e-editing

Using an Electronic Editing System
to Produce High Quality Documents

e-editing system

- Enables you and your colleagues to collaborate and edit each other's work using the PED Network
- Allows bureaus to produce documents in a timely manner that are better written, meet constituent's needs, and exude professionalism
- Reduces the amount of time and editing that program managers, assistant secretaries, deputy secretaries and Dr. García spend on documents

e-editing

This training will focus specifically on letters signed by Dr. García that are produced by PED Divisions and Bureaus

e-editing goals

- To capture Dr. García's "voice" in each letter
- To communicate clearly with the recipient of the letter
- To consistently produce high quality documents

e-editing step 1

Decide what type of letter you will be writing:

- Informative
- Request
- Regret/Apology
- Explanation
- Communication of PED Regulation or State Law
- Other

e-editing step 2

Before you begin writing a letter, ask yourself:

- What is the purpose of this letter?
- What message do you want to communicate to the constituent?
- How can you say this in a clear and concise manner?

e-editing step 2

The answers to the three previous questions will determine:

- What type of response
- How to structure the letter
- What template to use

e-editing templates
WHY

Important template criteria:

- Templates are like “skeletons”; they are the framework for your letter.
- It is your job to add the “meat” to the letter; to ensure that Dr. García’s “voice” guides the letter.
- It is also imperative that the letter is personalized to meet the needs of each constituent.

e-editing templates HOW

- Discuss with your bureau what kinds of letters you will be sending
- Choose 5-10 recurring topics on which to base your templates.
- Decide on 5-10 different salutations/openings you may want to use.
- Choose 5-10 different closings.

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e-editing designing templates HOW

- When writing letters on behalf of Dr. García, your bureau may choose to use templates that will be created and reside on the PED P-Drive.

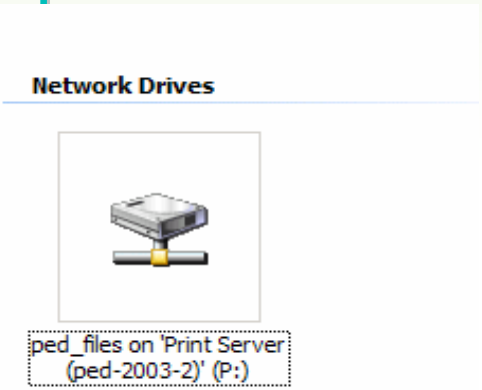
- Each template should be designed then approved by your Program Manager, Assistant Secretary, and Lori Bachman/Dr. García before use.

Slide 10

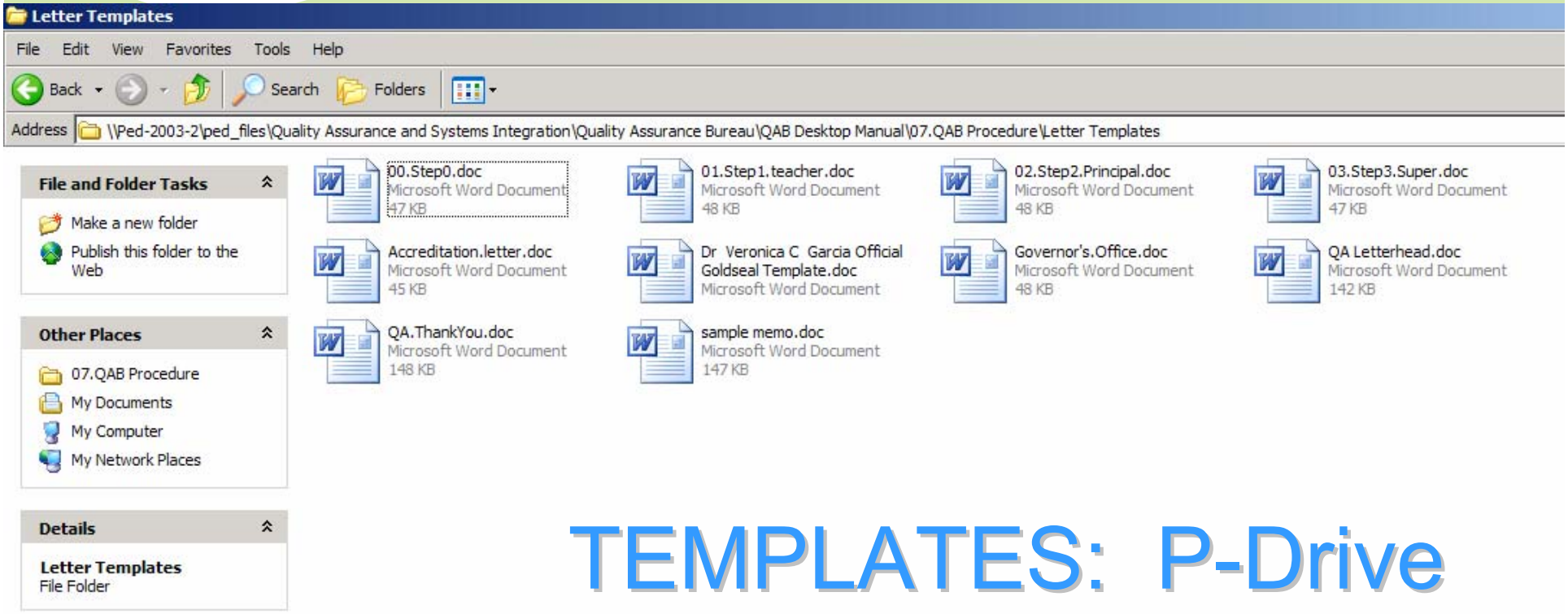
s1 shyde, 1/12/2006

e-editing templates: P-Drive TIPS

- The Template Folder on the P-Drive for your bureau contains templates for various stages of the resolution process.



- Please read all documents in that folder carefully and then decide which template is most appropriate.



TEMPLATES: P-Drive

e-editing

SAMPLE LETTER TEMPLATES

Type of Letter:

The constituent is being directed to work with teacher and then principal to find resolution

(Notice that this template follows the Protocol for Preparing Correspondence. All letter templates should follow this exact protocol.)

STATE OF NEW MEXICO
PUBLIC EDUCATION DEPARTMENT
300 DON GASPAR
SANTA FE, NEW MEXICO 87501-2786
Telephone (505) 827-5800
www.ped.state.nm.us

Each letter must be printed on official state letter head.

DR. VERONICA C. GARCÍA
secretary of education

BILL RICHARDSON
Governor

Post Date 3 Business Days

January 3, 2006

Maria Lopez
5000 El Camino Real #89
Las Cruces, NM 88007

Dear Ms. Lopez:

I am writing with reference to your letter received January 1, 2006 regarding your daughter, Victoria Lopez. One of our goals is to ensure that matters such as these are addressed. Therefore, a copy of this letter is being sent to Principal Moya.

In your role as a concerned parent in your community, you have communicated that you would like for Ms. Abbot to reconsider her disciplinary actions regarding Victoria. After reviewing the information you provided, I recommend that you continue to work with Ms. Abbot since this is a local district decision outside the purview of the Public Education Department (PED). If you are not satisfied with the result after working with Ms. Abbot, your next step in the process would be to contact Principal Moya. Our experience in the PED has demonstrated that, in most cases, you will find resolution by following a problem solving process at the local level.

Thank you for taking the time to fill out the intake sheet. Your dedication to informing the state government of issues that affect you is greatly appreciated. If you have further questions, please direct any future correspondence to:

Julia Rosa Emslie, Educational Consultant
Quality Assurance Bureau, Room G-15
New Mexico Public Education Department
300 Don Gaspar Street
Santa Fe, NM 87501
Phone: 505-827-4292 Fax: 505-827-4242
E-mail: juliarosa.emslie@state.nm.us

Truly,
Veronica C. García, Ed.D.
Secretary of Education

VCG/SH/jre (include the following initials: Dr.Garcia, person who writes letter, and person who types letter)

cc: Geri Romero-Roybal, Assistant Secretary of Education (always include division administrator)
Donald Moya, Principal, Las Cruces Elementary (focus of resolution)

e-editing step 3

The third step in the process is to write the letter:

- Once you have chosen your template, enter the appropriate constituent information and personalize the letter.

- Make sure to follow the Protocol for Preparing Correspondence for Dr. García.

e-editing step 4

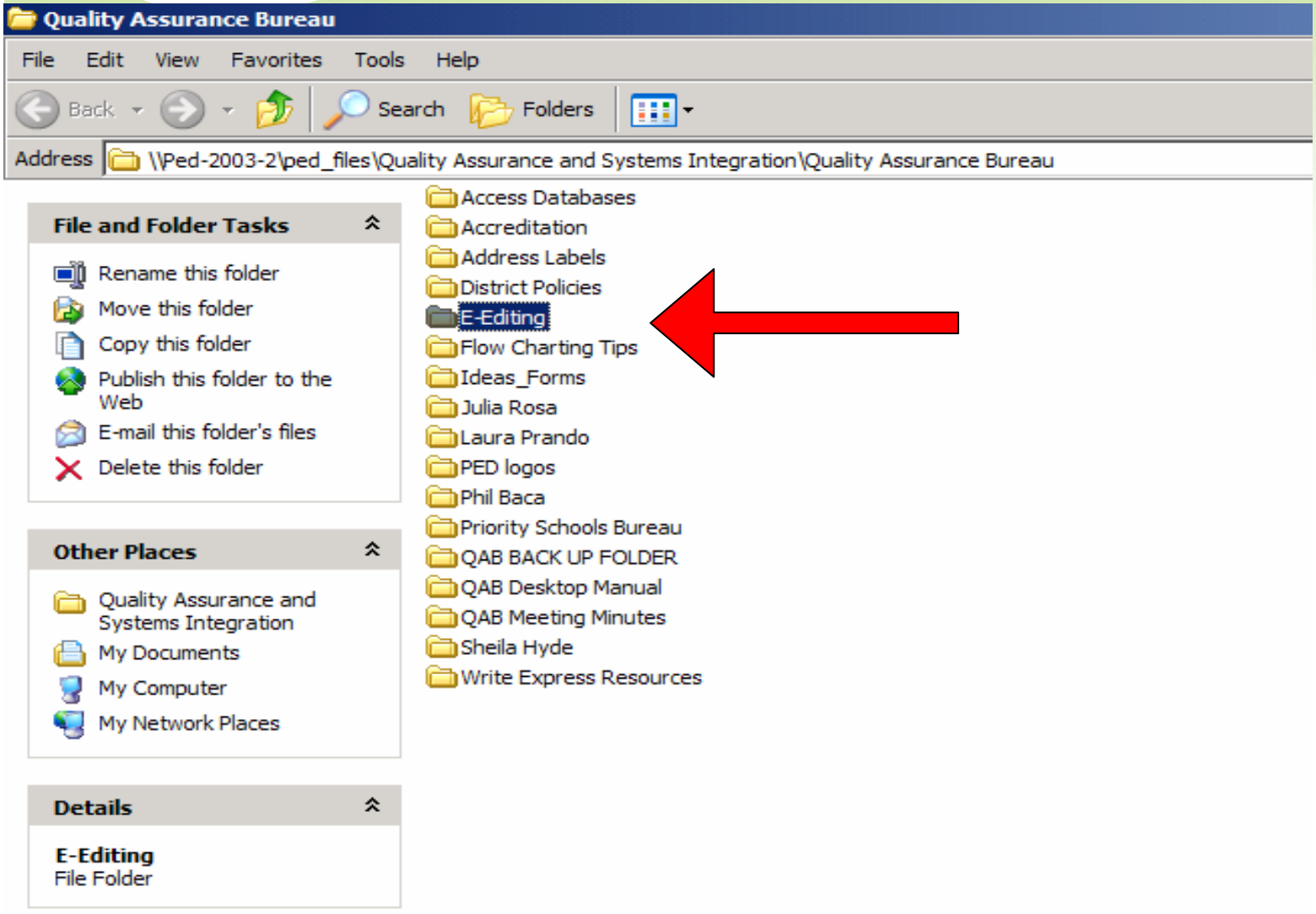
Setting up your bureau's system to:

- Review
- Revise
- Edit

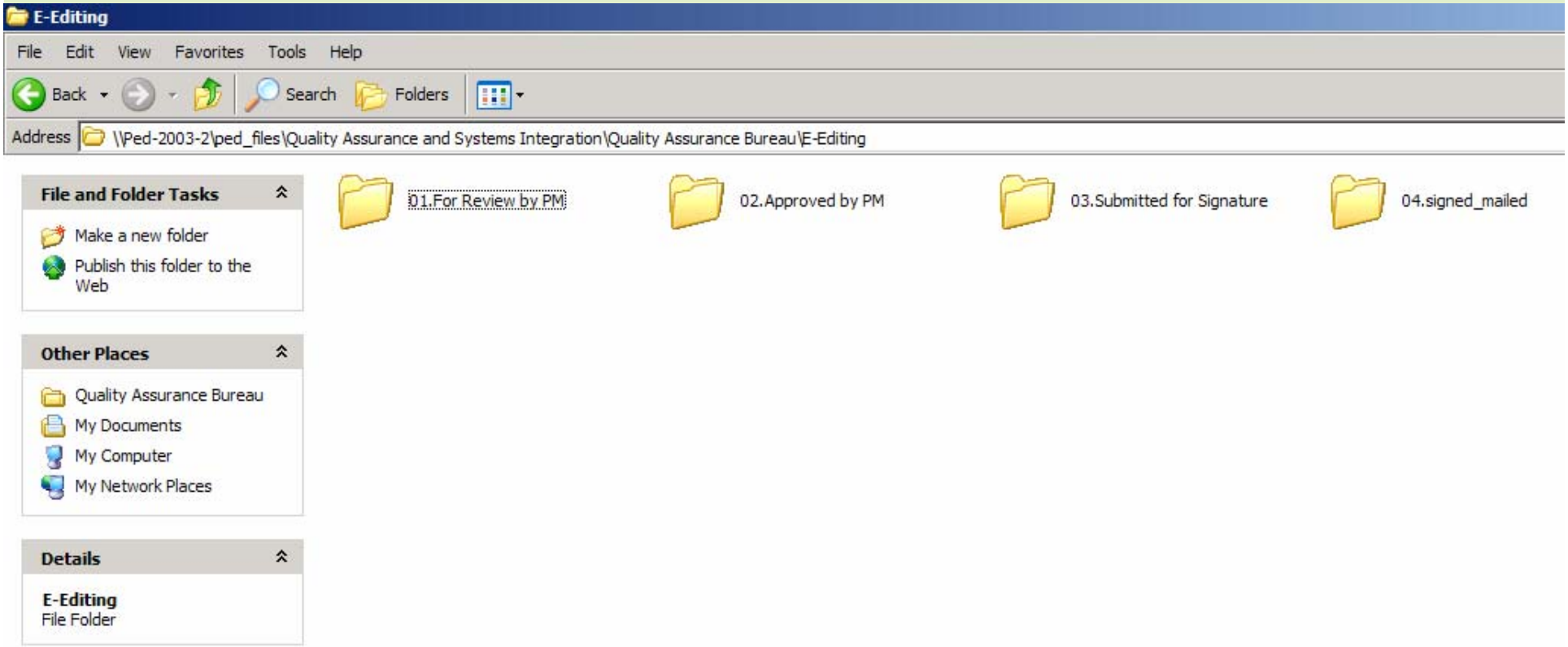
e-editing step 4

- The e-editing system is based on folders on the PED Network
- These folders are shared by bureau members (or specific people assigned to the process).
- Information Technology can ensure that folders are secure and only designated people have access to the e-editing folders.
- (Use the Track-It work order system to request help from IT.)

Create an e-editing folder in your bureau folder on the P Drive.



Example of folders within e-editing folder

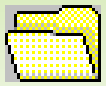


e-editing Folders on the P-Drive:

Arrange folders by steps in the system (for example):

- Submitted for Approval by PM
- Approved by PM
- Submitted for Signature
- Signed and Mailed

e-editing protocol checklist

Before placing a letter in the Submitted for Approval by PM  , follow these steps:

- Determine if you followed the Protocol for Preparing Correspondence for Dr. García. Check your formatting and grammar/spelling.
- Insure that the header on page #2 matches person being addressed and three day post-date of letter.
- Insert 5 spaces after page #2 header
- Finally, use the **Correspondence Checklist** on hard copy.

e-editing

Using the **Correspondence Checklist** before placing your letter in the PED Network e-editing system folders

Quality Assurance Constituent Correspondence Checklist

Instructions: Complete both checklists and put in file prior to submission to Program Manager.

Letter Checklist/writer:

1. ___ Pre-date by minimum of 3 business days
2. ___ Correct titles (address and dear ___)
3. ___ Spell check
4. ___ Appropriate template for request
   Protocol steps are accurate
5. ___ CC's accurate (name, title, place)
6. ___ Enclosures/attachment match request and body of letter
7. ___ Appropriate font size and consistency
8. ___ Formatting: Make sure that Dr. Garcia's signature is not "alone" on page #2
   Make sure that the content on page #2 is centered on the page
9. ___ Read aloud
10. ___ Read again looking for grammar, punctuation
11. ___ Have someone else complete the checklist

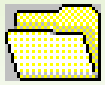
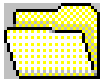
Letter Checklist/QA:

12. ___ Pre-date by minimum of 3 business
13. ___ Correct titles (address and dear ___)
14. ___ Spell check
15. ___ Appropriate template for request
    Protocol steps are accurate
16. ___ CC's accurate (name, title, place)
17. ___ Enclosures/attachment match request and body of letter
18. ___ Appropriate font size and consistency
19. ___ Formatting: Make sure that Dr. Garcia's signature is not "alone" on page #2
    Make sure that the content on page #2 is centered on the page
20. ___ Read aloud
21. ___ Read again looking for grammar, punctuation

Date: _____ to Dr. Garcia

Date Returned: _____signed
_____ need correction for: _____
_____ need correction for: _____

e-editing review

- Once you have placed the letter in the Submitted for Approval by PM 
- Your PM (or designated reader) will read the letter, make tracked changes, and put it in the Approved by PM 
- Then, you will open the letter, accept the changes and print the letter on gold seal (Page 1 on gold seal, page 2 on regular white).

e-editing submit for approval

After the letter is printed on gold seal, attach a Documents for Dr. García's Signature form along with a

sticky placed along the right hand edge of the paper that corresponds with the signature area.

DOCUMENT(S) FOR SECRETARY GARCIA'S SIGNATURE:

From: Quality Assurance Bureau
Submitted by/Return to:_____John Doe_____
Origin of Complaint: ____Mail _____Email _____Fax _____Phone _X__Governor's Office

initials	edited by	date draft #1	comments	date draft #2	comments	date draft #3	comments
	Secretary						
	Deputy Secretary						
	Administrative Assistant						
	Assistant Secretary						
	Program Manager						
	Other:						

Approved For Printing on Gold Seal & Signature by: (please initial)
_____Assistant Secretary **OR** _____Deputy Secretary
_____Date _____Date

Approved For Printing on Gold Seal & Signature through E-Editing Process
_SHE__Project Manager
1/3/06___Date

e-editing PROCESS

Let's Review

1. Choose a template from Template Folder on P-Drive.
2. Write letter.
3. Submit via e-editing to Program Manager/Designated Colleague by placing in the Submitted for Approval by PM
4. Make corrections when you retrieve the letter from the Approved by PM
5. Go over e-editing checklist.
6. Print on Gold Seal.

e-editing PROCESS

Let's Review

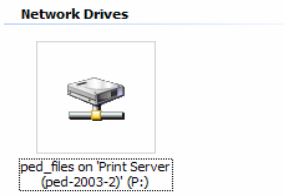
7. Attach a Documents for Dr. García's Signature Form and a Sign Here sticky in the area where Dr. García will sign.
8. Submit to Lori Bachman for approval and place soft copy in the Submitted for Signature
9. If letter comes back signed, make necessary hard copies and mail.
10. If letter comes back with corrections, make corrections, resubmit to PM (including original) for approval.
11. Then print again on gold seal; go back to #7.
12. When letter is mailed, place in Signed and Mailed

FORMS

Make sure to keep a copy of the following forms in your desktop manual :

1. Protocol for Preparing Correspondence for Dr. García
2. Correspondence Checklist
3. Documents for Dr. García's Signature

Keep the originals as soft copies in ONE folder on the P- Drive to ensure that all bureau members are using the most up to date form.



Using Microsoft Word to Track Changes during e-editing

Keeping track of Suggestions, Changes and Grammar/Style Issues

e-editing
using microsoft.com training

The most efficient way to learn how to track changes is to use a microsoft.com training module.

Go to: microsoft.com

- Click on TRAINING (left area of page)
- Click on WORD (middle area of page)
- Click on: Audio Course: Revise Documents with Track Changes….. (middle area of page)

This is an audio training that will walk you through the process, the training takes about 50 minutes.

(The slides that follow also serve as a training for the process)

e-editing
using microsoft.com training

After you place a document in the Submitted for Approval by PM :

- PM or designated person will click in the upper left hand corner of their task bar on Track Changes

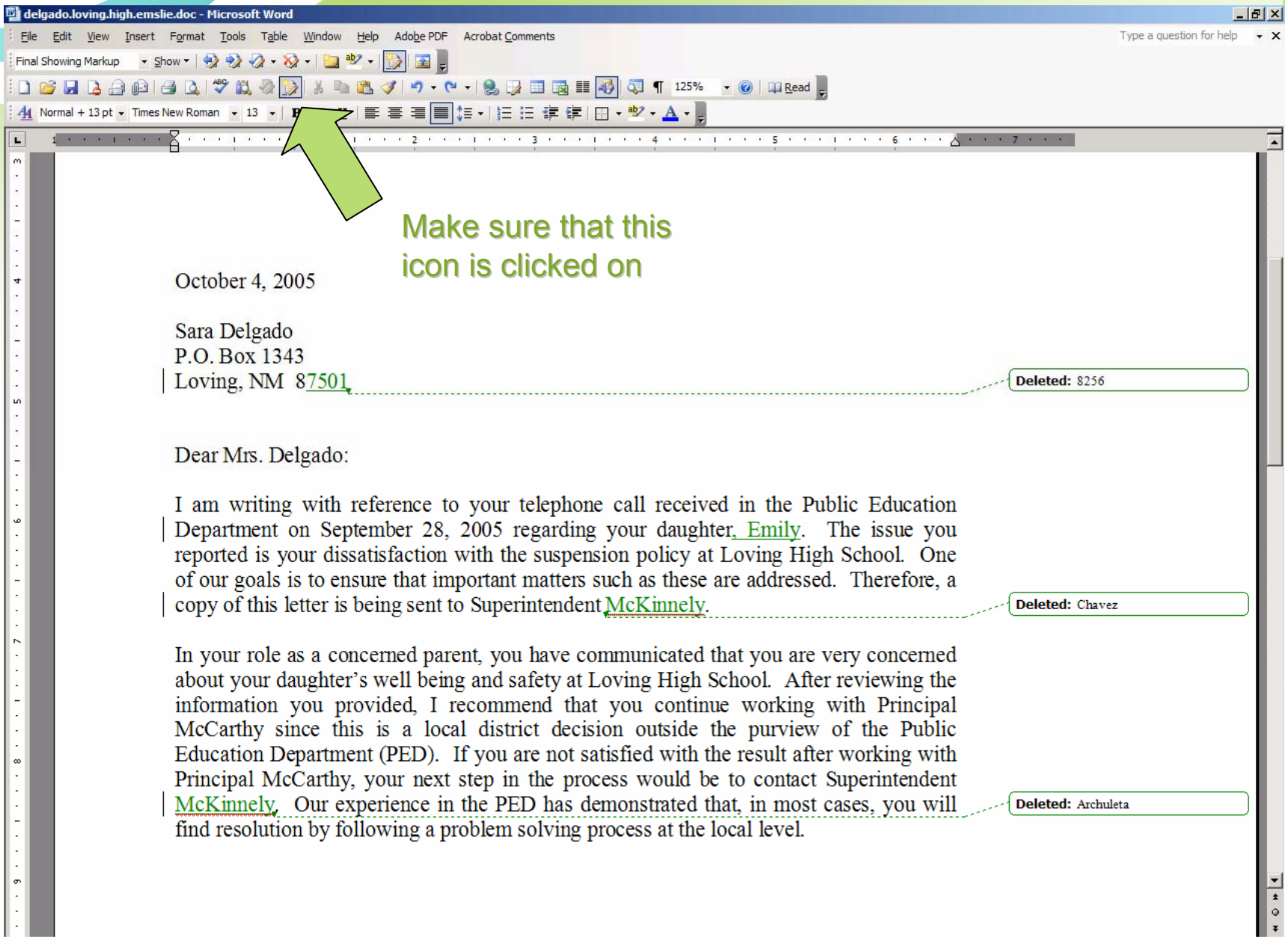
- If this option is not available, click on tools on the menu bar and scroll down to Track Changes

e-editing
using microsoft.com training

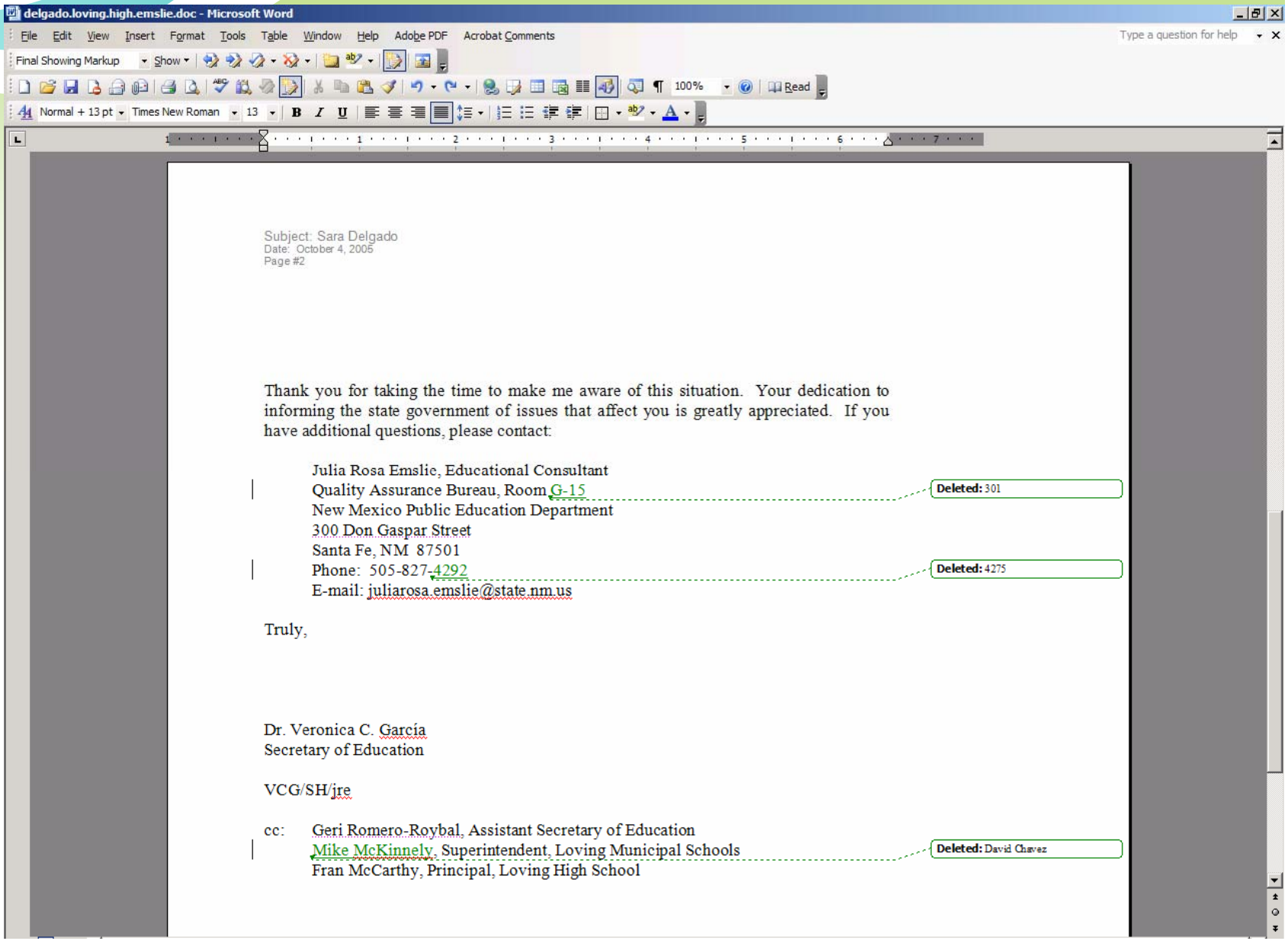
- Once the PM or designee has clicked on Track Changes, all changes or suggestions made to document will be visible.

e-editing Tracking Changes

CHANGES MADE BY PM



e-editing Tracking Changes
CHANGES MADE BY PM (page 2 of letter)

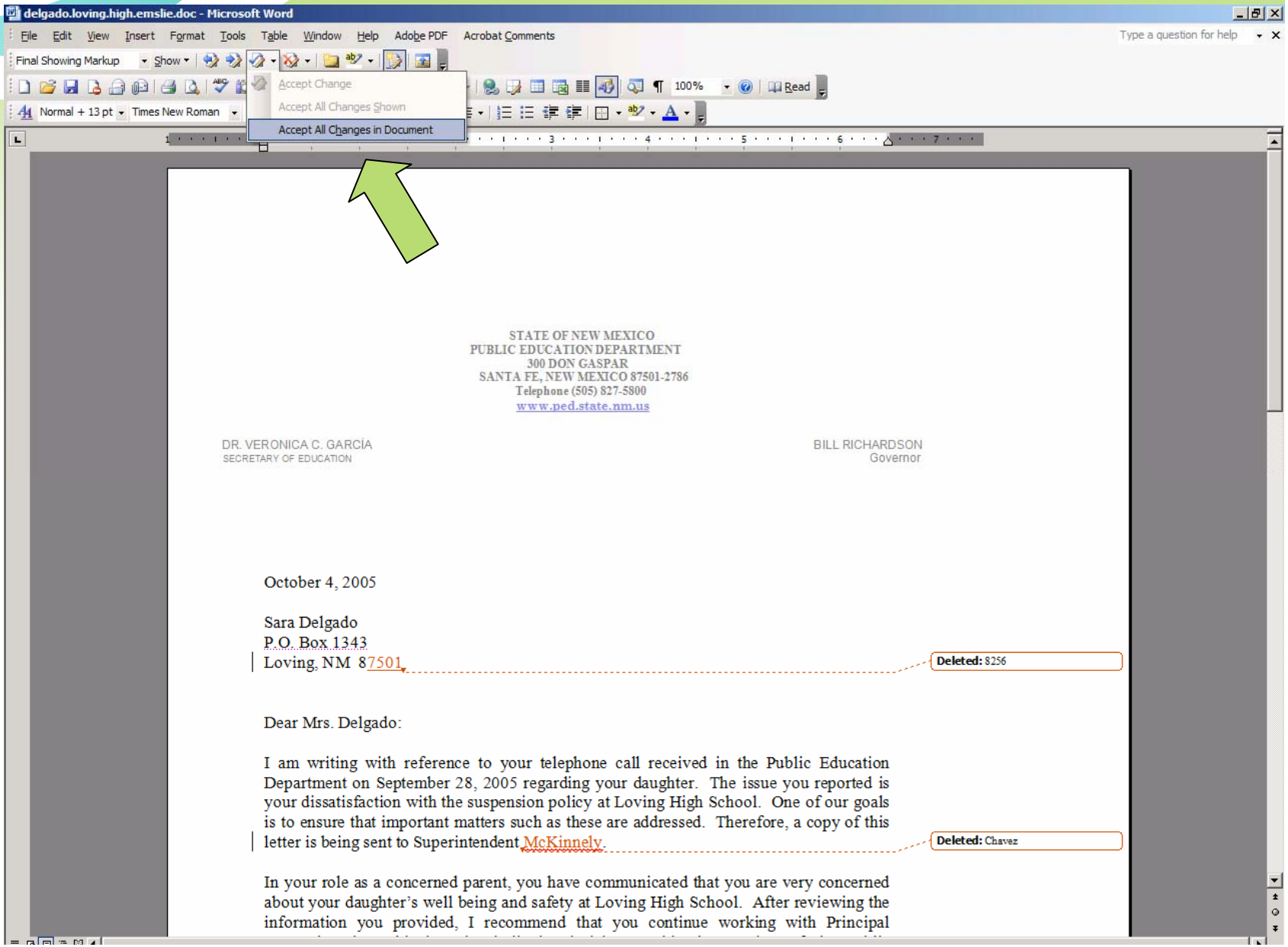


e-editing Tracking Changes
CHANGES ACCEPTED BY AUTHOR

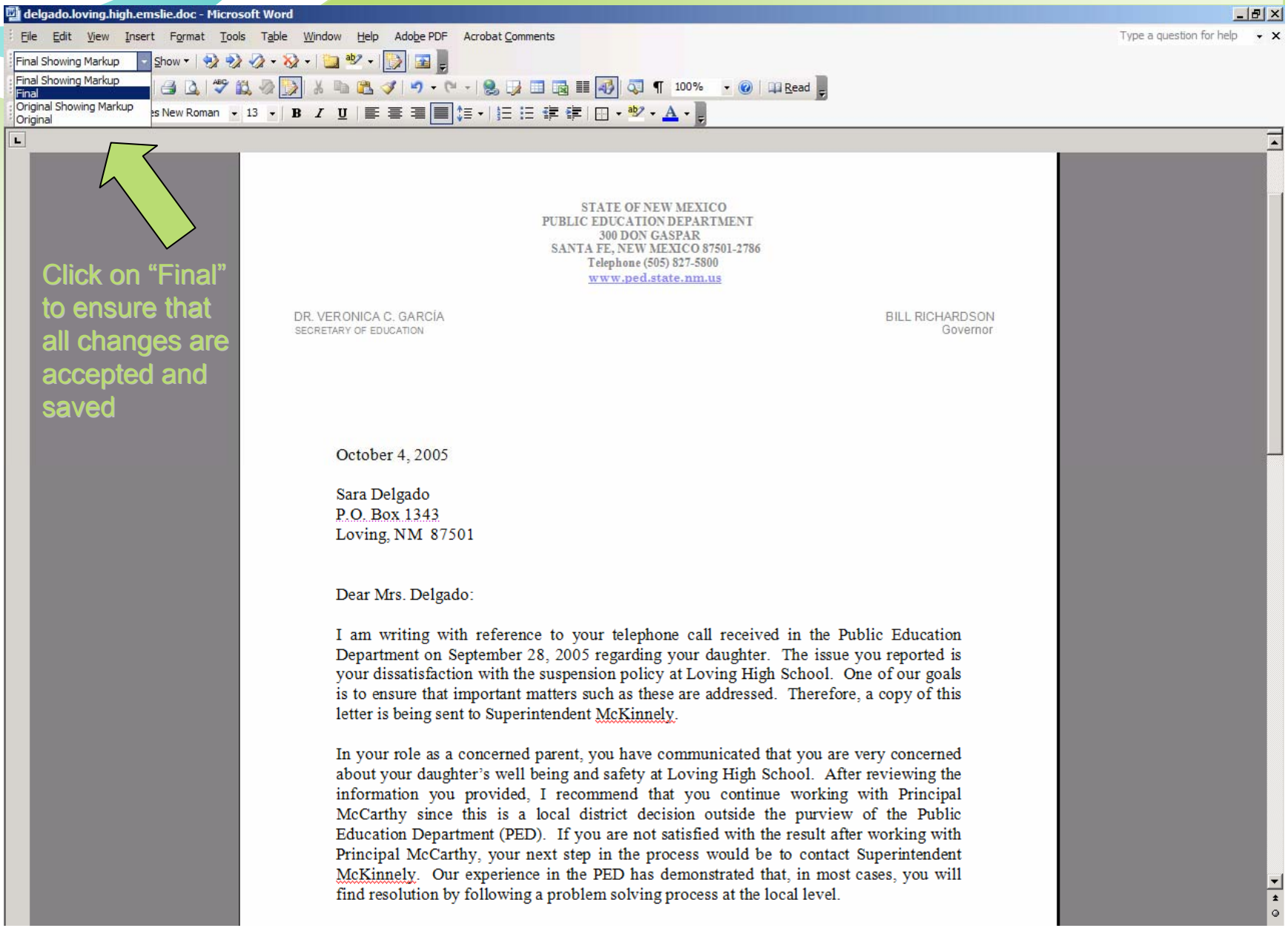
- PM or designee will then click Save and move the document into the Approved by PM

- Then, the documents author will review the document and accept the changes by clicking on:

e-editing Tracking Changes
CHANGES ACCEPTED BY AUTHOR



e-editing Tracking Changes
PREPARING DOCUMENT FOR PRINTING



- After all changes have been accepted by author, letter is printed on gold seal.
- Participating in the microsoft.com training is highly recommended.
- Questions? Comments? Contact: QAB Help Desk @ 505.827.4296