Note Taking Services Provided as a Sub Contractor to The Track Group, Inc.

The following directions are intended to assist and direct you in preparation for your role as a note taker for The Track Group. This document applies to note taking conducted over the phone or in person at an event on behalf of The Track Group for one of their clients.

Please review the entire document and then discuss any questions with your primary contact, a project manager at The Track Group. This is your single point of contact that can provide you with direction. You should not accept a change in the assignment without discussing any impact on cost and receive documented approval via email or fax.

PAPERWORK

Prior to performing any work, please have an agreement/contract in place authorizing the exact scope of work and payment amount. This can be a faxed agreement or an email authorization from your project manager. You should also review the vendor page at: http://www.trackg.com/trackgroupvendors.pdf and plan on providing the sub-contractor agreement and tax form as specified prior to the meeting/invoicing.

Please note that all information you hear at the meeting you are taking notes for is **confidential** and may not be shared with anyone other than an employee of The Track Group. You should obtain a job number from your project manager and you should reference this number on all emails, invoices, and documents you send. Invoices can be emailed to your project manager and the subject line should reference the job number and name and date of the meeting.

PREPARATION

Prior to the meeting, you should provide a sample of your past note taking work for review by the project manager.

You should understand exactly what the client expects in terms of notes. Typically, we are not providing dictation type notes, rather, they are intended as summary notes of what was said, decided, etc. Sometimes, your project manager can provide you with a sample of past notes that would be acceptable to the client.

-- CONDUCTED VIA TELEPHONE

If the meeting is via telephone, you will usually be given a call in conference number. You should plan on calling in a few minutes early and announce your presence as a member of The Track Group.

-- CONDUCTED IN PERSON

Confirm the location with your project manager and plan on arriving no later than 30 minutes prior to the start of the meeting where you are expected to take notes. You should confirm if you will be met on-site by a project manager, other note takers, or have a direct end client contact. You should present yourself as a member of The Track Group. If you are not met by a project manager, plan to call in when you arrive and after the first break if possible to report your status.

RECORDING DEVICES

Whether taking at a meeting or over the telephone, we request that you always plan to make a recording of the notes. Track can provide recording devices for meetings. For conference calls, it is necessary to announce your presence and mention that you typically record the conversation solely for the purpose of preparing summary notes as directed by the client and inquire if there are any objections to the recording. Please record your announcement regarding recording and the lack of objections to the recording.

In order to prepare for using the simple recording device, you should review the users manual located at: http://www.trackg.com/vn4100_recorder.pdf. You can expect to see that each recording (every time you press stop and then record) will generate the next number in a sequence (1, 2, 3, etc.) that are contained in up to four folders (A-D). Therefore, it may be helpful to jot down the folder and recording number on your notes as you write them to assist in going back later to clarify what was said when editing notes. For additional support on the recorders, see this link:
http://www.olympusamerica.com/cpg_section/cpg_support_product.asp?id=1291

After the meeting, you should provide the recorder to your project manager (if they are present) and they will upload the notes for you to access via the web.

LAPTOP

Additionally, it is often expected that the note taker will type notes real time using their own laptop at the meeting. If you do not have a laptop, you should let your project manager know. You should also save a copy of your notes on a flash drive for back-up and if the project manager is on-site with you, provide them a copy on their flash drive. If they are not on-site, you should email your rough notes to your project manager as soon as you return to an area with email.

REMINDERS

You are not to participate in the discussion or offer your opinions on the topics covered. Your role is to gather and record notes. If you have strong personal feelings on the topic of the meeting, you should recuse yourself from the work if you feel they may interfere with the assignment.

If you hear of any opportunities for additional note taking work or related tasks, you should alert the project manager and let the person inquiring know that you will pass along their information and request.

You should get the cell and office phone number of your project manager in case you need assistance or have problems on the day of the assignment. You should also provide your cell number and email to the project manager.

EDITING

If you have also been contracted to edit the notes after the meeting, it is important to confirm the style of editing and formatting for the document. Typically, you will provide a draft to the project manager who will request feedback from the client who may request further edits.

I have read the above directions regarding my assignment to take notes at meeting(s) for The Track Group, and I agree to all of the above items.

Name Printed   Date

Signature

Please send signed pages via fax to (703) 997-0760 – Attn your project manager.
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