• Peer Advisor Position Description

• Daily Tasks
  o Voicemail and Phone Related Tasks
  o Email
  o Agency Account Information Requests
  o (Newly) Activated Agency Accounts
  o Registration Checks
  o Notify Pending Registrations of Approaching Deadline
  o Orientation Checks
  o Checking Terms and Conditions
  o Conference Room Scheduler
  o Social Media Request Form
  o Opening Shift Duties
  o Closing Shift Duties
  o Card Swipe
  o Tracking Tool

• Registering Student Organizations
  o How Students Register a New Student Organization
  o How Students Renew/Update an Existing Student Organization
  o RSO Advisors
  o Disabled OrgSync Portals
  o Adding Students to an OrgSync Portal

• Passwords
Center for Student Involvement is committed to creating educational experiences for students that expand classroom learning and promote involvement, retention, challenge and success through student organizations and campus programs. We provide opportunities for students to develop a sense of belonging, build community, engage in public service and reach their potential as ethical leaders and responsible citizens.

CSI Peer Advisors provide advising services to Registered Student Organizations (RSOs) regarding student organization support services, leadership tools, event planning, OrgSync (online student organization management system), on- and off-campus funding opportunities, Club Finance Council, registration, fundraising, facility reservations, agency account maintenance and navigating campus policies and procedures. With team, plan, implement and provide support for CSI programs such as Davis Dance Revolution, and provide support for events such as The Buzz, Activities Fair and Picnic Day. Perform various administrative duties for the multiple programs within the Center for Student Involvement, including serving as ambassadors for OrgSync procedures and publicity.

Customer service is a significant responsibility of this position and requires cooperative teamwork. Provide administrative support in a high traffic reception area, manage a complex appointment calendar, schedule and arrange meetings, answer multi-line telephone, screen and process department and program forms, distribute mail, and maintain filing system for 600+ student organizations. Create marketing flyers, graph charts, and spreadsheets. Demonstrate excellent judgment and discretion in handling sensitive and confidential issues.

**Job Qualifications and Requirements:**

- **Must be a registered UC Davis student in good academic standing.**
- Peer advisors are expected to have knowledge of campus policies and procedures related to student organization activity, event planning, insurance and risk management, space reservation process, fundraising and leadership development.
- Must be punctual and ready to work scheduled hours.
- Must have strong customer service skills.
- Excellent written and oral communication required.
- Skills to edit and proofread materials accurately to produce error proof materials.
- Self-motivation and able to work independently or as a team under deadline pressure is required.
- Ability to maintain strict confidentiality and exercise discretion and sound judgment.
- Clarify department and campus policies to students, campus community and the general public.
- Experience with PC: Microsoft Office, computer calendaring software, electronic mail, voice mail, photocopiers, fax, printers and other basic office equipment.
- If hired, all peer advisors are required to take the 2 unit EDU 160 Spring Quarter training class and attend training in September, prior to the start of Fall classes.
In this section you will find directions on how to complete the Peer Advisors’ daily tasks. Peer Advisors are expected to complete the daily tasks in addition to any extra project assigned to them by CSI Coordinators.

Daily Tasks:

- Checking Voicemail
- Checking E-mail
- Checking Agency Account Information Request
- Checking Newly Activated Agency Accounts
- Registration Checks
- Notifying Pending Registrations of Approaching Deadline
- Orientation Checks
- Checking Terms and Conditions
- Checking the Conference Room Scheduler
- Checking the Social Media Request Form
- Opening Shift Specific Tasks
- Closing Shift Specific Tasks
- Card Swipe
- Tracking Tool

**VOICEMAIL (AND OTHER PHONE RELATED TASKS)**

- **Always get the caller’s name, RSO or department, and reason for calling.**
- **Voicemail**
  1. Call 754-0054
  2. Enter the PIN (123456789)
  3. Follow instructions as needed
- **Putting Callers on Hold**
- **Transferring Calls**
  1. Select transfer (puts caller on hold on the 2-2027 line)
  2. Dial extension and announce call
  3. If call is not accepted, push the 2-2027 button to return to call
  4. Say they are unavailable and take a message down
  5. If call is accepted, select “transfer”
  6. Stay on the phone until you see “CONFERENCE CALL” come up on the Caller ID.
  7. Once “Conference Call” comes up, you are safe to hang up
- **Making Calls**
  o If calling someone on-campus or in the 530 area code dial the 7 digit number
  o If calling someone off-campus use the 10 digit number (use area code)

**EMAIL**

- **Always CC rso-help when responding to/sending emails.**
- Once an email has been read and responded to, file it into the correct folder.
- If the email pertains to all staff, read it and then mark it as unread, so the next PA can read it.
- Sign Emails in the following format:

  CSI Staff
  Your Initials
Many emails you send are based off of canned responses.

Sorting Email:
- Emails are organized by folder after all necessary PAs have read them and they have been responded to.
- All folders have a corresponding school calendar year. Once the school year is over, these folders can be “hidden” on the tabs in the accounts→ labels setting.
- If we receive emails from comedians, motivational speakers, bands, etc. trying to come to campus, direct them to CES or Entertainment Council.

**AGENCY ACCOUNT INFORMATION REQUESTS**

1. Open “Pending” Agency Account Information Request on OrgSync
2. Confirm that the form was submitted by either the President or Treasurer of the RSO. *If not submitted by President or Treasurer, deny the request.*
3. Search for the RSO’s Agency Account on DaFIS either by using the Agency Account number or the RSO’s name.
4. Screen shot the statement and send it to the officer that submitted the form using the “AA Info Request” canned response.

**ACTIVATED AGENCY ACCOUNTS**

It takes 7-10 business days for Agency Accounts to be created/activated after the $35 activation fee is paid. Peer Advisors notify RSO officers when their Agency Account is created/activated. *If the RSO’s Agency Account is new, Peer Advisors must also notify them of their account number and update RSOs OrgSync Profile.* Here are the steps for this process.

1. Log in DaFIS
2. Query Jump= 2
3. Enter in this search criteria
   a. Month Range: Current Current through Current Current
   b. Account: 6800036

4. Process Query
   a. Transaction Grouping
   b. Custom Object Group
   c. Month Range
   d. Account(s)

5. Email RSOs when their existing AA has been activated using the “AA Activated” canned response.
6. If an RSO created a new AA, search to see if the account has been assigned a number.
7. When an RSO’s new Agency Account has been assigned a number, email the officers letting them know using the “AA Activated” canned response AND add the account number to the RSO’s OrgSync profile.
In the weekly notes, log which RSO was the you emailed & which new AA was the last to get a number.

REGISTRATION CHECKS

1. Log into OrgSync and go to CSI Admin page
2. Go to Pending Registration Requests
3. Check PA Weekly Notes to see where the pervious PA on duty left off
4. If reviewing a new RSO’s registration request, check if the group is new or if they already have a portal. If there is already a portal, put that in the notes. If there is not already a portal, proceed as normal.
5. Things to look for when reviewing registration request
   a. Name- can only use UC Davis to indicate location (Chess Club at UCDs NOT UCD Chess Club)
   b. Category- cannot be “Departmental”
   c. Orientation- must be completed by either the President or Treasurer.
   d. Description- must have a description
   e. The five officers- must be five different registered UC Davis students
   f. Office Emails- update the officer emails section. Each email address must be separated by “;”
   g. Agency Account- Does the group want to renew their account, create a new account, or not have an account?
   h. Agency Account- If they already have an Agency Account, use DaFIS to check the balance
   i. Authorized Reserves- must be two of the five officers
   j. Authorized Reservers- Check that the “UC Davis login ID” information is correct at this website http://email.ucdavis.edu/
   k. Check how many officers have accepted the terms and conditions.
   l. If it is a sorority or fraternity, has the SAFE Paperwork been completed and turned into the Office of Sorority and Fraternity Life?
6. Things to add to the “Notes”. Be sure to include the date and your initials.
   a. Has orientation been completed? (Be sure to email RSO if not)
   b. How many officers have accepted the terms and conditions.
   c. Does the group want to open/renew their Agency Account?
   d. If they already have an AA, how much money is in the account?
   e. When checking groups that are already registered for the year, what elements have been changed? (all the officers, just one officer, just the authorized reserves, etc.)?
   f. If needed, has the SAFE Paperwork been completed?
7. Add where you left off in the PA Weekly Notes

Note: The list of completed orientations and SAFE Paperwork can be found on the Google Drive. Google Drive -> CSI (OrgSync) folder -> 2015-2016 Registration Files -> the only two PAs work with are “SAFE and RSO Completion” and “2015-2016 Completed Orientation”.

NOTIFY PENDING REGISTRATIONS OF APPROACHING DEADLINE

Once the registration/renewal process is begun, RSOs have 30 days to complete the process. PAs should notify RSOs that the deadline is approaching when they have a week or less to complete the process. On the registration request you can see when it was started (in the example picture here, the request was submitted on June 16). In the notes you should be able to see why the request has not yet been processed yet (not all officers have accepted T&C, orientation not completed, the organization is in overdraft, or SAFE paperwork is not completed if it is a Sorority or Fraternity). Send the five listed officers an email response notifying them the 30 day deadline is approaching using the “30 day deadline” canned response.
• If one or more officer still needs to accept the terms and conditions, resend the request.
• To check if the orientation has been completed, go here.
• To check if the SAFE Paperwork has been completed, go here.
• To check if an RSO is or is not in overdraft, go to DaFIS.

ORIENTATION CHECKS

When a student completes the online CSI orientation, a confirmation email is sent to the student and the CSI staff members. PAs log who has completed orientation for what RSO on the 2015-2016 Completed Orientation log. This information is also transferred to the note section of the corresponding RSO’s registration request. Below are the steps for processing orientation confirmations.

• When an Email Comes in
  o Make sure the student is listed as president or treasurer on the RSO’s pending registration request.
  o Added a note about orientation being completed on the corresponding RSO registration request.
  o If the student is president or treasurer, update the Completed Orientation log with the students name, email address, student org, date completed, whether it has been logged in OrgSync and your initials.

• When Doing Registration Checks
  o Check the completed orientation log to see if either the listed president or treasurer have completed orientation.
  o If either has, add this to the notes.
  o If not, add this to the notes and email the officers letting them know they need to complete orientation using the “Orientation Required” canned response.

CHECKING TERMS AND CONDITIONS

Each officer of the RSO must review and accept the terms and conditions of being an office before the RSO’s registration request can be processed. The request to accept the terms and conditions is sent to the officers when the RSO’s is updated/created. Presidents and treasurers have a different set of T&C to accept than the other three officers. PAs need to check both forms. Below are the steps for checking T&C.

1. Start with the bottom most “Pending” form on the list. To open, click on the student’s name in blue.
2. Cross reference the student’s name and organization name with the organization’s pending/decided registration check.
3. President and treasurer must complete the “President and Treasurer Terms & Conditions”. The other three officers must complete the “Organization Leadership & Terms/Conditions.”
4. If the correct form was filled out and information on the T&C form and the registration match, approve. If this is a discrepancy or the wrong form was filled out, deny.
5. To approve/deny, select the appropriate option from the drop down menu under “Take Action” (on the right hand-side of the form).

CONFERENCE ROOM SCHEDULER

The Conference Room Scheduler form on OrgSync is used by CSI and SFL professional staff to reserve the 442 conference room for meetings. It is important that this gets checked daily and the meetings get added to the calendar so the conference room does not get double booked.
Steps for checking the Conference Room Scheduler
1. Go to the Dashboard of the Conference Room Scheduler form on OrgSync.
2. Compare the requested meeting time to the 442 Conference Room Schedule calendar on the Gmail account.
3. If the requested meeting does not conflict with an existing meeting, approve the form and add it to the 442 Conference Room Schedule calendar. Be sure to check if the meeting is repeating.
4. If the requested meeting does conflict with an existing meeting, deny the request and let the professional staff that made the request know.

### SOCIAL MEDIA REQUEST FORMS

More on this to come.

### OPENING SHIFT DUTIES

- Unlock front door.
- Turn on LCD screen. Login information for SCALA computer are found on the underside of the keyboard.
- Print out conference room schedule for the day and post it on the conference room door.
- **Sort Mail** on Mondays, Wednesdays, and Fridays. Please sort all mail as soon as it is delivered. Cross-reference the list of RSO’s and their mailbox number on top of the filing cabinet or OrgSync.
  - Professional organizations have their own mailboxes located at the Vet, Med and Law schools. If they have a bake sale permit, scan and email the permit to the 5 officers. File the paper permit. If you receive mail for one of these organizations send it over in an inter-office envelope addressed as follows
    - Request Law School c/o Elizabeth Leasure
    - Med School c/o Carmelina Raffetto
    - Vet School c/o Tina Maher
  - We often get mail for people not in the office. When this happens, put the correct location on the envelope and put in the outgoing mail.
  - **Checks:** Any checks received from UC Davis made out to RSOs must go to into the check folder and are logged. Email the RSO’s president and treasurer to notify them they received a check. Check the come to pick-up the check, make sure they are an officer for the org or who the check is addressed to and have them fill out the paper form before giving them the check.
  - If an organization’s mailbox is overflowing please contact the primary leader via email to clear out their box.
  - If they are the CSI PA checks, send an email to your fellow PAs that the checks have come in and give those checks to Peer Advisor Supervisor. Use the sign-out form.

### CLOSING SHIFT DUTIES

- Lock front door, break room door, and copy room door.
- Re-organize chairs, clean white board, and lock conference room door.
- Turn off LCD screen.
- Tidy up the front desk and the lounge area. Make sure chairs are put back in their place and surfaces are wiped down.

### CARD SWIPE

In partnership with the Center for Student Affairs Assessment, CSI now has a card reader. Whenever a
student comes into CSI, please have them swipe their card in the card reader or enter their student ID number on the web application. The web application can be accessed here. Students can opt out of swiping their card or giving you their ID number if they wish. The information that is collected is anonymous- we just know who swiped in not when they swiped in. It provided us with demographic information so we have a better idea of who we are serving. The information we gather is complied with the information gathered at all of the other offices with card readers and compared to student’s academic records. Eventually, this information will be used to say which programs (or combination of programs) help support/increase graduation and retention rates on campus.

**TRACKING TOOL**

In addition to the card swipe system, CSI also uses an internal tracking tool. The CSI User Dacsta Tool is used to collect information on how many (students, faculty, staff, community members) are in communication with us and what their questions are. Fill out the Data Tool survey whenever you interact with someone in-person, over the phone, or via email. Only input data for interactions that you have resolved. Do not input every email of an email thread between you and an RSO officer. Do not input an interaction if you refer the person to someone else inside of CSI; the only time you input a referral is if you are referring them to a resource outside of CSI.
REGISTERING STUDENT ORGANIZATIONS

There are many benefits associated with being an RSO. Undergraduate, graduate, and professional students may create and register organizations. CSI does not register subgroups of existing RSOs. Currently registered RSOs can register the organization for the following academic school year beginning May 1. RSOs’ registration and Agency Account expires on June 30 unless renewed for the following academic school year.

HOW STUDENTS REGISTER A NEW STUDENT ORGANIZATION

- All you need is 5 interested currently registered UCD students who will be listed as officers.
- The New President or Treasurer must complete the CSI online orientation (found here in the Register your Student Group section of our website).
- The New President will complete registration on OrgSync
  - How to create a profile for the new organization.
    - Log into OrgSync using your Kerboros login ID
    - Go to “Browse Organizations”
  - Click on the Green “Register New Organization”
    - Select “Center for Student Involvement” as the umbrella organization
    - Fill out the profile.
  - To complete registration must have:
    - The five officers’ names, email addresses, phone numbers.
    - Two people listed as authorized room reservers (These people must be a part of the 5 listed officers) and their UC Davis Kerboros login ID (might be different than email address).
    - Need to know if organization wants an Agency Account
      - Need one to make room reservations and access financial services on campus (CFC, Departmental Sponsorships, etc.)
  - Once the President has completed the registration process, all listed officers will receive an
email from OrgSync prompting them to approve the organization’s registration and the Terms and Conditions

- After all 5 officers accept the terms and conditions, the registration request will be reviewed by CSI staff. The group will receive an email from CSI Staff announcing their registration completion with details about agency account activation or any need for adjustment.
- If requesting a new or renewal of Agency Account, the officers will be prompted to pay the $35 activation fee at the ARC Business Center. Details and documentation for this will be in the approved registration email.

**Note:** New registrations take a little bit longer to process because all 5 staff coordinators must review the registration. Re-registration is approved by 1 staff coordinator, and therefore is a quicker process as it was already reviewed in the past.

**Note:** Officers have 30 days from the time Orientation is completed and the profile is updated to accept the terms and conditions. If all five officers do not accept the terms and conditions within 30 days, the renewal request will be denied and the process must be restarted

### HOW STUDENTS RE-REGISTER AN EXISTING STUDENT ORGANIZATION/UPDATE AN RSO’S PROFILE

- ** Incoming President or Treasurer** must complete the online orientation (found here in the Register your Student Group section of our website- http://csi.ucdavis.edu/student-organizations/register-your-student-organization/).

- The **New President** will complete registration on OrgSync
  - To complete the registration update, the officer updating the profile must have...
    - administrator access in their group’s portal
      - If students have contact with Outgoing Administrators (typically when updating during the school year):
        - Incoming officers must have a profile on OrgSync and join the group
        - Current Admins can grant the new officers administrator access. Go to their Organization Home Page>>People tab >>> click on name of student >>> Profile tab >>>Basic Details >>> Green Manage button
      - If students do NOT have contact with Outgoing Administrators (typically when updating during the summer or beginning of the year) a CSI staff member/Peer Advisor can invite them to the group as an “Administrator” or change the settings to give them “Administrator” access
    - The five officers’ names, email addresses, phone numbers.
    - Two people listed as authorized room reservers (These people must be a part of the 5 listed officers) and their UC Davis Kerboros login ID (might be different than email address).
    - Need to know if organization wants an Agency Account
      - Need one to make room reservations and access financial services on campus (CFC, Departmental Sponsorships, etc.)
  - To update the RSO’s OrgSync, they must go to the RSOs profile (My Membership → click on RSO), scroll to the bottom and click on “Manage Profile”, click on the green “Update Profile”, and update the appropriate fields.
  - Once the President has completed the registration process, all listed officers will receive an email from OrgSync prompting them to approve the organization’s registration and the Terms and Conditions.
  - After all 5 officers accept the terms and conditions, the registration request will be reviewed by CSI staff. The group will receive an email from CSI Staff announcing their registration
Completion with details about agency account activation or any need for adjustment.

- If requesting a new or renewal of Agency Account:
  - If there is enough money to pay the activation fee, money will be taken out of the Agency Account without any steps taken by the students.
  - If there is NOT enough money in account, the officers will be prompted to pay the $35 activation fee at the ARC Business Center. Details and documentation for this will be in the approved registration email.

Note: You can re-register at any time during the school year, but if you do not re-register by June 30, you must contact RSO-help to get your group re-enabled.

Note: Officers have 30 days from the time Orientation is completed and the profile is updated to accept the terms and conditions. If all five officers do not accept the terms and conditions within 30 days, the renewal request will be denied and the process must be restarted.

RSO ADVISORS

RSOs are not required to have an advisor, though some groups (especially larger ones) find it helpful to have someone to fill this position. However, our CSI professional staff is available to help with conflict management, event planning, and more. Although any CSI professional staff member is happy and willing to help any group, each group is given an identified CSI professional staff member as their CSI Advisor, which is a great place to start.

DISABLED ORGSYNC PORTALS

OrgSync Portals will be disabled if they are not re-registered by June 30. Disabled portals are not active and cannot be updated for renewal. To re-enable an OrgSync portal, an officer of the group must contact CSI via email, telephone, or come in-person.

HOW TO RE-ENABLE PORTALS

1. Click “Admin”
2. Click “Organization”
3. Search for the organization
4. Click on the arrows next to the organization’s photo
5. Click the “Disable” Tab then click the button that says “Enable”
ADDNG STUDENTS TO A ORGSYNC PORTAL

Only administrators can update and manage an RSO profile. To add someone to an RSO profile as a member or administrator, follow these instructions.

- Once on the RSO’s profile go the “People” tab.
- Click on “Invite People”

- Fill out the “Emails of Invitees” with the appropriate information.
- Select which group the person should be added to (for the most part either member or administrator).
- Hit “Submit”
PASSWORDS

Front Desk Computers

- Password: Password$1

G-Mail

- Username: spac.reception@gmail.com
- Password: pencil74

CSI Staff Resources Page

- Password: Password$1