to store both the new and used cartridges in this larger box until it is full of used cartridges and then use it for the return.

## Educator Connection:

- Educator Connection is a weekly publication sent via email to all superintendents, principals, and curriculum coordinators. This is the primary way that we share information with our districts. Content must be submitted by 8 a.m. each Tuesday as the newsletter will be sent at 10 a.m. that same day. However, anyone is welcome to subscribe. (All PLAEA staff are also automatically subscribed.) It also resides on the [PLAEA website under Leadership](#). Staff should contribute information for inclusion in the newsletter rather than emailing it directly to administrators. Contact Connie Johnson before sending emails through AEA Manager.

## Event Coordinator for PLAEA Offices/PLAEA Office Room Reservations:

One person, at each PLAEA office which hosts events, has been designated to coordinate the room reservations, room setup, presentation materials and supplies, equipment needs, food, calendar communication. One person is doing this to ensure consistency of service and support.

- Algona - Deb Gade
- Estherville - Tera Shatto
- Fort Dodge - Carrie Guerin

- Pocahontas - New secretary
- Spencer - Sue Berberich
- Storm Lake - Keri Ryherd
- Webster City - Shawna Badenhurst

[Link to document regarding PLAEA Rooms/Capacity](#)

PLAEA Rooms/Capacity available for direct reservation								
		Room Name						
		Room 1	Room 2	Room 3	Room 4	Room 5	Room 6	Room 7
Office Name	Algona (Jill)	Algona Large Conference Room - COVID Capacity-12						
	Estherville (Tera)	Estherville AEA Conference Area - COVID Capacity - 7						
	Fort Dodge (Carrie)	Lobby Conference Room - COVID Capacity - 6	Lower Level Conference Room - COVID Capacity - 25 to 30	Preschool Conference Room - COVID Capacity - 6 to 8	Upper Level Conference Room - COVID Capacity - 2 to 3			
	Jefferson (Shannon)	Conference Room - COVID Capacity - 10						
	Pocahontas (Deb)	Black Hawk Lake - COVID Capacity - 35	Dean Saunders Board Room - COVID Capacity - 5	Lizard Lake - COVID Capacity - 4	Silver Lake - COVID Capacity - 5	Spring Lake - COVID Capacity - 5	Swan Lake - COVID Capacity - 4	Twin Lakes - COVID Capacity - 30
	Spencer (Sue)	AEA Conference Room - COVID Capacity - 5		Spencer District Conf Room B - booked with Sue in Spencer PLAEA office - COVID Capacity - 45	Spencer District Conf Room C - booked with Sue in Spencer PLAEA office - COVID Capacity - 20			
	Storm Lake (Keri)	Bradley Conf #518 - COVID Capacity - 4 to 5	Lakes Conference Room - COVID Capacity - 30	Suite ABC - COVID Capacity - 30 to 35				
	Webster City (Shawna)	W.C. Large Conference Room - COVID Capacity - 6						
	PLEASE SEE RESERVATIONS IN AEA MANAGER FOR ROOM SPECIFICS (monitors, projectors, etc)							
Rooms/Capacity available for reservation outside of AEA								
		Name	Phone Number	Contact Name				
Location	Algona							
	Emmetsburg	Iowa Lakes Community College Campus						
	Estherville							
	Fort Dodge	Iowa Central East Campus - Triton Room	515-574-1049	Julie Evenson				
	Jefferson							
	Pocahontas							
	Spencer	Clay County Regional Events Center	712-580-3000					
Storm Lake								
Webster City	Brigg's Woods Conference Center	515-832-9572	Kelly Haman					

## Family & Educator Partnership (FEP) Folders:

IFSP Services - Birth to 3 years old

IEP Services - 3 years to 21 years old

FEP Folders are created to provide to parents at the time a disability is suspected is signed for the child and at the time of initial IEP placement.

- Is Your Child Eligible for Special Education? (purple folder) is provided to the parents at the time of the Disability Suspected meeting.
- Family Resources for Special Education (orange folder) is provided to the parents at the initial IEP meeting.

Both folders contain reference information for the parents regarding Special Education services along with information regarding our FEP program and Prairie Lakes AEA.

Spanish versions of these folders are now also available for each office as needed.

IFSP Folders are also now available. These are provided to parents during the initial IFSP meeting. They are titled Family Resources for Early ACCESS.

The information contained in these folders is also available electronically on the PLAEA website in the

staff portal under the Special Education tab.

<https://www.plaea.org/staff-portal/special-education-resources/>

Parents can be offered the information to be emailed to them electronically if meetings are being held virtual. PLAEA staff should offer to mail parents paper copies of folders. Secretaries in each PLAEA office can assist with mailing these out if needed.

Each Prairie Lakes AEA office should have a supply of each of these folders for staff to use during these meetings. Depending on the office location and size, we recommend from 25 to 50 folders of each at your offices. Fall months during count time (September and October) and spring months (April and May) are important times to make sure you have a supply of these folders available.

Additional supply of IEP folders can be obtained by emailing Deb Betz (dbetz@plaea.org). Supply of folders are located in the Pocahontas AEA office.

Additional supply of IFSP folders can be obtained by emailing Deb Betz (dbetz@plaea.org).

Folders are made up by the FEP staff (Deb Metz and McKaylee Heuton). All supplies for these folders are ordered from Brenda Prentice (bprentice@plaea.org).

If you have any questions on these folders, please contact Brenda Prentice.

### **Hearing Booth Appointments:**

Booth appointments are scheduled in 30 min increments (1 hr. Increments during the COVID pandemic to all for extra sanitizing).

If parent or outside referral sources call to request a hearing appointment for the child, please ask where the child lives. From the information you receive, please determine which PLAEA office would be the closest for the family to have the hearing screening. From that information, please transfer the call to one of the office locations where we have a hearing booth to schedule the appointment.

Hearing booths are located in these Prairie Lakes AEA offices:

- Algona - Angela Harvey (Audiologists)
  - Deb Gade in Algona office will schedule (712-335-6032)
- Fort Dodge - Maureen Salinas (Audiologist)
  - Monique Jones in Fort Dodge office will schedule (515-705-7149)
- Spencer - Michelle Conrad (Audiologist)
  - Sue Berberich in Spencer office will schedule (712-346-5002)
- Storm Lake - Shannon DeMoss
  - Keri Ryherd in Storm Lake office will schedule (712-458-7005)

Each of these offices locations has their own format regarding scheduling appointments as some use google calendar or google schedule.

See Stratus - Interpreter section of these guidelines for use of Stratus - Interpreter during hearing appts.

**During COVID, these guidelines are followed:** (Please share the following information with parent when making an hearing appointment.)

- Face coverings will be required by anyone age three or older.
- One child and one adult will be allowed to enter.
- No food or drinks are allowed.
- The parent/guardian will need to call/test the provider upon arrival and wait in the care for the

provider to escort them inside. Call/Test this phone #\_\_\_\_\_.

- Once you arrive, the provider will check your temperature and ask you to complete a brief screening questionnaire prior to entering the building.
- If you or your child have a temperature equal to or higher than 100.4 F, the appointment will need to be rescheduled.
- If you have been diagnosed with COVID-19 within the last ten days OR in close contact with someone diagnosed or in isolation due to COVID-19 exposure within the past 14 days, you will need to reschedule your appointment.

### Hearing / ABR Hearing Appointments/Scheduling:

Auditory Brainstem Response (ABR) measures auditory nerve reactions in response to sounds. An ABR is not a hearing test itself, but it can be used to detect hearing loss in infants and very young.

Shannon DeMoss and Angela Harvey are our two PLAEA Audiologists that are trained in this area to complete ABR testing within our agency. Appointments are scheduled by Monique Jones in our Fort Dodge office by contacting her at 515-705-7149. If a referral or parent contacts any office regarding scheduling an ABR hearing test, please transfer the call to Monique in Fort Dodge. These appointments can be scheduled to take place in any one of our PLAEA offices.

### Hearts and Flowers Fund:

Hearts and Flower Fund

Effective July 1, 2021, Brenda Hebert, Chair of the Wellness Committee, will begin handling the Hearts and Flower Fund on behalf of the Agency. The fund will be supported with partial self funding dollars as part of the Wellness program budget. Office's will no longer maintain a separate Hearts and Flower fund by staff donations.

Secretaries will continue to monitor events and communicate by email to Brenda Hebert and Connie Johnson. During the initial conversation the secretary, or the RA, will confirm with the staff member, that it is okay to share the information agency wide. With regard to a funeral, secretaries will gather other details, such as the name of the person, their relationship to the employee, and the name of the funeral home ect.

Connie will continue to inform all staff of details and the home address so staff can send their personal cards of condolences, recognition, or celebration.

The following events will be recognized by the Agency. Brenda Hebert will send the items out to staff on behalf of the Agency.

### Death:

- Staff member - Bouquet of flowers w/card will be sent - \$100.00 (Or noted family discretion)
- Spouse/Significant other - A green plant w/card will be sent - \$50.00
- Child - A green plant w/card will be sent - \$50.00
- Parent - A green plant w/card will be sent - \$50.00
- In-Laws - Card on behalf of the Agency
- Sibling - Card on behalf of the Agency

- Hospitalization of employee - Card on behalf of the Agency will be sent to their home address

#### Retirement: (Not years of service)

- The Agency will pay up to \$100.00 towards an agency retirement party held within the staff member's office.
- Each retiree receives a special gift from the agency to celebrate and recognize their service.

#### Birth of a child/adoption:

- The Agency will send a card and flowers to the employee's home.

#### Hospital stay:

- A card will be sent to the employee's home address.

In addition to what the Agency will provide, staff can continue to do their own individual recognition, BUT this will not be coordinated by the office secretaries or the Regional Administrators. For example, if a department wants to recognize a sick employee by sending flowers, they need to handle that themselves and not expect a secretary to coordinate the collection of money or ordering of the flowers.

#### HyVee Charge Cards/Accounts:

Your office may have access to a HyVee charge card. These cards should be used only for approved expenses/charges by your RA. This can be used to purchase small office supply needs such as dish soap for office or office needs that can not be received from Jim Hebert. It can also be used if coffee supply is needed for meetings being held within your office from outside agency staff, professional development, etc. Purchases that are approved for meetings such as rolls, small snacks, etc can also be charged. However, these purchases also need to have prior approval and only when involving district staff.

Once charge is made, please fill out ereq for payment to HyVee. Original receipts along with a copy of ereq should be sent to Josh Bader in the Fort Dodge office.

#### Leaves:

Please reference the current Classified Handbook for information on leave information.

<https://www.plaea.org/staff-portal/personnel-handbook/classified-handbook/>

Please reference the current Licensed Handbook for information on leave information.

[https://www.plaea.org/media/cms/License\\_Handbook\\_20202021\\_10\\_52F4886390879.pdf](https://www.plaea.org/media/cms/License_Handbook_20202021_10_52F4886390879.pdf)

Please notify your RA, designee, office staff, and those you work closely with as soon as possible to report that you will not be to work due to illness or other leave requests.

Please use the secretary google group email to communicate when you will be absent for more than one day from your office.

If you have any questions regarding leave, please contact your Regional Administrator and Brenda Hebert [bhebert@plaea.org](mailto:bhebert@plaea.org).



## Media:

AEAs provide Iowa students and educators with no-cost access to 16 high-quality, vetted digital resources. The resources are available anytime, anywhere. There are read-aloud ebooks, ebooks, digital audiobooks, videos, encyclopedias, articles, newspapers and more for our youngest and oldest learners.

With weekly free van delivery to every school, our Media Library offers a wide variety of material, all available at no charge for educators to use. These classroom materials benefit all PreK-12 teachers in every curriculum area. Our lending library provides content in an assortment of mediums, ranging from K-12 books, audio books, professional books and materials, journals, videos and DVDs.

Here is the link to the AEA digital resources:

<https://www.plaea.org/page-media--print/aea-digital-resources/>

Contact person is Christine Sturgeon [csturgeon@plaea.org](mailto:csturgeon@plaea.org)

## Mileage:

- Mileage/expense reports are completed monthly by each individual staff member and submitted via AEA manager through the approval tree.
- Mileage must be submitted in a timely manner so that it can be reviewed by the PLAEA office secretary and/or Regional Administrator/Supervisor/Administrator prior to the 5th of each month.
- Mileage reports are tracked from the 1st of each month to the last day of each month. (There is no carryover.)
- Secretaries responsible for each staff member listed on their RA supervision listing will review mileage that staff have submitted in the AEA manager system prior to approving.
  - Each travel day should have one listing per day - unless there is travel out of the area which includes hotel, taxi, or meal receipts.
  - Each travel day for mileage should have a starting destination and ending destination with all stopping points listed in between.
  - Abbreviations can be used and it is best to place a space between each destination instead of using commas, hyphens, slashes, etc. (Example: Office Spencer HS Office Spencer MS Office. This can also be abbreviated: Off SpHS Off SpMS Off)
  - If staff are providing home visits to children in the same town location, the entry looks similar to this. (Example: Office Spencer HV Head Start Rural Spencer HV Office. This can also be abbreviated: Off SpHV HS Rural HV Off.)
  - Direct bill hotel reservations should not be listed on mileage.
  - Registration reimbursement should not be listed on mileage unless regarding Teacher Quality (TQ) reimbursed registration. Requisition should be filled out for reimbursement of registration other than TQ.
  - Meals are reimbursed at the agency rates listed for out of area travel.
  - Receipts must be submitted to the secretary with the mileage for approval.
  - All receipts must be itemized receipts.
  - No alcoholic beverages are reimbursed by the agency and should be crossed off itemized receipts.

- Tips may be included for meals at the rate of 15%. Each secretary should calculate the tip rate using 15% to make sure it is correct. If not, please request that staff adjust on their reimbursement.
- All receipts should be collected together, approved against the staff person's mileage that has been submitted in the AEA manager.
- Each receipt should be labeled with PLAEA staff's full name and month of expense (Feb. 2021 mileage) and initial by the secretary that indicates that the receipt was reviewed.
- Best practice is to print a copy of the staff person's mileage for the month, compare each receipt to the entry on the mileage, approve total expenses, copy/scan all receipts together to Brenda Hebert. It is best that you group each staff person's receipts together in separate emails to Brenda Hebert.
- Reimbursement for anything other than daily traveled miles, reimbursement for out of area meals, travel such as airfare, taxi, etc should be reimbursed by completing an requisition.

If you have any additional questions, please contact Brenda Hebert [bhebert@plaea.org](mailto:bhebert@plaea.org).

### MiFi Hotspot Access:

- One device is available in each of the Algona, Estherville, Jefferson, Spencer, and Webster City offices. Fort Dodge, Pocahontas and Storm Lake have two available for staff use. Any staff member can check out a device from any office where devices remain. Please make contact with the secretary at that office and be conscientious of the checkout timeline.
- The secretary in the PLAEA office should store the MiFi Hotspots in a secure location. The secretary should also have a check out sheet available to use for the MiFi Hotspots check out by staff.

### New Staff Hire:

New staff hire information is provided by Brenda Hebert from the business office of PLAEA in Fort Dodge. Each year if you have any new PLAEA employees within your PLAEA office, we ask you as the secretary to welcome them to your office. We ask you that you have conversation prior to their start date regarding the following items:

- Office space needed - desk location, file cabinet, bookshelf, etc. (Discuss with your regional administrator in your office.)
- New staff will attend orientation in the Pocahontas office the first week of employment. Schedule will be sent out to new staff by Directors, HR, Administration.
- Secretary in each office will be responsible for working with new staff on these items listed:  
New Hire Secretary Checklist:
  1. Welcoming Posters – Please have a poster posted at the entrance welcoming new staff
  2. Staff available to greet new staff at the entrance when they arrive
  3. Distribute Office Keys
  4. Office Tour
  5. Office Supplies – be sure they know where the supplies are located
  6. Copier/Printer – training on the copier system
  7. Office mail box – be sure they have a mailbox setup



8. Name plate ordered and posted
9. Order Business Cards from Media
10. Telephone System Training/Voicemail setup (Phone extension numbers will be provided by tech dept.)
11. Google Calendar Training
12. Van Mail/Route Training
13. Postage Machine Training
14. Parking

New hires will have technology, AEA Manager – mileage, timecards and leave training at the new hire orientation that is scheduled each year.

### Office Closings/Event Cancellations/Weather-Related Announcements:

- Please reference the current Classified Handbook for policy on Weather - Office closings for classified staff.
- Office closings will be under the direction of the Regional Administrator for each regional office. Notification of office closing should be communicated with Connie Johnson for PLAEA Alerts.
- Event cancellations should be addressed by the event coordinators. Notification of cancellations of scheduled events should be communicated with Connie Johnson for PLAEA Alerts.

### Petty Cash:

The disbursement procedure for petty cash is designed to provide sufficient documentation of each expenditure, as well as proof that funds were actually disbursed. The petty cash disbursement procedure is outlined below:

- Screen disbursement requests. Disburse funds only for minor business expenses.
  - Twenty-five dollars or less
  - These purchases can be for purchases:
    - small office items needed immediately instead of waiting for order from vendor
    - batteries needed for equipment that secretary does not have in supply
    - mailing or insurance of mailing equipment or items that postage meter can not cover cost
  - Larger amounts can be used in emergency situations if approved by Michelle Dowd
- If a disbursement request falls within the petty cash disbursement guidelines and approved by Regional Administrator, unlock the container in which petty cash is stored. For security reasons, the petty cash fund should be locked at all times when it is not in use.
- Disburse cash to PLAEA staff person either prior to the purchase or after the purchase has been completed. Count the cash being disbursed, have the recipient count it as well, and to verify the amount being paid. Make note in petty cash records that you have provided the staff person with an amount of cash for purchase.
- Update petty cash log. This information can also be maintained on an electronic spreadsheet.
- Upon completed purchase from petty cash, itemized receipt must be provided for the purchase. If cash was not dispersed to make the purchase, reimburse staff for the total purchase cost. Record both on the receipt and on the petty cash log the date, amount of purchase, who purchased item, and reason for the purchase. Include the dept and the purchaser's name. (For example, batteries for OT Dept, Nicole Peter - Postage and Insurance for mailing equipment for Hearing Dept., Michelle Conrad - Pack of pocket folders for office supplies.)

- Replenish petty cash funds. When petty cash funds become low, the secretary will create an ereq requesting more money. Each box will contain \$100.00 total, except for Pocahontas office will have \$200.00. Total amount requested on the ereq should equal the total amount of the vouchers paid. When completing the ereq for reimbursement, each entry should be split out to the budget which the petty cash purchase falls under. For example, if the petty cash was used for OT purchases, please indicate OT dept and person purchased for. If petty cash was used to mail audiology equipment for repairs, please indicate Hearing Dept. - postage. If petty cash was used for basic office supplies, indicate that in the budget line. These vouchers along with receipts should be sent to Josh Bader in the Business Office to support the purchase order as back up to the replenishment.

## Phones:

(also reference information under Zoom Phones)

PLAEA agency phones are answered during work hours from 8:00 AM to 4:30 PM by a rotation of secretaries throughout the agency. This process ensures customer service, quick response times, and ease for use for the public. We are available to ensure the callers are connected to the correct PLAEA employee who can support and help them. Referrals made are communicated with appropriate staff members.

Phones are answered on a rotating basis by:

- Tera Shatto - Estherville office
- Monique Jones - Fort Dodge office (10:00 AM to 2:00 PM)
- Sue Berberich - Spencer office
- Keri Ryherd - Storm Lake office
- Shawna Badenhorst - Webster City office
- Deb Gade - Algona office
- - Pocahontas office
- Shannon Hagen - Jefferson office

Sample of phone answering:

- Good morning / good afternoon, Prairie Lakes AEA, this is Brenda, how may I help you?

Examples of transfers:

- If calling to speak with someone directly within our agency, please transfer them to extension using the directory. You may indicate to the caller that if they do not answer their extension, please leave a message and they will return your call as soon as possible.
- Birth to 5 referrals on children on in school - indicate that Ashlie Jergens takes care of these for our agency and you will transfer the call to her extension #56043.
- Concerns regarding a child that is in the school from a parent. Indicate to the parent that it is best for them to contact the district directly such as the child's teacher with the concern. If they have already contacted the school and still have a concern: ask which school district, what grade, and briefly what their concern is along with contact information for the parent. Indicate to them that you will contact the PLAEA bldg rep that serves the district where the child attends and they will contact the parent as soon as possible. Reference the master assignment listing to locate which PLAEA rep is assigned to districts.

- Parent concern with the school district - these calls should be transferred to the RA that serves that school district. If you know that the RA is not available for the call, please take a message and reach out to the RA as soon as possible to return the parent's call.
  - Questions or concerns regarding classes offered by PLAEA, para educator classes, license renewal, credit, transcripts, etc are transferred to Carrie Guerin at extension #57148.
  - Hearing appointment for child
    - Ask parent where child lives (town) or which school district child lives in
    - Indicate to the parent that we have hearing booths in these locations that would be near them:
      - Spencer
      - Algona
      - Fort Dodge
      - Storm Lake
- For example, if the child lives in Humboldt, ask the parent if they prefer to travel to Algona or Fort Dodge for the hearing appt.
- Depending on the child's location, transfer the call to the location where they would like to make the hearing appt
    - Spencer - Sue Berberich at #65002
    - Algona - Deb Gade at #56032
    - Fort Dodge - Montique Jones at #57149
    - Storm Lake - Keri Ryherd at #87005
  - Questions on printing and production - transfer to Jenifer Krischel #56017

★ Most of all remember to be as helpful as possible to the calling. If unsure of who to transfer them to or who would be able to assist them, please take their name, association (parent, school, etc), and contact information indicating to them that you will return their call as soon as possible. Contact Brenda Prentice and I will assist you with trying to route the call to who will be able to assist the caller.

Please don't have the caller transferred around several times.

Remember:

- That you have access to everyone's google calendar
- You will receive calls agency-wide

Please note that a good reference is the Master Staff Assignment sheet. Note that the Liaison Tab on the master assignment sheet may be a good reference.

### Phone - Agency Voicemail:

Voicemail messages left after work hours are answered by a small group of secretarial staff.

Voicemail messages should be retrieved at least 2 times per day (first thing in the morning and before you leave for the day). Phone calls are left in the agency voicemail when there is no one available to answer the calls before or after working hours and also during working hours when there is no one available to pick up the calls.

With our current system, the agency voicemail will be received as an email message to the group of secretaries listed below. The email message can be forwarded to the person responsible for answering the callers questions.

Please reference information in the Phone section listed above for additional details for forwarded messages.

These secretaries are assigned to the agency voicemail:

- Monique Jones (10:00 AM to 2:00 PM)
- Keri Ryherd - 1st back-up
- Poc Secretary - 2nd back-up

### PLAEA Alerts:

- PLAEA does not use the news media to announce closings, delays, or cancellations. If you need to make an announcement, please text or call Connie Johnson on her cell phone. (Her number is in AEA Manager.) **Do NOT send an email!** It's also totally acceptable to utilize a secretary for this work.
- In case of bad weather, please be sure to check PLAEA Alerts (<http://www.plaea.org/alerts/plaea-alerts/>) to ensure the event is still being held as planned. We do not use the news media for these announcements. You can also subscribe to receive an email and/or text alerts whenever the weather, or some other situation, warrants!

### Print and Production Requests:

#### [Print and Production Site Link](#)

1. Online Ordering System Instructions
    - If you have any questions or need help filling out your request, please contact: Jenifer Krischel: [jkrischel@plaea.org](mailto:jkrischel@plaea.org) or 712-335-6017
  2. Sign In to the Creative Services e-store or Create a New Account
  3. Sign in to the Creative Services E-store at this link with the same log-in information as your AEA Learning Online account. If you don't already have an account, click on "Sign In with AEA Login", then "AEA Login" or "Google" and "Sign Up." Follow the instructions to set up an account and sign-in.
- Placing a Graphic Design ONLY Request
- PLEASE NOTE: You will use this option if your request is for graphic design only and will not require any printing. If your request will eventually require printing, start your request with the category of the item you will need printed (ex. poster, envelopes, etc.).
- To get to the list of product categories, click on "Shop" located on the top left of the red bar and the categories will be listed on the left hand side. Once you have signed in to the Creative Services E-store to start your graphics request, simply click on "Graphic Design Request" located in the middle of the red bar at the top of the page. Upload all graphic files as necessary and enter as specifically as you can any special instructions. You then can submit your request and you will automatically be taken to checkout. Follow the same checkout instructions as listed below.
- Placing a Request (All Categories)

- ◆ Please do NOT use the “Custom Request Form” located in the red bar unless your request does not fit into any of the other Product Categories listed on the left hand side.

→ Once you have signed in to the Creative Services E-store, click on “Start Your Order” (first item located in the red bar at the top left of the page). To start your order, simply click on the category of the item you are requesting located on the left side under Product Categories. If your request will require graphics along with printing, check “Needs Graphics Work Done” located near the bottom of the request and you will be able to enter a description of the graphics work needed along with the option to upload any files. \*Please Note: Some categories will have multiple options once selected. Simply click on the graphic corresponding to whatever it is you are requesting.

→ Plain Copies

You will use this category for black/white or color copies such as worksheets, concert programs, booklets, or any printing that will require bindery work such as stapling or coil binding. Please note that these categories are more specific than our previous system as there are separate categories for envelopes, carbonless, etc.

→ Basic Printing

Once you have opened the plain copies printing option, click on “Add Paper Option”. Select the desired options from each drop down menu and then enter the total number of originals in your request. You then would choose any bindery if needed and enter the number of copies you are requesting. You can also add any special instructions needed to complete this job. You then will have the choice to either Upload the File or Upload Later. \*We STRONGLY encourage you to upload the file at the time you are placing your order to ensure it is the correct copy and to prevent any delay in printing. Once you choose either option your item will be added to your cart. If you are not automatically directed there, click on your cart, double check your order for accuracy and modify to make any necessary changes. Proceed to checkout and follow the instructions as listed below.

\*Note: The “Which Pages of your document will be this color?” can be left blank if all the pages are the same color. If the document has multiple colors, you would enter the page numbers of the document to be printed on that color, and then add as many additional paper options as necessary.

→ More detailed print request

You can enter any type of detailed print request by adding multiple paper and bindery choices. As an example, here is how you would enter a spiral bound booklet (printed front cover, blank back cover with inside pages printed f/b). The first thing you will do is click on “Add Paper Option” and enter your paper choices for the front cover. The number of originals per copy would be either one or two, depending on if you want it printed front/back or front only. You then would need to add another paper option for the back cover. If there is printing on the back cover, choose the appropriate options as to how you want it printed. Choose “Blank” as the print color if your back cover has no printing. You then would add another paper option for the inside pages. Select your paper choices according to how you want your booklet printed and then enter the total number of originals you need printed for the inside pages. You then would add Binding (Coil) for your finishing option. Upload your document and proceed to your cart. Check your cart for accuracy and make any modifications if necessary. Proceed to checkout and follow the instructions as highlighted in yellow below.

→ All Other Categories

Once you have selected the category for your specific request, simply choose the options you want from each drop down menu. You then will have the option to upload your own design or have us design it for you. If you are requesting us to design something for you or if the file needs a few adjustments, check “Needs Graphics Work Done” and you will be able to enter a description of the graphics work needed along with the option to upload any files. Once you choose either upload option, you will automatically be directed to your cart. Check your cart for

accuracy and make any modifications if necessary. Proceed to check out and follow the instructions as listed below.

→ Ordering Multiple Requests

If you have multiple orders to submit, once you have added your first item to the cart and checked for accuracy, simply click on the “Shop” button again and add any additional requests. Once all your requests are added to your cart, proceed to checkout.

→ Check Out

The final step for placing an order is to check out. Here you will give your request a unique Project Name/Job Title (ex. Volleyball Poster 2020). Choose a due date - see below\*. If you want your items to be delivered via van mail, please choose a due date that corresponds with your district's van route delivery. Fill out all the remaining required fields and add any special notes for delivery in the additional information box. You then can place your order. \*\*Please note that the price reflected in your cart is only an estimate and may change if we have to make any modifications/additions to your request. Once your order has been placed, you will receive a confirmation email along with all the order details.

→ Choosing a Due Date

The soonest the system will let you choose for a due date for any request is five business days. If you have a smaller print request and need it sooner, write in the special instructions when you need it. Any request requiring graphics will need to adhere to the five day minimum.

→ Keep a printed copy of each order to make future reordering easier.

Easiest way to login into the system is to use -- Sign in with AEA login:

### Login

Email address \*

Password \*

Login

☐ Remember me

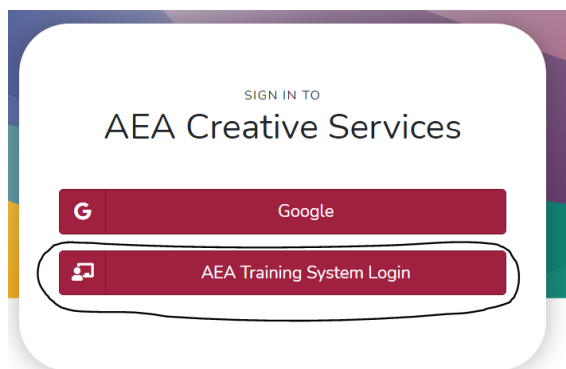
[Lost your password?](#)

[Other ways to login](#)



Sign in with AEA Login

Next - Use the section that indicates “AEA Training System Login. This would be the same login and password that is used when completing your mandatory training sessions.



**PLAEA Print forms** to use when not completing the online ordering in AEA Creative Services. If you download each of these forms, they are in fillable format.

### [Business Card Request Form](#)

Use this form when requesting business cards for staff.

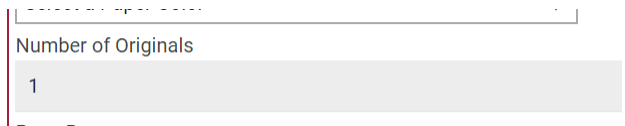
### [Internal Print Form](#)

Use this form when requesting internal print items for PLAEA staff. This can include such items as the door name plates.

### [Lamination Request Form](#)

Use this form to all lamination requests for PLAEA staff.

**Copies:** You can use the copy section online under the new AEA Creative Service Ordering System. When ordering copies to be printed, please make sure that the number of originals is the number of pages in your document. Front to back pages would count as 2 for the number of originals. So if you have a 25 page document that is front to back, you would have 50 for the number of originals. (25 if it was a one sided document.)



The number of copies that you are requesting will be asked later in the request under Quantity.

Quantity (Number of Copies):

**Envelopes:** Use the envelope section online under the new AEA Creative Service Ordering System. When ordering envelopes, the quantity is the number of envelopes which a box of them is 500.

**Please remember to note on all orders the department or person that you are requesting the print or production request for so that it can be billed accordingly.**

### [Referrals - Birth to 5 yrs old:](#)

Referrals for children ages birth to 5 yrs old in age are taken by Ashlie Jergens for our agency. Ashlie can be reached at 712-335-6043 or [ajergens@plaea.org](mailto:ajergens@plaea.org). All calls regarding referrals should be transferred to Ashlie. All faxes and emails should also be forwarded to Ashlie. Ashlie will gather the information and assign it to Service Coordinator as needed. This is to keep data gathering and the message consistent. For hearing booth screens/appointments, please refer to the Hearing Booth Appointment section of these guidelines.

### [Referrals - School age:](#)

Referrals from school age children may be received within our offices. These requests may come from parents, outside agencies, or school districts. When you receive referrals on school age children, please obtain the following information to pass along to the PLAEA reps (academic and behavioral) that serve the district where the child attends: 1) Child's full name 2) Child's DOB 3) Parent's name/contact information such as phone number 4) Grade 5) School District where child attends 6) Concern with the child. If a parent is making the referral, please ask them if they have already made contact with the school district with this concern. Please email all this information to the PLAEA reps (academic and behavioral) that serve the child.

During the summer, all these referrals on school aged children will be sent to Keri Ryherd in the Storm Lake office ([kryherd@plaea.org](mailto:kryherd@plaea.org)) (712-458-7005) to pass along to the Regional Administrator due to staff being off contract.

## Requisitions:

**NEW REQUISITION**

New Requisition      Originator: Prentice, Brenda (PrenticeB)

Mar 12, 2021      Requested By: Prentice, Brenda

Approval Tree  
Dr. Susie Meade (Michelle Dow... - Any (AEA)      Next Fiscal Year ☐

Item Type      Desired Delivery Date  
Any      Apr 12 2021

**Order Information**

Vendor Name	Item Number	Unit Cost	Quantity
<input type="text"/> Search	<input type="text"/>	\$0.00	1

Description

Mfr #

Budget Purpose      Amount      More  
      \$0.00

Total Distributed      \$0.00

Amount Remaining to be Distributed      \$0.00

**Orders Entered**

Line #	Vendor	Item #	Unit Cost	Quantity	Subtotal	
					Totals	\$0.00

Brief Description

☐ Print comments

Comments

Sections of a new requisition:

- Approval Tree: select the administrative staff person that the requisition being completed should be approved by. For example:
  - If purchase or reimbursement is for your office or region, approved by RA
  - If purchase or reimbursement is for a department, approved by liaison for that department
  - If purchase or reimbursement is for a staff person (depending on who approved), it could be RA or liaison of department
- Desire Delivery Date can be changed to current date or date that item is needed. Defaults to a month out timeframe.
- Vendor Name: Purchase that is being reimbursed or company that the item is being purchased from. If you can not locate the vendor needed, please contact Josh Bader [jbader@plaea.org](mailto:jbader@plaea.org).
- Item number:
 

This should be a number/word that relates to the reimbursement. If purchasing multiple items, each item should be listed out separately.

  - If ordered a book, this could be an ISBN number



- If ordering a supply item from Staples, this could be the product number
- If reimbursement to a staff member, place “reimbursement” in this field
- If for hotel reservations, put “reservation” in this field
- If payment relating to invoice, place the invoice number in this field
- Unit Cost:  
Cost of the item to be purchased, reimbursement amount, cost of hotel room for one night, etc.  
If purchasing multiple items, one unit cost should be listed here.
- Quantity:  
Number of units or items being purchased
- Description:  
This is where you should describe the information about the item being purchased or the reimbursement being requested. **Use multiple lines to complete a full description.**  
Examples could include;
  - ❖ Hotel reservation for Staff person’s name making the reservation for  
One night - direct bill to Prairie Lakes AEA  
Conf. #  
Attending State Directors Meeting  
In Des Moines, IA
  - ❖ The Mediator’s Handbook:  
Revised & Expanded - 4th Edition  
Paperback by Dr. Jennifer E. Beer  
Mediation Training for SpEd Staff  
Staff person’s name ordering the book for  
Shipping cost  
Approved by Kris Ahrens
  - ❖ Monthly Rental of Water Cooler  
Acct.# 40329  
June Invoice
  - ❖ Also note in the section under Description if it is Teacher Quality approved expense/purchase.
- Mfr: this section can be used to add the secondary item number of product being purchased or the manufacturer of the item.
- Budget purchase should be filled in with what department or area the item is being purchased for. It should include the department and staff person or persons - individual groups such as Assistive Tech, Challenging Behavior, FEP, SEBH, etc.

Examples:

- ❖ SpEd purchase for Spencer Office
- ❖ RA Travel - RA’s name
- ❖ Assistive Tech - staff person’s name
- ❖ Misc Supplies - PLAEA Office’s name
- ❖ Office Supplies - PLAEA Office’s name
- ❖ Behavior - SEBH group - staff person’s name
- ❖ OT Dept - OT’s name
- ❖ SLP Dept - SLP’s name

- ❖ Challenging Behavior - staff person's name

Agency budget numbers are added for each of these accounts by the business office.

- Comments section should be used for any additional notes that would be helpful for the business office. These can include:
  - ❖ Please order and ship to (indicate which office items should be shipped and who's attn)
  - ❖ Copy of receipts or invoice will be emailed to business office
  - ❖ These items were already purchased and requesting reimbursement
  - ❖ Please reimburse (staff person) as this item was paid for by----
  - ❖ Please fax a copy of the purchase order along with the registration forms that I will email to the business office (include fax number to use)
  - ❖ These items were approved for purchase or reimbursement by (RA, dept chair, or director's name)
  - ❖ This expense is Teacher Quality (TQ) approved expense

If you have any questions, please contact the business office for assistance.

### Secretary Section of Prairie Lakes AEA - Staff Portal:

This [section](#) contains documents frequently accessed by the secretarial staff to help facilitate our staff's needs. Updated Hotel/Motel listing is also available in this location.

### SSA (Social Security Administration) Requests:

Faxes or mail may come in from SSA requesting info on a special education student. Shannon Hagen (Jefferson PLAEA office) logs into SSA website <https://secure.ssa.gov/acu/iresear/login> once or twice a week and submits records to them electronically, there are usually around 10 or so a week. Our username is PLAEA001 and they require a password to be changed every three months. After logging in, click on "Access Electronic Requests." After submitting records, Shannon is currently sending a copy of the request to the appropriate PLAEA office to be kept in the student's central file. When you receive these emails from Shannon, please file them in the student's active or inactive central file at this time. These requests for records must be maintained in the student's file to indicate when the request, who requested the information, and what information was provided.

### Stationery and Envelopes:

- **Please use the agency's stationery with the current PLAEA logo.** Envelopes are also available with the agency logo and return address for each office location. Each office has a supply so please check with a secretary. A variety of note cards are also available in each office for employee use.
- Additional supplies of agency stationery and envelopes can be requested from the PLAEA Print and Production Department in the Pocahontas office. Please reference information in the Print and Production section for ordering.
- You may also create letterhead stationery on your computer to use but make sure you also use the correct logo and colors.

### Stratus: (Interpreter)

Reference Guide to using OPI to communicate with Limited English Speaker

### BEFORE I CALL:

- Know the language that is needed
- Be prepared to brief the interpreter about the nature of the call before he/she speaks to your Limited English Speaker.
- If you have a Non English Speaker on the phone call OPI and connect a 3 way call.
- For outbound calls, provide the operator with a dial out number and she will make a 3 way conference call.
- Provide operator with a message you wish to leave if there is no answer
- There is a dual handset to aid in communication when the patient is on site or you may communicate over Speakerphone if in a HIPAA compliant area.

### HOW DO I MAKE A CALL TO OPI:

- Dial 1-877-746-4674 and be prepared to provide
- what language you need
- where you are calling from : Account 8833- Prairie Lakes Area Education Agency
- Your name

### DURING THE CALL:

- Speak in short phrases or sentences.
- Check for understanding from your Limited English Speaker throughout the call. If needed, rephrase the questions or statements until understood.
- When speaking to the interpreter, do not give and/or ask too much information at one time
- Ask questions in the first person. Avoid asking questions to the interpreter such as “Can you find out when he arrived?” Instead, ask the interpreter to ask the Limited English Speaker, “When did you arrive?”
- Make sure to pause to allow the interpreter time to translate and the Limited English Speaker time to respond.

### ENDING THE CALL:

Before ending the conversation, ensure that both your Limited English Speaker and the interpreter knows that the session is about to end.

**Using Stratus on iPad:** (Each one of the AEA offices should have an iPad with Stratus installed.)



# How to use Stratus Video on an iPad

## 1) iPad tips

It is important to understand that the iPad is not fully turned off, it is only sleeping. To "wake up" the iPad, press the home button once. This will bring you to the lock screen. To unlock the iPad, place your finger on the screen and slide from left to right.



## 2) Launch and Login to App

Select the bird icon to launch Stratus Video Interpreting. Enter your username and password, or just select "Login" if they are inputted already. Make sure "Remember Me" is selected. It typically takes 10 seconds or so to verify credentials and login.



## 3) View the Language Page & Connect with an Interpreter

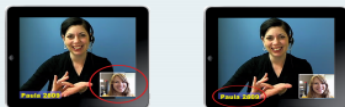
Once you've logged in you will be brought to the language page. Each language button is live and will connect you with an interpreter. Once you have selected the language you need you will be brought to the hold screen. Your wait will be approx. 30 seconds.



Stratus Video - [www.stratusvideo.com](http://www.stratusvideo.com) - 727.451.9766 - 33 N Garden Ave Suite 1000 Clearwater, FL 33755

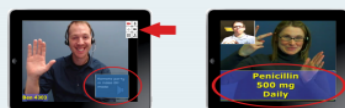
## 4) Once the Call is Answered

There are two important things to note once the call is answered. The first is the self-view window. This shows you everything the interpreter sees - make sure your patient can be seen here. The second is the interpreter ID number - this should be recorded.



## 5) In Call Features

There are two important in call features. First is the video privacy screen. Tap anywhere on screen once to see the control panel and select the middle button on the right. This blocks the interpreter's video feed. They may still hear the conversation and interpret for the patient, but this way patient may maintain modesty. The second important feature is the digital white board. This for written clarification and is controlled by the interpreter. If you ever want to ensure a patient understands something important like procedural or prescription information just ask the interpreter to pull up the whiteboard and type out whatever you need. This way the information is shared two ways.



## 6) Ending the Session and Logging Out

When the session is finished, tap on screen to view the control panel, and select the red button to hang up. This will bring you back to the language page. From there, click the gear in the upper right corner and select "Sign Out".



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## **Supplies / Supply Ordering:**

Supplies should be maintained in each PLAEA office for staff to use. These are basic office supplies such as staples, legal pads, pens, post it notes, envelopes, 3 ring binders, pocket folders, etc. Items needed for special projects should be approved and purchased for that department. Some offices may also have supplies for meetings such as post it flip chart pads, flip chart markers, etc.

Additional supplies can be purchased from Staples Advantage online. As PLAEA, we have an account set up for Staples Advantage for discounted prices on certain items. Try to use Staples Advantage or Amazon - wherever the item is listed as less expensive. Also, order items in quantities that will last for at least 6 months of the year but not ordering too many items that they will never be used. Items such as ink pens should be purchased in bulk and basic. Each staff member shouldn't pick out a certain pen that they like to be ordered.

Requisitions for supplies should be completed and submitted for approval. Each item should be listed separately on the requisition with product #, quantity, description, color, etc all noted. If items are purchased for the office, please note in the budget line - Office Supplies. If items are purchased for a certain staff member, please note in the budget line - "person's name and dept". Once approved, Josh Bader in the business office will order and ship the items to the noted office. After all items have been received, please let Josh Bader know so that invoice can be paid.

## **Teacher Quality:**

Licensed staff members are allowed to access funds for their own professional development.

TQ committee meets on the 4th Monday of the month to review applications from licensed staff members requesting money to advance their own professional development by attending a conference, purchasing personal pd materials or requesting collaboration time with one or more other PLAEA licensed staff. This money is only available to licensed staff members.

All information for Teacher Quality including forms and past meeting notes is located under the staff portal on the PLAEA website - Related Links - Teacher Quality.

<https://sites.google.com/a/plaea.org/teacher-quality/home/forms>

## **Technology Equipment:**

Each PLAEA office houses additional equipment for staff to use during their work. This can include such items as spare office laptops, LogiTech systems, MiFi hotspot(s), speakers, microphones, etc. Please keep an inventory of the equipment that you have in your office location. Please store in a secure location so that you can check out to staff as needed. This equipment should be inventoried monthly to make sure that staff are returning the equipment for other staff to access. Please have a checkout policy along with checkout sheets for each item. If you do not have this established in your office, please establish a process for this storage and checkout policy. Please report any broken or missing items to Mike Schmidt in Tech Dept. of PLAEA.

## Technology Support:

All requests from PLAEA staff to the technology department should be directed from an email support ticket created by emailing: [support@plaea.org](mailto:support@plaea.org). Please remember to include important information:

- your contact number
- when is a good time to contact you
- Internet connection - PLAEA, home, district, etc.
- include screenshot if you are receiving error message
- all important information that can assist the tech support team

## Time Cards:

Time cards should be completed for all classified staff on a daily basis and submitted in AEA manager monthly. Each day entry should be recorded by a staff person for ACTUAL hours worked for that day. Lunch time should be noted. Any paid leave requests that have been submitted, approved, and taken should be noted on your time card for the date used. These leaves could include sick leave, family sick leave, vacation, bereavement, emergency, personal, etc. Unpaid leave days or non-contact days should be noted on time cards as 8:00 AM - 8:00 AM -- 0 hours and noted in the description as unpaid or non contract. Weekly hours should not exceed 40 hours for full time staff. If your work day exceeds 8 hrs or is less than 8 hrs, time should be used or made up within the same work week. Please approve all changes in your schedule with your supervisor (Regional Administrator).

Example of time card (calendar view):

Calendar View	List View							
		Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		Employee: Prentice, Brenda   Month: April   2021   Apply Filter						
						8:00 am - 11:00 am 11:30 am - 4:30 pm 8.00 hours	8:00 am - 12:00 pm 12:30 pm - 4:30 pm 8.00 hours	
		4	5	6	7	8	9	10
		7:30 am - 11:30 am 12:00 pm - 4:00 pm 8.00 hours	8:00 am - 12:00 pm 12:30 pm - 4:30 pm 8.00 hours	8:00 am - 12:00 pm 12:30 pm - 4:30 pm 8.00 hours	8:00 am - 12:00 pm 12:30 pm - 4:30 pm 8.00 hours	8:00 am - 12:00 pm 12:30 pm - 4:30 pm 8.00 hours	8:00 am - 4:00 pm 8.00 hours	
		11	12	13	14	15	16	17
		8:00 am - 4:00 pm 8.00 hours	7:30 am - 12:00 pm 12:30 pm - 4:30 pm 8.50 hours	8:00 am - 12:00 pm 12:30 pm - 4:30 pm 8.00 hours	8:00 am - 12:00 pm 12:30 pm - 4:00 pm 7.50 hours	8:00 am - 12:00 pm 12:30 pm - 4:30 pm 8.00 hours	8:00 am - 12:00 pm 12:30 pm - 4:30 pm 8.00 hours	

Example of time card (calendar view):

Calendar View		List View			
April 2021				Employee: <span>Prentice, Brenda</span> Month: <span>April</span> 2021 <span>Apply Filter</span>	
Thursday	<a href="#">1</a>	8:00 am - 11:00 am: 11:30 am - 4:30 pm: 8.00 hours			
Friday	<a href="#">2</a>	8:00 am - 12:00 pm: 12:30 pm - 4:30 pm: 8.00 hours			
Saturday	<a href="#">3</a>				
Sunday	<a href="#">4</a>				
Monday	<a href="#">5</a>	7:30 am - 11:30 am: 12:00 pm - 4:00 pm: 8.00 hours	Office closed due to weather / approved work from home. Unpaid leave - office closed due to weather		
Tuesday	<a href="#">6</a>	8:00 am - 12:00 pm: 12:30 pm - 4:30 pm: 8.00 hours			
Wednesday	<a href="#">7</a>	8:00 am - 12:00 pm: 12:30 pm - 4:30 pm: 8.00 hours	Sick Leave		
Thursday	<a href="#">8</a>	8:00 am - 12:00 pm: 12:30 pm - 4:30 pm: 8.00 hours			
Friday	<a href="#">9</a>	8:00 am - 4:00 pm: 8.00 hours	Good Friday - Paid Holiday		
Saturday	<a href="#">10</a>				
Sunday	<a href="#">11</a>				
Monday	<a href="#">12</a>	8:00 am - 4:00 pm: 8.00 hours	Non Contract Day		
Tuesday	<a href="#">13</a>	7:30 am - 12:00 pm: 12:30 pm - 4:30 pm: 8.50 hours			
Wednesday	<a href="#">14</a>	8:00 am - 12:00 pm: 12:30 pm - 4:30 pm:	Family Sick Leave		

### **Reviewing and approving time cards:**

If you are responsible for reviewing and approving time cards for classified staff that work within your region, please follow the information provided above as guidelines.

- Check each day for time in and out
- Weeks should total 40 hrs or less
- All leaves should be indicated on the time card
- Leaves noted on time card should be crossed checked to make sure the leave requests were completed and submitted for approval

Please check with Brenda Hebert in the Business Office if you have any questions or concerns with completing your time card or approving time cards.

### **WEB IEP/IFSP/IMS:**

Currently, the WEB IEP maintains all special education IEP records on current (active) students.

<https://www.iowaidea.org/IDEA2/>

This system will be changing over to the new ACHIEVE system as of Nov. 1, 2021.

Updated information will be provided at this time.

### **Zoom Phone:**

PLAEA began using the zoom phone as our client as of March 17th, 2021.

Complete instructions regarding Zoom Phone and all the tools inside Zoom can be found on our staff portal under Internal Technology <https://www.plaea.org/staff-portal/internal-technology/>.

When using Zoom Phone and SMS (text) on your computer or personal phone, your personal device number will never be revealed to the public. They will always see your agency-assigned number.

The tools inside of Zoom will be the primary tools for communication within the agency. If you are making a phone call, sending a text message or chatting with other AEA staff, you should be using the tools within Zoom. If you are communicating with parents and LEA staff members, you should be using Zoom phone and text messaging. While many of you use your personal devices or Google Voice, you are expected to instead use Zoom. Zoom provides security and protection for the agency and our staff that is not possible with a personal device or within a Google Voice solution. As an example, SMS (text) messaging and voice mail with customers is archived within Zoom and can be retrieved in the event of a legal situation. This is not possible on personal devices, which could ultimately require a court subpoena of a personal device, which could lead to a host of issues for the agency and the staff involved.

We also recognize that many of our districts and customers use Google Chat, Google Meet and other tools to communicate with us. We know that it is easier to engage with these customers in a format that is familiar to them and we will continue to support the use of these other tools to communicate with them. However, these methods of communication are different than using a personal phone or Google Voice to make a phone call or send text messages. Instead of using a personal device or

Google Voice to communicate with our customers and staff, **please use Zoom phone and text. That is the expectation of the agency as we move forward.**

### **Acronyms:**

[Special Education Terms and Acronyms Ages 3 - 21 yrs.](#)

[Early Intervention \(Early ACCESS\) Terms and Acronyms Ages Birth - 3 yrs.](#)