



Administrative Assistant Manual

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At LifeWays, we demonstrate our expertise in exceptional service using

WINKS

Warm Welcome

Internally *and* Externally

No Judgement

Kindness

Seek Positive Intent

Warm Welcome

- Greet everyone with a warm welcome and acknowledge their presence.

Internally and Externally

- It is important to provide exceptional customer service to consumers, guests, and providers as well as your fellow LifeWays staff.

No Judgement

- “If you judge people, you have no time to love them.” (~Mother Teresa)

Kindness

- “You can catch more flies with honey than with vinegar” (~Unknown).
It is easier to persuade others with polite requests and a positive attitude rather than with rude demands and negativity.

Seek Positive Intent

- “I don’t believe that people wake up in the morning saying, “Who can I treat poorly today?” Always assume positive intent.” (~Mary-Frances Winters)
Give the benefit of the doubt - someone could be just having a bad day; maybe you can make it better!

Board Work

A call for Board Agenda items email is sent out monthly by Latrelle Burk, Executive Coordinator. The email provides deadlines for submission and a list of those items requiring Board approval, which include reviewed or revised Policies, all purchases exceeding \$250,000, all out-of-state travel, and appointments to Advisory Committees.)


Each item submitted should have an agenda title and a Subject Sheet (unless it is an Executive Summary or report only).

Agenda title examples:

- Approval of Quality Improvement & Credentialing Report (this would accompany an attachment)
- Approval of Expenses (this would accompany an attachment)
- Facilities Project Priority Lists – Report (this would not necessarily contain an attachment)
- Approval of Out-of-State Travel Expenses for [individual's name and title] to attend [conference name, location] at an estimated expense of [\$-----] (this would accompany an attachment of the Event Request form and conference brochure).

Example of Call for Agenda items email:

Due Nov 30: Board Approval Items and Reports for December 2021

 Latrelle Burk

↩ Reply

↩ Reply All

➡ Forward

⋮

To

• Amon Hodge; • Amy Cosgrovebridges; • Angie O'Dowd; • Audra Hornbeck; • Barbara Rudd; • Carly Coxon; • Casie Robertson; • Cassandra Watson; • Chad Surque; • Christina Tindal; • Courtney Sullivan; • David Lowe; • Denae Tracy; • Donald Wood; • James Horrigan; • Jamie Coulombe; • Jessica Bammer; • Jessica Tuccelli; • Jodie Smith; • Jon Johnston; • Joshua Williams; • Julie Robert; • Karen Cascaddan; • Katelynn Miller; • Kenneth Berger; • Latrelle Burk; • Maribeth Leonard; • Mark Weatherwax; • Melissa Ladd-Patnode; • Michael Cupp; • Nikki Thomsen; +10 others

Mon 11/22/2021 10:08 AM

🔔 You replied to this message on 11/22/2021 10:20 AM.

This message was sent with High importance.

Hello everyone,

Please submit all items needing Board approval as well as reports to the Board and/or information for the December Board Committee Meetings and Board Meeting no later than **Noon on Tuesday, November 30.**

PLEASE NOTE: December meeting dates are as follows –

Monday, December 6, 1:00 pm – Self-Determination
Monday, December 6, 3:00 pm – Mental Health in Schools **please note change from Tuesday to Monday*
Monday, December 6, 4:00 pm – Facilities
Wednesday, December 8, 3:00 pm – Program and Finance **please note change in day and time*
Wednesday, December 8, 4:00 pm – Quality Improvement & Credentialing
Thursday, December 9, 9:30 am – Recipient Rights Advisory Council **please note earlier date than normal*
Wednesday, December 15, 7:00 pm – Board Meeting (in Jackson)

Items that require Board approval include reviewed or revised Policies, all purchases exceeding \$25,000, all out-of-state travel, and appointments to Advisory Committees.

Each item should have an agenda title and an attachment (unless it is a report only). For example...

- Approval of Quality Improvement & Credentialing Report (this would accompany an attachment)
- Approval of Expenses (this would accompany an attachment)
- Facilities Project Priority Lists – Report (this would not necessarily contain an attachment)
- Approval of Out-of-State Travel Expenses for [individual's name and title] to attend [conference name, location] at an estimated expense of [\$-----] (this would accompany an attachment of the Event Request form and conference brochure)

Thank you!

Latrelle Burk

Executive Coordinator

LifeWays Community Mental Health

The Subject Sheet contains the date, Subject, Background/History, Administrative Consideration, Fiscal Impact and Recommended Motion for the Board's reference in consideration for action.

Example of a Subject Sheet (for a Board approval action item):



¶
May 2, 2022¶

¶
SUBJECT¶

¶
Approval of Architectural Services for Hillsdale Building Remodel.¶

¶
BACKGROUND/HISTORY¶

¶
LifeWays has completed renovations to the Jackson building supporting Certified Community Behavioral Health Clinic (CCBHC) functions and program expansion and has now turned its focus to the Hillsdale building. As a first step in that process, internal team members began meeting late summer 2021 to initiate the process of collecting information from internal and external stakeholders related to service gaps/needs and planned program expansion.¶

¶
ADMINISTRATIVE CONSIDERATION¶

¶
The Hillsdale Building Renovation team is collecting data reflecting current state in comparison to the previous fiscal year to identify increases in persons seen, referral patterns and needs, Emergency Department (ED) boarding and Integrated Health opportunities in Hillsdale County, as there is no Federally Qualified Health Center (FQHC) available to partner with to provide primary care services. We also completed a walkthrough of the physical space with clinical and administrative staff and sought feedback on possible positioning of staff related to workflow, that will allow a more welcoming environment to consumers.¶

¶
Engaging architectural services provides an opportunity to complete an onsite walkthrough and participate in necessary meetings to develop a plan for presentation to the LifeWays Board of Directors and Hillsdale County Board of Commissioners. A presentation will be made to the Board Facilities Committee summer 2022 to begin developing the action plan, including funding options, for proposed renovations in Hillsdale.¶

¶
RECOMMENDATION (Choose Option A, B, or C.)¶

- ¶
- A. → Approval to issue an RFP for architectural services for the Hillsdale Building Remodel. ¶
 - B. → Approval to seek three quotes for architectural services for the Hillsdale Building Remodel. ¶
 - C. → Approval to negotiate a contract for architectural services with Covalle Group Architects for the Hillsdale Building Remodel. ¶

Conference Calls

Reserve the conference line ahead of time through Outlook to ensure it is available for use.

Also, be sure to put the phone number to call in the Outlook invite: “To call in, dial 517-789-1209 and at any time during the greeting enter extension 2020” (for calls involving the CEO/Board) or “2021” (for all other calls).

From a Desktop Phone:

1. Press Speaker.
2. Select More.
3. Select MeetMe.
4. After the double burst tone, dial extension 2020 (for calls involved the CEO and/or Board member).
5. For all other conference calls, dial extension 2021.

From a “Bat” (Conference) Phone:

1. Press the phone receiver button to get a dial tone.
2. Using the “select button” choose Call Functions.
3. Select MeetMe.
4. For calls involving the CEO or Board Members, dial extension 2020.
5. For all other conference calls, dial extension 2021.

FreeConferenceCall.com

If Microsoft Teams and the conference line just isn’t working for whatever reason, there is another (free) resource: FreeConferenceCall.com

To set up an account, visit the website, enter your email address and a password. You will be assigned a call-in number and other information. This is a very user-friendly website with easy instructions for calls and online meetings.

Correspondence Standards

Topic Description	Notes
1. Document Types	<ul style="list-style-type: none"> All formal communications (letters and memos); Email; Reports; Memorandum of Understanding (MOU) and Agreements; Meeting Agenda and Minutes.
2. How to Establish the Standard	<ul style="list-style-type: none"> Agreement between Administrative Assistants, Executive Coordinators, and Executive Director of Governance.
3. What the Standard Is	<ul style="list-style-type: none"> Font – Century Gothic (11-point for letters and memos; 12-point optional for Agreements and MOUs). Margins (Memos, MOUs, Agreements) 1” all sides to allow 3-hole punch or report headers/footers that other people will add. Letterhead – Allow 1” for all margins. Second page, 1” all around then add header: <ul style="list-style-type: none"> - the first line indicates person’s name to whom it is addressed. - the second line is the date; always type the date out rather than select the auto date feature, as the auto date will replace the date of the correspondence to whatever the current date is whenever the document is opened - the third line is Page ___ of ___. Spacing: line space – single; before and after paragraph, one hard return. Acronyms – Spell out the first time used in a document, then abbreviate the acronym in parentheses; can use abbreviations thereafter.

	<ul style="list-style-type: none"> • Generally, numbers between one and ten are to be spelled out; above 10, use the number. • Logo Use – internal documents use 2021 logo, height at 0.70”. • Logos can be found in the Resources/Forms section of the Intranet http://www.intranet.lifewaysmi.org/Forms.html.
4. Communicating the Standard to Others	<ul style="list-style-type: none"> • Through Administrative Assistants, Executive Coordinators, and Executive Director of Governance to Team members; Updates in All-Staff Meetings; Email.
5. Monitoring the Standard	<ul style="list-style-type: none"> • Executive Coordinators establish regular meetings with Administrative Assistants to review the Administrative Assistant Manual, discuss agency needs related to manual, and training (Executive Director of Governance invited on occasion).

Logo Letterhead:

Logo letterhead should be used for interoffice memoranda, invoices, etc.

LifeWays Logo Envelopes:

LifeWays logo envelopes can be used with any logo paper.

Never use LifeWays logo envelopes to send information to consumers.

All envelopes must contain the initials of an individual or a department (the latter if not going to a consumer; otherwise use initials) beneath the return address as an internal identifier.

Facilities Help Desk (F-Desk Ticket)

Hillsdale Office

Web Work Order system: <https://justworkorders.com/Hillsdale/domenu.php>

Hillsdale staff and the Executive Director, Governance, have login permissions. Must have permission of supervisor prior to entering a Work Order request.

Jackson Office [to be updated further]

After hours or in dire emergencies, call 517-788-4331.

To submit a ticket online: Generally, the Administrative Assistant in each department has authorization to submit help desk tickets. If you are not setup to be a Facilities Help Desk User, please get permission from your supervisor, then request assistance from Karen Cascaddan. Karen will contact Jackson County to arrange for you to be setup as a Help Desk User.

Invoices

All invoices should be emailed by the vendor (or forwarded if you receive it) to invoices@lifewaysmi.org.

If you are sending an invoice to this email address, please include the cost center number.

Who can sign an invoice?

As per Procedure 03-05.04 Purchase Supplies, Equipment, Services and Other Program Materials, purchase permission levels guidelines are as follows:

- Requisitions of \$0 to \$5,000: Department Director
- Requisitions of \$5,001 to \$25,000: Finance Director
- Requisitions of \$25,001 to \$50,000: CFO
- Requisitions of \$50,001 and above: CFO and CEO

IT Help Desk

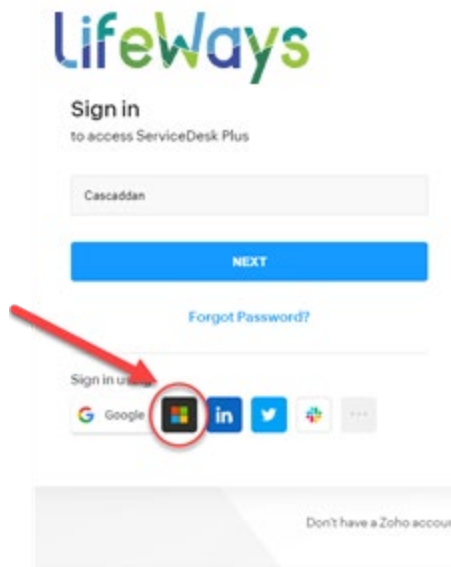
If in dire need, call the IT Help Desk directly at 517-780-3367

Otherwise, login:

1. Click the IT Help Desk Link:

https://accounts.zoho.com/signin?servicename=SDPOnDemand&hide_title=true&hideyahoosignin=true&hidefbconnect=true&hide_secure=true&serviceurl=https%3A%2F%2Fhelpdesk.lifewayscmh.org%2Fjsp%2Findex.jsp&signupurl=https://helpdesk.lifewayscmh.org/AccountCreation.do&portal_id=54591883

2. Select option to sign in using Microsoft



3. Login in with your credentials (the same you use when logging in at the beginning of your day).

Request:

1. Click on “report an issue”.
2. Always select Default Request unless advised to use a different option.
3. Your information should be prepopulated into the appropriate boxes.
4. Enter subject into the Subject box.
5. Put a brief description into the Description box.
6. Click Add Request and the request will be submitted.

Jabber

Jabber is a quick and effective way to communicate with anyone at LifeWays. It is also helpful in an emergency when you're on a call (such as a bomb threat) or paging a code as you can use Jabber's "chat" feature to alert Leadership or anyone else that may need to know the situation right away.

Please configure Jabber to open upon login to your computer.

To set Jabber to open when you log in:

1. Open Jabber.
2. Click on Settings drop-down arrow (the "wheel" on the upper right).
3. Under "General," check the box under Startup.
4. Click on "apply" then "ok."

To use Jabber:

Type a name in the search box.

- A list of contacts will appear; click on the appropriate person's photo.
- If you want to add that person to your personal list of contacts, click on "+."
- To call the person, click on the phone symbol. A list of phone numbers for that person will appear.
- To "chat" with that person, click on the "speech bubble," then on "chat." Begin typing your communication in the box at the bottom. Hit enter to send.

Jabber ties into your calendar feature and will reveal to users if you are Available, Away, In a meeting, or Offline.

To change or set your availability in Jabber:

- Left click the Jabber icon (in the system tray), click on your phone then on status.
- Once you enter information into that field it is saved. In the future if you want to display the same message, from the system tray, right click on the Jabber icon and select the availability message you would like displayed.
- This can also be done for your location.

Meeting Set-Up Flow Chart

Note: If it is a grant-funded program facilitating the meeting, lunch needs to be provided (LifeWays cannot pay for lunch for staff-only meetings).



Office 365

Office 365 is the online version of Microsoft's Office programs. You can check your email, share files for collaboration with your team members, and much more.

To log in, go to <https://portal.office.com>.

Log-in using the credentials that you use to log into your work computer.

Outlook

Email

Automatic Replies:

1. Click the File tab.
2. Click the Info tab.
3. Click Automatic Replies.

Example: "I will be out of the office beginning ____, returning _____. If your matter requires attention within that time frame, please contact dept. specific individual at person's email address and/or telephone number."

Composing a new email:

1. Click the Home tab; in the New section, click New Email.
2. Type the subject of the email into the Subject line.
3. Compose the body of the email.
4. Type in the email address of the person who will receiving the email in the To line.
5. Click send.

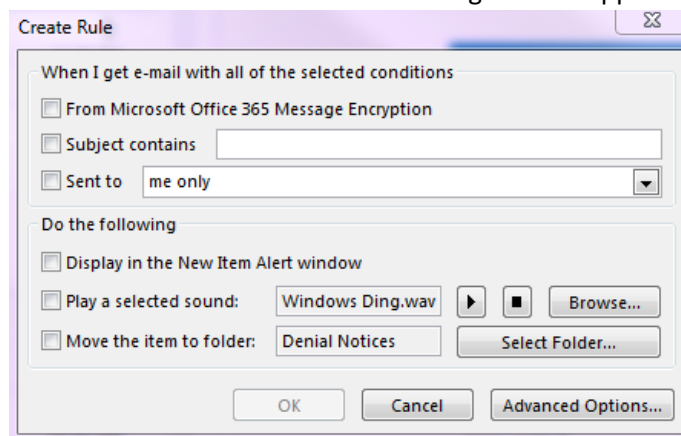
Organizing email:

Creating folders

1. Right click inbox on the left side of the screen.
2. Click New Folder.
3. Name the folder.
4. Enter.

Creating rules

1. On the Home tab, in the Move section, click the Rules drop down arrow.
2. Click create rule. The Create Rule dialog box will appear:




Recall a sent email (Note: this function will not work if the email has already been read):

1. Go to your sent email and open the email that you would like to recall.
2. Click the Message tab.
3. In the Move section, click the Actions drop down arrow.
4. Click Recall this message.
5. Choose whether or not to receive notice if each recall was successful, and/or whether to replace with a new email message.

Signature:

The signature block is a LifeWays Customer Service standard and must adhere to the font name and size as indicated below. This standard helps to identify phishing and malicious messages that appear to be LifeWays emails but are not.

Email signature template

Step 1: Hover over the signature and click  to select all the elements in the signature.

Step 2: Then copy these elements by holding down (Ctrl + C).

Step 3: Open an Outlook email message, navigate to the "insert" tab at the top, then click the drop-down arrow under "signature", and select "Signatures..."

Step 4: Delete any existing signatures that you have by selecting the signature and clicking "delete."

Step 5: Create your new signature by selecting "New" and typing your name in the pop-up window that appears, then click "ok."

Step 5: Paste (Ctrl +V) the new signature in the text box.

Step 6: Change name and contact information.

Step 7: Click "Save" above.

Step 8: In the "Choose Default Signature" menu (top right corner of window), click the drop down for "new messages" and select your newly created signature. Repeat this step for "replies/forwards" as well.

Step 7: Click "ok" at the bottom of the window.

NOTE: You must not edit the font, font size, or font color of the template. You also must not add any additional logos or images to the signature line. You can remove the mobile or fax options if they do not apply to you. Social media icons should link to LifeWays social media pages, do not change them to link to your personal pages.

LIFEWAYS SIGNATURE TEMPLATE

Jane Doe,

Certifications/Accreditations

Job Title/Position Title



Office (123) 456-7890

Mobile (123) 456-7890

Fax (123) 456-7890

Email firstname.lastname@lifewaysmi.org

1200 N. West Ave, Jackson, MI 49202

Confidentiality Note: The information transmitted is intended for the person or entity to whom or which it is addressed and may contain confidential and/or privileged material. Any review, retransmission, dissemination or other use of this information by persons or entities other than the intended recipient is strictly prohibited. If you receive this in error, please notify the original sender immediately by return e-mail and delete this message along with its attachments from your computer.

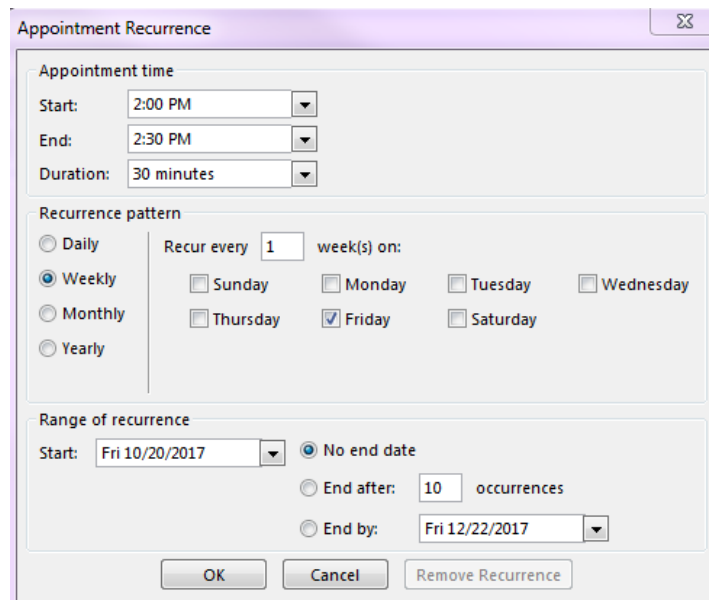
Stationery:

The signature block above should be the only item on an email (no designs, quotes, graphics/symbols or stationery).

Calendar

Making appointments:

1. Click the Home tab.
2. In the New section, click New Appointment.
3. Enter the Subject, Location, Date, and Time.
4. Include any important information in the body.
5. Also, in the body include your initials indicating you set up the meeting, as well as the date it was set up along with any other information that would be helpful (i.e., names of attendees).
6. If you would like this to be a recurring meeting:
 - a. Click the Appointment tab.
 - b. In the Options section, click Recurrence.
 - c. The Appointment Recurrence dialog box will appear.



The image shows the 'Appointment Recurrence' dialog box. It has three main sections: 'Appointment time', 'Recurrence pattern', and 'Range of recurrence'. In the 'Appointment time' section, 'Start' is 2:00 PM, 'End' is 2:30 PM, and 'Duration' is 30 minutes. In the 'Recurrence pattern' section, 'Weekly' is selected, and 'Recur every 1 week(s) on:' is set. The days of the week are listed with checkboxes: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday (checked), and Saturday. In the 'Range of recurrence' section, 'Start' is Fri 10/20/2017, and 'No end date' is selected. At the bottom are 'OK', 'Cancel', and 'Remove Recurrence' buttons.

Inviting attendees:

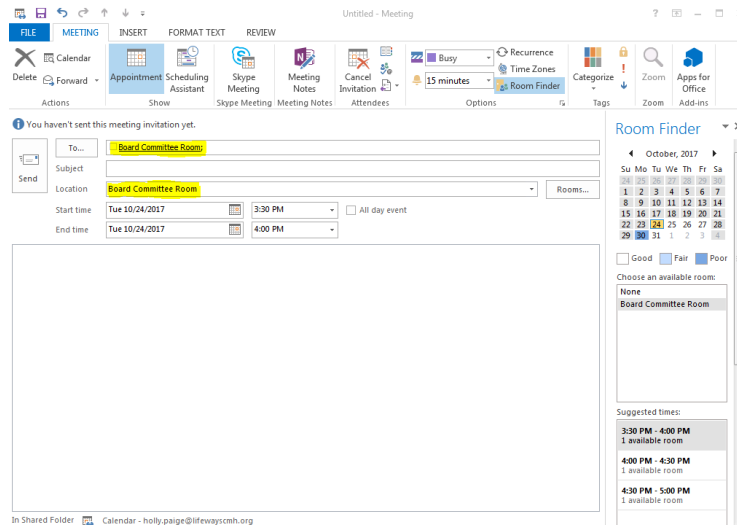
1. Click the Appointment Tab.
2. In the Attendees section, click Invite Attendees.
3. Enter the attendees you wish to invite.
4. If the attendees are not with LifeWays, make sure to provide instructions on which door to enter.

Scheduling Assistant:

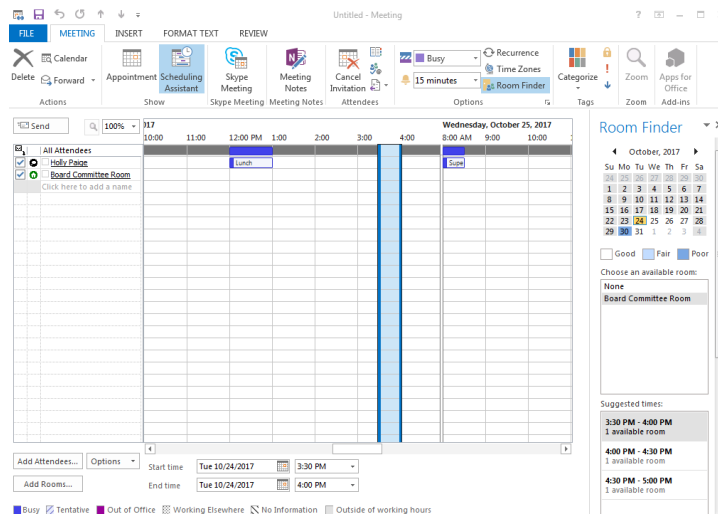
1. You will want to check the scheduling assistant to ensure those you wish to attend the meeting will be free at this time and to ensure the meeting room is available.
2. Click the Meeting Tab.
3. In the Show section, click Scheduling Assistant.

Schedule a Meeting Room:

1. Enter the meeting room you wish to request as if you were inviting it to the meeting – it will then appear in the location.



2. Check the scheduling assistant to ensure the room is available.



Blocking Time/Desk Time:

It can be difficult for our supervisors to find time to get their work done between all their meetings. Here are some tips to help with that.

1. If possible, try to block off at least an hour each day for desk time. Sometimes you may have to include “DO NOT BOOK” for others to not book appointments during that time.
2. Try to leave time in between meetings, if possible (at least 15 minutes).
3. Your supervisor needs a lunch, too; make it a point to not book meetings during their lunch time – block it off daily if necessary.
4. If a meeting is offsite, leave time for travel to and from.

5. Make sure to put the title of the meeting in the subject line so when others view your room reservation, they can see both who scheduled the meeting and what it is for; these two things must always be included for this reason.

Sharing Your Calendar with Another Person

1. With your calendar open, click on “Share Calendar” at the top.
2. A “Sharing Invitation” will open; under the subject line, check one or both boxes to request permission to view recipient’s calendar and/or to allow the recipient to view your calendar.
3. Select the number of “Details” that you wish the recipient to see.
4. Add the person’s name in the “To” box at the top and click “Send.”

Setting Calendar Permission

You can also add or update who can see and/or edit your calendar with this method:

1. With your calendar open, click on “Calendar Permissions” at the top.
2. To change or update a person’s permissions, click on their name, choose their “Permission Level,” and click on what you would like them to be able to do under “Read,” “Write,” “Delete Items,” and “Other.”
3. Click on “Apply” then “OK.”

Setting Work Hours

If your schedule is different from the normal 8:00 – 5:00, you can set your calendar to show your work hours.

1. Go to “File,” then “Options.”
2. Click on “Calendar.”
3. Under “Work Time,” set your work hours with a “Start Time” and an “End Time.” You can also set which days you work.

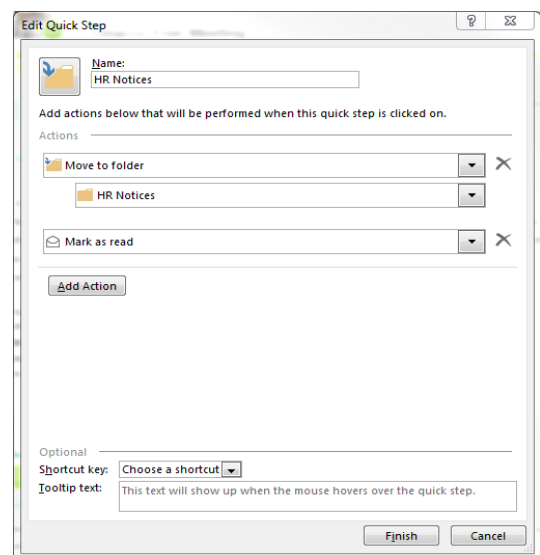
Quick Step

Create a shortcut for frequent tasks that contain several steps and reduce that task to only one click.

Creating a quick step in Outlook:

1. Click the Quick Step tab (in the Home menu).
2. Click on Create New (see visual below).
3. Give it a name.
4. Click on the Choose an Action drop-down box, select an option and follow subsequent commands.

Select Add Action (or as many actions as you wish), for it to complete multiple tasks with one click, then click Finish



Phone – Faxing



eGoldFax Quick Start Guide

SENDING FAXES

A) DIGITAL DOCUMENTS: Fax from Email (Computers, Smart Phones)

1. ADDRESS EMAIL TO: FaxNumber@egoldfax.com

- Subject and Message text are placed on to the Fax Cover Sheet including email signature, logo graphics

2. ATTACH documents (Word, Excel, PDF, TIFF, JPEG, BMP)

3. CLICK "SEND"

- Auto Fax Cover Sheet - Customize with customer logo, confidentiality statement (contact support to set up)
- Note: "1" before fax number and hyphens are optional
- International fax numbers: Enter 011, country code, area or city code, and phone number followed by @egoldfax.com
- Note: Parentheses are not allowed in the Fax Number
- Add frequently faxed-to contacts to your email system's address book for quick faxing. Use email format above and include "FAX" in display name of saved contacts for easy searching.



4. FAX CONFIRMATION

- You'll receive a "Fax Confirmation" email (success/failure) for your record. Fax Confirmation sent to "From Email".
- Option: Email Message with Thumbnails of Sent Fax Pages (choose 1 - 4 pages including cover sheet)

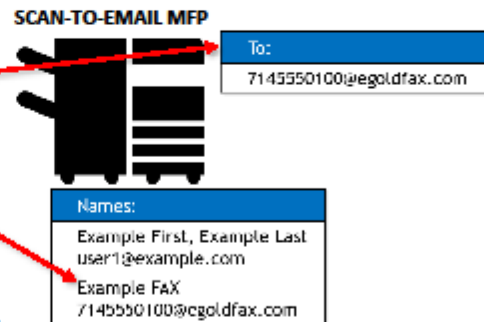
B) PAPER DOCUMENTS: Scan-to-Email Multi Function Products (MFPs)

1. SELECT Scan-to-Email from MFP Touch Panel

2. In the "TO:" Field ENTER: FaxNumber@egoldfax.com

3. SCAN THE DOCUMENT

- Option: Select contacts from MFP's Email Address Book. Use email format above and include "FAX" in display name of saved contacts for easy searching.
- Option: Enter Message, Subject, specify the email sender



RECEIVING FAXES

- Keep existing fax numbers by transferring (porting) to eGoldFax
- Obtain additional fax numbers (Local and Toll Free)
- Route faxes to multiple email addresses (PDF attachment)
- Option: Received fax email (no fax attachment)
- Option: Received fax email with fax download link

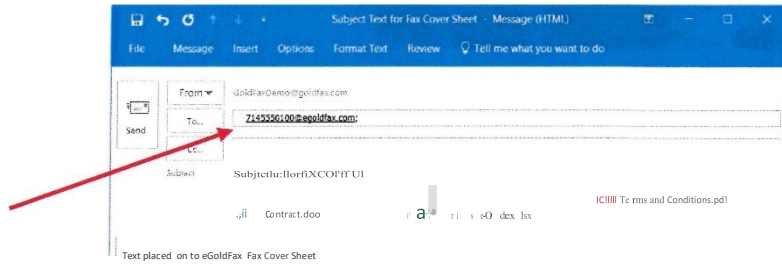


ENTERPRISE OPTIONS

- Route received faxes and sent fax confirmations to Network Folders and Printers
- Advanced received fax actions: Save XML metadata, Execute SQL statement, Execute program

OR

1. Scan your document to your own email address
2. Save the document in an appropriate folder
3. Create a new email, and in the "To:" Field enter:
FaxNumber@egoldfax.com
4. Enter information in the "Subject" Field
5. Attach the document
6. Send



QUESTIONS OR ASSISTANCE? CONTACT:

- Steven Dunning (steven.dunning@lifewaysmi.org) or
- Karen Cascaddan (karen.cascaddan@lifewaysmi.org)

Phone – Paging

On a LifeWays Desk Phone:

1. To initiate a page, press the services button (the button has a circle with a globe).
2. Select either *All Building Page Jax* or *LifeWays Page (Jax or Hills)*.
3. Your phone will ring; answer and wait for the beep.
4. Once you hear the beep, begin your announcement.
5. When done, hang up the phone.

The following is the process for announcing emergency situations. The code should be issued by the area of the building experiencing the situation by paging overhead. Follow the process in this order:

1. Page phones, "Code () in (designated area)."
2. Call 9-1-1
3. Call Reception at x2200
4. Call your supervisor

Code types:

Code "B" - Behavioral

NOTE: Use all appropriate measures to protect the consumer and others in the area until help arrives.

- Announcement: "Code B [location/team name/room number]"
Responding parties: Only those who have had Crisis Prevention Institute (CPI) training.
- Second Announcement (upon direction of Responding Team Coordinator): "Code B – UC," meaning that the situation is under control and no one else needs to respond.
- Third Announcement (upon direction of Responding Team Coordinator): "Code B All Clear," when the situation is no longer active.

Code "B with Caution" - Behavioral with situation unknown

- Announcement: "Code B with Caution [team/hall name]"
Responding parties: Only those who have had Crisis Prevention Institute (CPI) training.

NOTE: This code is called because an employee has pressed a safety button in their office and the situation is an unknown. A frontline staff member will report to the area and direct the CPI-trained individuals to the office that activated the alarm. Approach with caution and decide to employ CPI or call 9-1-1.

- Second Announcement (upon direction of Responding Team Coordinator): "Code B – UC," meaning that the situation is under control and no one else needs to respond.
- Third Announcement (upon direction of Responding Team Coordinator): "Code B All Clear," when the situation is no longer active.

Code "M" – Medical

- Announcement: "Code M [location/team name/room number]"
Responding parties: Physicians, nurses and first responders.
- Second Announcement (upon direction of Responding Team Coordinator): "Code M – UC," meaning that the situation is under control and no one else needs to respond.
- Third Announcement (upon direction of Responding Team Coordinator): "Code M All Clear," when the situation is no longer active.

Code "W" - Weapon/Hostage

- Announcement: "Code W [location/team name/room number]"
Responding parties: NO ONE – "Run, Hide, Fight"

PolicyStat

PolicyStat is the central repository space/program for all LifeWays Policies and Procedures.

PolicyStat training is given to every first-time user, scheduled by the Human Resources Department for new employees, or by contacting Karen Cascaddan.

To log into PolicyStat, click on the icon from a LifeWays computer desktop:



- Username: first initial, last name (to match your network login)
 - flast
- Password: initial password
 - password1

Screenshots: Using Google Extension or Greenshot

To capture an image on your computer screen, use the Google Screenshot extension or Greenshot.


Google Screenshot:

Download the Google Chrome extension by going to <https://chrome.google.com/webstore/detail/make-a-screenshot/gfpdknjgilakoegfncghjdggmolfocpa?hl=en>

The extension will look like a camera in the upper right corner of Chrome. You can now visit any website, click on the camera and the screenshot will be ready in a new tab. You can then right-click the picture and save it.

Greenshot:

If not already on your computer, this can be downloaded from www.GetGreenShot.org; the website also has an excellent Help section.

An icon that looks similar to this  will be in the system tray in the lower right corner of your computer screen.

This tool can be used on virtually anything on your computer screen, whether online or in a program such as Microsoft Word.

Shred Boxes

The shred boxes are located throughout the building and the contents destroyed by a bi-weekly service. If something is placed in the shred box by mistake, contact the Governance office (x2208) for assistance. A Governance staff member will unlock the shred box and look in the box for the item for you.

Travel Checklist

___ Complete the Event Request Form LW #9-03.05-A.

- available on LifeWays Intranet under “Forms/Finance/Event Request (Travel/Conference/Training).” <http://www.intranet.lifewaysmi.org/Forms.html>
- Include as much information and/or documentation about the event as possible (especially a valid emergency contact name and phone number; CMHA requires this info for training registrations).

___ Submit to Supervisor for approval.

___ Once approved, send copy to the Executive Coordinator in your area for processing (the original should be returned to the employee for their files).

NOTE: If out-of-state travel is involved, please forward to the Governance Executive Coordinator for it to be included on an upcoming Board Finance Committee Meeting agenda. The Board of Directors must approve all out-of-state travel.

___ The Executive Coordinator/Admin Assistant will complete the registration and ensure payment, if necessary.

___ The Executive Coordinator/Admin Assistant will provide an itinerary to the traveler with all pertinent information at least 2 weeks prior to travel.

___ A Meal Allowance Advance request should be made to the Executive Coordinator/Admin Assistant at least three weeks prior to a conference/training event. Should an advance be granted, it is not necessary to keep meal receipts.

___ Most conferences and trainings are non-refundable; should the employee be unable to attend the conference or training all efforts will be made to obtain a refund. Substitutions can often be made for free. Nonrefundable registrations will still be charged to the appropriate department’s budget.

___ LifeWays currently qualifies for the Michigan New Jobs Training Program (MNJTP) from Jackson College, which reimburses training expenses for certain staff members. The Executive Coordinator will cross check LifeWays’ employees’ eligibility and submit to Human Resources a copy of all paperwork that may be reimbursable prior to the training event.

If a hotel stay is needed:

___ The Executive Coordinator/Admin Assistant will reserve a room and will submit a credit card authorization form to the hotel one week prior to travel*; this will ensure that all charges (room, fees, taxes, parking, etc.) are charged to the LifeWays credit card.

* For hotels in Michigan, when submitting the credit card authorization form, also include the tax exemption form # 3372.

NOTE: Allowing all charges to be paid to the LifeWays’ credit card alleviates the staff member from having to give a personal credit card at check-in for incidentals; this also relieves the worry of a charge being mistakenly made by the hotel to the employee’s credit card.

NOTE: Any personal charges made to the hotel room by the employee (meals, if a meal advance was given; non-business gift shop purchases; damages, etc.) will be reimbursable by the employee.

___ If a conference rate for a hotel is not included with the training, a State Government or Government rate will be requested. It may be necessary for the employee to show their badge at check-in to confirm their government employment.

If a rental car is necessary:

___ The Executive Coordinator will reserve a rental car through LifeWays' Hertz corporate account. The rental car will be automatically billed to LifeWays. If additional fuel is needed, it must be paid by the employee and the receipt submitted with all other expenses.

___ Hertz cars have a "Plate Pass" that automatically pay tolls. A receipt is usually emailed to the Executive Coordinator.

___ Please let the Governance Executive Coordinator know when a rental car is used as it is charged to their credit card (helpful to know when it's time to reconcile the monthly credit card statement).

Out-of-State Travel must be approved by the LifeWays Board of Directors:

___ Submit the Event Request Form as soon as possible for travel expenses to be included on the Finance Board Committee Agenda (Finance Committee Meetings are generally held the 2nd Tuesday of each month) and the Board Meeting Agenda (Board Meetings are always held on the 3rd Wednesday of each month).

___ Once the Board approves travel, the Executive Coordinator will make all arrangements as stated above.

___ If flights are needed, the Executive Coordinator will contact the employee about flight time preference and other details. A date of birth is often required by the airlines to book a flight.

___ A Meal Advance Allowance can be requested three weeks in advance of travel. Should a meal advance be granted, it is not necessary to keep receipts.

Itineraries

___ An itinerary will be sent to the traveler two weeks prior to the first travel date. The itinerary will list all travel information, emergency contact, travel coordinator's contact information, and may include a copy of the hotel's credit card authorization form.

Following attendance to a conference or training:

___ Submit expenses on an Employee Travel Reimbursement Form for the appropriate year; the form can be found on the LifeWays Intranet at "Forms/Finance/Employee Travel Reimbursement Form (current year)."

NOTE: Parking is reimbursable with a receipt.

___ Provide a brief overview of the training with fellow staff members within 30 days.

___ Complete and submit to HR a Conference Training Attendance Documentation (Form #9-03.05A), available on LifeWays Intranet under “Forms/Finance”; a copy will be kept in the employee’s file to track training.

___ If the event was out-of-state, a copy of Form 497 should be forwarded to the Governance Office. The form will be included in the next month’s board meeting materials for the Board’s review.

Tips:

- Mileage is reimbursable from the LifeWays office to the training location; mileage is typically not eligible for an advance.
- Meals not covered by the conference are reimbursable if submitted with a detailed receipt (this is only applicable if a meal advance was not requested).
- To determine how much can be spent on meals, visit <https://www.gsa.gov/travel/plan-book/per-diem-rates> and plug in the city and state; this will take you to the standard rate for that city.
- To determine how much can be spent per *meal*, scroll to the middle of the page and you will see “Meals & Incidentals (MI&E) Breakdown.” There you will find the total amount allotted per day as well as breakdowns per meal (note that M&IE are paid at 75% on the first and last day of travel).
- Tips are limited to 15% and are part of the meal cost.
- Alcohol is not reimbursable.