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File Folder PROCEDURE MANUAL - PERSONAL SECRETARY TO THE PRESIDENT

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1	MANUAL	PROCEDURE MANUAL - PERSONAL SECRETARY TO THE PRESIDENT (PAGE 8, PARTIAL)	1	ND	B6 B7(C)

Freedom of Information Act - [5 U.S.C. 552(b)]

B-1 National security classified information [(b)(1) of the FOIA]

B-2 Release would disclose internal personnel rules and practices of an agency [(b)(2) of the FOIA]

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B-9 Release would disclose geological or geophysical information concerning wells [(b)(9) of the FOIA]

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PROCEDURE MANUAL

PERSONAL SECRETARY TO THE PRESIDENT

PROCEDURE MANUAL

PERSONAL SECRETARY TO THE PRESIDENT

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Kathy Osborne
12-14-81

DAILY ROUTINE

The Personal Secretary will have the daily schedule and the previous day's logs of presidential calls and movements on her desk upon arrival in the office each morning.

Make three copies of the logs and movements (there will be two sets on your desk). Distribute logs as follows: Mike Deaver, Jim Baker, Ed Meese, and send one set to Ellen Jones (she puts it into the computer for the President's diary). File one copy of the original logs in the personal secretary's desk. Information on these logs is not to be given out to anyone without Mike Deaver's approval. Often the Press Office will call to inquire if the President called someone. If the answer is affirmative, Larry Speakes must get clearance from Mike Deaver to release this information publicly.

Check with Dave Fischer on any appointments/meetings requiring remarks by the President. You or Dave can check with the President to see if he needs cards or half sheets for any of the remarks. There is a typing ball specifically for this purpose in your desk drawer in case of an emergency change or last minute remarks for the President. His speeches and remarks are always prepared by the Speechwriters office (Nancy Roberts), however she may sometimes use your typewriter to make any last minute changes or additions rather than returning to her office to do it. Always stay on top of the speeches, i.e., get the President's speech cards to him during personal time before an event so he has time to do his marking and notes on them. If there is no time for him to see the speech cards before a speech, the personal secretary or Nance Roberts in speechwriting can mark the cards for him.

During the day you will make notations on your schedule on who goes in the Oval office at what time and when they leave. It is very important that you keep track of who is with the President both for future reference in the computer (diary) and because you will often be asked this by staff during the day. However, it is sometimes difficult to keep track of when Mike Deaver is with the President since he has his own private door to the Oval Office. The only people who have open access to walk into the Oval Office are the Vice President, Mike Deaver, Jim Baker, Ed Meese, Bill Clark, Dave Fischer, and the Personal Secretary.

At the end of the day Dave Fischer will give you his schedule to match against yours. After making any additions or changes, make a copy of his front sheet, give it to him, and send the rest of his schedule along with yours to Ellen Jones (through Dick Darman's office). You may also get the President's schedule at the end of the day, along with speech cards he used throughout the day -- these can also go in Dick Darman's mail box.

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DAILY ROUTINE (CONTINUED)

All of the President's work should be neatly organized in specific folders. Use separate folders for letters that have to be signed and for autograph requests. Autograph requests are low priority unless it is a visiting head of state, someone very ill, etc., so use your judgment as to whether the President has enough time in his schedule each day to be taking time to sign photographs. For further guidance on which photos the President will actually sign himself, refer to the guidelines on autographed photo requests. All general photo requests should be a calligraphy inscription, autopen signature, etc. All photos that are actually signed by the President should be sent to Loesje Edwards to be logged for future reference, then she will send out to the proper channels or to specific individuals.

Always make sure that Dave Fischer is available to watch your phones while you are in the Oval Office with the President. If he is not available to do this, contact one of your back-up girls. Never leave your phones unattended during business hours. If the President is out of town for the day, you can flip the phone switch to Kathy Camalier's office for a few moments if you have to leave the office. Either she or Donna Blume will answer the four incoming lines for you and Dave Fischer.

If the President's schedule shows he is having lunch in the office, get a current menu from the steward and discuss it with the President. If he is having lunch with the Vice President or another staff member, the steward will check with them to see about their choice on the menu. If the President is having lunch in the Cabinet room with several people, the steward will pick the same menu for all participating and show it to you. You will indicate to the President what everyone else is eating and he will either go along with that menu or pick something separate (he usually likes just a bowl of soup and half of grapefruit).

Gifts which the President and Mrs. Reagan receive are all registered through Mary Power in the Gift Unit. Unless the President or Mrs. Reagan specifies that they will personally thank the donator of the gift, Mary Power will handle all thank you letters. Give Mary as much information as possible on the proper gift form. On gifts from very personal friends of the Reagans, make sure the President sees or is aware of the gift and ask him if he would like you to take care of acknowledging the gift or if he wants to.

Any supplies you need for your office may be obtained by calling the Messenger on your phone set and telling them exactly what you want. They will go to the supply room and pick up the items you need and bring them to you.

DAILY ROUTINE (CONTINUED)

Look through the schedule daily to become familiar with who is expected at each meeting and when there is any personal staff time with the President to take care of any personal correspondence, autograph requests, phone calls, material from Dick Darman to be read or signed, etc. The correspondence unit will send you copies of special letters and messages to groups and specific people almost daily. It is a good idea to read these before you file them in the cabinet behind your desk so you can update the President if necessary. It isn't necessary to file all of these copies -- only the personal ones since they are also filed in central files.

The President might be seeing someone in his office or at a meeting who has recently received a message, and he would have no knowledge that it was sent if he didn't do it. For instance, on November 5th, 1982, the Correspondence Unit sent Douglas Fairbanks, Jr. a letter over the President's signature congratulating him on receiving the National Veterans Award from the National Veterans Day Organization. On November 17th, Mr. Fairbanks wrote to the President thanking him for his letter, and indicating he was looking forward to seeing the President on December 4th and December 7th. In cases such as this, it is very helpful to the President to show him the correspondence that has transpired.

There will usually be a few separate times during each day which are scheduled Personal Staff Time on the President's schedule. This is specifically for the President to work on speeches, personal correspondence, phone calls, read briefings, take care of autograph requests, etc. It is best to save material for the President for these periods unless there is something urgent he should see or sign in which case you have to decide whether to interrupt his schedule (almost never) or fit it in between meetings.

Throughout the day Dick Darman will be giving you folders to give to the President. Check all the orange and green folders because they are usually marked Action or Telephone Calls. Give the White House Operator the necessary information as stated in the phone procedures section, and make a log of the calls he will be making, and check them off when they have been completed.

Dick Darman is very good about letting you know which folders must be seen by the President by a certain time that day (because of an upcoming meeting, Senate vote, etc.). The President will return these folders to you when he is finished with them and you, in turn, check to see if he has signed in all places indicated, then return to Dick Darman's office.

DAILY ROUTINE (CONTINUED)

Current newspapers and magazines are brought in to your office on a daily and/or weekly basis. The President and Mrs. Reagan also receive these at the residence, so it is not necessary for you to give any of them to him. When the current ones come in, you may dispose of the old ones as you see fit. These are mostly of interest to staff and visitors waiting in your office to see the President.

Do not leave classified or secret information on your desk or in Dick Darman's mail box overnight. Always call and have Dick Darman's office pick up material the President has already seen, or call Security and have material locked up for the night if the President hasn't seen it yet. Security will actually be going through your office at night looking for classified and secret material which you might have left out by mistake. Since your cabinets and desks lock, you will probably not encounter this problem.

THE PRESIDENT'S PERSONAL CORRESPONDENCE

Most of the Reagan's personal friends have a special code number to write to the President and Mrs. Reagan to insure that they will receive their personal mail. The outside of the envelope is marked with #16691 for personal mail to the President, and #16690 for personal mail to Mrs. Reagan.

The President's secretary will open all mail, including personal, and staple the envelope to the back of the correspondence. You will have to use your own discretion according to how much personal correspondence the President has, how much time he has to take care of it during a given time period, and if another department can type up a suggested reply to a personal friend for a letter with a specific issue mentioned in it. Usually, all personal correspondence is given to the President even for his signature, regardless of the fact that you may have had another staff member type up the response. Making the decisions on which ones to give to the President and which ones to have someone else handle can only come in time when you have become familiar with all his "pen pals" and some of the pests, and with the very personal friends.

The President prefers to sign his personal correspondence and those letters which he has dictated on the tape recorder. However, again, because of the limited free time he has and the volume of mail he receives, you will have to decide if we have autopen sign the letter, if you will have to handle it, or if the President will actually sign it.

Much of the correspondence marked to the President or to the Secretary to the President does not need to be answered by this office. General correspondence like this should be sent to Anne Higgins for a reply. She will prepare, type and have the letter signed. If she feels it is something the President would want to see or sign personally, she will ship it back to you.

Any mail other than personal correspondence should not be sent into the President without Dick Darman seeing initially. This might save the President being bothered at all, or possibly Dick might have some information the President could use in his reply.

The President usually dictates his personal correspondence onto a tape, or he handwrites the letters. The transcribing machine will either be at the personal secretary's desk or in Anne Higgins office. It is up to the personal secretary to decide whether she will actually transcribe and/or type the letters in final form. It all depends on whether the schedule allows her enough time to do either one. Although the President likes to sign the letters he dictates, if he is too busy, only hold the very personal ones back for him to sign and have the general ones signed elsewhere (the President has been advised if he doesn't see some of the letters he has dictated come back to him for signature, it is because we have already taken care of it because his schedule was too busy).

THE PRESIDENT'S PERSONAL CORRESPONDENCE (CONTINUED)

You should keep a copy of all correspondence the President writes on scratch paper or dictates on tape. All handwritten letters (other than very personal) should be sent to Biff Henley for a special file for hand-written items from the President. All tapes should be saved in a folder with the draft and a date on the folder. This is a cross-check with our copy of the letter the President dictated which is filed in alphabetical order in the personal secretary's desk drawer file.

The personal secretary has stamps to put on our file copies of the President's correspondence showing how he signed the letter and/or how he suggested the letter be signed in his correspondence. This is important for future reference in first name/signature card files.

Any correspondence typed by the President's personal secretary should be edited by Anne Higgins just as a safety check for punctuation, grammar, and any typographical errors.

Any personally dictated correspondence from the President with any "substance" regarding issues, policies, etc. should be routed through Dick Darman before the President (or whoever) signs it, as a safety check on accuracy and, especially to protect the President. Sometimes it might be necessary to delete or alter part of the correspondence.

Although it is not necessary to send copies of the President's very personal correspondence to the main files (copies are kept in the personal secretary's desk), keep a log of who the President wrote to and the date -- also of incoming letters to him which did not need a reply. About once every couple of weeks, send a copy of this to Biff Henley in the Files Section. This is a great help to both you and Biff because often someone else will be answering a letter from the same person because of a specific subject matter, and this simple cross-check will save the President and his staff embarrassment on duplicating correspondence.

All of the President's correspondence should be typed on the pale green stationery. Staff members are not allowed to use this for their own personal correspondence -- only the President. The shorter stationery uses the wide envelopes, and the longer stationery uses the smaller envelopes (stationery folded in three sections). Attached is a sample letter format for the President. However, a more detailed description can be found in the White House Correspondence Manual.

The Personal Secretary will get a monthly summary binder of letters for the President to see from Anne Higgins. These are samples of all the issues we hear about all month. The President will sometimes pull a few of these letters and personally dictate responses to them. He will also sometimes take all of them out of the binder and dictate responses to them (there are 20 to 30 during some months). These will need his personal signature only if time on his schedule allows it.

THE WHITE HOUSE
WASHINGTON

Current Date

Dear Mr. Smith:

Thank you for your nice letter and lll lll lll
lllllllllll lll ll lllll ll
llllllll.

It was certainly very good of you to do this. I
appreciate it very much.

Again, my thanks and best regards.

Sincerely,

Mr. Joe Smith
Any Street
Any town, U.S.A.

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DIRECT TELEPHONE ACCESS TO THE PRESIDENT

The individuals listed below are authorized direct telephone access to the President:

FAMILY:

Nancy Reagan (wife)
 Ron Reagan (son)
 Patti Davis (daughter)
 Maureen Reagan (daughter)
 Mike Reagan (son)
 Colleen Reagan (daughter-in-law)
 Doria Reagan (daughter-in-law)
 Dennis Revell (son-in-law/Maureen's husband)
 Mr. and Mrs. Neil Reagan (Neil is the President's brother)
 Dr. and Mrs. Richard Davis (Dr. Davis is Mrs. Reagan's brother)
 Dr. and Mrs. Loyal Davis (Mrs. Reagan's parents)

STAFF/USSS:

Michael K. Deaver
 James Baker, III
 Edwin Meese, III
 Kathy Osborne
 David Fischer
 Dr. Dan Ruge
 USSS: SAIC Robert De Prospero
 DSAIC Gary Wiestram

b(6)
 b(7)(c)

USSS Emergency calls only: 

SITUATION ROOM:

Manuel L. Rubio, Acting Director
 Senior Situation Room Duty Officer -- one of the following:
 Gerry Cunningham, Hank Gatlin, James Rippe, Ralph Sigler,
 Susan Benjamin, Lawrence Lee, Patricia Volz

CABINET AND VIP'S:

Vice President George Bush
 Former President Nixon
 Former President Ford
 Former President Carter
 Chief Justice Warren Burger

TELEPHONE ACCESS (CONTINUED)

CABINET AND VIP'S:

Secretary George Shultz
Judge William P. Clark
Secretary Casper Weinberger
Secretary Donald Regan
General Vessey, Chm. Jt. Chiefs of Staff
Attorney General Wm. French Smith
Director of OMB David Stockman
Director of CIA William Casey
Secretary Raymond Donovan
Secretary James Edwards
Ambassador Jeane Kirkpatrick
Secretary Andrew Lewis
Secretary Samuel Pierce
Secretary Samuel Pierce
Secretary James Watt
Secretary Richard Schweiker
Secretary Malcolm Baldrige
Secretary Terrell Bell
Secretary John Block

During normal working hours (between eight a.m. and six p.m.) the White House operator will clear all phone calls to the President through the Personal Secretary. The Personal Secretary will clear calls through Mike Deaver, Jim Baker or Ed Meese (in that order) before putting them through to the President. Any secure call for the President will come through the Signal Board and will first be verified for its authenticity. Then the Signal Switchboard will clear the call with Mike Deaver, Jim Baker or Ed Meese (again, in that order) before sending the call up to the Personal Secretary's office. After alerting the President, the call may then be put through to the President.

Although they are on the Direct Access List, all Cabinet and VIP's must be cleared by Mike Deaver, Jim Baker or Ed Meese. Mike Deaver should be notified whenever an individual on the "direct put-through" list calls but does not speak with the President, leaves a message, or requests a call back. Mike should also be advised even when the caller insists that they do not wish to bother the President if he is not immediately available and do not want to leave any sort of message.

After normal working hours or when the President is away from the White House, all calls should be directed to Dave Fischer who would have them cleared in the above manner.

PRESIDENT'S PERSONAL CALLS PROCEDURES

When you place a call from the President, you will usually have advance notice via a telephone memorandum. Give the name of the party and any pertinent phone numbers ahead of time to the White House Operator so she can be prepared. In these instances the President will usually just pick up the WH Operator line from the Oval Office and ask her to place the call. The WH Operator will then call you on the WH line and tell you the party is on the line. Ask her to hold--then put her on hold, and buzz the president on the PL Pres. line and tell him the call is coming through (if for any reason he can't take it because of an unexpected meeting, etc., he'll tell you then). Then push the WH button and tell the operator to put the call through to the Oval Office. Always announce all calls, even though the President may have originated it--don't let the Operator just put it through to the Oval Office.

PRESIDENTIAL TELEPHONE CALL REFERRALS

Calls to the President from Governors should be referred to Rich Williamson, ext. 7007. Calls from Senators and Congressmen should be referred to the Congressional Office, ext. 2230 (with the exception of Paul Laxalt who is a personal friend). Calls from Ambassadors should be referred to National Security, ext. 2255. Miscellaneous calls to the President should be re-routed through the WH operator to Comments (or extension 7639). Calls from Governors, Senators, Congressmen, Ambassadors, etc. should not be directly transferred to the appropriate area. Take a message (The President is not available at this time), then call the appropriate area and give the name and phone number for them to handle. You will get a telephone call recommendation if it is necessary for the President to make the call. This gives the President time to be briefed on a particular situation before he returns the call and may sometimes save him the trouble of returning the call altogether.

GENERAL TELEPHONE CALL PROCEDURES

All nuisance calls should be transferred to the Comments Office (Either flash the WH-620 Operator) or transfer to 7639. This can be done by putting your party on hold, calling the WH operator and asking her to transfer the call or, while the incoming line is depressed, depress the receiver until you hear the dial tone -- then either dial 0 and tell her to transfer to a specific department or extension, or just dial the four digit number yourself if you know it.

Your phone set operation includes answering Dave Fischer's calls. Dave's lines are encased in green on your set. The WH 620 line can be used to reach anybody in the White House or EOB. Just pick up the phone and push WH 620 and an operator will come on the line. The Sig. 199 line can reach anybody on the President's staff anytime, anywhere. Just ask for who you want and they will locate the party. Extension 2858 is the President's secretary's outgoing line. PL buttons are direct lines to The President (in red), Baker, Deaver, Meese, Speakes, Clark, Jennifer in the Vice President's office, Darman, Dodie Livingston, Studdert, Anne Higgins, Jim Rosebush, PLE6 (Oval Office Security), Photo Lab, Nell at the Reception Desk in the Lobby, Scheduling Office, Dave Fischer, Kathy Camalier, and your Messenger.

The "flip-switch" on your phone transfers David Fischer's White House and incoming line and your White House and incoming lines to Kathy Camalier and Donna Blume's phone sets (only ringing at Kathy Camalier's). This is to be used only when: the President is out of the office and you have to leave your office for a very short time; if you are on the line talking and cannot pick up another ringing line; if you have to go into the Oval office when Dave Fischer is not here to cover the phones and you cannot call your back-up (Kathy Camalier) to come and answer the phones.

The PL Messenger button is (if you need an usher) to use anytime you need someone to do something for you since you can't leave your desk very easily.

If the President is calling you the "Buzz from Pres." button will flash. The DND encased in red is lit only when the President does not want to be disturbed.

TELEPHONE CALL RECOMMENDATIONS

The President will often get telephone call recommendations for Ambassadors (new appointees), Senators, etc. The basic format of this recommendation (which can be found on page 34 of the White House Correspondence Manual), requires the name of the person to be called (phone number's he can be reached) with brief identification information if you think the name will not be familiar to the President. Indicate the date the President should make the call, your name (recommending the call), purpose of the call, and any background information he might need. Also list topics of discussion if applicable.

Unless a phone call was recommended by Mike Deaver, Ed Meese, or Jim Baker, all others must be approved and initialed by Dick Darman. An exception to this, however, is the telephone call suggestions which come from Penn James/Helene von Damm's area for new appointees. They do not need Dick Darman's approval and are returned directly to Helene when the calls have been completed.

If a head of state (foreign) is either calling the President (which a message would be taken and given to National Security), or if NSC has recommended a telephone call to the President, the Situation Room must be notified of the call before it is to be put through so a decision can be made if a translator is necessary or not (standard procedure).

It will save the President a lot of time and trouble if you call the White House Operator before you take the telephone recommendation into him, and alert her that he is going to make the call -- and give her the phone numbers that you have available. Sometimes there won't be a number on the recommendation, and this gives her plenty of time to track one down so we can get the call completed at the President's convenience, rather than having him wait while we all figure out where to get a phone number for someone.

GUIDELINES FOR AUTOGRAPHED PHOTO REQUESTS

- | | | |
|-------|--|---|
| I. | Heads of State, Royalty | Hand-inscribed by the President |
| II. | Top Members of Cabinet
Deputy Secty's | Hand-inscribed by the President
Calligraphy message and signed by the President (one only) |
| III. | Ambassadors | Calligraphy message and signed by the President (one only) |
| IV. | Members of Congress | Calligraphy message and signed by the President (one only) |
| V. | White House Senior Staff | Hand-inscribed by the President and calligraphy messages signed by the President |
| VI. | White House staff | Calligraphy message and signed by the President (one only) |
| VII. | Vice President
Vice Pres. Senior Staff | Hand-inscribed by the President
Calligraphy message and signed by the President (one only) |
| VIII. | Security | Calligraphy message and signed by the President (only one) |
| IX. | Miscellaneous: Dean of Eureka College, Eureka friends, etc. | Calligraphy and signed by the President (one only) |
| X. | Personal Friends | Calligraphy and signed by the President (some may be hand-inscribed under special circumstances). |
| XI. | Press:
White House Photos or photos the President appears in. | Calligraphy and hand-sign (only one and under special circumstances) |
| X. | Governors | Calligraphy message and signed by the President (only one) |