

Procedure for Training New County Engagement Specialists

- Regional Director's office informs Regional QuickBooks Team and QB Administrator of new County Engagement Specialist.
- QB Administrator contacts new County Engagement Specialist to discuss accounting experience, regional QB team members, and future training sessions.
- Send email to trainers with information that QB Administrator acquired.
- A trainer and CES discuss Council reports, employee wages/benefits, tax forms, and other pertinent information. Schedule initial visit and subsequent short periods of learning. List of pertinent reports.
- Progress report to RD office, QB Administrator and other trainers. Survey questions? Use learning objectives.
- Use Teams for personal consultations. Group sessions are possible in Teams. Regional team may consider group sessions. 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.

Other Committee Considerations

All CESs should acquire pertinent QuickBooks skills, as identified on the Letter of Agreement for County Engagement Specialists.

Limited direction from RD – request input from RD. committee request.

CESs need to know enough? Reports. Know what they are looking at.

More involvement from CES regarding payroll and tax forms.

Recommend that CESs reconcile bank statement or Council officer.

Include web resources during training.

Policies and Procedure for County Councils

Starting off point for training: reports, current knowledge level.

QuickBooks Payroll Time tracking may be beneficial for CES.