Proposal:

CLEAR Student Assistant Procedures Manual & Handbook

The Purpose of this Manual

This manual, CLEAR Student Assistant Procedures, will outline the duties of a Student Assistant within the Center for Learning Enhancement, Assessment, and Redesign at University of North Texas. In the event of my departure from the position, if I am not still on hand to personally train my replacement, the new hire can use this manual on the first day of their employment and again later, as needed, over the course of their tenure at CLEAR. This manual assumes the new hire knows basically what CLEAR does for UNT, but nothing more about the department.

I have worked at CLEAR in this position for two years. Much of what will be explained in the manual was learned over a long period of time. I feel the manual will allow for a smooth transition from me to another employee.

The manual will address budget reconciliation, travel procedures, filing and records retention, purchasing, and other office tasks. For a more detailed list of topics, see the attached outline.

Why This Manual Is Needed

I will be leaving my position at CLEAR by the time I graduate one year from now. It is a student-only position and thus has no full-time upgrade for me to move into. Therefore, I think it best to take the knowledge of procedures I have received over the last two years and put them into this manual so my replacement can learn how CLEAR works quickly and easily, and have a point of reference whenever something new comes up.

After I was initially hired, it was not easy for me to learn new procedures, especially when my supervisor was out sick or at lunch. I began work on a crude form of these procedure manuals a year ago with this in mind.

While an online form of this manual may be more easily searched, in the event of computer trouble or access problems, an online resource is impractical. This manual will include information on who to contact during issues that would make a computerized version of this manual inaccessible. Therefore a paper, hard-copy manual is the best option. To compensate, the information in the manual will be organized in the most easy-to-use way possible.

Manual Format

This manual will be a combination of two things:

1) An introduction to the Student Assistant position & the CLEAR department; and
2) A reference book that can be scanned quickly for immediately needed information.

An outline of the manual's specific contents is included.

The manual will include as much visual material as possible. Diagrams, screenshots of websites, images of forms, and photos of file cabinets will make it easier for a new hire to find things and know what to do with those things once they are found. A glossary will be included in the manual as well, as the position requires knowledge of terms specific to the department or to UNT's systems.

Timeline for Completion

Now:	Basic writing completed.
April 9, 2012:	Proposal, including manual outline, to be completed
April 13, 2012:	Reorganization of information according to outline
April 17, 2012:	General design layout. Includes only page layout and color scheme.
April 20, 2012:	Fitting of text content into design layout. Includes deleting redundant information as necessary.
April 23, 2012:	Completion of Index. Beginning of final proofreading & quality assurance.
April 25, 2012:	Final Project Due.

Cost Estimate

Minimal. I will be paid my regular hourly wages for a good deal of the time worked on it, as CLEAR has given me permission to work on this while on-the-job. Some of the pay will then go towards printing and binding, but school resources that are already included in my tuition and fees will be used whenever possible.

Conclusion

Due to the low costs, ease of use, offline availability, and my expertise within this position, a paper manual and handbook written by me to educate someone new to my position is a very good idea. It will be easy to use, helpful, and necessary for anyone coming into the department once I have graduated and left the position.

MANUAL & HANDBOOK OUTLINE

I. Records & Filing
    A. Files in the Office
        1. Wanda's filing cabinet
    B. Records Retention

    - 1. Records Retention Schedules
    - 2. Back room
  - C. Final Records Disposition
    - 1. When this is done
    - 2. Final Disposition Log
- II. Purchasing
  - A. Preferred Vendors
    - 1. Online
    - 2. Offline
  - B. Sales Tax
    - 1. Filing for Tax-Exempt accounts
    - 2. Filing for a Sales Tax refund
  - C. Transaction cover sheets & filing
- III. Budget
  - A. Budget reconciliation (on-the-fly)
    - 1. Cognos EIS
    - 2. Operating Spreadsheets on “Budget” Excel file
  - B. Management reconciliation (month-by-month)
    - 1. EIS
    - 2. Cross-referencing with Operating spreadsheets
  - C. In-depth reconciliation tips
    - 1. Comparison of all transactions
- IV. Travel
  - A. Procedures for Traveler pre-departure
    - 1. Forms to be completed
    - 2. Ticket & Hotel Booking
  - B. Procedures upon Traveler’s return
    - 1. Receipt collection
    - 2. Travel Advance Card log printout
  - C. Travel Vouchers
    - 1. Filling out
    - 2. Turning in
- V. Personnel
  - A. New Hire Procedures
    - 1. HR New Hire packets
    - 2. Office tour
    - 3. Alarm Codes
      - a. Getting code from employee
      - b. Entering code
      - c. Testing
  - B. Who to Contact when Routing Phone Calls
    - 1. Specialists within CLEAR
    - 2. Other UNT Departments
- VI. Glossary of Terms
- VII. Index