Training New Bookkeepers – Procedure

- CES informs Regional Director's office of new bookkeeper.
- Regional Administrative Associate informs Regional QuickBooks Team and QB Administrator.
- QB Administrator contacts new bookkeeper to discuss bookkeeping experience, regional QB team members, and future training sessions.
- Send email to regional trainers with information that QB Admin acquired during preliminary visit.
- Trainer and CES discuss reports, wages/benefits, other pertinent information, and schedule learning sessions.
- Trainer determines with CES if former Bookkeeper is capable and available to provide some QB training for new Bookkeeper.
    - At minimum, former Bookkeeper shows physical location of documents and reports.
- Trainer schedules initial visit with Bookkeeper and subsequent short periods of learning.
- Review Letter of Agreement located on the accounting manual website and prioritize learning topics.
- Review Monthly Checklist for Bookkeepers document located on the accounting manual website under checklists.
- Review Accounting Resources web sites.
- Trainer discusses with Bookkeeper a list of financial reports for Extension council. Follow-up with Bookkeeper prior to next Council meeting to be certain reports are accurate.
- Send Training Progress update to QB Administrator, other trainers, and Regional Administrative Associate.
- Use Teams for personal consultations. Group sessions are possible in Teams. Regional team may consider group sessions. Committee suggested that QB Administrator continue with QB training sessions.

Invite Trainers to co-teach a Teams session with QB Administrator. Co-teaching will provide opportunity for trainer to research and plan QB session(s) with QB Administrator and will reinforce QB skills.