OFFICE STAFF PROCEDURE TABLE OF CONTENTS

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**HELPING HANDS**

**BASIC INSTRUCTIONS FOR OFFICE STAFF**

**PICKUPS, RETURNS AND DONATIONS**

**Note! If you are unable to make you scheduled shift because of a change in your daily schedule, please notify Scheduler Sue Rattner. Sue can be reached at** [**hh.scheduling.1104@gmail.com**](mailto:hh.scheduling.1104@gmail.com) **. Please give Sue a couple days to find a replacement.**

**Helping Hands office hours are from 10:45AM – 1:15PM. This extra 30 minutes allows time to review daily paperwork and complete end of shift tasks. Office hours for residents to pick up or return items are from 11:00AM - 1:00PM**

1. Using HH office phone call and leave message for phone coordinator that you are at office.
2. Insure plenty of the Helping Hands trifold and clear donation box are on the table prior to starting your workday.
3. Encourage residents to take a copy of the trifold and let them know we continue to operate based on equipment and cash donations from Villagers.

**LOGGING ON TO COMPUTER**

1. Turn on the computer monitor by pressing the button under monitor in middle of screen.
2. Enter Pin # (1104)
3. Double click Microsoft Excel logo on the screen.
4. Find file for today’s date (i.e., 0217 Helping Hands Request). 2-digit month, 2-digit day following by Helping Hands request.

**\*\*\* YOU MUST** DO **THE NEXT TWO \*\*\***

1. On yellow line click (ENABLE CONTENT)
2. A Security Warning message will pop up and ask if you want to make this file a trusted file. **ALWAYS** Answer (YES)
3. If the daily file had been opened prior to logging on you will not see comments noted in 5 and 6 above. What you will see is a request to update (ALWAYS UPDATE)
4. Each of the primary functions of your daily computer task will be identified by (TABS). These tabs will be across the bottom of your worksheet as follows:
   1. Current Request, Agreement, Return History, Calls & Inventory, Bar Codes, Return Equipment form, Donation Equipment Form and Office Schedule

**EQUIPMENT ISSUE**

**NOTE!**

**The following should be done prior to you starting your workday with residents.**

**All items on daily pickup sheet have been reviewed for pickup and located in storage room by the shuttle driver. If item is not working as it should do not send out, or item is in a condition that you would not want to use it yourself do not send out. If available switch item with one from the front office. If not call coordinator, make the requested item available on the next day’s sheet. Call the resident and tell them the item does not meet your inspection and cannot go out.**

1. Go to the “CURRENT REQUEST) tab.
2. Find **the** person by ticket # and name (on pickup sheet left by Shuttle Driver) or name by using the mouse and scrolling thru all tickets with “waiting status” in the status column (n) of current requests. **NOTE ALWAYS NEAR BOTTOM OF FILE**
3. Provide you helper with the ticket#, Name and Equipment type as indicated on the computer screen.
4. Left click your mouse in the cell of the respective ticket in the bar code column.
5. Request you helper scan the bar code. NOTE! BE SURE YOU ARE IN THE CORRECT CELL OF THE RESIDENTS TICKET. You can tell by a solid dark line will be around that cell. If this is not done or the helper scans prior to you be ready the bar code will be scanned into the computer wherever the location of the cursor was last.
6. Highlight column (A) by left clicking on column and holding down while sliding the mouse to column (M). Release the mouse. With cursor in the highlighted area right click the mouse and select copy from the drop-down menu. Note! The highlighted area will now be surrounded by dashes). If this does not happen redo step (6).
7. Go to the “AGREEMENT” tab. Left click mouse in first cell. Now right click and a popup will display. Left click on paste (1st clip board cymbal). The information from the current request will now show on the agreement page.
8. On the top left-hand side of your screen, you will see a tab called (FILE) tap on file and an additional menu will pop up select “PRINT.”
9. On the print screen select the number of copies you need (normally 2) and select print.
10. Have resident sign one copy and your initial same copy. Second copy goes to the resident.
11. Before leaving the agreement form click the “delete” key to remove information from the agreement form.
12. Go back to the current request tab.

**EQUIPMENT RETURN**

**NOTE! Returned equipment can be in two different locations, the current request tab, or the return history tab.**

**If you have ticket number check date of issue (i.e., 0712b) that would indicate what tab to research ticket. If in current month go to current request, if other than current month go to return history. With out the ticket # always start with the return history tab**

**It is always best to scan for the BAR CODE (even if you have the ticket number) if available.**

**When searching for item use the following in sequence.**

1. **Search using scanner for Bar Code.**
2. **Search using Ticket #**
3. **Search using last four digits of phone number.**
4. **Last Search for name**
5. Go to the appropriate file based on information you have either current request or return history.
6. Left click on the Triangle (above line 1 & left of Column A. This will highlight the entire page in grey.
7. Top of screen (dark green area) click on search. A drop-down menu will appear, select (FIND). The drop-down menu for find will appear.
8. Request co-worker Scan Bar Code.
9. Click (FIND NEXT) if found go to step 7.
10. When unable to find using bar code continue your search as follows:
    1. Search using Ticket #
    2. Search using last four digits of phone number.
    3. Last Search for name If still unfound leave note that ticket was not found and go to step 8.
11. Found item.
    1. Left click on the bar code box of selected item. Note! A dark like will appear around the bar code.
    2. Delete Bar Code from selected item.
    3. Change the status cell to (**RETURNED TO INVENTORY**)
12. Go to **Calls and Inventory** tab.
13. Review the equipment and ensure equipment is working properly. If not (REG TAG with information as what you see wrong). If the equipment is soiled to the point, you would not use, and you have tried to clean with the available cleaning fluids and sanitizer. Red Tag as soiled. Red Tagged equipment should be moved to backroom workbench area.
14. Return to current request.
15. Locate the description of item being returned and go to the dark green column (e) and add 1 to the quantity in that column.
16. Return to current request.

**DONATED EQUIPMENT**

**NOTE!**

**Only bar code donated equipment if it is on our equipment list (see calls and Inventory) and is in good working order. Equipment not on our list of available equipment should be placed on workbench in back room. If equipment needs repair Red Tag describe problem and move to back room. Do not bar code!**

1. Find the roll of bar codes to be used on new or donated equipment.
2. Find the item being donated on the calls and inventory tab.
3. Go to column (D) donated office and increase the number by 1.
4. Place your cursor over selected item right click and copy.
5. Go to the bar code tab. At the bottom (last item) of the file.
6. Insure the next available bar code number agrees with the next bar code on the roll of bar codes. These two numbers must agree.
7. In the blank description area for the selected bar code right click and paste the description from step 4 above.
8. Place the bar code on the right side of the equipment (see picture in the equipment picture list in the policy and procedure manual.
9. Sanitize the equipment per the Sanitizing Procedures of this procedure.
10. Return to the current request tab.

**OFFICE WALK-IN CLIENTS**

# **Occasionally residents walk in the office and request equipment. When their need is immediate, we can provide the equipment to them if available. The daily ticket number followed by an “A or B” will be used to complete for this task. (Note! The status block of the (A or B) ticket will also state “RESERVED FOR OFFICE”**

# **The following procedure will assist you in completing that task.**

1. When resident requests the equipment same day for a specific reason go to step 3.
2. Provide the resident with a copy of our Hand out and request they call (352 973-2284) by 4PM and the equipment will be available the next business day. END OF TASK
3. Once determined what equipment they need go to Calls and Inventory tab.
4. If the WEEKEND INENTORY column “C” yellow is 3 or less for the equipment being requested coordinator only can authorize. Go to step 2.
5. Go to current request tab.
6. Select the equipment requested from the equipment available in the office.
7. Select the available daily ticket number (A or B) complete the data entry as follows.
8. The following information is required in each column as follows to complete the ticket:
   1. (Ticket) # as assigned by computer.
   2. (+-) only used if multiple equipment is requested.
   3. (Action) Drop down menu is available and must be used. Click on action cell of your ticket and a drop-down menu noted by a triangle to the side of the cell. With cursor on the drop-down triangle left click and a drop down for all ACTION types will appear. Place your cursor on “OFFICE ISSUED” and it will be placed into your selected cell.
   4. (Item) Drop down menu is available and must be used. Click on action cell of your ticket and a drop-down menu noted by a triangle to the side of the cell. With cursor on the drop-down triangle left click and a drop down for all equipment types will appear. Place your cursor on the selected item and it will be placed into your selected cell.
   5. (Bar Code) This column must be filled by scanning the bar code from the equipment selected. Place cursor in the blank cell. Note! a dark border will highlight the cell you are requesting the bar code to be placed in. Request you assistant to scan the bar code. The scanned bar code will now be displayed in the cell.
   6. (Name) type the name of the resident requesting the equipment.
   7. (Address) type the address of the resident requesting the equipment.
   8. (Village) Drop down menu is available and must be used. Click on action cell of your ticket and a drop-down menu noted by a triangle to the side of the cell. With cursor on the drop-down triangle left click and a drop down for all known Villages will appear. Place your curson on the selected item and it will be placed into your selected cell.
   9. (Phone) type phone number of residents. Note just the numbers computer will display in phone number format once you select enter.
   10. (Date) type today’s date (format MM/DD)
   11. (Weeks) type the number of weeks equipment is requested for. Note! Do not exceed 8 weeks without the permission of the coordinator.
   12. (Return date) is computer generated based on the date and weeks information provided.
   13. (Status) Drop down menu is available and must be used. Click on status cell of your ticket and a drop-down menu noted by a triangle to the side of the cell. With cursor on the drop-down triangle left click and a drop down for all available selections will appear. Select “PICKED UP AT OFFICE” will appear. Place your curson on the selected item and it will be placed into your selected cell.
9. Highlight column (A) by left clicking on column and holding down while sliding the mouse to column (M). Release the mouse. With cursor in the highlighted area right click the mouse and select copy from the drop-down menu. Note! The highlighted area will now be surrounded by dashes). If this does not happen redo step (6).
10. Go to the “AGREEMENT” tab. Left click mouse in first cell. Now right click and a popup will display. Left click on paste (1st clip board cymbal). The information from the current request will now show on the agreement page.
11. On the top left-hand side of your screen, you will see a tab called (FILE) tap on file and an additional menu will pop up select “PRINT.”
12. On the print screen select the number of copies you need (normally 2) and select print.
13. Have resident sign one copy and your initial same copy. Second copy goes to the resident.
14. Before leaving the agreement form click the “delete” key to remove information from the agreement form.
15. Go back to the current request tab.

**SANITIZING & CLEANING PROCEDURES**

**The Hospital grade sanitizing and cleaning solution we can have can be used for both sanitizing and cleaning. Scrub brushes and cloth wipes available on the peg board in the back room.**

**It is always recommended that you use the gloves provided when sanitizing or cleaning.**

**Remember when finished if you can say I would use this piece of equipment great. If not red tag the equipment.**

1. **All equipment must remain outside until sanitized.**
2. Use spray bottle with sanitizing solution and saturate the equipment, clean as necessary using the scrub brushes and cloth wipes available on the peg board in back room. Other approved cleaning solutions are on peg board also.
3. Review the equipment and ensure equipment is working properly. If not (REG TAG with information as what you see wrong). If the equipment is soiled to the point, you would not use, and you have tried to clean with the available cleaning fluids and sanitizer. Red Tag as soiled. Red Tagged equipment should be moved to backroom workbench area.
4. Place usable equipment in the front equipment storage area wet allowing it to dry naturally.
5. Return to current request.

**END OF SHIFT**

1. **Turn off computer**. Ensure all files are closed before you power off.
2. **Select the Microsoft logo** on left side bottom. (Window symbol)
3. **Select the power symbol** and select power down. (Note! If a response is requested concerning updates available select update and power down.
4. Sign all completed transaction and file bottom right drawer in brown folder by today’s date.
5. **Review contents of donation box**. Remove cash more than $20.00 and all checks. **Note!** Key to donation box is located Left top drawer of Helping Hands desk in magnetic key box.
   1. Using envelopes provided in Helping Hands top right drawer write date, accumulated amount of checks and cash and sign.
   2. Place cash and checks into envelope and place in the Helping Hands lock box located on back side of column in storage room. Note! leave no more than $20 dollars in the clear donation box.
   3. **LOCK DOORS**

In most cases doors will lock when closed. It is important to check both doors to insure they are locked when departing for the day. The breeze way door sticks and may not close properly so double check that door from outside to insure it has closed and is locked.

**THANK YOU**

**YOU HAVE MADE THIS A SUCCESSFUL DAY FOR HELPING HANDS AND A BETTER AND SAFER DAY FOR RESIDENTS OF THE VILLAGES.**