This project was funded by the Office of Literacy and Essential Skills (OLES)
Clerical Essential Skills Training

developed by Literacy Link Eastern Ontario (LLEO) in partnership with
Northern Connections Adult Learning Centres
Snell Complex, Hwy.#7, Sharbot Lake, Ontario K0H 2P0
Telephone: (613) 279-2499       Email: literacy@frontenac.net

Writers/Researchers: Joyce Bigelow, Kelly Cowdy, Judith Campbell
Project Partner: MCF Practice Firm - Kingston
Editor: Carol Keeler
Essential Skills Articulation: Linda Conley
Project Co-ordinator: Brenda Allen
Project Manager: Doug Noyes

We gratefully acknowledge funding from the
Office of Literacy and Essential Skills (OLES).
We also wish to remind our many community partners that we appreciate their ongoing support, without which all of our programs – including Essential Skills Occupational Training – would not be possible.

For more information, contact
Literacy Link Eastern Ontario
Westgate Square
203A-837 Princess St.
Kingston, Ontario K7L 1G8
Phone: (613) 507-5307 Fax: (613) 507-5174 Email: info@lleo.ca Website: www.lleo.ca

DISCLAIMER: The materials in this publication have been compiled from sources believed to be reliable and to represent the best current opinions on the subject, as of the publication date. Every effort has been made to ensure the validity of the material. Neither LLEO nor any quoted sources are responsible for any errors or omissions. They are also not liable for any loss, claim, or demand arising from any use, misuse, or reliance upon the information. This manual is intended to help practitioners provide basic guidelines for safe practices inside a literacy setting. Do not assume therefore, that all necessary warnings, precautionary measures, and legal standards are contained in this document and that other or additional measures may not be required.
Office Clerical

Module 1: Essential Skills

Unit 1: Should I Take This Training?
Unit 2: What Are the Essential Skills?
Unit 3: Essential Skills Job Profiles
Unit 4: Learning for Work

Demo 1: Essential Skills
Unit 1: Should I Take This Training?

Welcome to the Clerical Essential Skills Occupational Curriculum. This training will strengthen your reading, writing, math, and other Essential Skills. It will help you prepare for an entry-level position in a company that can provide you with on-the-job training. It will also help you prepare for further training in clerical work, if you decide this is your goal.

During this training you will read information and complete learning activities that will help you learn and practise your Essential Skills. The information and activities will be related to real work in the clerical field. Throughout the training, you will complete activities using documents and tasks related to the office workplace. You will also complete demonstrations (Demos) to show that you have the Essential Skills needed to work as a clerk or receptionist. You can include these demonstrations with your resume when you apply for a job.

Even if your goal isn’t to get a job as a clerk or receptionist right away, this course will help you develop Essential Skills that you will use for any further education and throughout your life.

This training is suitable for a variety of learners including those who are planning to enter the workforce for the first time, people who are changing careers, new Canadians who need to know more about the Canadian workplace, employees who are trying to improve their skills, and anyone else who wants to improve their Essential Skills.

The training is designed to be easy to use for individuals working at their own pace or for those working in groups. Users should have a working knowledge of the English language and be able to follow simple written text and instructions. Learners will also need to have a basic understanding of computers to create and save a wordprocessing document and to navigate the internet.
If I take this course, will I get a job?

We cannot guarantee that you will get a job, or be successful in a job just because you took this training. Taking this training is a beginning to developing and practising the Essential Skills needed in any Canadian workplace. There may be other skills that you will need to develop before you will be employable in the clerical field. For example, you will need to have good computer and keyboarding skills. However, the Essential Skills you learn or improve here will help you acquire those technical skills. Essential Skills will help you on the job and in your everyday life. If you work hard, you will gain from this course and improve your chance of both getting a job and keeping it. Mastering the skills needed to successfully complete this training will put you further along the path to becoming a successful employee.
What You Will Find in This Curriculum

The materials in this training package will help you prepare to work in an entry-level position. While you are working through the material, you will be developing Essential Skills that will be transferable to many areas of your life.

✓ Examples of job tasks used in this curriculum are based on the Essential Skills Job Profiles for General Office Clerks, Administrative Clerks, Receptionists and Switchboard Operators, and Data Entry Clerks, as published by Human Resources and Skills Development Canada.
✓ Many of the activities use authentic workplace materials to prepare you for real job tasks.
✓ You will often be asked to use a computer and the Internet to search for information or to complete activities. This will give you the opportunity to become more comfortable with computer use and the Internet. Ask your instructor for help if you do not have basic computer skills or you are not familiar with the Internet.
✓ At the end of each module you will find a Self Evaluation. Take the opportunity to review what you have learned and to check off the statements that describe what you can now do. This will help you keep track of your learning.
Basic Computer Skills Self-Assessment

**Learning Activity 1**

1. To see if you have the computer skills needed to work on this curriculum, fill out the computer skills self-assessment below and on the next two pages by putting a check (✓) in the Yes or No column. If you are not sure of a skill, ask your instructor to help you with the question.

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Computer:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can you turn on a computer?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can you open and exit an application (program)?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can you shut down the computer properly?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can you insert (put in) and eject (take out) removable storage media, such as a CD, DVD or USB flash drive?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can you change the size of windows with minimize, restore and maximize?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can you run more than one program at the same time and move between multiple open windows?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can you print a document?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Keyboard:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can you find and use basic keys (space bar, enter, shift, caps lock, arrows, delete, backspace, tab)?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Module 1: Essential Skills

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>Not sure</th>
</tr>
</thead>
</table>

**Mouse:**

- Can you point, click and double-click?
- Do you know what the right-click does?
- Can you select text with a mouse?
- Can you scroll up and down or across with the mouse?
- Do you know the difference between the mouse pointer, I-beam (a pointer shaped like a capital i) and hand pointers?

**Files:**

- Can you open files?
- Can you open a new blank document?
- Can you save a file to a specific folder/location?
- Can you use “Save As” to create a copy of a file under a new name or in a different folder/location?
- Can you create a folder with a meaningful name?
- Can you use folders to manage your files?

**Word Processing:**

- Can you use *Cut, Paste* and *Copy* features?
- Can you change font type, size and colour?
- Can you change the size or direction of a page?
- Can you use *Spell-check*?
### Internet:

Can you open a browser (Internet Explorer, Google Chrome, Firefox, etc.) to get to the Internet?

Can you locate a website with the URL address?

Can you use a browser’s navigation tools to go back, forward, refresh and get to a homepage?

Can you find information using search engines (Yahoo, Google, etc.)?

Do you know about online irritants such as pop-up windows, cookies, adware, spyware and viruses?

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Email:

Do you have an email address?

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Are there any skills you need to work on? If so, ask your instructor to show you how or to connect you to basic computer training programs. These may be available at your learning centre. If not, you may be able to do a workshop or course online at one of the following:

- The Learning Hub, (a free online program for adult across Ontario [www.learninghub.ca](http://www.learninghub.ca)),
- Sioux Hudson Literacy Council’s e-Channel online learning ([www.siouxhudsonliteracy.com](http://www.siouxhudsonliteracy.com)),
- BBC’s Webwise ([www.bbc.co.uk/webwise](http://www.bbc.co.uk/webwise)).

---

The following Essential Skills were used to complete this Learning Activity.

- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory
Unit 2: What Are the Essential Skills?

Essential Skills are the basic skills needed for every occupation. They are the skills we all need for work, learning and life. They are skills that you use to perform daily living tasks. You use Essential Skills every day in all areas of your life.

Essential Skills help people to be successful in training and in their jobs. They can help you to find and keep a job. They can help you to be more productive and to work safely. They allow you to learn new things and can act as a foundation to acquire the technical skills needed for work. Essential Skills help us to solve problems and adapt to change. Essential Skills will allow you to grow with your jobs.

There are nine Essential Skills:

- Reading Text
- Document Use
- Numeracy
- Writing
- Oral Communication
- Computer Use
- Thinking Skills
- Working with Others
- Continuous Learning

When you develop your Essential Skills, you can use them at home and at work. They are yours to keep and take with you to a new job or career.

Essential Skills are enabling skills that:
- Help people perform the tasks required by their occupation and other activities of daily life.
- Provide people with a foundation to learn other skills.
- Enhance people’s ability to adapt to change.

The Essential Skills you develop now can be yours forever. They are transferable to your daily life and other careers.
The Essential Skills can be divided into two groups. “Academic Skills” and “Soft Skills”.

### Academic Skills

<table>
<thead>
<tr>
<th>Essential Skills</th>
<th>Typical Applications</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reading</strong></td>
<td>• Scan for information or overall meaning.</td>
</tr>
<tr>
<td></td>
<td>• Read to understand and learn.</td>
</tr>
<tr>
<td></td>
<td>• Compare information from several sources or from complex and lengthy texts.</td>
</tr>
<tr>
<td><strong>Document Use</strong></td>
<td>• Read signs, labels or lists.</td>
</tr>
<tr>
<td></td>
<td>• Understand information on graphs or charts.</td>
</tr>
<tr>
<td></td>
<td>• Enter information in forms.</td>
</tr>
<tr>
<td></td>
<td>• Create or read schematic drawings.</td>
</tr>
<tr>
<td><strong>Numeracy (math)</strong></td>
<td>• Make calculations.</td>
</tr>
<tr>
<td></td>
<td>• Take measurements.</td>
</tr>
<tr>
<td></td>
<td>• Perform scheduling, budgeting or accounting.</td>
</tr>
<tr>
<td></td>
<td>• Interpret data.</td>
</tr>
<tr>
<td></td>
<td>• Make estimations.</td>
</tr>
<tr>
<td><strong>Writing</strong></td>
<td>• Write to organize or record information.</td>
</tr>
<tr>
<td></td>
<td>• Write to inform or persuade.</td>
</tr>
<tr>
<td></td>
<td>• Write to request information or justify a request.</td>
</tr>
<tr>
<td></td>
<td>• Write to summarize or compare information.</td>
</tr>
<tr>
<td><strong>Computer Use</strong></td>
<td>• Use computer controlled equipment.</td>
</tr>
<tr>
<td></td>
<td>• Use word processing software.</td>
</tr>
<tr>
<td></td>
<td>• Send and receive emails.</td>
</tr>
<tr>
<td></td>
<td>• Use spreadsheets and databases.</td>
</tr>
<tr>
<td></td>
<td>• Navigate the Internet.</td>
</tr>
<tr>
<td></td>
<td>• Use company- or trade-specific software.</td>
</tr>
<tr>
<td><strong>Continuous Learning</strong></td>
<td>• Learn on the job.</td>
</tr>
<tr>
<td></td>
<td>• Learn through formal training.</td>
</tr>
<tr>
<td></td>
<td>• Learn through self-study.</td>
</tr>
<tr>
<td></td>
<td>• Understand one’s own learning style.</td>
</tr>
<tr>
<td></td>
<td>• Find relevant learning resources.</td>
</tr>
</tbody>
</table>

From: *What are Essential Skills for the Trades*, Human Resources & Skills Development Canada
Soft Skills

Of course, employers want people who have developed the “Academic Skills” - who can read, write and do the hands-on work of the job. Employers also look for employees who can communicate well, think clearly, organize themselves, solve problems, adapt to changes, work comfortably with other people and can keep on learning new skills. These “Soft Skills” are Essential Skills, too, and must be developed and practised just like “Academic Skills”.

“Soft Skills” are very important as they are the skills that determine how we do our jobs. They help us keep our jobs.

Thinking Skills are further broken down as:
- Problem solving
- Decision making
- Finding information
- Job task planning and organizing
- Critical thinking
- Significant use of memory

From: What are Essential Skills for the Trades, Human Resources & Skills Development Canada
Important Soft Skills
Learning Activity 2

When we want to learn something new, it is important to think about what we might already know. Connecting previous knowledge to new material helps us understand and remember it. Think of learning a new skill or new information as clipping pieces of similar information together. The stronger your clip, the more information it can hold.

Think about what you might already know about clerical work and consider the “Soft Skills”: Oral Communication, Finding Information, Critical Thinking, Job Task Planning & Organizing, Decision Making, Problem Solving, Significant Use of Memory, Working With Others, and Continuous Learning. On the sheet below, write four “Soft Skills” that you believe would be important for someone wanting to work in a clerical position.

The following Essential Skills were used to complete this Learning Activity.

- Reading
- Document Use
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Problem Solving
- Decision Making
- Critical Thinking
- Significant Use of Memory
- Job Task Planning & Organizing
- Finding Information

© LLEO 2011, Clerical Essential Skills Training  
Page 12 of 25
Soft Skills to Improve
Learning Activity 3

Read the list on the next page. It is a list of activities that employees sometimes do at work that they shouldn’t do. Below is a list of short form codes for the “Soft Skill” Essential Skills. Using these codes, note one “Soft Skill” that you think would need to be improved by the employee for each of the situations. Place the code on the line in front of the activity statement.

Choose from these Essential Skills:

<table>
<thead>
<tr>
<th>Essential Skill</th>
<th>Short Form Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oral Communication</td>
<td>OC</td>
</tr>
<tr>
<td>Working with Others</td>
<td>WO</td>
</tr>
<tr>
<td>Continuous Learning</td>
<td>CL</td>
</tr>
<tr>
<td>Problem Solving</td>
<td>PS</td>
</tr>
<tr>
<td>Decision Making</td>
<td>DM</td>
</tr>
<tr>
<td>Critical Thinking</td>
<td>CR</td>
</tr>
<tr>
<td>Job Task Planning and Organizing</td>
<td>PO</td>
</tr>
<tr>
<td>Significant Use of Memory</td>
<td>M</td>
</tr>
<tr>
<td>Finding Information</td>
<td>FI</td>
</tr>
</tbody>
</table>
PO  Employee doesn’t show up for work on time and doesn’t call in when he is unable to get to work.

Employee takes too much time for breaks and lunch.

Employee doesn’t follow the work schedule.

Employee doesn’t get along with other workers.

Employee talks back to the boss.

Employee doesn’t follow instructions.

Employee talks with friends instead of working.

Employee waits to be told what to do instead of looking for things that need to be done.

Employee uses shortcuts that result in poor work quality.

Employee lets personal problems cause poor performance on the job.

Employee uses drugs or alcohol at work.

Employee misuses company property.

Employee hides work to get out of doing it.

Employee makes or gets too many personal phone calls.

Employee takes too many days off from work without a good reason.

Employee swears and uses bad language around customers and other workers.

List adapted from: The Janus Employability Program. Don’t Get Fired: How to Keep a Job. Twenty Problems That Can Get Workers Fired for Cause (Globe Fearon Educational Publisher. 1995.)

The following Essential Skills were used to complete this Learning Activity.

- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory
**Unit 3: Essential Skills Job Profiles**

This training is related to the Essential Skills job profiles developed by Human Resources and Skills Development Canada or HRSDC. HRSDC has studied more than 230 occupations, looking at the Essential Skills needed and used on the job for each. By doing many interviews with employers and employees, they have developed occupational profiles with job specific task examples for each of the Essential Skills. The website describes which Essential Skills employers expect (what employers need from their employees) and how the Essential Skills are used for many different parts of a job. These descriptions are called Job Profiles.

When you are looking for work, the Essential Skills Job Profiles:

- Tell you the Essential Skills that are required to do the job.
- Help you recognize Essential Skills you already have to do the job.
- Help you identify Essential Skills you need to develop for the job.

For more information and to research what Skills are required for a job, you can go to the Essential Skills web site:

http://www.hrsdc.gc.ca/eng/workplaceskills/essential_skills/general/home.shtml

**NOTE:** Websites change all the time. If this link changes, you can use the following search words to find the website you need: “Essential Skills Canada”.

To check the profile for a job that you are interested in, go to the website listed above, then:

When the website opens, look for the list of choices on the left side of the page. Find “Essential Skills Profiles” and click on it.

Scroll down the page and click on “Search the profiles”.

Click on “Occupation”.
Type your chosen occupation in the box. Let’s choose, for example, “General Office Clerk”. Then click “Next”.

This will bring up the occupation General Office Clerks (1411). The number in brackets is the National Occupational Classification (NOC). Each job has been given a number or “NOC Code”.

Click on that link.

Scroll down the page to learn how each Essential Skill fits the job profile of a General Office Clerk.

**National Occupational Classification**

NOC stands for National Occupational Classification. The NOC was designed to help Canadians understand the jobs in the labour market. Each job is given a number or code. It organizes over 30,000 job titles into 520 occupational group descriptions. It is used daily by thousands of people to compile, analyze and communicate information about occupations, and to understand the jobs found throughout Canada’s labour market.

The NOC website is [http://www5.hrsdc.gc.ca/NOC/](http://www5.hrsdc.gc.ca/NOC/)

When you see a pink box, like the one above, it is there to explain the meaning of a word or phrase that might not be familiar to most learners using this curriculum. There may be other words in the curriculum that you don’t know and that we don’t provide a pink definition box for. If you don’t know the meaning of a word, look it up on the Internet. Just type the word and then “definition” in the search box. A number of sites will come up that can explain the word and some will even let you listen to how it is pronounced. If there is a speaker icon, just click on it.
Essential Skills Profile

Learning Activity 4

1. On the previous page in the yellow box, we told you how you might find the meanings of words you were not familiar with using the Internet. Find the meanings of the following words. Also, try finding a site that lets you listen to how the word is pronounced.

   a. Curriculum
   b. Demonstration
   c. Authentic
   d. Evaluation
   e. Enabling (enable)

2. Using the occupational profile for General Office Clerks NOC 1411 from the HRSDC website, what are the two most important Essential Skills for the occupation?

   ____________________________________  ____________________________________

3. Find two examples of how each of the nine Essential Skills is used on the job and write them in the chart below.

<table>
<thead>
<tr>
<th>Reading Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
</tr>
<tr>
<td>2.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Document Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
</tr>
<tr>
<td>2.</td>
</tr>
</tbody>
</table>
# Module 1: Essential Skills

<table>
<thead>
<tr>
<th>Writing</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Numeracy</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Oral Communication</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Thinking Skills: Problem Solving</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Thinking Skills: Decision Making</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Thinking Skills: Job Task Planning and Organizing</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
</tbody>
</table>
## Module 1: Essential Skills

<table>
<thead>
<tr>
<th>Thinking Skills: Significant Use of Memory</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
</tr>
<tr>
<td>2.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Thinking Skills: Finding Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
</tr>
<tr>
<td>2.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Working with Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
</tr>
<tr>
<td>2.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Computer Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
</tr>
<tr>
<td>2.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Continuous Learning</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
</tr>
<tr>
<td>2.</td>
</tr>
</tbody>
</table>

The following Essential Skills were used to complete this Learning Activity.

- [✓] Reading
- [✓] Document Use
- [✓] Writing
- [☐] Numeracy
- [☐] Oral Communication
- [☐] Working with Others
- [✓] Computer Use
- [☐] Continuous Learning
- [☐] Problem Solving
- [☐] Decision Making
- [☐] Critical Thinking
- [✓] Finding Information
- [☐] Job Task Planning & Organizing
- [☐] Significant Use of Memory
What Employers Want
Learning Activity 5

Imagine that you are applying to be a receptionist or clerk in an office, and answer the following questions.

1. Think about your strong “Soft Skills”. List these for this employer.
   ______________________________________________________
   ______________________________________________________
   ______________________________________________________
   ______________________________________________________

2. What other Essential Skills can you bring to the job?
   ______________________________________________________
   ______________________________________________________
   ______________________________________________________
   ______________________________________________________

The following Essential Skills were used to complete this Learning Activity.
- □ Reading
- □ Oral Communication
- □ Working with Others
- □ Numeracy
- □ Computer Use
- □ Continuous Learning
- □ Thinking Skills
- □ Problem Solving
- □ Decision Making
- □ Job Task Planning & Organizing
- □ Critical Thinking
- □ Finding Information
- □ Significant Use of Memory
National Occupation Classification
Learning Activity 6

1. Go to the National Occupation Classification site at http://www5.hrsdc.gc.ca/NOC/ and do a Quick Search for three of the NOC codes that this curriculum covers: 1411, 1414 and 1422. Print out the three occupations and use them to complete the following chart.

<table>
<thead>
<tr>
<th>NOC Code and Title</th>
<th>Example Titles</th>
<th>Employment Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>1411 General Office Clerk</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1414 Receptionists &amp;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Switchboard Operators</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1422 Data Entry Clerks</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Look over the main duties of the three occupation descriptions. Do you feel one of these jobs might be right for you? ☐ Yes ☐ No

3. Go to the section of the page titled Classified elsewhere and look up one or two other jobs that interest you.

The following Essential Skills were used to complete this Learning Activity.
☑ Reading ☑ Document Use ☐ Numeracy ☑ Writing
☐ Oral Communication ☐ Working with Others ☑ Computer Use ☐ Continuous Learning

Thinking Skills
☐ Problem Solving ☑ Decision Making ☐ Critical Thinking ☑ Finding Information
☐ Job Task Planning & Organizing ☐ Significant Use of Memory
Unit 4: Learning for Work

Now that you have thought about what Essential Skills and habits you would like or not like in an employee, it is time to start to think about your own skills.

You will need to build strong academic skills to be able to complete work tasks. It is also important to build good, not poor, work habits.

These are the reasons we will be considering the “Soft Skills” as well as reading, document use, writing and numeracy skills, in this curriculum. Your learning experience is practice for work or further training, so during this program you will be expected to avoid the poor habits listed earlier in Learning Activity 3.
My Essential Skills
Learning Activity 7

A good question to ask yourself now is: “According to the Essential Skills Job Profiles, which Essential Skills should I learn or improve so that I will succeed in this job?”

Choose one occupation that you are interested in from the “Essential Skills Profiles” for NOCs 1411 General Office Clerks, 1414 Receptionists and Switchboard Operators, 1422 Data Entry Clerks, 1441 Administrative Clerks or another clerical position. Print out the profile and consider the Essential Skills needed to do the tasks. Now, complete the chart below. Talk to another learner or your instructor about them.

<table>
<thead>
<tr>
<th>Essential Skills I think I would need to learn or improve:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

The following Essential Skills were used to complete this Learning Activity.

- ☑ Reading
- ☑ Document Use
- ☑ Oral Communication
- ☑ Working with Others
- ☑ Computer Use
- ☑ Critical Thinking
- ☑ Decision Making
- ☑ Finding Information
- ☑ Job Task Planning & Organizing
- ☑ Continuous Learning
- ☑ Problem Solving
- ☑ Thinking Skills
- ☑ Numeracy
- ☑ Writing
- ☑ Significant Use of Memory
Learner Self-Assessment

Now that you have completed Module 1 – Essential Skills, assess your performance. In the comments section, you can write down thoughts you have about the section. Use a blank sheet of paper if you need more space.

I started this chapter on (date) _______________ and finished on (date) ___________. I think I worked through it in a reasonable time □ yes  □ no

### Clerical: Module 1 – Essential Skills

#### Unit 1 – Should I Take This Training?

| I know what this training curriculum is based on and that it is what I want to take. | □ yes  □ I need more time to decide  □ no |
| I know what to do if I am having trouble understanding or need some help with an area of learning. | □ yes  □ yes but I need more practice  □ no |

#### Unit 2 – What Are the Essential Skills?

| I know that there are nine Essential Skills and can name at least four. | □ yes  □ yes but I need more practice  □ no |
| I have a basic understanding of what the Essential Skills are and how they can help me prepare to work in the Clerical field. | □ yes  □ yes but I need more practice  □ no |
| I know the importance of having good “Soft Skills”. | □ yes  □ yes but I need more practice  □ no |

#### Unit 3 – Essential Skills Job Profiles

| I can name the two most important ES for the job of General Office Clerk. | □ yes  □ yes but I need more practice  □ no |
| I can find, and use, the Essential Skills website to get a job profile. | □ yes  □ yes but I need more practice  □ no |
| I have read, or skimmed, the Essential Skills profile for General Office Clerk, Data Entry Clerk, Receptionist/Switchboard Operator occupation. | □ yes  □ yes but I would like to read more  □ no |
| I know what NOC codes are, how to find the NOC website and how to search for an occupation by its NOC code. | □ yes  □ yes but I would like to read more  □ no |
## Unit 4 – Learning for Work

I know what Essential Skills I would like to improve.

- [ ] yes
- [ ] yes but I need more practice
- [ ] no

**Comments:** (write down thoughts you have about the section. Use a blank sheet of paper if you need more space)

________________________________________________________________
________________________________________________________________
________________________________________________________________
Module 2: The Clerical Field

Unit 1: Clerical Work Overview
Unit 2: Computer Job Skills
Unit 3: Keyboarding
Unit 4: Office Machines
Unit 5: Confidentiality
Unit 1: Clerical Work Overview

So you want to get a clerical job? But just what does that involve?

The Administrative/Clerical field is one of the largest job categories in the world. Clerical employees are needed in all types of office settings. Clerks work in a variety of industries and offices both small and large. Below is a list of the occupations in the NOC Major Group 14 - Clerical Occupations.

### National Occupational Code

#### Major Group 14 - Clerical Occupations

- **141 Clerical Occupations, General Office Skills**
  - 1411 General Office Clerks
  - 1413 Records Management and Filing Clerks
  - 1414 Receptionists and Switchboard Operators

- **142 Office Equipment Operators**
  - 1422 Data Entry Clerks
  - 1423 Desktop Publishing Operators and Related Occupations
  - 1424 Telephone Operators

- **143 Finance and Insurance Clerks**
  - 1431 Accounting and Related Clerks
  - 1432 Payroll Clerks
  - 1433 Customer Service Representatives - Financial Services
  - 1434 Banking, Insurance and Other Financial Clerks
  - 1435 Collectors

- **144 Administrative Support Clerks**
  - 1441 Administrative Clerks
  - 1442 Personnel Clerks
  - 1443 Court Clerks

- **145 Library, Correspondence and Related Information Clerks**
  - 1451 Library Clerks
  - 1452 Correspondence, Publication and Related Clerks
  - 1453 Customer Service, Information and Related Clerks
  - 1454 Survey Interviewers and Statistical Clerks

- **146 Mail and Message Distribution Occupations**
  - 1461 Mail, Postal and Related Clerks
  - 1462 Letter Carriers
  - 1463 Couriers, Messengers and Door-to-Door Distributors

- **147 Recording, Scheduling and Distributing Occupations**
  - 1471 Shippers and Receivers
  - 1472 Storekeepers and Parts Clerks
  - 1473 Production Clerks
  - 1474 Purchasing and Inventory Clerks
  - 1475 Dispatchers and Radio Operators
  - 1476 Transportation Route and Crew Schedulers
Although each of the NOC classifications in Major Group - 14 Clerical Occupations has some unique duties that separate it from the rest, there are many common tasks. All clerical workers do general office tasks such as:

- Filing and record keeping.
- Writing letters and emails.
- Locating and retrieving data or information from files.
- Using office equipment.
- Preparing, receiving, reviewing, and verifying documents.
- Compiling information for reports.
- Keeping a calendar and informing others of deadlines and other important dates.
- Sorting and cataloguing material or information.

Many of the clerical skills you will need can be learned through experience and on-the-job training, but some employers will require at least a year of clerical/administrative training for a clerical job. There is a lot of competition for jobs, so you might want to consider attending a one to two year program in vocational school or college. These programs teach the basics of information and data management, computer skills, interpersonal relations, customer service, research and basic accounting. With college training your chances of getting and keeping a job, your pay rate, will be improved.

Even if you don’t attend college, you will need to have basic office and computer skills in order to get a clerical, reception or administrative job. You will need to have:

- Accurate typing skills. Entry-level clerical jobs require between 20 and 40 words per minute keyboarding skills.
- Strong writing and communication skills.
- Good interpersonal and customer service skills.
• Experience using office equipment both safely and properly. Some examples of equipment you would need to be familiar with are: computer, multiple-line telephone, fax machine, photocopier, and scanner.

• Computer program knowledge of Windows, wordprocessing, spreadsheets, data bases, electronic organizers or calendars, as well as the internet and email.

• A good personal presentation and an ability to get along with others.

• An understanding of office etiquette.

• Strong filing and file management skills.

Are you ready?
The Conference Board of Canada’s “Employability Skills 2000+” lists the necessary skills to consider for administrative professionals. Some of these are

• Developing communication skills.
• Applying critical thinking skills when making decisions.
• Learning how to work with others to participate successfully in team projects.
• Improving technology skills.
• Focusing on life-long learning.

If not, continue with this training!
Clerical Job Skills
Learning Activity #1

1. Using a local newspaper or the Service Canada Job Bank at www.jobbank.gc.ca, find five detailed job ads for clerical, administration or reception positions. In the table below list the skills that the employer is looking for and the duties that the job will include.

<table>
<thead>
<tr>
<th>Job Ad</th>
<th>Skills Required</th>
<th>Duties</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
2. Consider the three NOC profiles that you printed out while working on Module 1. Compare these profiles to the job ads you have found. What is similar? What is different?

<table>
<thead>
<tr>
<th>Similarities</th>
<th>Differences</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. Go to Service Canada’s Job Bank at [http://www.jobbank.gc.ca/](http://www.jobbank.gc.ca/), choose your language and then go to the Career Navigator section. From here, use the links to take some of their quizzes to see if Clerical Work is right for you. Discuss the results with your classmates or instructor.

---

The following Essential Skills were used to complete this Learning Activity.

- ✔ Reading
- ✔ Document Use
- ✔ Numeracy
- ✔ Writing
- ✔ Computer Use
- ✔ Continuous Learning
- ✔ Problem Solving
- ✔ Decision Making
- ✔ Critical Thinking
- ✔ Finding Information
- ✔ Job Task Planning & Organizing
- ✔ Significant Use of Memory

© LLEO 2011, Clerical Essential Skills Training
Unit 2: Computer Skills

Clerical staff are expected to accomplish many of their normal, daily duties using computers. For example, many employees use computers to perform one or more of the following tasks:

- Compose documents.
- Enter database information.
- Use spreadsheets.
- Download company forms.
- Make benefit choices.
- Keep track of things to do and schedules using an electronic organizer.
- Preserve (back up) important data.
- Log on to workgroups on the internet.
- Communicate by email.

Standard office tasks, like those listed above, require basic computer and software skills. Therefore, it's wise to learn how to use the latest version of Microsoft Windows, which is currently the most popular computer operating system. Performing most standard office tasks also means that you must be familiar with software applications, such as those included in Microsoft Office. Microsoft Office is only one of a number of software suites (a collection of applications or programs), but it is the most popular. Many employers consider Microsoft Office skills a requirement for getting the job. Good Microsoft Office applications to know are Word and Outlook. Depending on the job, you might also need to know Excel and/or Access. Once you know these programs, you'll also know the basics of many others and be prepared for almost any job.

You will also need to know how to use a web browser such as Internet Explorer. There are other browsers, but Internet Explorer is still the most popular. Employers are assuming that just about everybody knows how to access the Web these days. Many employers are reducing the cost of paperwork by shifting such things as job applications, benefit claim forms, time cards, and paycheck stubs to the Internet or email.
If you're not already familiar with Microsoft Office programs, the popular browsers and email programs, you'd be wise to learn. We have listed several free training programs available online below; or your instructor may be able to help you find an in-person course.

Check out the free computer training at:

- [www.gcflearnfree.org](http://www.gcflearnfree.org) has video tutorials, step-by-step lessons and hands-on activities on many computer and software topics, including: Windows, Microsoft Office applications, the Internet and email basics.

- [www.bbc.co.uk/webwise](http://www.bbc.co.uk/webwise) provides an introduction to the basics of using the Internet and email. Using videos, quick quizzes and games as a fun way to gain skills, it covers browsers, web addresses, bookmarking; online forms, searching the web; email (including address books and attachments), Internet/email safety and online communities.

- [http://freecomputertraining.com.au](http://freecomputertraining.com.au) has free computer training courses in Microsoft Excel, Word, PowerPoint and MYOB Accounting Setup. Learners can work at their own pace, using the videos, workbooks and exercises. You will need an enrolment key which you get with a free registration and subscription to the email newsletter.

- [http://office.microsoft.com/en-us/training](http://office.microsoft.com/en-us/training) *Microsoft Office Online* has its own resources to help you learn and work in Office, including demo videos, downloadable training presentations and tutorials on almost all Office 2003 or 2007 topics including Access, Excel, Outlook, Publisher and Word.
1. Everyone taking this clerical training will have different computer skills. Some of you will just be starting on computers. Some will be experts at Facebook, internet and instant messaging and some will have experience working on a variety of software programs. Whatever your level, there will be computer skills you still need to learn.

Use the self-assessment form below to help you decide what skills you have in working with the most common office software applications. Beside each of the computer programs listed, put a check mark (✓) in the column that best shows how well you can use it, Very well, Just a little, or Not at all.

Note: If you don’t know what some of these programs are, do a web search. Try going to a site like www.Webopedia.com and entering the term (example: word processing, spreadsheet).

<table>
<thead>
<tr>
<th>I can use:</th>
<th>Very well</th>
<th>Just a little</th>
<th>Not at all</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows Operating Systems</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Word-processing programs like Microsoft Word</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spreadsheets, as in Microsoft Excel</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Presentation programs like PowerPoint</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email programs like Outlook</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internet browsers and search engines</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
2. There isn’t room in this curriculum to teach all the computer skills that are needed to work in a clerical job. This does not mean you should not learn computer skills.

Now that you have considered what you know about the most common office computer programs, find out where you can take a course that will improve your computer skills. There may be computer courses offered at your learning centre. There may be online courses available for you to take through literacy programs such as The Learning Hub, (a free online program for adults across Ontario [www.learninghub.ca](http://www.learninghub.ca)) or Sioux Hudson Literacy Council’s e-Channel online learning ([www.siouxhudsonliteracy.com](http://www.siouxhudsonliteracy.com)), also Ontario-based. You could also try one of the sites suggested on the previous page or computer training recommended by your instructor.

Use the chart on the next page to record the options you have for training on each of the different office programs or applications.

3. Discuss your training needs with your instructor and get his or her help to decide the best way to include computer training in your learning plan.

Whatever you choose, **start now** to build computer training into your training plan and personal schedule.

---

**The following Essential Skills were used to complete this Learning Activity.**

- [✓] Reading
- [✓] Document Use
- [☐] Numeracy
- [☐] Writing
- [✓] Oral Communication
- [☐] Working with Others
- [✓] Computer Use
- [☐] Continuous Learning

**Thinking Skills**

- [ ] Problem Solving
- [✓] Decision Making
- [☐] Critical Thinking
- [✓] Finding Information
- [✓] Job Task Planning & Organizing
- [☐] Significant Use of Memory
<table>
<thead>
<tr>
<th>Applications used in the Clerical Field:</th>
<th>Where I can get training:</th>
<th>Include in training plan:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows Operating Systems</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Word-processing programs like Microsoft Word</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spreadsheets, such as Microsoft Excel</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Presentation programs like PowerPoint</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email programs like Outlook</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internet browsers and search engines</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Unit 3: Keyboarding

Typing vs. Keyboarding

Typing skills were originally developed and used with typewriters. Good typists:

- Were primarily secretaries and clerical workers.
- Usually typed from a copy or dictation.
- Required speed and accuracy for maximum output.
- Needed complex knowledge of letter formatting, spelling and grammar.
- Could make few errors, as correction usually required re-typing the document.
- Were skilled with typing the upper numerical row.

With the arrival of personal computers, typing has moved towards keyboarding. With keyboarding the important skills are slightly different and include:

- Basic knowledge of the keyboard.
- Familiarity with the numerical keypad.
- Correct hand positioning and use of the fingers to increase speed.
- Good use of the backspace and insert keys to cover corrections.
- Basic formatting, spelling and grammar.

You may consider yourself pretty skillful on the keyboard. You can type messages to your friends and instructions into search engines. You sometimes use a word processing program to write a letter. But you are still using two fingers to do your typing. Many people start out with the ‘hunt and peck’ approach - using two fingers and scanning the keys to find each letter. Would learning real keyboarding skills be worthwhile? The answer is yes.

What do good keyboarding skills look like? Good keyboarders use touch typing. Touch typing teaches you to use all your fingers and watch the screen rather than the keys; and it’s much faster!
Touch typing basics

If you want to learn some basic skills, start by placing your fingers on the home row. The home row is made up of the letters ASDF and JKL. The four fingers of your left hand go on ASDF and the right fingers go on JKL. Your thumbs rest lightly on the space bar. Your hands should rest in a relaxed, curved position as if you are “scratching”. By reaching up and down with your fingers you can reach all of the keys. By reaching with your ‘pinky’ finger you can press the Enter, Shift and Tab keys. See the drawing below for finger-to-key placement. When you place your fingers on the home row, notice that the F and J keys have raised dots or bars to help you with the placement of your fingers.

Learning keyboarding can be a little dull and repetitive. If you overdo it and turn it into a chore, you will lose interest. You can try to make the learning more entertaining by using “learn to type” computer games. There are lots available for little or no cost on the Internet. However, you should begin with a course rather than a game. While keyboarding games can improve keyboarding speed, they won't teach you how to type correctly. Sequenced lessons are needed before you start playing the games.

There are many free or low-cost touch-typing or keyboarding instruction, testing and practice game sites on the Internet.

- Two websites that offers sequenced lessons can be found at [http://www.typing-lessons.org/preliminaries_1.html](http://www.typing-lessons.org/preliminaries_1.html) and
http://www.nimblefingers.com/

- The following website offers many links to keyboarding resources: http://www.d11.org/mann/computerliteracy/keyboarding.htm

- www.download.com is a good place to find free typing instruction and typing testing software. If your learning centre doesn’t already have typing software for you to use to learn and increase your typing skills, check out some of the downloads here. Use the editor’s or user ratings and comments to help you choose one that suits you. Do not download anything onto your learning centre’s computers without permission, though.

Keyboarding speeds are especially important to data entry specialists who may be paid based on speed (per piece rate or per record rate).

**The Computer Keyboard**

A computer keyboard looks similar to an alpha-numeric (letters and numbers) typewriter keyboard. This is called a QWERTY layout from the first six letters in the top alphabet row (the one just below the numbers). It is also referred to as the "Universal" keyboard. However, computer keyboards also have keys which serve special functions.

**Numeric Keypad**

Most computer keyboards also have a numeric keypad on the right hand side. Numeric keypads contain only numbers, mathematical symbols for addition, subtraction, multiplication, division, a decimal point, and several function keys (e.g. End, Delete, etc.) A laptop does sometimes have a numeric pad, but not all the time. These keys are also known as, collectively, a numeric pad, numeric keys, or a numeric keypad, and it can consist of the following types of keys:

- Arithmetic operators such as +, -, *, /.
- Numeric digits 0-9.
- Cursor arrow keys.
- Navigation keys such as Home, End, PgUp, PgDown, etc.
- Num Lock button, used to enable or disable the numeric pad.
- Enter key.

A numeric keypad, numpad or tenkey for short, usually operates in two modes: when Num Lock is off, keys 8, 6, 2, 4 act like an arrow keys and 7, 9, 3, 1 act like Home, PgUp, PgDn and End; when Num Lock is on, the digit keys produce corresponding digits. On Apple or Macintosh computers, which lack a Num Lock key, the numeric keypad always produces only numbers. The num lock key is replaced by the clear key.

The arrangement of digits on numeric keypads is different from that of telephone “Touch-Tone” keypads—this may be confusing for those who are used to telephone keypads.

Numeric keypads are useful for entering long sequences of numbers quickly, for example in spreadsheets, financial/accounting programs and calculators. Input in this style is similar to that of a calculator or adding machine.


Feel the 5 key of a numeric keypad. You will note that it has a raised dot or bar. This acts as a locator for finger placement to allow you to work on the keypad without looking at the keys.

**Supplementary Learning Activity**

For an explanation of what the keys on a Windows Keyboard are for, type “windows keyboard explanation of keys” into your Internet search engine.
How Good Are You at Keyboarding?
Learning Activity 3

1. Refer to the diagram on the next page. At the bottom is a colour-coded legend. On the diagram, draw arrows from the legend to the applicable parts of the keyboard.

2. Take a free test and find out your keystrokes per hour (kph) or keystrokes per minute (kpm) using one of the sites below. Take a ten key (numerical keypad) test as well since that is a very important part of keyboarding.
   - **Typer A** [http://typera.tk/](http://typera.tk/) Has online typing tests, which give your scores in keystrokes per minute (kpm) for the *correctly typed* words. If you mistype a word, it will be ignored and your score won't increase.
   - **Data Entry Home Business** covers almost anything that a data entry person would need to learn about keyboarding. The Ten Key Test Room page provides information about the numeric keypad and has lessons and testing. [http://www.dataentryhomebusiness.com/ten-key-test.html#grades](http://www.dataentryhomebusiness.com/ten-key-test.html#grades).
   - **Learn 2 Type** [http://www.learn2type.com/tenkeytest](http://www.learn2type.com/tenkeytest) has a ten key test that measures your keystrokes (kph).
   - **Tested OK** [http://testedok.com/](http://testedok.com/) (download) has free data entry, typing and keyboarding skills tests. Although not free, the software can be downloaded to your computer for a free 30 day trial.

3. Considering all the job ads you have looked at, do you think you need to improve your touch-typing and ten-key skills? □ Yes □ No

4. If you said yes, start now to take a course that will improve your keyboarding skills. Build this into your training plan and personal schedule. Talk to your instructor about this.
PC Computer Keyboard

The following Essential Skills were used to complete this Learning Activity.

- ☑ Reading
- ☑ Document Use
- ☑ Oral Communication
- ☑ Computer Use
- ☑ Working with Others
- ☑ Numeracy
- ☑ Writing
- ☑ Continuous Learning
- ☑ Job Task Planning & Organizing
- ☑ Critical Thinking
- ☑ Finding Information
- ☑ Significant Use of Memory
- ☑ Decision Making
- ☑ Problem Solving
- ☐ System keys
- ☐ Application key
- ☐ Function keys
- ☐ Numeric keypad
- ☐ Other
- ☐ Enter keys
- ☐ Cursor control keys

Keyboarding Ergonomics

You might not realize it, but working at a keyboard for extended periods can be hard on your body. This is especially true when you are learning keyboarding or when you are in a new job. The added stress can tighten up your muscles and cause back, neck, hand and eye pain and even injury. It is important that you learn how to sit and work correctly at a computer keyboard.

Below are some of the key things to keep in mind with respect to typing posture and hand position:

- Sit back in your chair. Sit up as straight as possible (within reason!).
- Keep your feet flat on the floor.
- Your upper arms should be vertical. Don’t lean forward as this will cause strain.
- Keep your forearms horizontal to the keyboard, or slightly slanted with hands a little lower than elbows (keeps the blood flowing to the hands!).
- The backs of your hands should be parallel to the keyboard. Keep your fingers relaxed, curved and upright like you are “scratching” the keyboard.
- Keep your wrists straight, so that the tendons in your wrists aren’t restricted through the carpal tunnel.
- Have your hands placed so that you are able to keep your index, middle and ring fingers on their home keys. Both pinky fingers should be able to reach the shift keys without bending your wrist sideways.
- Have the first line of text on your screen at eye level.
- Take frequent breaks! Get up and walk around. Do a different type of work.

**Ergonomics** is the science of adapting the job, the equipment and the human to each other to reduce operator fatigue and discomfort and increase productivity.
Keyboarding Injury Prevention Ergonomic Guidelines

- Head and body are straight with shoulders relaxed.
- Top of print is at eye-level.
- Fingers relaxed (scratching position) with wrists straight.
- Upper arms vertical. Elbows are close to the body. Forearms slightly angled with wrists below elbows.
- Work-surface is adjusted to elbow level.
- Backrest is adjusted to fit the lumbar region of your spine.
- Chair height allows adequate leg clearance and maintains keyboard/work-surface at elbow level.
- Feet rest flat and firmly on the ground or are supported by a footrest.
Keyboarding Injury Prevention
Learning Activity 4

Without looking back, see if you can answer the following questions.

1. How should you be sitting?

2. Where should your hands be?

3. What is the proper position for your forearms?

4. How should you hold your wrists?

5. Where should you direct your eyes?

6. How should your hands be positioned?

7. How should your feet be positioned?

8. What should you remember to do?

The following Essential Skills were used to complete this Learning Activity.

- [ ] Reading
- [x] Document Use
- [ ] Numeracy
- [x] Writing
- [ ] Oral Communication
- [ ] Working with Others
- [ ] Computer Use
- [ ] Continuous Learning
- [ ] Thinking Skills
- [ ] Problem Solving
- [ ] Decision Making
- [ ] Critical Thinking
- [ ] Finding Information
- [ ] Job Task Planning & Organizing
- [x] Significant Use of Memory
Unit 4: Office Equipment

Photocopiers

A photocopier (also known as a copier or copy machine) is a piece of office equipment that makes paper copies of documents and other visual images quickly and cheaply.

The photocopier is a necessary piece of equipment in any business office. Traditionally, copiers only made black and white copies, but with the price of colour copiers decreasing many offices are switching over to more advanced models. Today's photocopiers often perform multiple functions, acting as printers, fax machines and scanners, as well as copiers. With these multiple functions and changes in photocopying technology, control panels and mechanisms have become complicated. This can be confusing for the inexperienced office worker. Photocopiers come in a wide range of shapes and sizes, from desktop models to giant production equipment.

However, the basic principles of photocopying are still the same and copying a simple document isn’t hard even for someone new to these office machines.

The following are some basic instructions, but you should always refer to the User’s Manual, when you need help.

1. Make sure the copier is on. The On/Off switch is usually on the top or right hand side of the copier. Many photocopiers have a "sleep" mode to reduce power usage. Try touching the screen or pressing a “Power Save” or the "Copy" button on the control panel to make it "wake up."
2. The photocopier may need to warm up. Older photocopiers take longer than newer models. Read the screen. It will probably ask you to wait until it is ready to copy.

3. a) Place your document on the glass plate (called the platen glass). (Lift the cover of the photocopier; the platen is the glass surface underneath.) Place your document face down on the glass. At the edges of the glass you'll see guide marks that indicate where to position your document.

OR

b) If the photocopier has a multi-feed tray, also called a document feeder instead of a cover over the platen, place your document(s) in the document feeder. Check to see which way up you should place the documents. Almost all imaging and printing devices have a symbol to show you which direction is correct. Look near your document feeder.

4. Photocopiers often have two paper trays, one with 8 1/2-inch by 11-inch paper (called letter-size), and the other with 8 1/2-inch by 14-inch paper (called legal-size). Many copiers have an auto detect (automatic detection) feature that determines what size of paper you are copying and automatically selects the same size paper to copy to. If your copier does not, select the size paper on the control panel.

Note: Most photocopiers also have a "paper bypass" feed that allows you to insert special-sized or quality paper.

5. Select colour or black and white if the photocopier is a colour copier.

6. Reduce or enlarge the original image, if necessary. Many photocopiers have preset buttons for 50 percent (1/2 the size) and 150 percent or 200 percent enlargements. Sometimes you can adjust the image size automatically to fit a different paper size. You may need to set the reduction or enlargement percentage using a number key pad.
7. Many photocopiers can produce two-sided copies (duplexing), copy two original documents onto one page (book), collate (sort into groups), punch holes or staple. Consult the photocopier user manual for specific instructions. Set any of these features or functions on the photocopier, if necessary.

8. Select the number of copies to be made. The photocopier may have a number key pad for selecting the number of copies, or it may have arrows, or a plus and minus sign for increasing or decreasing the number.

9. If you are making several copies of more than one page you may want to collate the copies. For example, if you had a document that was three pages long and you were printing multiple copies. Using collate enabled, it would print pages 1,2, and 3 in that order and then repeat. However, if you did not collate, but rather “sorted” and you were printing 3 copies of those same five pages it would print pages in this order: 1,1,1, 2,2,2 and then 3,3,3.

10. Press the "Copy" button. The "Copy" button is usually the largest button on the control panel. It may also be labeled "Start." Often the button will be green, or have green markings.

11. The photocopier will produce your copies.
Photocopying
Learning Activity 5

1. In the table below, a list of terms related to photocopying appears in the first column (left). Write the definition of each word beside it in the second column (right). (To improve your computer skills you can try typing the term words in a Word or Spreadsheet document and cut and paste definitions from the Internet instead of handwriting below.)

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>control panel</td>
<td></td>
</tr>
<tr>
<td>sleep mode</td>
<td></td>
</tr>
<tr>
<td>platen</td>
<td></td>
</tr>
<tr>
<td>multi-feed tray</td>
<td></td>
</tr>
<tr>
<td>letter-size paper</td>
<td></td>
</tr>
<tr>
<td>legal-size paper</td>
<td></td>
</tr>
<tr>
<td>duplex</td>
<td></td>
</tr>
<tr>
<td>collate</td>
<td></td>
</tr>
<tr>
<td>sort</td>
<td></td>
</tr>
</tbody>
</table>
2. Ask your instructor to show you the photocopier at your learning centre. Find out which of the following features are included in the learning centre’s copier.

- Automatic feed  □ Yes  □ No
- Multiple copies  □ Yes  □ No
- Different paper sizes  □ Yes  □ No
- Duplex  □ Yes  □ No
- Collate  □ Yes  □ No
- Enlarge/Reduce  □ Yes  □ No
- Book Copying  □ Yes  □ No

What other features does the copier have? ____________________________________________________________
__________________________________________________________

3. Ask your instructor if you may do some copying tasks for your learning centre to get experience using the various features.

4. In previous activities, the box showing the Essential Skills used for the learning activity has had the Essential Skills marked off. Have you been considering these? Look at the blue box at the bottom of this page. Do you agree with our assessment of the skills used? Explain why you agree or disagree with each skill assessment.

______________________________________________________________________________________________
______________________________________________________________________________________________
______________________________________________________________________________________________
______________________________________________________________________________________________
______________________________________________________________________________________________

The following Essential Skills were used to complete this Learning Activity.

- Reading  ☑
- Document Use  ☑
- Numeracy  □
- Writing  ☑
- Oral Communication  ☑
- Working with Others  □
- Computer Use  ☑
- Continuous Learning  □

Thinking Skills

- Critical Thinking  ☑
- Finding Information  ☑
- Problem Solving  □
- Decision Making  □
- Job Task Planning & Organizing  □
- Significant Use of Memory  □
Fax Machines

A fax (short for facsimile) is a document sent over a telephone line. Almost all businesses use some kind of a fax machine, although faxing through the computer’s printer or using email and Internet alternatives have decreased the use of this machine. In many offices, standalone fax machines have been replaced by computerized systems that receive and store incoming faxes, and then route them to the proper person on paper or by an email. Using these systems can lower costs by eliminating unnecessary printouts. It also reduces the number of inbound phone lines needed by an office.

However, fax machines still have some advantages. For example, private material, which is not encrypted, may be at risk of interception when sent over the Internet or email. Also, electronic signatures on contracts are not always recognized by law while faxed contracts with copies of signatures are. It is sometimes more convenient to send a fax than to scan and send an electronic document.

The clerical staff in an office are often responsible for sending, receiving and distributing faxes to the correct person.

**Encrypt:** to put into code or cipher. Text messages or other important data are encrypted into a form that cannot be read by people who do not know how to decrypt it. **Decryption** is the process of converting encrypted data back into its original form, so it can be understood.
Fax Control Panel

See the following page for the legend.
Fax Control Panel Legend (see previous page for picture)

1. **One-Touch Keys** – These 10 keys plus the Shift key provide you with the option to store up to 20 pre-set numbers in memory.

2. **Redial/Pause** – Redials the last number called or inserts a pause in quick dial numbers.

3. **Hook/Hold** – Hook allows you to dial without lifting the receiver and hold lets you place telephone calls on hold.

4. **Resolution** – Sets the resolution when you send a fax.

5. **Fax Mode** – Sets the machine to fax and lights up when in fax mode.

6. **Volume Keys** – Adjusts the volume of the handset or speaker.

7. **Search/Speed Dial** – Lets you look up numbers stored in dialing memory.

8. **Menu/Set** – Lets you access the menu to program and store settings.

9. **Copy Mode** – Sets the machine to copy and lights up when in copy mode.

10. **LCD Display (Liquid Crystal Display)** – Screen shows messages to help you set up and use the machine.

11. **Dial Pad** – Use for dialing the phone or fax and as a keypad to enter numbers into the machine.

12. **Stop/Exit** – Stops an operation/fax or exits from the menu.

13. **Start** – To start sending a fax or take a copy.

14. **Reports** – Allows you to select and print a variety of reports.
The Fax Control Panel
Learning Activity 6

1. From the list of fax features below draw lines to the appropriate areas or buttons on the control panel picture.

Fax Features

One-Touch Keys
LCD Display
Redial
Volume Keys
Hook/Hold
Fax Mode
Menu
Copy Mode
Reports
Stop/Exit

The following Essential Skills were used to complete this Learning Activity.

- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory
Unit 5: Confidentiality

Although clerical jobs are usually considered junior (lower-ranking) positions in a company, clerks are often required to copy, fax or file confidential information.

When this happens, usually a “need to know” practice should take affect. Even though you are working with confidential documents, you are expected not to read any information that you don’t need to know. You are also expected not to share information with anyone, either in or out of the office, that doesn’t have the authority to see it.

There are strict privacy laws concerning the handling and distribution of personal or private information. Employers do not take their responsibility to protect this information lightly. If they did they could face large fines, as well as the loss of customer goodwill.

Personal information is not the only confidential information, though. In today’s marketplace, competition is strong. Business secrets, including client lists, research and copyright, are sensitive and can be of great value to the company. Businesses are careful to keep their secrets away from the prying eyes of a competitor. You will be expected to honour this.

You must commit to respecting and maintaining the confidentiality of your workplace, your employer, work mates and clients. Your job depends on it!

Confidentiality and Non-disclosure Agreements

An employee non-disclosure agreement, often called a confidentiality agreement, is used by businesses to ensure that an employee's knowledge of company

Disclosure: To uncover or reveal something.
- The release of information about a person or entity.
- Any public distribution of information (especially around inventions) by print, demonstrations, or other means.
and client information is kept private and confidential.

Examples of the types of information that businesses would wish not to be disclosed are:

- Information on the nature of specifications and formulas for patents, copyrights, trademarks and service marks.
- Information on company processes ("the way we do things here").
- Information on trade secrets- a formula, device, or mechanism, for example - that provides a competitive advantage to a company.
- Private information about clients or employees such as their credit information, social insurance numbers, medical information, birth dates, addresses and other contact details.

Having a confidentiality agreement does not prevent an idea from being stolen, but it does give the person or business damaged by the disclosure the evidence to fire the employee or to sue for losses. The Employment Confidentiality Agreement Form often states specific penalties for breach of that agreement.

The agreement may also define exactly what information can and cannot be disclosed. However, it may instead contain an “umbrella effect” which covers all information. For example it may deal with the non-disclosure of data, prototypes, engineering specifications, computer software, test protocols, manufacturing processes and so on.

Read the sample Confidentiality Agreement on the next page. There are probably some words that you aren’t familiar with. Take a minute to look these up in a dictionary.
CONFIDENTIALITY AGREEMENT

In consideration of my appointment, engagement or employment with Frontenac Health Centre, I do hereby covenant, promise, undertake, and agree with Frontenac Health Centre as follows:

(1) to preserve the confidentiality of any and all information in relation to patients and any other persons that comes to my knowledge by reason of my appointment, engagement or employment with Frontenac Health Centre; and

(2) to refrain from divulging or disclosing to any person, agency, body corporate or otherwise any such information to which I may have access unless specifically authorized in writing by the appropriate individual or body; and

(3) to use my best efforts to preserve the confidentiality of all such information.

I further acknowledge and agree that this undertaking shall remain in force both during and after my term of appointment, engagement or employment with Frontenac Health Centre, howsoever this may be terminated (whether voluntary or involuntary).

I further acknowledge and agree that, in the event that I breach or threaten to breach this agreement and undertaking, Frontenac Health Centre shall be entitled, at its option, to:

(a) obtain an injunction prohibiting and/or ceasing such breach;

(b) immediately dismiss me from my appointment, engagement or employment on the basis of such breach or threatened breach being hereby deemed to be just cause for dismissal; and/or

(c) take all other legal or civil remedies available to Frontenac Health Centre.

I further acknowledge and agree that due to the highly sensitive and personal information which is frequently dealt with by Frontenac Health Centre, this undertaking requires me to exercise the utmost good faith in dealing with such information.

DATED at Frontenac, ON, this ________ day of _____________________, 20__

Name:

_____________________________________________

Signature

_____________________________________________

Witness
Confidentiality
Learning Activity 7

1. What is meant by the expression “a need to know policy”?

__________________________________________________________________________________________

__________________________________________________________________________________________

2. For what are Confidentiality and Non-Disclosure Agreements used?

__________________________________________________________________________________________

__________________________________________________________________________________________

3. Fill in the Confidentiality Agreement on the previous page with your name, date, and signature.

4. Refering to the Confidentiality Agreement on the previous page, answer the following questions.

a. Who is the agreement between?

__________________________________________________ and ______________________________________

b. What three things do you agree to by signing the agreement? (You may use your own words)

______________________________________________________

______________________________________________________

______________________________________________________

______________________________________________________

______________________________________________________

______________________________________________________

______________________________________________________

______________________________________________________

______________________________________________________
c. For how long is the agreement in affect (does it remain in force)?
   _______________________________________________________
   _______________________________________________________
   _______________________________________________________

d. What could happen if you do breach (violate or break) the contract?
   _______________________________________________________
   _______________________________________________________
   _______________________________________________________
   _______________________________________________________

5. Look at the blue box at the bottom of this page. Do you agree with our assessment of the Essential Skills used? Explain why you agree or disagree with each skill assessment.
   _______________________________________________________
   _______________________________________________________
   _______________________________________________________
   _______________________________________________________
   _______________________________________________________

The following Essential Skills were used to complete this Learning Activity.

- [x] Reading
- [x] Document Use
- [ ] Numeracy
- [x] Writing
- [ ] Oral Communication
- [ ] Working with Others
- [ ] Computer Use
- [ ] Continuous Learning
- [ ] Problem Solving
- [ ] Decision Making
- [x] Critical Thinking
- [x] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory

Note: In future learning activities, you will have to fill in the blue ‘Essential Skills Used’ boxes at the bottom of each activity by yourself.
Learner Self-Assessment

Now that you have completed Module 1 – Essential Skills, assess your performance. In the comments section, you can write down thoughts you have about the section. Use a blank sheet of paper if you need more space.

I started this chapter on (date) _______________ and finished on (date) _______________. I think I worked through it in a reasonable time □ yes □ no

<table>
<thead>
<tr>
<th>Clerical: Module 2 – The Clerical Field</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit 1 – Clerical Work Overview</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I know about the variety of jobs in the clerical field that I may work towards.</td>
<td>□ yes</td>
<td>□ I need more time to decide □ no</td>
</tr>
<tr>
<td>I have read about a number of the tasks that clerks do.</td>
<td>□ yes</td>
<td>□ yes but I need more practice □ no</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unit 2 – Computer Job Skills</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>I know that good computer skills and knowledge of applications used in offices is very important when preparing to work in the clerical field.</td>
<td>□ yes</td>
<td>□ yes but I need more practice □ no</td>
</tr>
<tr>
<td>I have been able to do a self-assessment of my present computer application knowledge.</td>
<td>□ yes</td>
<td>□ yes but I need more practice □ no</td>
</tr>
<tr>
<td>I have learned where I can get training to improve my computer skills and have worked with my instructor to include computer training in my learning plan.</td>
<td>□ yes</td>
<td>□ yes but I need more practice □ no</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unit 3 – Keyboarding</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>I have learned about the benefits of touch-typing.</td>
<td>□ yes</td>
<td>□ yes but I need more practice □ no</td>
</tr>
<tr>
<td>I know the layout of a computer keyboard and numeric keypad.</td>
<td>□ yes</td>
<td>□ yes but I need more practice □ no</td>
</tr>
<tr>
<td>I can find ways to improve and test my alpha and numeric keyboarding skills.</td>
<td>□ yes</td>
<td>□ yes but I would like to read more □ no</td>
</tr>
</tbody>
</table>
I understand why the proper posture and positioning is important when working at a computer (ergonomics).

<table>
<thead>
<tr>
<th></th>
<th>yes</th>
<th>yes</th>
<th>no</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>but I would like to read more</td>
<td></td>
</tr>
</tbody>
</table>

**Unit 4 – Office Machines**

I have improved my reading, writing and document use skills while learning about fax and copier machines.

<table>
<thead>
<tr>
<th></th>
<th>yes</th>
<th>yes</th>
<th>no</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>but I need more practice</td>
<td></td>
</tr>
</tbody>
</table>

**Unit 5: Confidentiality**

I have learned about the importance of confidentiality in the workplace. I have been able to find information in a confidentiality agreement.

<table>
<thead>
<tr>
<th></th>
<th>yes</th>
<th>yes</th>
<th>no</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>but I need more practice</td>
<td></td>
</tr>
</tbody>
</table>

**Comments:** (write down thoughts you have about the section. Use a blank sheet of paper if you need more space)

________________________________________________________________
________________________________________________________________
________________________________________________________________
Module 3: Thinking Skills

Unit 1: Introduction
Unit 2: Finding Information
Unit 3: Critical Thinking
Unit 4: Job Task Planning and Organizing
Unit 5: Decision Making
Unit 6: Problem Solving
Unit 7: Memory Use
Unit 1: Introduction

Everyone has to think in order to live and function in the world, so you might wonder, “Why do I need to learn how to think - I can think already.” What are Thinking Skills anyway?

Six individual skills make up the Essential Skills’ Thinking Skills. Each one works along with other Essential Skills and usually you will use more than one at a time.

Thinking Skills include:

- Memory Use
- Problem Solving
- Finding Information
- Decision Making
- Critical Thinking
- Job Task Planning & Organizing

You think in different ways, using different skills, depending on what your task is. For example, when you think in order to solve a problem, it is different from thinking to find information. Sometimes you use Critical Thinking skills to determine if new information is true, other times you use your memory skills to remember and retrieve information that you have already learned. In the next six units, you will learn about the different Thinking Skills and ways to improve your use of them.
Unit 2: Finding Information

The ability to find information is important in our lives at work and at home. We use a variety of sources, including written text, verbal communication, and computerized information systems to locate and use information. Finding Information is not a standalone skill. The Essential Skills of Reading, Document Use, Working with Others, Computer Use, Oral Communication and the other Thinking Skills are necessary to complete tasks of Finding Information.

Finding Information tasks involve:

- **Checking** sources that are provided for the worker (procedure book, on-the-job safety poster, memo, company hotline).
- **Consulting** sources that are easily located (supervisor, co-workers, manufacturer’s manuals, websites).
- **Applying** established procedures to select information (making lists, contacting suppliers, reading work orders).
- **Gathering** information from several different sources (technical manuals, charts and diagrams, government regulations).
- **Analyzing** information (which you have collected by using the four points listed above) to develop a solution to a problem.

Six stages to Finding Information

On the next page is a chart showing six Information Skills Process stages, with questions for you to ask yourself at each stage.
The Information Skills Process (ISP)

Steps in the process:
- What is my purpose?
- Why do I need to find this out?
- What are the key words and ideas of the task?
- What do I need to do?

Steps in the process:
- Did I fulfill my purpose?
- How did I go – with each step of the information process?
- How did I go – presenting the information?
- Where do I go from here?

Defining
What do I really want to find out?

Steps in the process:
- What do I already know?
- What do I still need to find out?
- What sources and equipment can I use?

Locating
Where can I find the information I need?

Steps in the process:
- Have I enough information for my purpose?
- Do I need to use all the information?
- How can I best combine information from different sources?

Steps in the process:
- How relevant is the information I have found?
- How credible is the information I have found?
- How will I record the information I need?

Steps in the process:
- What information can I leave out?

Steps in the process:
- What information can I leave out?
- How did I go – presenting the information?

Selecting
What information do I really need to use?

Processing
How can I present this information?

Steps in the process:
- With whom shall I share this information?

Organizing
How can I use this information?

Steps in the process:
- What will I do with this information?

Steps in the process:
- What did I learn from this?
The Information Process Document
Learning Activity #1

Finding information can be difficult if you don’t understand the layout or design of the document. So let’s make sure you understood the design features of The Information Process model on the previous page. It is called a model because it is a drawing representing the actual process you go through to find information. Use the model on the previous page to answer the following questions.

1. What is the title of the document?

2. Usually when we look at a circular model, we start at the top and move clockwise around the circle. In this model what would be the starting stage?

3. What design feature helps you to know which “Steps in the Process” boxes go with each stage oval of the process?
4. Choose one stage of the process. Write the one-word stage title below. Then write the describing question included in the oval with the title word beside it. Below this, write the matching “Steps in the Process”.

<table>
<thead>
<tr>
<th>Stage Title</th>
<th>Describing Question</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Steps in Process

<table>
<thead>
<tr>
<th>Steps in Process</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

**Which of the following Essential Skills were used to complete the Learning Activity on the previous page?**

- [x] Reading
- [x] Document Use
- [x] Numeracy
- [x] Writing
- [x] Oral Communication
- [x] Working with Others
- [x] Computer Use
- [x] Continuous Learning
- [ ] Problem Solving
- [ ] Decision Making
- [ ] Critical Thinking
- [ ] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory
Ways to Locate Information

- **Ask** an expert on the subject. You can do this by speaking or writing.
- **Read** about it. Check in a manual, catalogue, encyclopedia, or dictionary.
- **Search** electronic sources like computer software, DVDs, or the internet to get information from an organization or online database.

Asking for Information

A quick way to find information is to ask someone who knows. However, you need to make sure that you ask the right person, not just the person next to you. Choose someone that knows about the subject you are researching or trying to find information about. Ask an expert, a supervisor or instructor.

You may not have thought of it, but a good place to find an expert is the public library. Research librarians are excellent sources of all kinds of specialized information. Many public libraries also have ‘online’ services, where you can text chat, email or talk on the phone with a research expert at another location. Libraries are not the only places where you can find an online expert to answer your questions.

The Internet is also a good resource, if you are careful in choosing a knowledgeable site. Websites that specialize in the topic you are researching often have a discussion group, a chat group or someone that you can email to answer your questions.
Reading for Information

One of the Essential Skills most commonly linked to Finding Information is Reading. You use this skill for written or printed text in a book or letter or on the internet. In the workplace, text could include memos, email, instruction manuals, signs, posters, reports, bulletins, pamphlets, dictionaries, and policy booklets. When looking for information, we don’t have time to read everything available. We need to know how to find the information quickly.

Hints for Finding Information in Written Material:

- **Skim** – to quickly identify the main idea of the text.
  
  Skimming is done at a speed three to four times faster than normal reading. You can skim when you have lots of material to read in a limited amount of time.

- **Scan** – to search for specific words or phrases in the text.
  
  In most cases, you know what you are looking for, so you concentrate on finding that particular piece of information.

- **Use the extra features** that are often provided in written material.
  
  These features include things like Table of Contents, Index, Title, Sub-title, and Header/Footer (the smaller print at the top or bottom of a page). Underlining and **bold print** in paragraphs are other tools that will lead you to look in the right place.

Finding Information on the internet:

A computer or internet search uses more techniques than those mentioned in the hints above for finding information in text. Computers and the internet have given us new sources of information. Enormous databases covering every subject imaginable are available for you to search. To sort your way through all
With so much information or ‘data’ available, it is easy to end up with too much. So, before doing a search, write down exactly what information you are looking for and what you’re not looking for. This will help you to find keywords for your search. Most inquiries or searches work best if you provide several keywords, not just one. Try to use nouns or ‘things’ for your keywords. Don’t worry about using ‘upper case’ or capitalizing letters. The search engine doesn’t look at that, it finds by the word.

Once you have your keywords, you must decide how to enter them into the search engine. Most online searching is based on something called Boolean Search Logic. By using the Boolean “operators” and keywords, we are able to widen or narrow our search. The most useful keyword combination is often a phrase. Phrases are groupings of two or more words. By enclosing a keyword phrase in quotation marks (for example, “data entry clerk”), you tell the computer to search for documents containing those exact words in that exact order.
REMEMBER: A successful internet search can take many tries. After all, there are hundreds of millions of documents online that are not sorted into any category. It is no wonder that effective internet searches require patience and some skill to find just the right information.

What If You Can’t Find the Information You Need?

No one wants to fail. Sometimes, even if we try our best, we can’t find the information required. As long as you’ve given it your best effort, don’t be embarrassed that you couldn’t find the information. Ask for suggestions for where to look. If others can find the information when you couldn’t, ask them how and where they found it.
Finding Information
Learning Activity #2

1. What are three ways to locate information?

2. If you need to ask someone for information, who should you choose?

3. What were the three hints given to help you to find information in written material?

4. Find a book that has a table of contents, index, section titles and headers. How would these features help you to find information?

5. If you wanted to find information on where you could get free online training in Microsoft Word, what keyword or phrase would you use?
To locate “10 tips for finding information on the internet” from Microsoft, go to: [http://www.emazzanti.net/10-tips-for-finding-information-on-the-internet/](http://www.emazzanti.net/10-tips-for-finding-information-on-the-internet/).

6. Read the material and write a summary of the ten tips, using a word-processing program such as Microsoft Word, then print and save your document under the name *10 Tips for Finding Information on the Internet*.

Which of the following Essential Skills were used to complete this Learning Activity?

- [ ] Reading
- [ ] Document Use
- [ ] Numeracy
- [ ] Writing
- [ ] Oral Communication
- [ ] Working with Others
- [ ] Computer Use
- [ ] Continuous Learning
- [ ] Thinking Skills
- [ ] Problem Solving
- [ ] Decision Making
- [ ] Critical Thinking
- [ ] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory
Learning Activity #3

On the page following the questions in this activity, you will find a job advertisement from Service Canada’s Job Bank. Using your Finding Information skills, do the following:

1. Skim the document to find out the main idea. In one sentence, describe what the page is about. *Remember: skimming is done at a speed three to four times faster than normal reading, so you can cover a lot of material in a short amount of time.*

2. Scan the document to find and circle the NOC code number. (*Hint: look for the keyword NOC*)

3. Scan to find what education is required for this job. Circle it.

4. What keyword did you look for to complete the document scan in question #3?

5. Does the job require a criminal record check? □ Yes □ No

6. How many hours a week is the job? _____ hours

7. What keyword did you scan for to find the answer quickly to #6 above? ____________________________

8. Find and circle the section on the Essential Skills required for the job.

9. Which of the six Essential Skills Thinking Skills are required?

□ Problem Solving □ Decision Making

□ Critical Thinking □ Job Task Planning & Organizing

□ Significant Use of Memory □ Finding Information
10. What design features help you find information in this job advertisement document?

____________________________________________________________________________________________________________

11. Skim over the sections on Specific Skills and Work Conditions and Physical Capabilities. Do you think this type of job would be a good fit for you? □ Yes □ No

Why?_____________________________________________________________________________________________________

_____________________________________________________________________________________________________

Which of the following Essential Skills were used to complete this Learning Activity?

- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Thinking Skills
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory
Job Advertisement

Job Search Safety Advice

- E-mail this Job

Job Number: 5144250

Title: Receptionist-typist (NOC: 1414)

Terms of Employment: Permanent, Part Time, Day

Salary: $12.00 Hourly for 20 hours per week

Anticipated Start Date: As soon as possible

Location: Kingston, Ontario (1 vacancy)

Skill Requirements:

- Education: Completion of high school
- Experience: Experience an asset
- Languages: Speak English, Read English, Write English
- Work Setting: Health services
- Business Equipment and Computer Applications: Windows, General office equipment, Word processing software, Spreadsheet software, Internet browser
- Typing (Words Per Minute): 41 - 60 wpm
- Specific Skills: Greet people and direct them to contacts or service areas, Obtain and process information required to provide services, Answer, screen and forward telephone calls, Record and relay information, Schedule and confirm appointments, Perform clerical duties, such as filing and sorting and distributing mail
- Security and Safety: Criminal record check
- Work Conditions and Physical Capabilities: Fast-paced environment, Work under pressure, Repetitive tasks

Essential Skills: Reading text, Document use, Numeracy, Writing, Oral communication, Working with others, Problem solving, Decision making, Critical thinking, Significant use of memory, Finding information, Computer use, Continuous learning

Employer: ACT Toronto
**Unit 3: Critical Thinking**

Critical thinking is the process of reasonably evaluating a situation or problem and then deciding what to believe or do. It is a disciplined way of thinking that a person uses to assess the truth of something. Critical thinking involves defining an idea or subject, gathering and organizing all of the information about it that you can, examining this information from all viewpoints or angles, and then, with an open mind, assessing it. Using your best judgement, you will be able to draw a conclusion.

Imagine that you are beginning a new job as an office clerk. Tomorrow is your first day and you want to make a good impression by being on time. You live out of town and aren’t familiar with the location of your new workplace, but your supervisor has given you a map and detailed driving directions. You’re worried that this route is a little long and that you will be stuck in rush hour traffic as well and be late for work. A friend tells you about a shortcut that he has used to get to an office in the same block. It takes you off the main highway, onto secondary roads and around the back way. It’s been awhile since he drove the route, but he assures you that when he took it last, it was great and saved him over three quarters of an hour. What should you do? When faced with whether or not to listen to the friend’s advice and take the shortcut, the critical thinker doesn’t “flip a coin” to decide. He asks questions, looks at facts, makes detailed observations and is able to draw a conclusion based on the results.
Define

What exactly are you trying to find out? What do you want to prove? What is your goal? You need to answer questions like these in order to define what the puzzle, question or subject really is. In our example, you need to decide if the shortcut is worth taking. You must have a clear understanding of what you want to achieve before you begin to gather information.

Examine

You need to examine all of the information you have gathered, look for mistakes, check for things that don’t fit and weed out anything that is unnecessary.

The alternate route is shorter. You like this because you won’t have to leave home as early. On the other hand, your friend can’t tell you the condition the shortcut road. What if there is construction on that route? Which of these details is more important in deciding your route – the time factor or the unknown condition of the road?

It would be wonderful if all of the information you came across was “true”, but this is not always the case. Be sure you start with facts and not opinions. Opinions often look like facts.

“You will never find a better route than my shortcut!”

Take time to think about this, and ask questions:

- Is the information provable?
- Does it come from a reliable source?
- Is it related to the problem?

Facts are provable.

“A metal roof will last longer than an asphalt-shingled one.” This is a fact. It is provable. You don’t always have to prove a fact yourself, but you do have to make sure that your information is from a reliable source. Before you rely on a piece of information, it must be provable or from a good source.
Opinions are not provable.

They reflect personal beliefs and are not provable. “A medical office receptionist has a better job than an administrative clerk.” “That house is painted a pretty colour.” “Car racing is a more dangerous sport than skydiving.” These are all opinions. Someone else might have a different opinion; might have worked in a medical office or been an admin clerk, seen the same house, or had a different experience with skydiving. They might not agree with you. Opinions are not necessarily bad, but they can have a bad effect if you use them as a starting place for your own thinking.

You need to ask questions in order to get all the facts. Ask many questions!

Some Questions to Ask:

- What is the question I am trying to answer?
- What do you mean by that?
- How did you come to that conclusion?
- Why do you believe that you are right?
- What is the source of your information?
- What happens if you are wrong?
- How do I know you are telling me the truth?
- What is an alternate explanation?
Fact or Opinion?
Learning Activity #4

Identify each of the following statements as fact or opinion by checking the correct box below the statement.

1. It snows more in Ontario than it does in Prince Edward Island.
   - Fact [ ]  [ ] Opinion

2. It’s all right to call your employer to say that you are sick when you want to keep a doctor’s appointment.
   - Fact [ ]  [ ] Opinion

3. You need a university degree to work in a general clerical position.
   - Fact [ ]  [ ] Opinion

4. Someone who is colour blind would not make a good house painter.
   - Fact [ ]  [ ] Opinion

5. Andrea thinks that the skiing is better in British Columbia.
   - Fact [ ]  [ ] Opinion

6. Ottawa is the capital of Canada.
   - Fact [ ]  [ ] Opinion

7. Boys are better hockey players than girls.
   - Fact [ ]  [ ] Opinion

Which of the following Essential Skills were used to complete this Learning Activity?

- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory
Assess

Once you have gathered information, examined it thoroughly, and checked it for mistakes, you must assess it. You must do this by reasoning. You are reasoning when you combine relevant facts to reach a conclusion. You need to weigh all the possibilities. Don’t jump at the first possible solution. Think it over and reason it out, using factual information.

It is often difficult for us to separate “thinking” from “feeling”, but it is important to approach any question with an open mind.

Sometimes, even something as simple as which word is used can change how you think about things. For example, instead of the word dog you could use the words mutt and purebred. However, mutt gives a negative impression, while purebred is positive. If you accept the word mutt without questioning it, you will be starting with someone’s opinion, not a fact.

You may have a bias or prejudice that stops you from properly assessing information.

What is bias? Bias is liking one thing so much more than another that it stops you from being fair.

What is prejudice? Prejudice is forming a negative opinion without having facts or knowledge.

You need to be fair and open-minded even when it involves something you disagree with. If you are not willing to consider more than one side of an argument, you are not using critical thinking.

Don’t be “overly critical”. The point isn’t to be so careful that you find fault where there is no fault. Don’t make mountains out of molehills by overstating small problems.
Drawing a Conclusion

Critical thinking does not guarantee that you will find the truth or the correct answer. You may not have all the information about the subject. Something important may remain undiscovered or simply be unavailable.

It is up to you to think carefully and summarize what information you have. Don’t draw the conclusion based on your emotions, on what your horoscope says, or on whether your friend with the shortcut looks you in the eye and “seems to know what he is talking about”. A critical thinker avoids nonsense, finds the truth and discovers the best course of action. He rejects “guessing” or “having a feeling about” the truth in favour of looking at facts. He bases his conclusions on careful assessment and reasoning.
Steps to Critical Thinking

12. Define the question. Express it clearly and precisely. What are you trying to accomplish?
   - Identify your goal, purpose or objective.
   - Decide what you are looking for and what you want to learn.

   **Ask questions.** What do you already know about the subject? What information do you need to find to answer the question?

2. Examine the points and evidence.
   - Gather information from all sides of the issue.
   - Break your information down into statements or points.
   - Search for ideas that don’t fit or don’t belong.

   **Ask more questions.** What are the prejudices of people who wrote or gave you the information that you have gathered?

3. Assess the information you have gathered.
   - Summarize what you have learned.
   - Organize what you have collected so that you understand it.
   - Sort out facts from opinions and prejudice.
   - Put it in your own words.

   **Ask questions again!** Do you have any prejudices about the subject? What are they?

4. Draw conclusions and form judgements about the argument using logic and reasoning.
Note: The red highlighted letters in the “Steps to Critical Thinking” on the previous page spell out the word “DEAD” which is known as an *acronym*.

Define  Examine  Assess  Draw Conclusions

Critical Thinking

keeps your problem solving skills

“DEAD”

on target
Practising Critical Thinking
Learning Activity #5

When you have several job choices and must decide which one to apply for, you will use Critical Thinking. Circle which of the following are examples of Critical Thinking?

1. I will research the jobs that are hiring near my home. I will evaluate, choose and list the jobs that interest me most.

2. I will consider whether I want to apply for these jobs after reading “Other Information” from the job profiles.

3. I enjoy reading about different jobs.

4. My family and I will decide which college I will attend for specific training in jobs that interest me, based on what we can afford.

Which of the following Essential Skills were used to complete this Learning Activity?

- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory
Fun with Critical Thinking
Learning Activity #6

Here’s a chance to try out your Critical Thinking skills in a fun way by doing some logic problems and ‘mind stretchers’. Challenge yourself and see how many of the following ‘brain teasers’ you can answer correctly. Some of them are tricky, so think carefully. This activity can be more interesting if you can do it with another person or a group. Don’t worry if you don’t get the answers, brain teasers are supposed to trick you.

1. You are participating in a race and by its end, you manage to overtake the SECOND person. In what position do you finish?

2. If you overtake the LAST person in the same race, in what position do you finish?

3. This math teaser must be done in your head only - do NOT write it down.

   Take 1000 and add:
   - 40
   - 1000
   - 30
   - 1000
   - 20
   - 1000
   - and 10

   What is the total?

4. Have you ever seen a square manhole cover? Probably not and there is a good reason for this. Can you think of a reason why it is better to have round manhole covers than square ones?

5. Do they have a 1st of July in England?

6. How many birth days does the average man have?
7. Some months have thirty-one days, some have only thirty. How many have twenty-eight days?

8. Why can’t a man who is living in Canada be buried in the United States?

9. Divide 30 by \( \frac{1}{2} \) and then add 10. What is the answer?

10. Is it legal for a man in Saskatchewan to marry his widow’s sister?

11. If there are 3 bananas on the table and you take away two, how many bananas do you have?

12. How far can a deer run into the woods?

13. A farmer has seventeen sheep, and all but nine die. How many are left?

14. John, the assistant in the butcher shop, is 180cm tall. What does he weigh?

15. How many two cent postage stamps are there in a dozen?

**Try and read the following two paragraphs. You may be surprised!**

The pweor of the hmuan mnid: I cdnuolt blveiee taht I cluod aulaclty uesdnatnrd waht I was rdgnieg. Aoccdrnig to a rscheearcr at Cmagbride Unervtisy, it deosn’t mttaer in waht oredr the ltteers of a wrod are, the olny iprmoatnt tihng is taht the frist and lsat ltteer be in the rghit pclae.

The rset can be a taotl mses and you can sitll raed it wouthit a porbelm. Tihs is bcuseae the huamn mnid deos not raed ervey lteter by istlef, but the wrod as a wlohe. Amzanig ins’t it?

**Which of the following Essential Skills were used to complete this Learning Activity?**

- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Thinking Skills
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory
Unit 4: Job Task Planning and Organizing

Each job comes with its own set of rules.

As a new employee, you will not have to decide on your own job tasks. You will be told when to do something, how to do it, and when to stop. During this training period, your supervisor will show you how to do the job. She will give advice and hints on ways to plan and organize so that you will do the best job. This is the time to ask questions. It is your opportunity to learn and show that you are capable of doing the job. Gradually, as you learn the job, you will develop your own routine or method of performing each task. Knowing how to get the task done, you can begin to plan the best way of doing it.

Repetition means doing the same thing over and over again.

Much of any job involves repetition. When you learn the basics of your job, and put your knowledge to work, you will find yourself developing routines and patterns that repeat every day.

Priorities are things that must be given attention. They are things that must be placed at the top of your “to do” list.

Once you have completed on-the-job training and you are settled into your new clerical position, you will usually organize your own job tasks based on priorities set by your supervisor. While the tasks are mostly repetitive, you will have interruptions by phone calls from clients or suppliers or requests from supervisors. You will often do work for several managers and will have to juggle deadlines to ensure that service is provided to all of them in a balanced way. So, while your days are routine, frequent interruptions or disruptions will require you to be flexible and have the ability to set and adjust priorities.

Flexibility means being able to adapt easily to new, different, or changing requirements.
Time Management

This is a common expression, but actually, you can’t manage time. Time ticks on no matter what we do. Instead, we must learn to manage our own use of time.

Time management is an important part of Job Task Planning and Organizing. It is a valuable skill for an employee to have. However, like any skill it takes time to learn and a lot of practise to develop. One good thing is that we can practise time management in our daily lives - at home, at school, everywhere.

How can we manage ourselves?

- Check present use of time.
- Set goals.
- Organize.
- Develop good work habits.
- Schedule.
- Include leisure time in your planning.
- Don’t slack off.

What do you do with your time?

Have you ever counted minutes like a dieter counts calories? It can often be an eye-opener to see how much time we actually spend doing almost nothing. All these minutes add up to hours and days. How often have you not done something you really wanted to do because you “just didn’t have time”?

Outside of work, it is up to each one of us to decide what an important use of personal time is and what is unimportant. At work, while a supervisor usually decides these things for us, it is up to us to manage time and keep to that schedule.

Remember: It is important not to waste either personal or job time.
How You Use Your Time
Learning Activity #7

Working on this curriculum and attending a learning centre are good ways to start to practise good time management skills to prepare you for the world of work. When we are at school, as when we are in an office job, it is important that we don’t waste time doing things other than work. We need to keep track of what we do throughout the day.

For one day, while you are working on this curriculum, create a “log” or record of everything you do between nine a.m. and four p.m. You can use the sample form on the next page or create your own.

Mark down the number of minutes that you spend on each activity you do. Keep your log with you all the time. At least once an hour mark down your activities. Don’t leave it to the end of the day and then try to remember what you did. You will have forgotten all the little things. Remember to mark down chatting, coffee breaks, etc. No cheating!

After you complete your log, look it over and check your time use.

Add up how much time you spent on each type of activity.

After completing all of the above, consider the results. Would you want to try to change any of your time use? ________________ Comment on why.

If you were an employer paying you to do your work (learning), would you be happy with your time use? __________________________

Comment on why._____________________________________________________________

Remember: Some of the activities in this curriculum may not seem work related, but the Essential Skills you are using and practising are transferable between your daily life, school and your career.
Time Use Log

<table>
<thead>
<tr>
<th>Activity</th>
<th>Number of Minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Which of the following Essential Skills were used to complete this Learning Activity?
- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory
Goal Setting

An important step to managing your time, and therefore a part of Job Task Planning and Organizing is setting goals for yourself and working to achieve those goals. Goals are important to give us direction, long-term vision and short-term motivation.

Goals can be big or little. They can take less than ten minutes to achieve or more than ten years. A goal some days could be getting out of bed! A goal can be getting a job. The important thing about a goal is that it is something that you can do if you try to do it. Look at your goals every day and make goal setting a routine.

Goals are not dreams….

Goals are specific. Make them well planned and clear. Write them down.

Goals are measurable. You can tell when you reach your goal.

Goals are attainable. Something you can actually do or reach.

Goals are rewarding for you. You are more likely to do it if you can see the value or reward at the end.

Goals have a time period or time limit.

It takes practice to be successful at setting “SMART” goals.

Remember: “SMART” is an acronym to help you remember the parts of a goal.
Reaching Your Goals

To be successful at reaching your goal, it is important that you make a goal that is “SMART”. You also need to arrange a realistic plan with timelines or markers.

Break your goal into pieces and concentrate on each hurdle as you cross it. Keeping a record of your progress will help you to track where you are on your way to successfully reaching your goal.

Look at your progress regularly and decide if you are on track. Should you change your plan? Should you get help? Should you give more time to it?

Finally, when you reach your goal, don’t forget to reward yourself for a job well done.

Make a goal.

Arrange a plan.

Run with your plan.

Keep records of your progress.

Evaluate your progress & the results.

Reward yourself.

Remember: “MARKER” is also an acronym. It is one way to remember the important steps you take to reach your goals. You can remember “MARKER” by associating it with distance markers in a race to reach your goal - “the finish line”.

© LLEO 2011, Clerical Essential Skills Training
Look At Your Goals Every Day!

There are many helpful things you can do to reach your goals. What works best for one person might not be as good for someone else. Visual aids, things you can look at, are often a good way to program your brain. Reading and re-writing your goals are two very effective visual aids. By actually writing down your goals and posting them in places where you will see them during your day, you make them more real. You keep your goals front and centre in your mind. One way to make a goal a visual thing and keep track of your progress is by using a Goal Board. For more information on Goal Boards and help in making one of your own, go to http://www.ehow.com/how_4678676_goal-board.html. You could also use your Finding Information skills and search the internet for “How to Make a Goal Board” or ask someone, such as your instructor, for help in learning about goal boards.

Make Goal Setting a Routine

Another aid to successfully reaching your goals is making goal setting a routine. Begin every morning with a "To-Do" list. A list is a good way to help organize and manage your time, and your goals will be right there under your nose every day. Don’t be discouraged if something on your list isn’t finished or a goal is not reached; just add it to tomorrow’s list and try to plan better the next day.
Goal Setting Games

Some people find goals are reached faster if they make a game out of it with steps or markers along the way. They reward themselves for reaching the steps, not just the goal at the end. You can make a game out of meeting the goals you set yourself each day with fun, silly rewards for each time you achieve a marker, take a step in the right direction or make it past a hurdle.

For instance, let’s say there is one little word that you would like to eliminate from your vocabulary before you start your new job in two weeks. You are in the habit of saying it often and know that it won’t make a good impression on your new boss. Pick a non-offensive word to replace it with, and reward yourself each time you make a successful substitution. Instead of hollering that bad word, try yelling "Chocolate!"- Then reward yourself with a piece (just ONE!). Likewise, every time you say the bad word, you can charge yourself a quarter to be put in a jar. (Use the quarters to buy more chocolate… but no cheating!).

Get Support

Sometimes we all need just that little bit of extra help or push to reach our goal. Working toward a meaningful goal often means using outside resources and support, so let others know about your goal. Don’t be afraid to spread the word that you would appreciate some help. Ask a friend or family member to be an ‘accountability partner’ who will hold you to your commitment and follow-up on your progress with you.
Making Your Goal SMARTer  
Learning Activity #8

1. Do you remember reading about Goal Setting and SMART goals? Do you remember what SMART goals are? SMART goals are a proven method of maximizing goal-setting success. You probably have some goals in life that you haven’t reached yet. Pick one of them. (It doesn’t matter if it is a career or personal goal.) As an example, you might choose to learn a Microsoft Office program or improve your typing speed. In the space below, explain how you can make your goal **SMART**. (You can also choose to get more practice using the computer, by typing this out in a word-processing program.)

Goal: ________________________________________________________

____________________________ ______________________
S ______________________________________________________
M ______________________________________________________
A ______________________________________________________
R ______________________________________________________
T ______________________________________________________

2. Make a Goal Board for the goal you chose in #1. You may do this by cut and paste, drawing or using computer graphics and word-art.

---

Which of the following Essential Skills were used to complete this Learning Activity?

- ☐ Reading
- ☐ Oral Communication
- ☐ Document Use
- ☐ Working with Others
- ☐ Numeracy
- ☐ Writing
- ☐ Computer Use
- ☐ Continuous Learning
- ☐ Problem Solving
- ☐ Decision Making
- ☐ Critical Thinking
- ☐ Finding Information
- ☐ Job Task Planning & Organizing
- ☐ Significant Use of Memory

© LLEO 2011, Clerical Essential Skills Training
3. As we have said, To-Do lists are good ways to help you reach your goals. They can also help you make sure that you do all the tasks you need to do in a day, whether you are at work, at home, or at school. It’s a good idea to make To-Do lists a daily routine. It takes some time and practice, though. Start by making yourself a To-Do list using the form below. Tomorrow, refer to the list that you made today, and discuss with your instructor or group how you feel you can improve your goal setting. When you are setting your daily goals, keep these five points in mind.

- Break big tasks up into smaller, more manageable things-to-do.
- Prioritise your goals for the day and do the most important ones first.
- Stick to a policy of doing something now rather than later.
- Always think of how you can best use the present time.
- Do your best to make every day count.

<table>
<thead>
<tr>
<th>PRIORITY</th>
<th>DATE</th>
<th>COMPLETED</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. How do you think you could use To-Do lists in a clerical job?
Get Organized

To be able to work efficiently you need to be organized. Many people find this difficult to do in their personal life and space. This carries over into their work life. You need to plan and organize so that you move from the problem to the goal. The following boxes have some hints to help you get organized.

Organize Your Activities.
- Gather all tools & supplies first.
- Keep on task (control interruptions).
- Simplify (don’t get hung up on the little stuff).
- Put tasks in an order of what comes first, second...last.

Organize Your Work Spaces.
- Keep your workspace clear.
- Clean up the mess and get rid of the clutter.
- A Place for everything & everything in its place.
- Use “systems” & “gadgets”; baskets & bins.
- Get rid of sticky notes & scraps of paper or organize them.

Organize Yourself.
- Get into routines & good habits.
- Use bits of time.
- Do two things at once.
- Use Systems.
  - Schedules.
  - Calendars (Day timers / Organizers).
  - Lists, “To-Do” lists & checklists.
Unit 5: Decision Making

When you are starting out in a new job, your decision-making tasks will be limited. There will be guidelines, instructions or regulations that will help in decision-making for each new task.

Regulations might apply to your hours of work, dress, customer service, policies, etc. Your supervisors will give you instructions with each part of your new job. It is important to understand these instructions and follow them. If you have any questions about these guidelines, ask your supervisor.

As you become more familiar with the job, you will make more decisions. The following list will give you an idea of some of them.

Clerks and Receptionists might have to make decisions on:

- Whether they can assist a customer with a request.
- On the appropriate client codes to assign to a file or document.
- When to interrupt phone calls or put people on hold.
- The length of time to schedule for appointments based on information provided by the clients.
- When to set up meetings so that they are convenient for all those attending.
- What office supplies are needed and when to place the order.
- Whether to enter information onto the computer if there are discrepancies or missing information.
- If paperwork, such as payroll figures, purchase orders or work hours, has been reported correctly.
Unexpected vs. Job-Related Decisions

There are two main types of decision-making situations that you will experience at your new workplace: job-related decisions and unexpected decisions.

**Job-related decisions** are those that you will have to make on a daily basis. Most jobs have a job description where the decisions you are responsible for are usually laid out. These decisions become routine. Your supervisors will give you guidelines on how and when to make these decisions. A job-related decision might be who best can take a call, based on the subject matter and the availability of staff.

**Unexpected decisions** are decisions that are not part of your regular routine. For example, you are entering data on a computer spreadsheet and notice that the weights and bills of lading numbers aren’t clear. Should you rely on your experience and enter what you think the numbers are, call the customer to verify the information, or ask your supervisor. You will need to make that decision.

Knowing whether it is part of your job to make these decisions is important. You need to know what decisions you are responsible for and what is beyond your authority. You don’t want run to your supervisor all the time for decisions that you should be making, but you also don’t want to lose your job for overstepping your authority.

Sometimes the only decision you need to make around unexpected situations is whether to tell your supervisor. Do I call him over now and tell him? Do I mention it at the end of the workday? Ask your supervisor if you are unsure. You don’t want to make decisions that aren’t yours to make.
Decisions Have Consequences

Whatever you decide, your decision will have consequences. Consequences are things that happen because of a decision or action. A Customer Service Clerk may have to decide whether to refer a customer complaint to her supervisor or handle the complaint herself. In effect, she might be responsible for a lost customer or lost revenue for her employer if she deals with the matter unsatisfactorily. Yet, if she doesn’t take care of it herself, she may be seen as not doing her job. All decisions have consequences, good and bad. Remember that **not** making a decision is actually deciding *not to do anything*.

When you are trying to make a decision, it’s a good idea to think about all the possible consequences. What could happen, good or bad, if I made this decision? Sometimes we call these good and bad lists or pro and con lists. Pro means good things and con means bad or negative things.

---

Flipping a coin isn’t a reasonable way to make a decision at work.

Instead, weigh the options and use critical thinking skills to help.
Decision Making
Learning Activity #10

Using the “Decisions” Charts on the next two pages, fill in two possible decisions for each of the following situations. For each decision list the “pros and cons” of the decision.

1. **Situation: Changing Jobs**

You work for a trucking company. For several months now, you have been working in a junior position, helping in the office and filling in on dispatch. You are good at your job and like the people you work with. In fact, you get a ride to work with Megan, a co-worker on the same shift as you. This is a good thing, because you don’t have a car. You presently work part time from 6:00 in the morning to 1:00 in the afternoon. Today you hear that there is a job opening for an accounts receivable clerk on the day shift from 9:00 a.m. to 5:00 p.m. Even though the hours are longer and the work is more difficult, you think you would enjoy the change. The job would have more responsibility and a future. The new job would also mean a pay increase, which would be great because you are saving to buy a car. The job posting says that you have to apply for the job by tomorrow morning. You have a big decision to make. What should you do?

2. **Situation: Covering for another employee**

You are a shipping and receiving clerk of a large department store. It is your day off. The manager calls you to ask you to come in to cover for another employee who has called in sick. She tells you there is a large truckload coming in today and she really needs your help. You don’t have any set plans for the day, but you thought you might get some things done at home and arrange to go out with friends. Should you agree to work, or not?

---

**Which of the following Essential Skills were used to complete this Learning Activity?**

- [ ] Reading
- [ ] Document Use
- [ ] Numeracy
- [ ] Writing
- [ ] Oral Communication
- [ ] Working with Others
- [ ] Computer Use
- [ ] Continuous Learning
- [ ] Thinking Skills
- [ ] Problem Solving
- [ ] Decision Making
- [ ] Critical Thinking
- [ ] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory

© LLEO 2011, Clerical Essential Skills Training
## Decision Making: The Pros & Cons

<table>
<thead>
<tr>
<th>Issue:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Decision: Option 1</th>
<th>Decision: Option 2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pros</strong></td>
<td><strong>Pros</strong></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Cons</strong></td>
<td><strong>Cons</strong></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Preferred Decision:**
## Decision Making: The Pros & Cons

<table>
<thead>
<tr>
<th>Issue:</th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Decision: Option 1</th>
<th>Decision: Option 2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pros</strong></td>
<td><strong>Pros</strong></td>
</tr>
<tr>
<td><strong>Cons</strong></td>
<td><strong>Cons</strong></td>
</tr>
</tbody>
</table>

**Preferred Decision:**

---

© LLEO 2011, Clerical Essential Skills Training
Unit 6: Problem Solving

Good problem solving skills are a benefit to both you and your employer. Problems will come up frequently during your workday. There are many times when it is even your job to solve these problems.

Problems? What Problems?

For clerical positions, problem solving is one of the most important Thinking Skills. There are always problems that you will have to deal with. We have listed some examples below:

- Clerks frequently have to deal with malfunctioning office equipment such as a computer or photocopier. They may try to fix the problem or decide to call a technician.

- A Payroll Clerk might have her computer crash when the payroll was due. She would have to consider various options to solve the problem of getting the pay cheques out on time.

- A Receptionist/Switchboard Operator is asked a question for which she doesn’t have the answer. She must solve the problem by searching for information within the office or contacting an outside source.

- A Dental Office Receptionist encounters problems when appointments are overbooked or cancelled with little or no notice. These appointments must be re-scheduled to best suit the needs of both dentist and patient.

- A Data Entry Clerk realizes that his sources of data information don’t match. The work site time sheet and the injury report each show a different number of hours worked. He must consult with a manager to solve the problem and make the correct entry.
As a new employee, how should you handle problems?

4. **Understand the problem.** Just like you did in Critical Thinking. You have to understand exactly what you have to solve.

**Decide if you can fix the problem on your own.**

- **Yes:** Fix the problem. (You may also want to mention it to your supervisor.)
- **No:** Tell your supervisor. The problem then becomes his to fix.

**How do you know if you can, or should, fix the problem on your own?**

That’s a hard question to answer because there are so many things to consider. Some employers like initiative and others just want you to do your job.

If you notice something, that is health and safety related, you **must always** tell your supervisor.

Watch other employees. What kinds of problems do they solve on their own and what kinds do they get help to fix? If you come across a problem, ask your supervisor for help. Note her reactions to helping you. Does she tell you that you should have gone ahead and solved it yourself? If you’re not sure, ask, “In the future; should I fix it myself or call you?”

A big part of problem solving is to know when to problem solve and when to ask for help! Don’t rush into things just because you think you are capable.

**REMEMBER:** When in doubt, ask!
You’ve decided to fix the problem...now what?

Steps to Problem Solving

1. Continue to understand the problem by stating, “What EXACTLY is the problem?”

First, we have to recognize that there is a problem. Look at the problem closely.

State the problem as specifically and clearly as possible. You cannot properly solve a problem unless you understand exactly what the problem is.

Ask yourself these questions. What do you hope to do or change?
What is in your power to do?

You have been getting a ride to work with Mike. He suddenly decides that he can’t drive you anymore. Is the problem that Mike can’t drive you to work anymore or is the problem that you don’t have a ride to work? Does the problem really have anything to do with Mike? Take him out of the problem and restate it: “I don’t have a ride to work.” That’s what you need to solve. How will you get to work?

2. Find the facts. What do you know about the problem?

Find out all the facts and organize them. Have you seen similar problems before that you could use as a starting point? You may need to gather information or get help from others to solve the problem.

Has this happened before? How did you find a ride with Mike in the first place? Can you repeat that process?

3. Organize by listing solutions. What are some possible solutions?

Organize your information and list solutions. Brainstorm - think of as many solutions as you can without thinking about whether each one is a good solution or not. Just think, think, think, and write ideas down. How have you solved the same problem in the past?
What can you do to find a ride? Post a notice in the staff room? Put an ad in the paper? Ask your friends and co-workers? Can you afford to buy a car or a bicycle?

4. **Which is the best solution?**

Examine your list of solutions and consider them.

Use your Critical Thinking steps to determine if each solution will be a “true” solution. Choose the best ones and imagine each solution in place. Which solution seems the best fit? Will it work? How will you know if you have solved the problem? What are the consequences or the results?

5. **Solve the problem.**

Choose the option that works best and put your solution in place. Make a plan to carry out your chosen solution. When do I start? Think of the Nike slogan, “Just do it”.

6. **Evaluate the results - ask yourself, “How do I know it is working?”**

Did it work? Did it create another problem? After using your chosen solution for a period, evaluate whether it is working or whether it needs to be changed.

Ask other people what they think. Find out how it affected them. See if anyone can help you.

Maybe riding your bike to work will be good for the summer, but it won’t once winter comes. Riding your bike though, gives you time to solve the problem on a more permanent basis.
Module 3: Thinking Skills

Unit 6: Problem Solving

Blocks to Problem Solving:
- Not knowing where to start.
- No planning.
- Not enough information.
- Dislike of subject or topic.

Aids to Problem Solving:
- Confidence.
- Clarity.
- Goals.
- Organization.
- Curiosity.
- Creativity.
- Motivation.
- Open to feedback.
- Practice.

I can do it!
Using Steps to Solve Problems
Learning Activity #11

Go through the first four problem solving steps with the following problem situation. Don’t forget to use Critical Thinking.

**Situation:** You forget to bring your telephone headset to work, but are able to borrow one from a co-worker. While talking to a customer on the phone, you realize that you need to refer to a file. You get up to reach for it and when you do, you stretch the headset cord too far, pull the wires out, and damage the headset.

1. **Understand** and **State** the Problem:

2. **Find** the facts:

   __________________________________________________________________________

   __________________________________________________________________________

3. **Organize by Listing Solutions**

   **Possible Solution 1**
   __________________________________________________________________________
   __________________________________________________________________________
   ________
   ________
   ________

   **Possible Solution 2**
   __________________________________________________________________________
   __________________________________________________________________________
   ________
   ________
   ________

   **Possible Solution 3**
   __________________________________________________________________________
   __________________________________________________________________________
   ________
   ________
   ________

   **Roadblocks/Consequences**
   __________________________________________________________________________
   __________________________________________________________________________
   ________
   ________
   ________

   **Roadblocks/Consequences**
   __________________________________________________________________________
   __________________________________________________________________________
   ________
   ________
   ________

   **Roadblocks/Consequences**
   __________________________________________________________________________
   __________________________________________________________________________
   ________
   ________
   ________

**Which is the best solution?**

4. **Evaluate** your choice: __________________________________________

Which of the following Essential Skills were used to complete this Learning Activity?

- Reading
- Oral Communication
- Document Use
- Working with Others
- Numeracy
- Computer Use
- Writing
- Continuous Learning
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory
Unit 7: Memory Use

Memory is an interesting thing. We use it all the time; so much so that we usually aren’t even aware that we are using it. Did you know where to find the cream for your coffee this morning? Did you know to look in the fridge? That’s memory. We use memory in every aspect of our lives...without even thinking about it!

Job-Specific Memory

Just as it is in our private lives, memory is a very useful tool at work. Employees need to remember certain things in order to do their jobs. Each job has its own specific tasks and ways of doing things that you will have to remember in order to accomplish your work.

These are some examples of things you might need to remember at your job.

- A clerk in a general office setting might have to remember file codes and safe combinations, and memorize established procedures.

- An inventory clerk might memorize a list of preferred suppliers, part numbers and product prices.

- A receptionist would have to remember general office information, such as codes for transferring calls, which calls are directed to which department, and the location of particular files.

- A data entry clerk would need to remember details about how to process a variety of different forms and where to find information stored on computer files.
Tips to Help You Remember:

1. If someone tells you something, repeat it. Saying something aloud helps us to remember the information.

2. If you learn a new skill, practise it. Create your own activity to try it out. This is a good tip to practise while you’re taking this training.

3. Write the information down. Take notes in a notebook. If you have trouble writing the information, draw diagrams and pictures to help you remember. Writing or drawing not only helps you remember, it gives you somewhere to look it up later if you forget.

4. Visualize the information. Picture it in your mind. Try to see the number, the name, the colour, even the process of doing something, in your mind, as if you had taken a picture. Rehearse it in your head. Imagine that you’re doing the task or saying the information aloud. Visualization is a good tool.

5. The more you understand something, the more likely it is that you will be able to remember it. If you don’t understand, ask questions.

6. Think of sentences or phrases that match the words you are trying to remember, or create a word using the first letter of each thing you want to remember. This is called an acronym. Remember the acronyms “DEAD”, “SMART”, “and MARKER” that were used in earlier units?

7. Make up a little chant by saying the words in a rhythm. Do you remember the old Big Mac chant? Two all beef patties, special sauce, lettuce, cheese, pickles, onions on a sesame seed bun. Did we get it right? It’s been a while!

8. To help you remember something that you are reading, try highlighting important information.
Remembering
Learning Activity #12

1. Without flipping back to previous pages, can you remember what the eight tips to help you to remember are?

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

2. What tip could you use to remember…

The *Steps to Critical Thinking* that you learned earlier in this module?

____________________________________________________________________________________

____________________________________________________________________________________


Which of the following Essential Skills were used to complete this Learning Activity?

- [ ] Reading
- [ ] Document Use
- [ ] Numeracy
- [ ] Writing
- [ ] Oral Communication
- [ ] Working with Others
- [ ] Computer Use
- [ ] Continuous Learning
- [ ] Problem Solving
- [ ] Decision Making
- [ ] Critical Thinking
- [ ] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory
Learner Self-Assessment

Now that you have completed Module 3 – Thinking Skills, assess your performance. In the comments section, you can write down thoughts you have about the section. Use a blank sheet of paper if you need more space.

I started this module on (date) _______________ and finished on (date) ___________. I think I worked through it in a reasonable time □ yes □ no

<table>
<thead>
<tr>
<th>Clerical: Module 3 – Thinking Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Unit 1 – Introduction</strong></td>
</tr>
<tr>
<td>I know what the six Thinking Skills are.</td>
</tr>
<tr>
<td><strong>Unit 2 – Finding Information</strong></td>
</tr>
<tr>
<td>I know about the six stages to finding information.</td>
</tr>
<tr>
<td>I can use various design features to help me find information quickly in documents.</td>
</tr>
<tr>
<td>I can use ‘skimming’ and ‘scanning’ when reading to help locate information.</td>
</tr>
<tr>
<td>I am able to use a search engine to locate information on the Internet.</td>
</tr>
<tr>
<td><strong>Unit 3 – Critical Thinking</strong></td>
</tr>
<tr>
<td>I know the steps to Critical Thinking and an acronym to remind me of the steps.</td>
</tr>
<tr>
<td>I know the difference between fact and opinion.</td>
</tr>
<tr>
<td>I have learned that bias and prejudice affect Critical Thinking.</td>
</tr>
</tbody>
</table>
## Unit 4 – Job Task Planning and Organizing

| I know how to keep track of my time and evaluate my time use to deal with priorities. | ☐ yes | ☐ yes but I would like to read more | ☐ no |
| I know what SMART Goals are, how to set SMART Goals for myself, and ways to help me achieve my goals. | ☐ yes | ☐ yes but I would like to read more | ☐ no |
| I have learned about being organized. | ☐ yes | ☐ yes but I would like to read more | ☐ no |

## Unit 5 – Decision Making

| I know how to judge consequences (pro or con). | ☐ yes | ☐ yes but I need more practice | ☐ no |

## Unit 6 – Problem Solving

| I know and can use the four steps of problem solving. | ☐ yes | ☐ yes but I need more practice | ☐ no |

## Unit 7 – Memory Use

| I know and can use at least 4 of the 8 memory tips. | ☐ yes | ☐ yes but I need more practice | ☐ no |

**Comments:** (write down thoughts you have about the section. Use a blank sheet of paper if you need more space)
Office Clerical

Module 4: Documents & Forms

Unit 1: Reading for Learning and Doing
Unit 2: Workplace Documents
Unit 3: Filling-in Forms
Unit 4: Keeping Track
Unit 5: Graphs and Charts
Unit 1: Reading for Learning and Doing

Working in any office requires a great deal of reading. You will read things like instruction manuals, memos from your boss and policies and procedures set out by your employer. You will need skills to help you understand and remember what you have read. Let’s call this “Reading for Learning”.

The second type of reading could be called “Reading for Doing”. This type we use more often in the workplace where we need to find information quickly. We don’t necessarily need to remember the information, we just need to know how to find it and use it.

You will have to read and understand many different kinds of documents. Schedules, catalogues, emails, forms, client files and invoices are just a few. This module will help to provide you with the skills to know which type of reading to use, and how to work with documents.
Reading Strategies

A successful employee uses active reading skills. This section provides tips to help you improve these reading skills.

1. **Think about why you are reading.** You need to understand the purpose of your reading in order to know when you have met that purpose. Ask yourself “Am I reading…

   ✓ **To get a general idea?**” For this, you may only need to read headings and first and last paragraphs or look at diagrams.

   ✓ **To find a single piece of information?**” Decide what information you need. Search for keywords and categories. For example, in a catalogue a chair could be under the keyword “chairs” or the category “furniture”.

   ✓ **To learn details?**” If, for instance, you are reading to learn a computer software program, or how to do a certain task, you will probably need to read and reread the material several times. You can’t stop reading until the details are clear and fixed in your mind.

2. **Preview or look over the text.** This will give you an idea of how difficult the material is, how it is organized and what the topic is. Previewing gets your mind "in gear". It lets you get a mental outline of the topic and reminds you of what you already know.

3. **Picture it while you read.** Create mental images of the procedure or topic described in the text. Draw a picture or imagine yourself performing the procedure. Focus on the details or steps. Pictures are often easier to remember than words so imagining them can improve your memory.
4. **Check your understanding.** Ask yourself questions as you read, to find out how well you understand the text.

   - Am I reading at a steady pace or do I have to slow down and reread sections?
   - Do I already know something about the subject that will help me to understand or do I need to learn some background information first?
   - Do I know what’s important in each section or do I find it hard to decide?
   - Do I know the words or terms used or do I have to look up several words in each section?
   - Can I talk or write about the main ideas in my own words?
   - Have I got a comfortable, quiet place to read without distractions?

5. **Slow down and try to find solutions.** If you don't understand what you are reading:

   - **Highlight** important sections.
   - Use a dictionary or glossary for words you don’t know.
   - Find a place to read without distractions.
   - Re-write it in your own words.
   - Ask someone else for help in understanding.

6. **Apply what you're learning.** As you read, take time to think of examples familiar to you. As soon as possible, try to use the information you have learned.

7. **Use the graphics provided with the written information.** Graphics such as drawings, tables, charts, or diagrams help you picture the information.
Reading Documents with Many Paragraphs

In the workplace, you will have to read long documents. Sometimes, you will be reading these “for learning” - to understand and remember. More often, you will read “for doing” - to find information quickly.

When reading a story, you need to start from the beginning and read to the end, otherwise, you won’t know what is going on. However, when searching for information you don’t need to read the whole book. For example, if you are looking for facts about vacation time in the company’s employee handbook, you don’t need to read about health and safety policies. You need to pick out the right information and read that. This is where your skimming and scanning skills come in handy. Remember when you learned these in the Thinking Skills module in the Finding Information section?

It is also important to understand document organization, so you can quickly find the information you need. To help you find things quickly, a textbook or manual usually contains the following:

- **Table of Contents** - This is at the beginning of a book. It lists the books’ contents and tells you the page numbers where you can find them.
- **Index** - This is usually at the back of the book. It is an alphabetical listing of names and topics along with the numbers of the pages on which they appear.
- **Headings** - The title, subtitle, or topic at the beginning of a paragraph, or chapter is a heading. Headings are usually **bold**, **underlined**, or **both**. They help you to scan and find the main points in the text.
- **Headers and Footers** - These contain information, such as a title, chapter, date, or page number. They are at the top (Header) or bottom (Footer) of a page and usually repeat throughout a document.
- **Font Style Changes** - **Underlining**, **highlighting**, **bold type**, **italics**, **CAPITALS**, **coloured print** and putting words in “quotation marks” all help to bring words or phrases to your attention.
- **Bullets** - These are small dots, squares, dashes or graphics that begin a short descriptive phrase. They are in a list format to make a summary of related titles, ingredients, species, data, key phrases, etc. In a bullet list of bullets, like the one above, the first few words identify the main idea of that paragraph. When you are quickly looking for information, you can just scan down to the first word or two in the bulleted list.
The Memo
Learning Activity #1

Use the memo on the next page to answer the following questions. For each question, think about why you are reading and write the letter for your reason after your answer:

A. To get a general idea
B. To find a single piece of information
C. To learn details

1. If you are the office receptionist, do you need to read this memo?

________________________________________________________

2. What is the memo about?

________________________________________________________

3. A memo consists of what two parts?

________________________________________________________

4. Which paragraph explains what makes up the body of a memo?

________________________________________________________

5. When composing a memo, what should you do?

________________________________________________________

6. Did you need to read the whole memo to find out the answers to these questions?  □ Yes       □ No

The following Essential Skills were used to complete this Learning Activity.

Read    Read    Read    Read
G      O      C      W
R      D      N      W
C      U      C      C
S      M      C      M
J      O      S      M

Thinking Skills

□ Problem Solving □ Decision Making □ Critical Thinking □ Finding Information
□ Job Task Planning & Organizing □ Significant Use of Memory
Memo

To: All staff
From: Joyce Bigelow
Date: June 15, 2010
Subject: How to Write an Effective Memo

A memo (short for memorandum) is a business document meant to be read quickly and passed along rapidly. It is more informal than a letter and is most often used to provide or ask for information, announce a new policy, provide updates or cover other internal issues. Memos have a basic format which should be followed.

All memos consist of two sections: the heading and the body. The heading indicates who is writing to whom, when, and why. The heading should include the following parts: Date, To (who the memo is for), From (who the memo is written by) and Subject (what the memo is about). A cc ("Carbon Copy") is an optional heading to include people to who will receive the memo but do not have to respond.

The body of the memo should contain the following:

- First paragraph provides main idea.
- Second paragraph expands on the details, states the facts or discusses the problem or issue.
- Third paragraph, if necessary, continues the details or explains the importance.
- Last paragraph outlines the action required. Unless the memo’s purpose is simply to inform, you should finish with a clear call for action - who should do what and how long they have to complete it.

When composing a memo, follow these rules and always take the four-step approach to writing: plan what you want to say, write a draft, revise the draft and edit. This helps you to write a professional memo.
1. On a separate piece of paper, list the main points of the seven reading strategies suggested earlier.

2. For the rest of this activity you will need to download a User’s Guide for the Brother Fax-2810. To do this:

   • Go to www.brother.ca.
   • Choose the Drivers & Support tab.
   • Choose the Downloads hyperlink.
   • Use the Select Category dropdown menu to select Fax Machines.
   • Use the Select a Model dropdown menu to select Fax-2820 (under Laser).
   • Click Search.
   • Select the hyperlink for Manuals.
   • Select your language and Search.
   • Click the Download button on the end of the row under User’s Guide.
   • This should bring up a User’s Guide for the Fax-2820. The document was about 160 pages when we looked at it, so we don’t suggest that you print it out. Review it online to answer the following questions. Note: If you are unable to locate this online, you may find another book or catalogue with a Table of Contents and Index. Ask your instructor for help.

3. Find the Table of Contents and print it using the “Print Current Page” command. Remember, you will find the Table of Contents near the beginning of the document. What page number is it? __________

   a. Using the Table of Contents, locate the page which tells you how to load a document ______________________

   b. Find the page in the Table of Contents which tells you how to set the ring volume ____________________

4. Find the index. What page is “Caller ID” on? ______________
5. Quickly look over some of the rest of the User’s Guide. What other features of documents does the catalogue use?

- Headings  □ Yes  □ No
- Headers or footers  □ Yes  □ No
- Font style changes  □ Yes  □ No
- Bullets or numbered lists  □ Yes  □ No
- Main idea at the beginning  □ Yes  □ No

The following Essential Skills were used to complete this Learning Activity.

☐ Reading  ☐ Document Use  ☐ Numeracy  ☐ Writing
☐ Oral Communication  ☐ Working with Others  ☐ Computer Use  ☐ Continuous Learning

Thinking Skills
☐ Problem Solving  ☐ Decision Making  ☐ Critical Thinking  ☐ Finding Information
☐ Job Task Planning & Organizing  ☐ Significant Use of Memory
Unit 2: Workplace Documents

In the workplace, most reading and writing tasks involve documents. Clerical workers spend a large part of their day using documents. Some examples from various Essential Skills profiles are:

- Read phone messages and pass them along to the appropriate individual.
- Read memos regarding policy, procedures, security, personnel changes or daily events.
- Skim incoming mail to see who should deal with it.
- Read forms related to the office, such as insurance forms and hospital admitting forms.
- Read notes from supervisors explaining job tasks or giving instructions.
- Read brochures and letters from companies describing their products.
- Read client files to answer client questions and to prepare physicians or dentists for appointments with clients.
- Read brief letters and faxes from clients.
- Refer to computer manuals to find information on software applications.
- Proofread letters, reports and presentations that are being sent out of the office to clients.
- Interpret policy statements from management.
- Refer to computer manuals to learn how to perform certain functions or how to use new software packages.
- Refer to procedures and regulations manuals when problems arise or instructions must be clarified.
<table>
<thead>
<tr>
<th>Types of Documents</th>
<th>Examples</th>
</tr>
</thead>
</table>
| Lists                        | • Shopping list  
• List of things to do (To Do list)  
• Table of Contents  
• Directories  
• Client contact list |
| Forms                        | • A job application  
• Order form  
• Time logs or sheets  
• Invoice  
• Admission form |
| Labels and signs             | • Workplace Hazardous Materials Information System (WHMIS) labels  
• Labels on packages  
• Labels on client files and forms |
| Notes, letters, memos       | • Reminder notes from other drivers  
• Letters to and from customers  
• Memos from supervisors  
• Detailed work orders |
| Manuals, specifications, regulations | • Service manuals  
• Training manuals  
• Company operating procedures and policies  
• Health and safety regulations |
| Reports, books, journals     | • Incident reports  
• Productivity reports  
• Professional or technical journals relating to job specialty |
Lists

A list is a group of items, which relate to each other in some way. Lists are familiar to us in our daily lives. We make shopping lists, wish lists, “to-do” lists, etc.

For example, I have to buy milk, eggs, bread, lettuce and coffee on my way home from work today. Calling it my “shopping list” gives it a title that shows what the items have in common.

Simple lists can be several single words, one after another under a short title like our shopping list, but they can be made of more than single words. Lists often contain short sentences, or phrases in point form with little or no punctuation. Lists can be bulleted (•) to help show the different points like the examples on the previous page. Numbers provide an order of importance or sequence (the order in which they should occur) to items on a list. Dates or times can also show when something happened or when it should occur.

However, lists can be more complicated than a simple record of items down a page. They can include pictures or graphics, as well as words. They can be “nested” or placed inside another document. Lists can combine with other information, such as dates and they can interconnect with other lists or sources of information. When this happens, we call it a combined list.

<table>
<thead>
<tr>
<th>List name or title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dr. Martin’s Weekly Schedule</td>
</tr>
<tr>
<td>Jan 10 9:00 to 12:00</td>
</tr>
<tr>
<td>13:00 to 16:00</td>
</tr>
<tr>
<td>Jan 11 9:00 to 12:00</td>
</tr>
<tr>
<td>13:00 to 16:00</td>
</tr>
<tr>
<td>Jan 12 8:00 to 16:00</td>
</tr>
<tr>
<td>Jan 13 9:00 to 12:00</td>
</tr>
<tr>
<td>13:00 to 16:00</td>
</tr>
<tr>
<td>Jan 14 9:00 to 12:00</td>
</tr>
<tr>
<td>13:00 to 16:00</td>
</tr>
<tr>
<td>Jan 15 off</td>
</tr>
<tr>
<td>Jan 16 off</td>
</tr>
</tbody>
</table>
Combined Lists

Combined Lists are the result of two or more simple lists working together in one document. They usually take the form of a table, organized according to the order of one of the lists, usually the primary list. Go back and look at the example on the previous page for the doctor’s weekly schedule. You will notice that there are actually two lists. The dates for the 7 days of the week make up one list, and the other list details the activities.

In our example below, we see part of a Table of Contents for a stationery catalogue. It also contains two lists. The first is the list of items in the catalogue and the second is the list of pages. The order is determined by the page number list. In each of the examples, the one on the previous page and the one below, the two lists work together to provide the information that readers need. Neither list, by itself, provides enough information for readers to do their tasks.

<table>
<thead>
<tr>
<th>Item</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Books</td>
<td>2</td>
</tr>
<tr>
<td>Appliances</td>
<td>3-5</td>
</tr>
<tr>
<td>Binders</td>
<td>14-2</td>
</tr>
<tr>
<td>Binding</td>
<td>26-2</td>
</tr>
<tr>
<td>Boards</td>
<td>30-4</td>
</tr>
<tr>
<td>Business Cards</td>
<td>41</td>
</tr>
</tbody>
</table>

List 1

Item

List 2

Page
Tables

A table is an orderly way to display the information of combined lists. It is made up of an arrangement of vertical **columns** (up and down) and horizontal **rows** (across).

Each column represents a list. Columns are often called fields. The most important or primary list/field can be found in the first column. The items in the primary list column are the main subjects or groups to which the other lists (columns) relate. Columns are often given labels or names that describe their content. Column labels can be a word, phrase or a single letter or number.

The table of contents on the previous page is a table. The items are in the first column and the page numbers are in the second column. The labels “Item” and “Page” make up the first or top row. We call this a “label” or “header row” rather than row one. Not all combined lists or tables have header rows or labels, though. In a Table of Contents, the column contents would be obvious even without labels. In other tables you might have to read some of the content to decide what the table described. Look at the table below. There are labels in the header row.
Each row of a table holds the details of the item in the first column (primary list). In our example at the bottom of the previous page, we can see that Jane Atkinson is the Director and she works 5 days a week for a total of 39 hours. It is possible to read across the row and create a sentence. Rows are also called records. In our example, row 1 is the record of Jane Atkinson.

Where a row and a column intersect is called a cell. In the table on the previous page, the cell containing “Reception” is at the point that the “Position” column meets with “Jim Turner’s” row.

**Intersecting Lists**

Intersecting lists are a combination of three lists. They are organized so that you can locate information in one of the lists by searching information in the other two. The driving schedule below is one example of an intersecting list.

It might be easier to understand if we work through this example. The clerk for a transport company creates a schedule. He has six truck drivers and five trucks. One truck is in for service each day except weekends, and each driver gets two days off in a row. The trucks rotate amongst the drivers. You have three lists to work with: Drivers, Days and Trucks.

Using the table below, you can locate which driver drives which truck on what day. Which truck does Woods drive on Wednesday? Look across the header row until you find “Woods” and put your right finger on that column. Scan down the first column listing the days of the week until you reach “Wed” and put your left finger on that row. Now, bring your right finger straight down and your left finger straight across until they meet where the column (Woods) and row (Wed) intersect. There is your answer. **None, Woods is off that day.**

<table>
<thead>
<tr>
<th>Driver</th>
<th>Lui</th>
<th>Woods</th>
<th>Barnes</th>
<th>Cook</th>
<th>Smith</th>
<th>Peters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mon</td>
<td>Truck 1</td>
<td>Truck 2</td>
<td>off</td>
<td>Truck 3</td>
<td>Truck 4</td>
<td>off</td>
</tr>
<tr>
<td>Tues</td>
<td>Truck 2</td>
<td>off</td>
<td>Truck 3</td>
<td>Truck 4</td>
<td>Truck 5</td>
<td>off</td>
</tr>
<tr>
<td>Wed</td>
<td>Truck 3</td>
<td>off</td>
<td>Truck 4</td>
<td>Truck 5</td>
<td>off</td>
<td>Truck 1</td>
</tr>
<tr>
<td>Thurs</td>
<td>off</td>
<td>Truck 4</td>
<td>Truck 5</td>
<td>Truck 1</td>
<td>off</td>
<td>Truck 2</td>
</tr>
<tr>
<td>Fri</td>
<td>off</td>
<td>Truck 5</td>
<td>Truck 1</td>
<td>off</td>
<td>Truck 2</td>
<td>Truck 3</td>
</tr>
<tr>
<td>Sat</td>
<td>Truck 1</td>
<td>Truck 2</td>
<td>Truck 3</td>
<td>off</td>
<td>Truck 4</td>
<td>Truck 5</td>
</tr>
<tr>
<td>Sun</td>
<td>Truck 2</td>
<td>Truck 3</td>
<td>off</td>
<td>Truck 4</td>
<td>Truck 5</td>
<td>Truck 1</td>
</tr>
</tbody>
</table>
Tables
Learning Activity #3

1. Below, you will find a table. Referring to the table, do the following.

   a. Circle the second column label.
   
   b. Highlight the header row.
   
   c. How many lists make up this table? _________
   
   d. What is the primary list? ______________________________
   
   e. What information does this table provide? ______________________________
   
   f. When was asset #1584161 purchased? _________________
   
   g. What is asset #1587922? ______________________________
   
   h. What was the cost of asset #1578084? _________________

<table>
<thead>
<tr>
<th>Asset No.</th>
<th>Asset</th>
<th>Date Purchased</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>1563126</td>
<td>Printer</td>
<td>06/01/07</td>
<td>2,025</td>
</tr>
<tr>
<td>1563190</td>
<td>Press</td>
<td>07/02/08</td>
<td>11,000</td>
</tr>
<tr>
<td>1578084</td>
<td>Copier</td>
<td>07/31/08</td>
<td>1,575</td>
</tr>
<tr>
<td>1584122</td>
<td>Copier</td>
<td>12/28/09</td>
<td>1,199</td>
</tr>
<tr>
<td>1584161</td>
<td>Printer</td>
<td>06/01/10</td>
<td>825</td>
</tr>
<tr>
<td>1587023</td>
<td>Copier</td>
<td>11/07/08</td>
<td>1,231</td>
</tr>
<tr>
<td>1587038</td>
<td>Printer</td>
<td>02/20/10</td>
<td>1,788</td>
</tr>
<tr>
<td>1587182</td>
<td>Computer</td>
<td>03/04/08</td>
<td>17,090</td>
</tr>
<tr>
<td>1587916</td>
<td>Lift</td>
<td>03/05/09</td>
<td>15,464</td>
</tr>
<tr>
<td>1587922</td>
<td>Vacuum</td>
<td>09/15/07</td>
<td>359</td>
</tr>
<tr>
<td>1594236</td>
<td>Press</td>
<td>12/27/07</td>
<td>6,900</td>
</tr>
<tr>
<td>1596732</td>
<td>Copier</td>
<td>01/05/09</td>
<td>799</td>
</tr>
</tbody>
</table>
2. On the next page is a list of the telephone numbers and departments for employees of Stanley Warehousing and Transport. The list is set up as a table. Use the document to answer the following questions.

a. What department does Nathan Fiori work in?

b. What is the Office Manager’s name and phone #?

c. Who would you call if you wanted to confirm a shipping order?

d. Who would you call if you had to report a mechanical problem with your truck?

e. In what order is the list? Circle the right answer.
   i. Numerical order
   ii. Alphabetic order by department
   iii. Alphabetic order by employees’ last name (surname)
   iv. No order (random)

f. There are three lists making up this Directory. What are their titles?
<table>
<thead>
<tr>
<th>Name</th>
<th>Department</th>
<th>Direct Phone #</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bronsky, Yuri</td>
<td>Truck Maintenance</td>
<td>555-1216</td>
</tr>
<tr>
<td>Campanelli, Jodee</td>
<td>Dispatcher</td>
<td>555-1215</td>
</tr>
<tr>
<td>Chang, Tommy</td>
<td>Shipping</td>
<td>555-1217</td>
</tr>
<tr>
<td>Drysdale, Matt</td>
<td>Warehouse Manager</td>
<td>555-1213</td>
</tr>
<tr>
<td>Fiori, Nathan</td>
<td>Receiving</td>
<td>555-1219</td>
</tr>
<tr>
<td>Jamison, Andrea</td>
<td>Office Manager</td>
<td>555-1212</td>
</tr>
<tr>
<td>Matson, Brenda</td>
<td>Sales</td>
<td>555-1218</td>
</tr>
<tr>
<td>O'Toole, Dan</td>
<td>Transport Manager</td>
<td>555-1214</td>
</tr>
<tr>
<td>Zersky, Brian</td>
<td>Human Resources</td>
<td>555-1220</td>
</tr>
</tbody>
</table>
Forms

Workplaces must have ways to gather and manage information. People design forms to make it easy for employees to find, gather and report the information they need.

Because workplaces need so many different kinds of information, they need a wide range of forms. There are many examples below, taken from clerical Essential Skills profiles.

- Credit-related forms such as the Personal Property Branch Registration form, credit applications, settlement forms, collection reports and claim-for-loss forms.
- Banking and financial forms such as withdrawal, deposit and rapid-transfer forms, debit and credit memos, stop-payment forms, deposit and withdrawal slips, investment certificates and Registered Retirement Savings Plan (RRSP) applications.
- Time sheets or schedules to keep track of hours worked.
- "Action Required" forms in response to customer complaints.
- Refund and repair forms.
- Rain-Cheques entitling customers to the sales price when an item becomes available.
- Application forms, work orders, job reports, and questionnaires.
- Supply order forms, purchase orders, cheque requisitions, packing slips and invoices.
- Fax cover sheets.
- Forms relating to registered mail, express post, customs, waybills and lost parcels.
- Forms for payroll or benefits, such as medical plan applications and pension forms.
- Insurance and workers compensation forms.
• Medical forms, such as patient registrations, pre-hospital admission, consent for treatment and test request forms.

• On-screen forms for service complaints, refunds and repairs.

So many forms. It seems overwhelming, but there are some things that all forms have in common. See the diagram on the next page for some of them.

Not only are there many types of forms, there are also different ways we use forms. We read forms to get information to do our jobs. We fill in forms to provide information to other people.

Forms act as an organized way to communicate between the person who has the information and the person who needs the information. When we don’t fill out forms properly, clearly and completely, this communication is broken and information is lost or misinterpreted. There are consequences. Shipments go wrong, files get lost, payments aren’t made, patients don’t get the right care, customers are unhappy, and the list goes on. If nothing else, people will waste time trying to get the correct information.
Common Information Found on Forms

Identifying information
(Company Name, Form Name and or Form Number)

Information identifying who form is to or for.
Possible use of labels

Date form completed

Limited space to enter details or info required, usually headings and lines or boxes

Signature(s) to confirm or authorize

Signing Date

This form is a packaging or packing slip. Shipping and receiving clerks use packing slips to "pick" the items out of their inventory and set them aside as an "order" for shipping. When a business receives a delivery, a staff member, often a clerk or receptionist, uses the packing slip to check that the order is complete.
Forms
Learning Activity #4

1. Why is it important to fill in forms properly, clearly and completely?

2. What are some common features of forms?

3. Use the form on the previous page to answer the following questions.
   a. What is the name of this form?
   b. What company is the form from?
   c. Who is the form to or for?

The following Essential Skills were used to complete this Learning Activity.
- [ ] Reading
- [ ] Document Use
- [ ] Numeracy
- [ ] Writing
- [ ] Oral Communication
- [ ] Working with Others
- [ ] Computer Use
- [ ] Continuous Learning
- [ ] Thinking Skills
- [ ] Problem Solving
- [ ] Decision Making
- [ ] Critical Thinking
- [ ] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory
Registration Form
Learning Activity #5

Use the form on the next page to complete this activity.

1. What business does this form belong to?

2. What is the purpose of this form?

3. Use your scanning skills to find the answers to the following. Remember when you scan a document you don’t read the whole document from start to finish. You just look for key words or phrases.

<table>
<thead>
<tr>
<th>Question</th>
<th>Keywords or keyphrases used:</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is the patient married?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Does the patient have insurance?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What is the patient’s home phone number?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Who would you contact if the patient had an emergency?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>When did the patient register?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The following Essential Skills were used to complete this Learning Activity.

- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory
# Dale Medical Clinic

## PATIENT REGISTRATION FORM

*Please Print*

**Today’s date:**  
August 20, 2010

### PATIENT INFORMATION

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient’s last name:</td>
<td>Ramsay</td>
</tr>
<tr>
<td>First:</td>
<td>James</td>
</tr>
<tr>
<td>Middle:</td>
<td>T.</td>
</tr>
<tr>
<td>Marital status (circle one)</td>
<td>Wid</td>
</tr>
<tr>
<td>Birth date:</td>
<td>07/22/1965</td>
</tr>
<tr>
<td>Sex:</td>
<td>F</td>
</tr>
<tr>
<td>Street address:</td>
<td>235 Hidden Bay Road</td>
</tr>
<tr>
<td>Apt.</td>
<td>204</td>
</tr>
<tr>
<td>City:</td>
<td>Brampton</td>
</tr>
<tr>
<td>Province:</td>
<td>ON</td>
</tr>
<tr>
<td>Postal Code:</td>
<td>M2M 5M5</td>
</tr>
<tr>
<td>Health Card #:</td>
<td>123 456 7890</td>
</tr>
<tr>
<td>Home phone no.:</td>
<td>(555) 225-6422</td>
</tr>
<tr>
<td>Business phone no.:</td>
<td>(555) 267-3310</td>
</tr>
<tr>
<td>Chose clinic because/Referred to clinic by</td>
<td>Dr.</td>
</tr>
<tr>
<td>(please check one box):</td>
<td>Insurance Plan</td>
</tr>
<tr>
<td></td>
<td>Hospital</td>
</tr>
</tbody>
</table>

### INSURANCE INFORMATION

*Please give your insurance card to the receptionist.*

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is this patient covered by</td>
<td>Yes</td>
</tr>
<tr>
<td>insurance?</td>
<td></td>
</tr>
<tr>
<td>Please indicate primary</td>
<td>[Insurance]</td>
</tr>
<tr>
<td>insurance</td>
<td></td>
</tr>
<tr>
<td>[Insurance]</td>
<td></td>
</tr>
<tr>
<td>[Insurance]</td>
<td></td>
</tr>
<tr>
<td>[Insurance]</td>
<td></td>
</tr>
<tr>
<td>[Insurance]</td>
<td></td>
</tr>
<tr>
<td>Patient’s relationship to</td>
<td>Self</td>
</tr>
<tr>
<td>subscriber:</td>
<td></td>
</tr>
<tr>
<td>Name of secondary insurance</td>
<td>[Insurance]</td>
</tr>
<tr>
<td>(if applicable):</td>
<td></td>
</tr>
<tr>
<td>Patient’s relationship to</td>
<td>Self</td>
</tr>
<tr>
<td>subscriber:</td>
<td></td>
</tr>
</tbody>
</table>

### IN CASE OF EMERGENCY

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of friend or relative (not living at</td>
<td>Phillip Ramsay</td>
</tr>
<tr>
<td>same address):</td>
<td></td>
</tr>
<tr>
<td>Relationship to patient:</td>
<td>Brother</td>
</tr>
<tr>
<td>Home phone no.:</td>
<td>(555) 336-6091</td>
</tr>
<tr>
<td>Work phone no.:</td>
<td>(555) 375-6763</td>
</tr>
</tbody>
</table>

The above information is true to the best of my knowledge. I authorize my insurance benefits be paid directly to the physician. I understand that I am financially responsible for any balance. I also authorize [Name of Practice] or insurance company to release any information required to process my claims.

*Signature:*  
**Date:** August 20, 2010

---

© LLEO 2011, Clerical Essential Skills Training
Unit 3: Filling-in Forms

Just as you have to read forms to get and use information, you also have to be able to provide information by filling-in forms yourself. Forms that need information entered into them are the most common forms used at work. You fill in forms for many purposes, such as:

- To request information.
- To provide information.
- To record or document things or happenings.
- To give an opinion or comparison.

The first thing you have to consider when putting information into a form is “Who wants this information and why do they want it?” Without knowing this, you could misunderstand the questions, give the wrong information, or not provide enough information.

The second thing you have to think about is the organization of the form. Earlier in this module, we identified some common features of forms on the Packaging Slip from Frank’s Produce. Not all documents will be the same as this form and some of the common features may be in different places or not there at all. However, it will be easier if you remember that:

- The “identifying information” will be found near the top.
- There will be headings, questions or line and box descriptions to which you should respond.
Look Before You Leap When Filling In Forms

1. You should look over the whole form before starting to fill it in. (It is a common mistake to put the city name and postal code in the address box, only to find later that they each have their own boxes.)

2. Check to see where you should fill-in the information - above, below, or beside the heading or question.

3. Decide which information you should complete and which someone else should complete. For example, you probably shouldn’t complete sections that say “For Office Use Only” unless you are working in the office requesting the form. Your supervisor may fill out some sections while you will fill out others.

Some information will be put into forms regularly, so you should memorize it or write it down and keep it with you. Information like your name, phone number and address are easy. You may need to provide your Social Insurance number and you may find it difficult to remember it. When filling out job applications, you will also need information about your previous employment including addresses and dates. When filling out an Employment Insurance claim you will need to know how long you worked for your last employer and even your mother’s maiden name. **Make sure you have all the information you need.**

Some information you will need to get by referring to another document or source. **Know where to find information.**

Still other information will come from your opinion or your observation and memory. It is important that you seriously consider these bits of information. If you fill out an accident report, the details may be very important later if an insurance claim is required.

**Remember:** When filling-in forms, ask yourself…

- Who needs this info and why do they need it?
- What kinds of information are needed?
- Do I have all the information I need? Where can I get it?
- Where do I put the information?
- Is it up to me to provide the information?
Filling In Forms

Learning Activity #6

1. Earlier in this module, we listed some of the forms that clerks use. Refer back to that list and pick out five forms that a clerk would have to fill in. Create a table on another sheet of paper to list these forms. For each form you have listed in the table, select its purpose(s) from the list below. Write your choice(s) beside each form.

   a. Record or document things or happenings.
   b. Request information.
   c. Provide information.
   d. Give an opinion or comparison.

2. On the next two pages, you will find an Employment Application form. Please fill in the form. If there are words you do not understand, look them up in a dictionary or on the Internet. If you need help with any of the sections, discuss them with your instructor.

3. In your own words, explain the meaning of the following words or phrases that are often in job applications and other forms.

   a. Applicant __________________________________________
      ___________________________________________________
   
   b. References _________________________________________
      ___________________________________________________
   
   c. Disclaimer _________________________________________
      ___________________________________________________
# Employment Application

## Applicant Information

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First</th>
<th>M.I.</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Street Address</th>
<th>Apartment/Unit #</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>City</th>
<th>Prov.</th>
<th>Postal Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Phone</th>
<th>E-mail Address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date Available</th>
<th>Social Insurance #</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Position Applied for

## Do you have a criminal record?  YES  NO  If yes, explain

## Education

<table>
<thead>
<tr>
<th>High School</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
<th>Did you graduate</th>
<th>YES  NO</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>College</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
<th>Did you graduate</th>
<th>YES  NO</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other Training</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
<th>Did you graduate</th>
<th>YES  NO</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## References

*Please list three references.*

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Company</th>
<th>Phone ( )</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Company</th>
<th>Phone ( )</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Company</th>
<th>Phone ( )</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

## Previous Employment (include volunteer work, if applicable)

<table>
<thead>
<tr>
<th>Company</th>
<th>Phone ( )</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Module 4: Documents & Forms

<table>
<thead>
<tr>
<th>Address</th>
<th>Supervisor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Title</td>
<td>Starting Salary $</td>
</tr>
</tbody>
</table>

**Responsibilities**

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
<th>Reason for Leaving</th>
</tr>
</thead>
</table>

May we contact your previous supervisor for a reference? [ ] YES [ ] NO

<table>
<thead>
<tr>
<th>Company</th>
<th>Phone ( )</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Address</th>
<th>Supervisor</th>
</tr>
</thead>
</table>

| Job Title | Starting Salary $ | Ending Salary $ |

**Responsibilities**

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
<th>Reason for Leaving</th>
</tr>
</thead>
</table>

May we contact your previous supervisor for a reference? [ ] YES [ ] NO

<table>
<thead>
<tr>
<th>Company</th>
<th>Phone ( )</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Address</th>
<th>Supervisor</th>
</tr>
</thead>
</table>

| Job Title | Starting Salary $ | Ending Salary $ |

**Responsibilities**

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
<th>Reason for Leaving</th>
</tr>
</thead>
</table>

May we contact your previous supervisor for a reference? [ ] YES [ ] NO

<table>
<thead>
<tr>
<th>Company</th>
<th>Phone ( )</th>
</tr>
</thead>
</table>

**Disclaimer and Signature**

I certify that my answers are true and complete to the best of my knowledge.

If this application leads to employment, I understand that false or misleading information in my application or interview may result in my release.

Signature: ___________________________ Date: ____________

---

**The following Essential Skills were used to complete this Learning Activity.**

- [ ] Reading
- [ ] Oral Communication
- [ ] Document Use
- [ ] Working with Others
- [ ] Numeracy
- [ ] Computer Use
- [ ] Writing
- [ ] Continuous Learning
- [ ] Problem Solving
- [ ] Decision Making
- [ ] Critical Thinking
- [ ] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory
Unit 4: Keeping Track

We all have busy lives, with many different things happening. Sometimes, we have so many things on the go that it is hard to stay organized and remember everything that we should. This is where forms can be useful to us. “To-Do” lists, as we talked about earlier, schedules, time sheets, travel expense records and travel logs, all help to keep us on track. They help us remember what we have done and what we need to do.

Organizers

Organizers, day-timers and daybooks are calendars that help us to schedule our lives, keep track of activities and make short notes to ourselves. They are an important part of office life. Not only do reception, administrative and clerical staff have to keep track of their own schedules, they often have to keep track of the schedules of others in their workplace.

Even before you start working, a daybook can help you keep track of your daily activities, appointments and tasks. Things like training assignment due dates and your goal timelines are some examples. Another purpose of daybooks is to record upcoming events. Writing down information about an event helps you to get the details clear in your mind and helps you to remember them in the future.

There are many different forms of daybooks and organizers, from simple pocketsize calendars with squares for writing to electronic PDAs (personal data assistants) and computer-based organizer software. What you use is up to you, but start now!

Most offices now have some type of organizing software that includes ways to keep track of business contacts, appointments, tasks, to-do lists, special events, etc.
Online Calendars
Learning Activity #7

1. Since you will probably have to use a computerized calendar once you are working - why not start now? Yahoo, Hotmail and Google have free online calendars you can use. Sign up for a Yahoo, Hotmail or Google email account and the calendar comes with it. Start to organize yourself now.
   
a. If you don’t already have a Yahoo, Hotmail or Google account sign up for one.

b. When you are signed in to your account, locate the calendar page.

c. Read some of the tutorials that explain how to add events, add tasks, share information with friends, etc.

d. Enter at least ten events and things to do. These could be birthdays, dates to remember, appointments or tasks that you have to complete.

e. Try to use your calendar every day for at least a week, updating it with new tasks and events and removing those that are complete.

2. Write a short paragraph or two about your online calendar. Use a word processing program to do this. Being able to write well is important for clerical jobs. Do your best and make sure to use the spelling and grammar checks to find your mistakes.

The following Essential Skills were used to complete this Learning Activity.

- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning

Thinking Skills
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory
Time and the 24-Hour Clock

Many businesses use the 24-hour clock for their scheduling. This may be unfamiliar to you. It may seem confusing but it is quite easy. A day is divided into 24 hours, from midnight to midnight. The 24-hour clock is divided the same way, with these hours numbered from 0 to 23. This time system is the most common throughout the world. The 12-hour clock, which uses a.m. and p.m., is used primarily in the United States and Canada.

With the 24 hour clock, times are usually written as 4 digit numbers. We write these as hh:mm (for example 11:23), where hh is the number of hours that have passed since midnight and mm is the number of minutes that have passed since the last full hour. A colon (:) may be between the hours and the minutes. Zero may be in front of the hour to make a 4 digit number (for example 01:15 is the same as 1:15). For time-keeping which involves seconds, the times can be written as 6-digit numbers or hh:mm:ss (01:23:45).

When speaking, we usually say the full hours as the number followed by "hundred" with an optional "hours" to show we are referring to a time of day. For example, we would say "sixteen hundred" or "sixteen hundred hours" for the time 16:00. For the time 18:30, we would say "eighteen thirty". 18:05 is either "eighteen oh five" or "five past eighteen".

In 24-hour time, the day begins at midnight, 00:00, and the last minute of the day is 23:59. Sometimes, 24:00 refers to midnight at the end of a day. 24:00 hours is the same time as 00:00 hours.

The 12-hour and 24-hour times are similar from 1:00 a.m. to 12:59 p.m. (01:00 to 12:59). To convert a 12-hour time to the 24-hour notation from 1:00 p.m. to 11:59 p.m. (13:00 to 23:59), 12 hours are added to each hour. From 12 midnight to 12:59 a.m. (00:00 to 00:59) 12 hours are subtracted (See conversion chart to the right).
The 24 Hour Clock
Learning Activity #8

1. Fill in the blanks in the following time conversion table.

<table>
<thead>
<tr>
<th>12hr Time</th>
<th>24hr Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>12:25 am</td>
<td>1:00hrs</td>
</tr>
<tr>
<td>2:35 am</td>
<td>1600hrs</td>
</tr>
<tr>
<td>4:30 pm</td>
<td>16:30</td>
</tr>
<tr>
<td>5:15 am</td>
<td>20:15</td>
</tr>
<tr>
<td>5:15 pm</td>
<td>21:15</td>
</tr>
<tr>
<td>8:12 am</td>
<td>08:12</td>
</tr>
<tr>
<td>11 pm</td>
<td>23:00</td>
</tr>
<tr>
<td>1:37 pm</td>
<td>01:37</td>
</tr>
</tbody>
</table>

2. Write out in words how you would say the following:
   a. 02:00hrs __________________________________________
   b. 20:10hrs __________________________________________

3. How would you write the following as 24 hour times?
   a. oh six fifty-nine ______________
   b. oh seven hundred hours _____________
   c. twenty-three thirty hours ____________
Unit 5: Graphs and Charts

In many documents, visual representations are included to help readers see, understand and remember the information better. These visuals include graphs, charts, diagrams, schematic drawings and photographs. Here are some examples from the Essential Skills profiles to show how clerical workers use visuals:

- Read graphs showing production rates of various departments.
- Refer to statistical graphs and charts.
- Create graphs and charts from raw data for financial or other reports.
- Obtain information from graphs and charts presenting sales, registrations, financial information or other data and create updated reports.
- Review pie or bar charts showing the performance of investments.
- Plot information on a graph, for example, to show the volume and subject matter of telephone calls and customer visits.
- Interpret workplace hazardous materials information system (WHMIS) symbols and safety posters in the workplace.
- Refer to diagrams or drawings when assembling or maintaining equipment.
- Reference sketches of computer screens in computer manuals when learning how to use new software.
- Reference diagrams on photocopiers to learn how to operate them.
  - Refer to labelled diagrams of new forms to learn how to complete them.
  - Study pictures and assembly drawings to identify parts of similar size, shape and function and to determine the placement and assembly of parts.
  - View sketches drawn by customers to identify
required parts.

- Interpret customer sketches and scale drawings of items to be built. These drawings give details of parts and materials and fabrication specifications.
- May interpret scale drawings, such as topographical maps and blueprints, to plan work schedules or identify material requirements.

Since there is so much information presented in these kinds of visual displays, it is important to understand how to read and construct them. Throughout this training we have included many pictorial representations (pictures, diagrams and drawings) to help in explaining what we mean. If you have had trouble understanding these, or if you have any difficulties as we continue, please ask your instructor for more help. Over the next 15 pages, we will be discussing some of the most common graphs and charts.

**Graphs**

A graph is a diagram or drawing used to present facts in visual form. It shows the changing relationship between things, usually in numbers or amounts. Graphs use bars, lines, curves, pictures or parts of a circle to display data. The most common graphs are bar, circle (pie) and line graphs. A graph is one of the easiest ways to compare numbers and is used to make facts clearer and more understandable.

As you can see from the examples on the previous page, graphs are used in many different ways. However, reading and interpreting graphs can be confusing. The most common mistake people make is trying to get information from a graph before really understanding it. Here are some suggestions:

1. Scan the graph for:
   a. The title.
   b. The labels or words describing each section.
   c. The key or legend.

2. As you read the graph, think about whether the information makes sense. For instance, if the graph is about amounts of rain, think about how much rain you usually get. Compared to what you know, does the information seem sensible? If so, you
are probably reading the graph correctly. If not, try to figure out why it isn’t making sense before you try to answer any questions!

3. Next, be sure you know what information you are trying to find. You probably won’t need to read and analyze the whole graph to get the one or two pieces of information you need.

4. Use clue words to help you. Are you asked for a single piece of information, are you asked for several pieces of data, or are you asked to compare or find how much change has occurred?
Pictographs

A pictograph uses symbols or small pictures to represent data. A key or legend shows the numeric value given to each symbol. The size, number or colour of the symbols can vary to indicate change. Below is a pictograph representing car sales for five salespersons at a dealership. From this we can quickly see that Lloyd is selling the most cars at 60.

A pictograph may be drawn with symbols running horizontally (left to right) as this one is or vertically (up and down).

Note the parts of the graph:

- The title explaining what the graph is about.
- The rows making up the vertical or y-axis variables. In this case, the label shows it as salespersons.
- The columns making up the horizontal or x-axis variables. In this case, the numerical values from 0 to 100.
- The key or legend explaining the symbols. Here we see that one picture of a car equals 10 cars sold.
Pictographs
Learning Activity #9

1. Do a survey of at least five people on one of the following topics:

   a. How many cups of coffee or tea they drink in a day.
   
   b. How many hours of television they watch in a day or week.
   
   c. How many people are in their family.

2. In the space below or on a separate sheet, complete a table of your survey.

3. In the space below or on a separate sheet, create a pictograph of your survey, including a title, legend, and x and y-axes. Make sure your symbols/pictures relate to the topic.

The following Essential Skills were used to complete this Learning Activity.

- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory
Bar Graphs

Bar graphs are easy to create and read. They are used to compare information or look at information over time, such as years. In a bar graph, the information is shown in data bars with the values represented by the height or length of the bars. Usually, the graph displays several bars to compare the data. The varying bar height or length represents the value, with the tallest or longest being the greatest value.

Notice that the parts of the graph are similar to those in the pictograph. In this case, we have labels to show the horizontal or x-axis is made up of the years and the y-axis is the number of chocolate bars produced. It is easy to compare the years and to see that the production rates are constantly increasing.

Bar graphs can come in various designs or formats. They may look like the example above or the bars may be horizontal. They may also compare more than one category or “series”. These are sometimes called parallel bar graphs.

The example below is a horizontal parallel bar graph comparing the number of new and repeat clients from the years 2007 to 2011.
Bar graphs can also combine several series into one bar to show the accumulated total. In the graph below, the Elite computers series is added on top of the Innova computers series to show the total sales of computers for each region. Notice this graph has labels for the axes, with the x-axis being the Regions and the y-axis being the number of units sold in 1,000’s. There are also grid-lines.
Bar Graphs
Learning Activity #10

1. In a bar graph, how do you know which data bar represents the category with the greatest amount or value?

2. Looking at the graph on the previous page representing the # of Repeat and New Clients for the Last Five Years, answer the following:
   a. In 2008, were there more new or repeat clients?
      - New
      - Repeat
   b. Approximately how many new clients were there in 2007?
   c. Is the trend for new client numbers increasing or decreasing?
      - Increasing
      - Decreasing

3. Looking at the graph on the previous page representing the NewTech Computer Sales by Region, answer the following:
   a. Which region sold the most computers?
   b. What amount does each grid-line represent?
   c. Approximately how many Innova computers were sold in Ontario? (*Hint: Count the grid lines and multiply by their value.*)

Trend: a general direction of movement for prices, rates or numbers.
d. How many Elite computers were sold in Ontario? ____________

The following Essential Skills were used to complete this Learning Activity.

- [ ] Reading
- [ ] Document Use
- [ ] Numeracy
- [ ] Writing
- [ ] Oral Communication
- [ ] Working with Others
- [ ] Computer Use
- [ ] Continuous Learning
- [ ] Thinking Skills
- [ ] Problem Solving
- [ ] Decision Making
- [ ] Critical Thinking
- [ ] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory
Line Graphs

A line graph is used to display data or information that changes value continuously over time – data trends. These graphs are easy to create and read. They can even allow you to make predictions about future data.

Line graphs compare the two variables of an intersecting list. By drawing a continuous line between all the points on a grid, the graph shows how the variables are related to, or different from each other. Each point represents a cell of the intersecting list.

Let's look at the various parts of a line graph.

- **Title** – As in other graphs, the title should tell us what the graph is about.
- **Axes** – Both x-axis (horizontal) and y-axis (vertical) represent different data.
- **Labels** – Each of the x and y-axes tell us what kinds of data are covered.
- **Scales** – Both axes give numbers to show how much or how many.
- **Points or Dots** – Are added at places along the lines to help define specific values where the lists intersect.
- **Lines** – Connect the points, provide estimates of values between the points and visually show the trend.

You could think of a line graph as a bar graph with the tops of the bars shown as points which are joined by lines with the rest of the bar removed. Consider the chocolate bar production graph from the Bar Graph section. This is redrawn as a line graph below on the right.
Our example graph on the previous page only showed one category of data – the Almond Clusters Bar. However, as we said earlier, the line graph can represent intersecting lists’ data. These can cover multiple categories, like the intersecting list in the table below.

<table>
<thead>
<tr>
<th>Years</th>
<th>Almond Clusters</th>
<th>Chewy Bites</th>
<th>Peanut Crisp</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>51700</td>
<td>49500</td>
<td>53500</td>
</tr>
<tr>
<td>2008</td>
<td>52400</td>
<td>51000</td>
<td>53250</td>
</tr>
<tr>
<td>2009</td>
<td>53000</td>
<td>51000</td>
<td>53750</td>
</tr>
<tr>
<td>2010</td>
<td>53250</td>
<td>49500</td>
<td>54000</td>
</tr>
<tr>
<td>2011</td>
<td>53500</td>
<td>51650</td>
<td>54250</td>
</tr>
</tbody>
</table>

This can be graphed as follows:

![Chocolate Bar Production Rates 2007 to 2011](image)

Notice that each line is a different colour to show each type of chocolate bar. Each line also has its own shape (triangle, diamond and square). Each shape on the graph indicates the number of that type of bar produced in that year.
Line Graphs
Learning Activity #11

1. What are line graphs used for?

2. On the line graph on the previous page, use arrows to label the following parts of the graph:
   a. Title
   b. Axes – Both x-axis and y-axis
   c. Labels – For each of the x and y-axes
   d. Scales – For both axes
   e. Points or Dots
   f. Lines
   g. Legend

3. Using the graph for Chocolate Bar Production Rates on the previous page answer the following:
   a. Which bar is produced the most?
   b. Which bar has continuously had increased production?
   c. Which bar experienced a large decrease in production for one year?
d. In what year did the decrease happen?

The following Essential Skills were used to complete this Learning Activity.

☐ Reading       ☐ Document Use       ☐ Numeracy       ☐ Writing
☐ Oral Communication ☐ Working with Others ☐ Computer Use ☐ Continuous Learning

 Thinking Skills
☐ Problem Solving       ☐ Decision Making       ☐ Critical Thinking ☐ Finding Information
☐ Job Task Planning & Organizing ☐ Significant Use of Memory
Circle Graphs or Pie Charts

Circle graphs, also known as Pie charts, show how a whole thing is divided into parts. Some common features of circle graphs are:

- They are circular in shape.
- The whole circle represents the whole amount.
- The circle is then split into pieces (segments or sectors), with each piece of the pie (sector of a circle) representing a part of the whole.
- The size of each piece/sector is relative to the amount it represents, making it easy to make visual comparisons.
- The total of all the pieces or sectors is equal to the whole amount.
- Data may be displayed in percents, fractions or cents per dollar. If you add up all the percentages in a pie chart, the total would be 100%.

Below is a circle graph representing the results of a travel agency survey on “Why People Travel”. Note the parts of the graph:

- The title.
- The data labels. In this example, showing the category and the percentage.
- The varied colours or pattern to help distinguish the different pieces/segments/sectors.
- The legend.

Survey on Why People Travel

<table>
<thead>
<tr>
<th>Pieces/segments/sectors</th>
<th>Data labels</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Business</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visit Friends or Relatives</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work Related</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leisure</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Like other graphs, circle graphs can have different designs or formats. Below are some other examples of circle graphs or pie charts from Wikimedia.org.

The chart to the left shows the circle in 3-dimensional effect. The pieces or segments are pulled apart for a better visual effect.

The chart to the right has no labels on the segments as the visual has a better impact than the numbers. Notice that the legend follows the clockwise order of the segments from the top or 12 o’clock position.
In the graph to the left showing the breakdown of electricity sources, the data labels have been placed outside the pieces or segments and combined with the legend. The location next to the segment (or the line linking the label to the segment), along with the colour box, allows the reader to make the connection.
This series of pie charts allows the reader to easily compare the carbohydrate, protein and fat contents of four different diets.
Some circle graphs even get creative, like this one on the right that breaks down the costs of coffee.

**Creating a Circle Graph or Pie Chart**

When you are creating a circle graph, there are some useful steps to follow:

1. **Is the Data Right for a Circle Graph?** Check to see if the data adds up to a "whole" thing.

2. **Decide on the parts.** What will be the different parts, or data groups, of the whole. Usually putting your data into a table helps you to see this.

3. **Calculate Percentages, Fractions or Cents on the Dollar.** Convert each data group’s amount into a percentage or fraction of the whole. (Note: This can be done easily in spreadsheet computer programs.)

4. **Draw the Graph.** Draw a circle and draw in a sector for each data group. Make the pie pieces as close as possible to the percentage of the specific data group.

5. **Add Title, Legend and Labels.** Create a title that helps the reader to know what the chart is about. Something like John’s Pie Chart won’t work. Next, include a legend and labels.
Circle Graphs/Pie Charts
Learning Activity #12

1. What are circle graphs used for?

________________________________________________________

2. Why do you think circle graphs are also called pie charts?

________________________________________________________

3. Refer to the example graph three pages back titled Toronto visible minority population characteristics (Census 2006) to answer the following:
   a. What population group is represented by the fourth segment?
      ______________________
   b. What are the three largest population groups?
      ______________________, ____________________ and ____________________
   c. Did you need to be able to see the colours of the segments to answer the above questions a and b? Why or why not?
      ____________________________________________________
      ____________________________________________________

4. Refer to the example graph three pages back titled Electricity in the USA 2006 to answer the following:
   a. What percentage of the power came from Nuclear?
      ______________________
   b. What colour was used to represent Natural Gas?
      ______________________
   c. What was the second largest source of electricity?
      ______________________
5. Look at the series of pie charts comparing the carbohydrate, protein and fat contents of four different diets found two pages ago.
   
   a. Which diet has the most percentage of protein content? 
      ____________
   
   b. Which diet has the least carbohydrate percentage? 
      ____________

6. In the module on Thinking Skills, for Activity #7 - How You Use Your Time, you created a log of what activities you spent your time on and how much time you spent at them.
   
   a. Use the information you gathered for that activity to fill in the table below. You will need to add up the total minutes for each activity.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Total Time</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   b. Open Microsoft Excel or another spreadsheet program.

   c. In the spreadsheet, recreate the above table with your information completed.

   d. Create a pie chart of the data in the spreadsheet table. Select the whole area of the table and click on the graphing icon and

The following Essential Skills were used to complete this Learning Activity.

- Reading
- Oral Communication
- Working with Others
- Numeracy
- Computer Use
- Writing
- Continuous Learning
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory
choose Pie Charts. You may design the graph however you wish. If you need more help doing this, go to the Help section of Excel and type in *Create a Pie Chart*. 
Learner Self-Assessment

Now that you have completed Module 4 – Documents and Forms, assess your performance. In the comments section, write down thoughts you have about the module. Use a blank sheet of paper if you need more space.

I started this chapter on (date) _______________ and finished on (date) ___________. I think I worked through it in a reasonable time.

☐ yes  ☐ no

Clerical:
Module 4 – Documents & Forms

Unit 1 – Reading for Learning and Doing

I understand the differences in reading for learning and reading for doing work.  ☐ yes  ☐ I need more time to decide  ☐ no

I learned active reading skills.  ☐ yes  ☐ yes but I need more practice  ☐ no

I learned skills to read documents with many paragraphs.  ☐ yes  ☐ yes but I need more practice  ☐ no

Unit 2 – Workplace Documents

I know about different kinds of lists and how to use them.  ☐ yes  ☐ yes but I need more practice  ☐ no

I have an understanding of the parts of a table and how to make and interpret tables.  ☐ yes  ☐ yes but I need more practice  ☐ no

I have a basic understanding about the design of forms and how to get information from them.  ☐ yes  ☐ yes but I need more practice  ☐ no

Unit 3 – Filling-in Forms

I know some of the reasons that a clerical worker fills-in forms.  ☐ yes  ☐ yes but I need more practice  ☐ no

I understand the steps to take when filling in a form.  ☐ yes  ☐ yes but I need more practice  ☐ no
### Unit 4 – Keeping Track

<table>
<thead>
<tr>
<th>I have learned about online calendars.</th>
<th>□ yes</th>
<th>□ yes but I would like to read more</th>
<th>□ no</th>
</tr>
</thead>
<tbody>
<tr>
<td>I understand the 24 hour clock time-keeping system.</td>
<td>□ yes</td>
<td>□ yes but I would like to read more</td>
<td>□ no</td>
</tr>
</tbody>
</table>

### Unit 5 – Graphs & Charts

<table>
<thead>
<tr>
<th>I learned about the parts of a graph.</th>
<th>□ yes</th>
<th>□ yes but I need more practice</th>
<th>□ no</th>
</tr>
</thead>
<tbody>
<tr>
<td>I learned how to read Pictographs, Bar Graphs, Line Graphs and Circle Graphs/Pie charts.</td>
<td>□ yes</td>
<td>□ yes but I need more practice</td>
<td>□ no</td>
</tr>
<tr>
<td>I learned when to use one type of graph over another.</td>
<td>□ yes</td>
<td>□ yes but I need more practice</td>
<td>□ no</td>
</tr>
<tr>
<td>I learned how to create a graph in a spreadsheet program.</td>
<td>□ yes</td>
<td>□ yes but I need more practice</td>
<td>□ no</td>
</tr>
</tbody>
</table>

**Comments:** (Write down thoughts you have about this section. Use a blank sheet of paper if you need more space.)

________________________________________________________________________________________________________
________________________________________________________________________________________________________
________________________________________________________________________________________________________
________________________________________________________________________________________________________
________________________________________________________________________________________________________
________________________________________________________________________________________________________
________________________________________________________________________________________________________
Office Clerical

Module 5: Records Management

Unit 1: Introduction
Unit 2: Filing
Unit 3: Data Entry
Unit 1: Introduction

Organizing documents and other pieces of information is an important part of clerical work in most offices today. We live in an information-focused society and businesses need to access and maintain more information than ever before. We must be able to locate this information quickly and easily when we need it. The method of organizing and storing information is known as filing or records management. By using this method, a record can be controlled from the time it is created until it is destroyed.

There are many types of records, such as:

- Lists
- Forms
- Documents
- Letters
- Receipts
- Reports
- Manuals

At one time, managing records meant dealing with paper files. Now, with the massive amount of information to be filed and the need to conserve space, there are many new methods for storing information. Records come in many formats, such as:

- Electronic - video recordings, audio recordings, multimedia presentations, slide presentations, online content, etc.
- Microforms - a film or paper for storing miniaturized reproductions of records. Microform images are commonly reduced about 25 times from the original size. Also called microfilm (reels) and microfiche (flat sheets).
- Magnetic media - hard drives, diskettes, computer tapes, CDs, DVDs and USB drives.
After a record of information is created, it needs to be maintained safely and securely so that when it is needed, it is available. The three key elements in making records management effective are documentation, consistency and accuracy.

**Documentation**

By documentation, we mean the written procedures that tell us how, where and when to file something. Documentation provides a way to communicate the rules and procedures to everyone who has access to the records. If everyone is following the same established and documented procedures, an efficient records management system will be the result.

**Consistency**

Consistency means that the filing rules remain the same from day-to-day and from person-to-person. Consistency is lost when several people using the same records use different rules or procedures for filing. Often when a new filing clerk settles into an office, one of the first things she does is reorganize the files. If each clerk uses her own different filing system, it can make records almost impossible for others to find.

**Accuracy**

The last and most important requirement is accuracy. No amount of documentation and consistency can save a record system from careless filing. Putting files in the wrong order, making a mistake in a file name, or having documents stuck together are all ways to make it difficult to find the information needed. The delays in obtaining information lead to lost work time, dissatisfied customers or uninformed decision-making. All of these things can cause financial loss to the employer.

**REMEMBER:**

Documentation + Consistency + Accuracy = Records management

By following the set rules of filing in an office, information can be retrieved at a future date by any employee without any confusion.
Filing Elements
Learning Activity #1

1. What are the three important elements to a good filing system?

________________________________________________________
________________________________________________________
________________________________________________________

2. In your opinion, which is the most important element and why?

________________________________________________________
________________________________________________________
________________________________________________________

3. Complete the online tutorial at:

Which of the following Essential Skills were used to complete the Learning Activity on the previous page?

- [ ] Reading
- [ ] Document Use
- [ ] Numeracy
- [ ] Writing
- [ ] Oral Communication
- [ ] Working with Others
- [ ] Computer Use
- [ ] Continuous Learning
- [ ] Thinking Skills
- [ ] Problem Solving
- [ ] Decision Making
- [ ] Critical Thinking
- [ ] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory
Unit 2: Filing

There are several ways to determine the order to use when filing and storing information. The most common method is the alphabetic system. Another choice would be to file using the chronological system. This means that information is filed by time and date rather than by alphabet. Other systems, such as numerical, geographic and subject filing, use alphabetic rules as their base.

Each company may have different procedures for storing information in an alphabetic system. These procedures can vary from business to business, or even department to department. There is an international organization designed to help office personnel file information more easily, efficiently and consistently. The Association of Records Managers and Administrators, Inc, or ARMA, has created a list of Alphabetic Filing Rules. These are rules for storing information alphabetically. In this section, you will learn some of the rules set out by ARMA.

Basic Filing terms

To understand filing procedures and to be able to apply them properly, you need to understand some basic filing terms. We will review these over the next few pages.

Unit

In an ARMA system, records are indexed (put in order) unit by unit. Each record name or file is broken down into its parts, called units. A filing unit may be a number, a letter, a word, or combination of these. When alphabetizing, we have to look at names unit by unit. If a person or an organization has two names, we would say it has two units. The table below shows some examples.

<table>
<thead>
<tr>
<th>NAME</th>
<th>UNIT 1</th>
<th>UNIT 2</th>
<th>UNIT 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ann’s Flowers</td>
<td>ANN’S</td>
<td>FLOWERS</td>
<td></td>
</tr>
<tr>
<td>Julie’s Haircare</td>
<td>JULIE’S</td>
<td>HAIRCARE</td>
<td></td>
</tr>
<tr>
<td>Ted’s Auto Parts</td>
<td>TED’S</td>
<td>AUTO</td>
<td>PARTS</td>
</tr>
<tr>
<td>Candles and Such</td>
<td>CANDLES</td>
<td>AND</td>
<td>SUCH</td>
</tr>
<tr>
<td>Victoria’s Antiques</td>
<td>VICTORIA’S</td>
<td>ANTIQUES</td>
<td></td>
</tr>
</tbody>
</table>
Filing Segment

One or more filing units is a filing segment, that is, the complete name, subject, or number which is being used for filing purposes. For example, to file the name of an individual, each part of the name is a unit (first name, middle initial and last name). The complete name of the individual is a filing segment.

Indexing

Deciding what order and format to assign the units in a person’s name is called indexing. We must answer some questions about the order of the units when we file the record.

- Should we file a person’s record by first or last name?
- Do we include “The” in a business name and file it under T?
- Do we consider the punctuation when alphabetizing a name?

Indexing answers these questions and puts the units in the correct order.

Alphabetizing

Alphabetizing is simply putting words or units in alphabetical order. The names Andy, Jason, and Tanya, are in alphabetic order because A comes before J and J comes before T.

When the names both begin with the same letter, we have to consider the second letter in the name when alphabetizing. Therefore, the names Valour and Victor are in alphabetic order.

If the first and second letters in the name are the same, we consider the third letter; continuing in this way until the letters are different. Once there is a different letter, arrange the names alphabetically according to the first different letter.

Just as we did to alphabetize words, we can arrange the names Unit by Unit by putting them in alphabetical order. When the first units are the same, arrange by the second unit, when the second units are the same, arrange by
the third unit. Follow this same pattern until there is a difference in the units.

An important rule in alphabetizing is ‘nothing comes before something’. Listed below are some examples of what this means.

- The name Clark would be filed before the name Clarke.
- J. Smith comes before John Smith.
- Joe’s Auto would be filed before Joe’s Auto Sales.

When people talk about the case of a letter, they are telling you whether it is a capital letter or a small letter. Capital letters are upper case, and small letters are lower case. When we are alphabetizing, uppercase and lowercase letters are treated in the same way. The names McLean and Mclean are treated exactly the same.
Filing Terms
Learning Activity #2

1. What does the acronym ARMA stand for?

2. Divide the following filing segments into units by drawing a red line between the units.

   1) John A. Smith
   2) Dom’s Auto Parts
   3) Kingston Whig-Standard
   4) Fashion 101 Boutique
   5) Hendrix Business Supplies
   6) Katy Simons

3. Put the file folders on the next page in alphabetic order by writing the correct order on each folder using numbers.

Which of the following Essential Skills were used to complete the Learning Activity on the previous page?

☐ Reading    ☐ Document Use    ☐ Numeracy    ☐ Writing
☐ Oral Communication    ☐ Working with Others    ☐ Computer Use    ☐ Continuous Learning

Thinking Skills
☐ Problem Solving    ☐ Decision Making    ☐ Critical Thinking    ☐ Finding Information
☐ Job Task Planning & Organizing    ☐ Significant Use of Memory
12 ARMA Rules of Filing

Rule 1 - Personal Names

We arrange the units in a certain order when indexing people’s names. Unit 1 should be the person’s last name; unit 2 is the person’s first name or initial. Finally, use the person’s middle name or initial as unit 3. Remember, ‘nothing before something’…when one of the units is just an initial, it comes before a name starting with that same letter. Leave out punctuation such as periods, apostrophes or hyphens.

<table>
<thead>
<tr>
<th>NAME</th>
<th>UNIT 1</th>
<th>UNIT 2</th>
<th>UNIT 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roberta J. Adams</td>
<td>ADAMS</td>
<td>ROBERTA</td>
<td>J</td>
</tr>
<tr>
<td>Shelley B. Andrews</td>
<td>ANDREWS</td>
<td>SHELLEY</td>
<td>B</td>
</tr>
<tr>
<td>Terry Andrews</td>
<td>ANDREWS</td>
<td>TERRY</td>
<td></td>
</tr>
<tr>
<td>Wilma Karen Jackson</td>
<td>JACKSON</td>
<td>WILMA</td>
<td>KAREN</td>
</tr>
<tr>
<td>Walter Jenson</td>
<td>JENSON</td>
<td>WALTER</td>
<td></td>
</tr>
<tr>
<td>William Jenson</td>
<td>JENSON</td>
<td>WILLIAM</td>
<td></td>
</tr>
<tr>
<td>Fred Shanks</td>
<td>SHANKS</td>
<td>FRED</td>
<td></td>
</tr>
<tr>
<td>Fred B. Shanks</td>
<td>SHANKS</td>
<td>FRED</td>
<td>B</td>
</tr>
<tr>
<td>Ann Marie Williams</td>
<td>WILLIAMS</td>
<td>ANN</td>
<td>MARIE</td>
</tr>
<tr>
<td>Anna Williams</td>
<td>WILLIAMS</td>
<td>ANNA</td>
<td></td>
</tr>
<tr>
<td>Don Williams</td>
<td>WILLIAMS</td>
<td>DON</td>
<td></td>
</tr>
</tbody>
</table>

Rule 2 - Personal Names with Prefixes

Some names have two parts, for example MacDonald or DeSouza. In these two-part names, the Mac or De is a prefix and is considered part of the name. We can ignore any punctuation, such as apostrophes or spaces that might be part of the prefix. Some commonly used prefixes are: d’ D’ de, De, Del, De la, Di, Du, El, Fits, La, Le, M, Mac, Mc, O’, Saint, St, Van, Van de, Van der, and Von.

<table>
<thead>
<tr>
<th>NAME</th>
<th>UNIT 1</th>
<th>UNIT 2</th>
<th>UNIT 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ona DuMonde</td>
<td>DUMONDE</td>
<td>ONA</td>
<td></td>
</tr>
<tr>
<td>Pauline DuMonde</td>
<td>DUMONDE</td>
<td>PAULINE</td>
<td></td>
</tr>
<tr>
<td>Ariel L’Abelle</td>
<td>LABELLE</td>
<td>ARIEL</td>
<td></td>
</tr>
<tr>
<td>Jonie A. MacDonald</td>
<td>MACDONALD</td>
<td>JONIE</td>
<td>A</td>
</tr>
<tr>
<td>Terry C. M’Donald</td>
<td>MCDONALD</td>
<td>TERRY</td>
<td>C</td>
</tr>
<tr>
<td>Carl Van Eric</td>
<td>VANERIC</td>
<td>CARL</td>
<td></td>
</tr>
<tr>
<td>Jane Van Eric</td>
<td>VANERIC</td>
<td>JANE</td>
<td></td>
</tr>
</tbody>
</table>
Rule 3 - Hyphenated Personal Names

When someone has a hyphenated first, middle, or last name, it is looked at as one unit. With a name like Mary-Anne, do not include the hyphen in the unit name and do not separate it into two units.

<table>
<thead>
<tr>
<th>NAME</th>
<th>UNIT 1</th>
<th>UNIT 2</th>
<th>UNIT 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vera Andrews – Smyth</td>
<td>ANDREWSSMYTH</td>
<td>VERA</td>
<td></td>
</tr>
<tr>
<td>Tina DeTom-Jones</td>
<td>DETOMJONES</td>
<td>TINA</td>
<td></td>
</tr>
<tr>
<td>Ginny Shawny Lee</td>
<td>LEE</td>
<td>GINNY</td>
<td>SHAWNY</td>
</tr>
<tr>
<td>Amy Shawny-Lee</td>
<td>SHAWNYLEE</td>
<td>AMY</td>
<td></td>
</tr>
<tr>
<td>Ann-Marie S. Shootle</td>
<td>SHOOTLE</td>
<td>ANNMARIE</td>
<td>S</td>
</tr>
</tbody>
</table>

Rule 4 - Single Letters and Abbreviations of Personal Names

When a person uses his or her initials as their name, we index them as separate units. The name J.K. Rowling would be alphabetized using Rowling as unit one, J as unit 2, and K as unit 3. Sometimes people will abbreviate their names; William becomes Wm. or Joseph becomes Jos. People also use nicknames like Tony, or Ted rather than Anthony or Edward. Nicknames, as well as abbreviations, are indexed as they are written.

<table>
<thead>
<tr>
<th>NAME</th>
<th>UNIT 1</th>
<th>UNIT 2</th>
<th>UNIT 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.J. Andrews</td>
<td>ANDREWS</td>
<td>A</td>
<td>J</td>
</tr>
<tr>
<td>Lee Bailings</td>
<td>BAILINGS</td>
<td>Lee</td>
<td></td>
</tr>
<tr>
<td>Lou Chancer</td>
<td>CHANCER</td>
<td>LOU</td>
<td></td>
</tr>
<tr>
<td>Wm. Daniels</td>
<td>DANIELS</td>
<td>WM</td>
<td></td>
</tr>
<tr>
<td>T. J. Simpson</td>
<td>SIMPSON</td>
<td>T</td>
<td>J</td>
</tr>
<tr>
<td>Geo. N. Victory</td>
<td>VICTORY</td>
<td>GEO</td>
<td>N</td>
</tr>
</tbody>
</table>

Rule 5 - Personal Names with Titles and Suffixes

We often use personal titles with names. These can be Miss, Mr., Mrs., or Ms. Other titles could be Capt., Dr., Prof., or Sgt. Suffixes appear after a name. Some examples of suffixes are II, III, Jr., and Sr. Professional designations like CPA, MD, and PH.D, are suffixes as well. Prefixes and suffixes are the last indexing unit we use to distinguish between two or more names that are the same. Prefixes and Suffixes are sometimes placed in brackets (parenthesis) at the end.
Royal or religious titles, such as King, Queen, Prince, Princess, Father, or Sister, are considered professional designation suffixes, unless they are placed before a single given name or single surname only, as is the case with Father James, or Princess Margaret. In this case, they are indexed as written. Some professional terms also can appear either before or after the name, as in the case of Mayor or Prime Minister.

<table>
<thead>
<tr>
<th>NAME</th>
<th>UNIT 1</th>
<th>UNIT 2</th>
<th>UNIT 3</th>
<th>UNIT 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sharon Balderson, CPA</td>
<td>BALDERSON</td>
<td>SHARON</td>
<td>CPA</td>
<td></td>
</tr>
<tr>
<td>Father James</td>
<td>FATHER</td>
<td>JAMES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mrs. Amy Jenes</td>
<td>JENES</td>
<td>AMY</td>
<td>MRS</td>
<td></td>
</tr>
<tr>
<td>Queen Elizabeth II</td>
<td>QUEEN</td>
<td>ELIZABETH</td>
<td>II</td>
<td></td>
</tr>
<tr>
<td>Mrs. Jenny Landerman</td>
<td>LANDERMAN</td>
<td>JENNY</td>
<td>MRS</td>
<td></td>
</tr>
<tr>
<td>Sister May Smith</td>
<td>SMITH</td>
<td>MAY</td>
<td>SISTER</td>
<td></td>
</tr>
<tr>
<td>Paul K Teaside III</td>
<td>TEASIDE</td>
<td>PAUL</td>
<td>K</td>
<td>III</td>
</tr>
<tr>
<td>Mr. James Wide, Jr.</td>
<td>WIDE</td>
<td>JAMES</td>
<td>JR</td>
<td>MR</td>
</tr>
<tr>
<td>Dr. Fred Walters</td>
<td>WALTERS</td>
<td>FRED</td>
<td>DR</td>
<td></td>
</tr>
</tbody>
</table>
ARMA Rules – Personal Names
Learning Activity #3

1. When filing personal names, which name is the first filing unit?

2. In the following names, circle the prefix.
   a) McPherson
   b) St. Jacques
   c) Van Kleiff
   d) de la Roche

3. Using ARMA rules, break down the following into filing units?

<table>
<thead>
<tr>
<th>NAME</th>
<th>UNIT 1</th>
<th>UNIT 2</th>
<th>UNIT 3</th>
<th>UNIT 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oscar de la Renta</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>J. van Tol</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dianne Andrew-Allen</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sister Therese James</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Betty-Joe Braydon</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Father Bernard</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>S. J. Campbell-Jones</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mary Anne Kipling</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taylor Livingston III</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Daniel Saint Pierre</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dr. John Thompson</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
4 Number the following from one to ten to show the correct filing order. (If file folders are available for you to use at your learning centre, you could label them by printing the names on labels on the folders. Then you could place them in correct filing order.)

R. T Sampson
Captain R. T. Sampson
Robert T. Sampson
Dr. Robert Sampson
Robert T. Sampson, Sr.
Robert T. Sampson Jr.
Robert Sampson
Robert T. Sampson, C.P.A.
Dr. Sampson
Father R. T. Sampson

Which of the following Essential Skills were used to complete the Learning Activity on the previous page?

- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory
Rule 6 - Names of Businesses and Organizations

The names of businesses should be indexed as written. We index each word in a business name as a separate unit with one exception. When a business name has *The* as the first word, it is treated as the last unit and is often placed in brackets. If a personal name is included in the business name, it is indexed as it is written. When business names are hyphenated or have names with a prefix, they are considered one unit.

<table>
<thead>
<tr>
<th>NAME</th>
<th>UNIT 1</th>
<th>UNIT 2</th>
<th>UNIT 3</th>
<th>UNIT 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barb’s Boutique</td>
<td>BARBS</td>
<td>BOUTIQUE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Baron Dollar Store</td>
<td>BARON</td>
<td>DOLLAR</td>
<td>STORE</td>
<td>THE</td>
</tr>
<tr>
<td>Copiers Are Us</td>
<td>COPIERS</td>
<td>ARE</td>
<td>US</td>
<td></td>
</tr>
<tr>
<td>Cpt. Jim’s Seafood House</td>
<td>CPT</td>
<td>JIMS</td>
<td>SEAFOOD</td>
<td>HOUSE</td>
</tr>
<tr>
<td>Dr. Adam’s Tree Repair</td>
<td>DR</td>
<td>ADAMS</td>
<td>TREE</td>
<td>REPAIR</td>
</tr>
<tr>
<td>St. Peter Lawn Care</td>
<td>STPETER</td>
<td>LAWN</td>
<td>CARE</td>
<td></td>
</tr>
<tr>
<td>The Worthy Coat Factory</td>
<td>WORTHY</td>
<td>COAT</td>
<td>FACTORY</td>
<td>THE</td>
</tr>
<tr>
<td>Zing Gray Daily News</td>
<td>ZING</td>
<td>GRAY</td>
<td>DAILY</td>
<td>NEWS</td>
</tr>
</tbody>
</table>

Rule 7 - Single Letters and Abbreviations in Business and Organization Names

Many business names contain letters that are not words. When single letters are separated by a space, as in *A P Masonry*, we index each letter as a separate unit.

When a business uses an acronym in their name, the acronym is indexed as one unit, ignoring punctuation.

Sometimes words are shortened, or abbreviated. Words like *Mfg., Co., Corp., or Inc* and names made up of letters, such as the call letters used by television or radio stations like *CKWS or CBC*, are indexed as written and as one unit, disregarding any punctuation or spacing.

<table>
<thead>
<tr>
<th>NAME</th>
<th>UNIT 1</th>
<th>UNIT 2</th>
<th>UNIT 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>A B Electronics</td>
<td>A</td>
<td>B</td>
<td>ELECTRONICS</td>
</tr>
<tr>
<td>A OK Café</td>
<td>A</td>
<td>OK</td>
<td>CAFÉ</td>
</tr>
<tr>
<td>Ace Repair Co.</td>
<td>ACE</td>
<td>REPAIR</td>
<td>CO</td>
</tr>
<tr>
<td>KKS R Broadcasting</td>
<td>KKS R</td>
<td>BROADCASTING</td>
<td></td>
</tr>
<tr>
<td>L.A.N., Inc</td>
<td>LAN</td>
<td>INC</td>
<td></td>
</tr>
<tr>
<td>Regal Mfg. Corp.</td>
<td>REGAL</td>
<td>MFG</td>
<td>CORP</td>
</tr>
<tr>
<td>USA Today</td>
<td>USA</td>
<td>TODAY</td>
<td></td>
</tr>
</tbody>
</table>
Rule 8 - Punctuation and Possessives in Business and Organization Names

When indexing business and organization names, we ignore all punctuation. All names are indexed as written, totally disregarding commas, periods, hyphens, apostrophes, dashes, exclamation points, question marks, quotation marks and slashes (/).

<table>
<thead>
<tr>
<th>NAME</th>
<th>UNIT 1</th>
<th>UNIT 2</th>
<th>UNIT 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>All-a-Round Hock Shop</td>
<td>ALLAROUND</td>
<td>HOCK</td>
<td>SHOP</td>
</tr>
<tr>
<td>Bill's Rent-a-Wreck</td>
<td>BILLS</td>
<td>RENTAWRECK</td>
<td></td>
</tr>
<tr>
<td>The Crew's Nest</td>
<td>CREWS</td>
<td>NEST</td>
<td>THE</td>
</tr>
<tr>
<td>Inside/Goodside Glass</td>
<td>INSIDEGOODSIDE</td>
<td>GLASS</td>
<td></td>
</tr>
<tr>
<td>Jerry-N-Box Catering</td>
<td>JERRYNBOX</td>
<td>CATERING</td>
<td></td>
</tr>
</tbody>
</table>

Rule 9 - Numbers in Business and Organization Names

All numbers, whether Arabic (1, 57, 473) or Roman numerals (II, VI, and IX), no matter how many digits, are to be considered as one unit. When names contain digit numerals, we arrange them in ascending order, lowest to highest, with Arabic numbers coming before the Roman numerals and both before alphabetic names.

Numeral: A symbol or mark used to represent a number.

However, numbers that are written out in words, like ONE, EIGHT and SEVENTEEN, are filed alphabetically. They would come after numbers written as numerals.

When numerals appear in the middle or end of the name, like Century 21 Realtors, numerals still go before letters. Therefore, Century 21 Realtors would come before Century Antiques.

When numbers have ordinals attached, as in 1st, 2nd or 3rd, those letters are ignored.
Number and Numeral Examples:

<table>
<thead>
<tr>
<th>NAME</th>
<th>UNIT 1</th>
<th>UNIT 2</th>
<th>UNIT 3</th>
<th>UNIT 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-2-3 Easy Mart</td>
<td>123</td>
<td>EASY</td>
<td>MART</td>
<td></td>
</tr>
<tr>
<td>1 Stop Shopping Centre</td>
<td>1</td>
<td>STOP</td>
<td>SHOPPING CENTRE</td>
<td></td>
</tr>
<tr>
<td>4th Street Market</td>
<td>4</td>
<td>STREET</td>
<td>MARKET</td>
<td></td>
</tr>
<tr>
<td>7-Nights Exitied Inn</td>
<td>7NIGHTS</td>
<td>EXITED</td>
<td>INN</td>
<td></td>
</tr>
<tr>
<td>XV Movie Theatre</td>
<td>XV</td>
<td>MOVIE</td>
<td>THEATRE</td>
<td></td>
</tr>
<tr>
<td>Gary's 2-Way Taxi Co.</td>
<td>GARYS</td>
<td>2WAY</td>
<td>TAXI</td>
<td>CO</td>
</tr>
<tr>
<td>Gary's Auto Repair</td>
<td>GARYS</td>
<td>AUTO</td>
<td>REPAIR</td>
<td></td>
</tr>
<tr>
<td>Twenty-First Street Patio</td>
<td>TWENTYFIRST</td>
<td>STREET</td>
<td>PATIO</td>
<td></td>
</tr>
</tbody>
</table>

**Rule 10 - Symbols in Business and Organization Names**

Business names can contain symbols as well as numbers and words. Examples of these symbols are the at symbol @, dollar signs $, the number sign # or the ampersand & (the symbol meaning and). When a symbol is part of a business name, we treat this symbol as if it were spelled out. Therefore, & is filed as and, and % is filed as percent. Sometimes the symbol is used with a number without any spacing in between, like #1, or $10. We then consider it as one unit and spell the symbol out, so it would be indexed as number 1 or 10 dollars.

<table>
<thead>
<tr>
<th>SYMBOL</th>
<th>INDEXED AS</th>
</tr>
</thead>
<tbody>
<tr>
<td>&amp;</td>
<td>AND</td>
</tr>
<tr>
<td>¢</td>
<td>CENT or CENTS</td>
</tr>
<tr>
<td>$</td>
<td>DOLLAR or DOLLARS</td>
</tr>
<tr>
<td>#</td>
<td>NUMBER, POUND or POUNDS</td>
</tr>
<tr>
<td>@</td>
<td>AT</td>
</tr>
<tr>
<td>+</td>
<td>PLUS</td>
</tr>
<tr>
<td>?</td>
<td>QUESTION</td>
</tr>
<tr>
<td>%</td>
<td>PERCENT</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NAME</th>
<th>UNIT 1</th>
<th>UNIT 2</th>
<th>UNIT 3</th>
<th>UNIT 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>50¢ Burger Den</td>
<td>50CENT</td>
<td>BURGER</td>
<td>DEN</td>
<td></td>
</tr>
<tr>
<td>D &amp; B Bargain</td>
<td>D</td>
<td>AND</td>
<td>B</td>
<td>BARGAIN</td>
</tr>
<tr>
<td>¢ Days Motel</td>
<td>DOLLAR</td>
<td>DAYS</td>
<td>MOTEL</td>
<td></td>
</tr>
<tr>
<td>The Dollar Smart Store</td>
<td>DOLLAR</td>
<td>SMART</td>
<td>STORE</td>
<td>THE</td>
</tr>
<tr>
<td>Just Good ¢ Store</td>
<td>JUST</td>
<td>GOOD</td>
<td>CENTS</td>
<td>STORE</td>
</tr>
</tbody>
</table>
ARMA Rules – Business Names
Learning Activity #4

1. Break down the business names into units in the table below.

<table>
<thead>
<tr>
<th>NAME</th>
<th>UNIT 1</th>
<th>UNIT 2</th>
<th>UNIT 3</th>
<th>UNIT 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tip Top Cleaners</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Corner Pub</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CKTV</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>P. J. Holdings Inc.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mechanic’s Choice</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paul’s Pizza &amp; Pasta</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>24 – 7 Phone Service</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internet @ Home</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B-4 You Go</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>#1 Used Cars</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A ++ Towing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Test your skills by completing the alphabetic filing activity at [http://www.wisc-online.com/objects/ViewObject.aspx?ID=BST205](http://www.wisc-online.com/objects/ViewObject.aspx?ID=BST205). If this link does not work, try [www.wisc-online.com](http://www.wisc-online.com) and type in “Records Management: Applying ARMA Rules to Business Filing” and choose that file to view. You will have to put a name in the box to start the activity.

3. Put the file folders on the next page in alphabetical order by writing numbers on each folder. (If file folders are available label them and place them in correct filing order.)
Which of the following Essential Skills were used to complete the Learning Activity on the previous page?

- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory
Rule 11 - Government Names

Indexing government names is a little bit different. The first to be indexed is the country, province, county, city or town that has jurisdiction over the agency involved. Secondly, we use the distinctive name of the agency. For example, a public works department will be under the jurisdiction of a particular city, so the city name would be indexed first, then Public Works. Only if we need further clarification, or if it is in the official name, do we add the words “Province of” “County of”, or “Department of”.

<table>
<thead>
<tr>
<th>NAME</th>
<th>UNIT 1 (Jurisdiction)</th>
<th>UNIT 2</th>
<th>UNIT 3</th>
<th>UNIT 4</th>
<th>UNIT 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Works, Kingston, ON</td>
<td>KINGSTON</td>
<td>PUBLIC</td>
<td>WORKS</td>
<td>KINGSTON</td>
<td>ONTARIO</td>
</tr>
<tr>
<td>Revenue Canada</td>
<td>CANADA</td>
<td>REVENUE</td>
<td>CANADA</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Rule 12 – Addresses

In some cases, personal or business names can be identical. Let’s say there are two Joan O’Keefe’s or there is more than one Dairy Queen. In this case, we have to determine the filing order by the address. Address elements must be considered in a particular order: City, Province (spelled as the full word, not abbreviated), Street Name, Street type/Quadrant (NE, NW, SE, SW), House or Building Number.

<table>
<thead>
<tr>
<th>NAME</th>
<th>UNIT 1</th>
<th>UNIT 2</th>
<th>UNIT 3</th>
<th>UNIT 4</th>
<th>UNIT 5</th>
<th>UNIT 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metro 310 Barrie St.</td>
<td>METRO</td>
<td>KINGSTON</td>
<td>ONTARIO</td>
<td>BARRIE</td>
<td>ST</td>
<td>310</td>
</tr>
<tr>
<td>Kingston, ON</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Metro 775 Bayridge Dr</td>
<td>METRO</td>
<td>KINGSTON</td>
<td>ONTARIO</td>
<td>BAYRIDGE</td>
<td>DR</td>
<td>775</td>
</tr>
<tr>
<td>Kingston, ON</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Metro 460 Gardiners Rd</td>
<td>METRO</td>
<td>KINGSTON</td>
<td>ONTARIO</td>
<td>GARDINERS</td>
<td>RD</td>
<td>460</td>
</tr>
<tr>
<td>Kingston, ON</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Cross-referencing

You will file most correspondence, reports, or other material under only one standard filing segment (subject, name or identification code). However, there are times when more than one filing segment will apply to the material. In these cases, a cross-reference system is useful to allow you (and others) to locate the information quickly. A cross-reference file would be labelled with the alternate name file segment and the notation See and the name of the file where the information can be found.

Cross-referencing is particularly useful when there may be some confusion around where the file should be located.

- It may be unclear which name is a person’s surname and which name is their given or first name. For example, the names Elliott and James. Is his name Elliott James or James Elliott?
- In some cultures, a person’s name is the reverse of what we traditionally do in the Western world. In China, for example, it is correct to put the person’s surname first and the given name last.
- Hyphenated surnames often cause confusion. A person named Ann Telford-Smyth would be filed as TelfordSmyth, Ann. However, it should be cross-referenced as Smyth, Ann Telford.
- Alternate names - Sometimes people use more than one name, such as a professional name. This is particularly true of actors and writers. For this we use the acronym AKA for Also Known As. For example, Norma Jean Baker AKA Marilyn Munroe. Businesses also may use a different name than their corporate name. In this case, we use the acronym DBA for Doing Business As. So, for example, you might set up a cross-reference file for Bank of Nova Scotia that says See Scotiabank.
- Compound names are particularly popular with law and accounting firms. In this case, it is useful to create a cross-reference file starting with each of the lawyers or partners names. Therefore, the firm of Nelson, Hurley & Adams would have cross-reference files for Hurley, Adams & Nelson and Adams, Nelson & Hurley.
• Acronyms can also cause confusion for people looking for information. For example, this course has been developed by LLEO, which stands for Literacy Link Eastern Ontario. Therefore, if the main file is under the name LLEO a cross-reference file should be set up for Literacy Link Eastern Ontario, which says “See LLEO”.
Cross-Referencing
Learning Activity #5

1. What is the purpose of cross-referencing files?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

2. What are six examples of cross-referencing which could be useful to avoid confusion about the location of the file?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

3. How would you label the file and cross-referencing file for Laurie Cole-Meyers? Complete the labels on the file folders below.

Which of the following Essential Skills were used to complete the Learning Activity on the previous page?

- Reading
- Oral Communication
- Document Use
- Working with Others
- Numeracy
- Computer Use
- Writing
- Continuous Learning
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory
ARMA Rules Quick Reference

**Personal names**
1. Surname (last name).
2. Given name (first name).
3. Middle name or initial.
Initials in personal names are separate units.
Nicknames are indexed as written.

**Business names**
- As written (on letterhead).
- Names are indexed as written.
- Each word is a unit.
- **Articles:** a, an, the.
- **Prepositions:** to, at, on, of, for.
- **Conjunctions:** and, but, or, nor.
- **Symbols:** &, %, $.
  Are separate indexing units.
  Symbols are indexed as if spelled out.
  “The” as the first word is considered the last unit.

All punctuation marks are disregarded.

Business acronyms and abbreviations are indexed as written.

**Titles**
- A title before a name, a seniority suffix, or professional suffix after a name is the last indexing unit.
- Royal and religious titles followed by surname only are indexed as written.

**Numbers**
- Written as digits are filed before letters or words.
- Numbers spelled out are filed alphabetically.
- Digits are filed ascending order.
- Arabic numbers before Roman numerals.
- Disregard ordinal suffixes (rd, nd, etc.).

Numbers are filed before alphabetic suffixes.

**Prefixes – Articles and Particles**
(De La, D’, Le, Mac, Mc, Von, Van, Von der, Van der, O’, Saint, St., San, etc.).
All are combined with the name that follows to form a single unit.
Punctuation and spaces are disregarded.

**If two people or organizations have identical names, filing order is determined by address.**
1. City name.
2. State or province names.
3. Street names.
4. House or building numbers.

**Cross-Reference**
- Unusual Names - Kim James see James Kim.
- Hyphenated Surnames - Staynor Louise Jones See JonesStaynor, Louise.
- Alternate Names (DBA, AKA).
- Compound Names should be cross-referenced under each name.
Unit 3: Data Entry

As we said earlier, businesses need to process and keep track of more and more information all the time. Data entry clerks and other clerical workers must make sure that they handle, store and retrieve information smoothly and efficiently. They are responsible for keying in everything from sensitive company documents to critical client and accounting information.

Data entry can be done using non-keyboard forms of entry, such as scanners or electronically-transmitted files and documents. However, filling in forms on a computer monitor using a keyboard or number pad is the most common method. Because of this, people who do data entry are often called ‘keyers’.

Data keyers enter lists of items, code numbers, financial information or other data into computers. Some examples of data sources include customers’ personal information, medical records, product information and membership lists. The data may be in words, for example, names. It may be dates, such as birthdates or order dates. It may be numbers like telephone, invoice or parts numbers. It may be a mixture of all these things.

Critical Essential Skills for data entry are Job Task Planning and Organization (time management, meeting deadlines and multi-tasking), Document Use, and excellent Reading for proofreading. Computer skills needed include accurate typing ability and business software knowledge.
Database Basics

Usually the term database refers to data stored in a software program or application on a computer, where it can be quickly stored, managed and retrieved. Some examples of printed databases are a telephone directory, a personal address book, a library index or a recipe box.

Most databases store data in one or more tables. Remember tables are organized in columns and rows. Each column contains a single kind of data, maybe last name or a postal code. A column of data is called a field. Each row contains one piece of data from each field relating to a single person or item. Each row of data is called a record.

Using the printed database examples in the first paragraph, let’s look at what the records and fields would be, if we laid them out in a table:

- In a telephone book, each person or business is a record. The names, addresses and telephone numbers make up the individual fields. All the records have the same fields, but there is no set number of records.
- For the personal address book, each of our personal contacts would be a separate record. We could have fields for first name, last name, address, telephone number and possibly email address, birthday, etc.
- In a library index, each book would be a record. Sample fields could be title, author, publisher, publication date, copyright date, edition, ISBN number, subject, etc.
- In our recipe box, each recipe would be a record. Fields could include ingredients, instructions, number of portions, dietary information, etc.

When a database is designed, the fields are set. The number and names of the fields do not change. On the other hand, any number of records can be added with information provided or left out of each of the fields.
Database Basics
Learning Activity #6

On the next page is an example of a database of books for a learning centre. Use this to answer the following questions.

1. What are the names of the four fields that are showing?
   ____________________________   ____________________________   ____________________________   ____________________________

2. Each row contains all the information for what?
   __________________________________________________________

3. In what order are the records sorted in this example?
   __________________________________________________________

4. The code MA stands for math. How many math books are there?
   __________________________________________________________


6. What book was entered most recently?
   __________________________________________________________

Which of the following Essential Skills were used to complete the Learning Activity on the previous page?

☐ Reading ☐ Document Use ☐ Numeracy ☐ Writing
☐ Oral Communication ☐ Working with Others ☐ Computer Use ☐ Continuous Learning
☐ Problem Solving ☐ Decision Making ☐ Critical Thinking ☐ Finding Information
☐ Job Task Planning & Organizing ☐ Significant Use of Memory
An Example of Part of a Database Table

<table>
<thead>
<tr>
<th>Code</th>
<th>Title</th>
<th>Author_Publisher</th>
<th>Date entered</th>
</tr>
</thead>
<tbody>
<tr>
<td>MA-022</td>
<td>Accounting I</td>
<td>Prentice Hall</td>
<td>04/05/2009</td>
</tr>
<tr>
<td>MA-002</td>
<td>Accounting for Canadian Colleges</td>
<td>Ted Palmer, Vic D'Amico</td>
<td>21/07/2002</td>
</tr>
<tr>
<td>CO-025</td>
<td>Adobe PageMaker 5.0 for Windows 95</td>
<td>CCI Learning Solutions Inc.</td>
<td>15/01/2003</td>
</tr>
<tr>
<td>LA-082</td>
<td>Adult Language Arts</td>
<td>Pat Hatt</td>
<td>22/08/2002</td>
</tr>
<tr>
<td>TU-009</td>
<td>Adult Literacy Educator skills List</td>
<td>OLC</td>
<td>05/12/2007</td>
</tr>
<tr>
<td>REF-028</td>
<td>Advanced Learner’s English Dictionary</td>
<td>Harper Collins Publisher</td>
<td>15/03/2010</td>
</tr>
<tr>
<td>LR-049</td>
<td>Advanced Reading Power</td>
<td>Beatrice S. Mikulecky/Linda Jeffries</td>
<td>15/03/2010</td>
</tr>
<tr>
<td>RF-003</td>
<td>After the Garden</td>
<td>Doris Jean Austin</td>
<td>21/07/2002</td>
</tr>
<tr>
<td>HE-039</td>
<td>Aids IRNormation Kit</td>
<td>Ditty</td>
<td>22/08/2002</td>
</tr>
<tr>
<td>RY-012</td>
<td>Alice’s Adventures in Wonderland</td>
<td>Lewis Carrol</td>
<td>20/09/2004</td>
</tr>
<tr>
<td>RS-003</td>
<td>All About Animals</td>
<td>Unknown</td>
<td>21/07/2002</td>
</tr>
<tr>
<td>RS-032</td>
<td>All Purpose Writers</td>
<td>unknown</td>
<td>21/07/2002</td>
</tr>
<tr>
<td>RF-060</td>
<td>All signs point to murder</td>
<td>Kat Goldring</td>
<td>22/01/2003</td>
</tr>
<tr>
<td>LSP-005</td>
<td>All Spelled Out- B</td>
<td>Betsy Rubin</td>
<td>21/07/2002</td>
</tr>
<tr>
<td>LSP-006</td>
<td>All Spelled Out- C</td>
<td>Betsy Rubin</td>
<td>21/07/2002</td>
</tr>
<tr>
<td>RE-166</td>
<td>Along the Gold Rush trail</td>
<td>Gail Wilson Kenna</td>
<td>21/07/2002</td>
</tr>
<tr>
<td>AV-012</td>
<td>Alternate Route</td>
<td>National Film Board of Canada</td>
<td>14/11/2007</td>
</tr>
<tr>
<td>RS-094</td>
<td>Amazing Creatures</td>
<td>Tamim Ansary</td>
<td>02/03/2005</td>
</tr>
</tbody>
</table>
Entering Data

Clerical workers do not have to design and set up databases, so you do not need to know how to create a database. Your job will be to enter the information into a database that has been designed to suit your employer. Usually a form or series of forms have been created to make your job easier. For example, below is an input form used to enter a new book into our book database shown on the previous page.

No matter how you feed the data into your database, straight into the table or using an input form, your database’s purpose is to digest all that data and help people turn it into usable information.

For instance, imagine you have a database of customers. You would input the name, address and phone number of each customer. You might also enter a contact person’s name, the salesperson that looks after the account, details of what they ordered and when, invoices paid or outstanding, etc.
It is important to be able to get the information you want out of the database when you want it. Can you print a list of customers in Ontario? Can you find out who owes money or which of your salespeople is selling the most? That is what matters.

Again, it isn’t going to be your job to create the reports, but if you don’t put the data in correctly the information in the reports will be wrong and of no value. It may even be costly to individuals or companies.

**A sample data-entry window**

![A sample data-entry window](image-url)
Entering Data  
Learning Activity #7

1. On the following two pages are blank data input forms. Complete them for the following customers.

a. Lorraine Hendricks, Purchasing Clerk, Canadian Rentals Inc.  
   135 Jones Ave., Toronto, ON M5N 1B2  Ph (416) 555-1212 Fax (416) 555-1213  Email lhendricks@CanadianRentals.can

b. Maurice Bouchard, Clerk, Best Doors Manufacturing  
   2246 Best Ave., Kingston, ON K6U 5R7  Ph (613) 555-2420, Fax (613) 555-6789

c. Francie Blasko, Manager, Rosemount Retirement Home  
   23 Pleasantview Dr., Winnipeg, MB X2X 1X9  Ph(204) 555-3645, Cell (204) 555-1645, Fax (204) 555-3655

d. Dong Yoon Han, Owner, Chit Chat Café  
   236 Main Ave., Moncton, NB A1A 2A3  Ph (506) 555-2267, Fax (506) 555-2270  Email chitchat@bestconnect.cdn

2. Add four new contacts to your Email lists. (Go to your Email program. Select Contacts and then Add Contact or New Contact.) Enter as much detail as you can. Your contacts’ information will be stored in a database waiting for you to need it.

3. Ask your instructor if you can download the free 30-day trial Data Entry Test from http://testedok.com/. It has a Numeric Test (numbers only), Alpha Test (letters only) and an Alphanumeric Test (both numbers and letters) that you can use to test your data entry skills. There are also free online Alpha-numeric Tests you may try, such as www.typeonline.co.uk where you can find Number Pad lessons, Copy Practice and Speed Tests or do your own web search for free online Alphanumeric Tests for other options to improve or test your skills.

Which of the following Essential Skills were used to complete the Learning Activity on the previous page?

- [ ] Reading  
- [ ] Document Use  
- [ ] Numeracy  
- [ ] Writing  
- [ ] Oral Communication  
- [ ] Working with Others  
- [ ] Computer Use  
- [ ] Continuous Learning  
- [ ] Thinking Skills  
- [ ] Problem Solving  
- [ ] Decision Making  
- [ ] Critical Thinking  
- [ ] Finding Information  
- [ ] Job Task Planning & Organizing  
- [ ] Significant Use of Memory
Learner Self-Assessment

Now that you have completed Module 5 – Records Management, assess your performance. In the comments section, you can write down thoughts you have about the section. Use a blank sheet of paper if you need more space.

I started this module on (date) _______________ and finished on (date) _______________. I think I worked through it in a reasonable time ☐ yes ☐ no

| Clerical:  |
| Module 5 – Records Management |

### Unit 1 – Introduction

| I know the three key elements of records management. | ☐ yes ☐ I need more time to decide ☐ no |

### Unit 2 – Filing

| I know what ARMA stands for. | ☐ yes ☐ yes but I need more practice ☐ no |
| I understand the basic filing terms. | ☐ yes ☐ yes but I need more practice ☐ no |
| I have learned 12 ARMA rules of filing and I can use them for filing. | ☐ yes ☐ yes but I need more practice ☐ no |

### Unit 3 – Data Entry

| I have learned that databases are usually laid out in tables and I understand the basic terms of fields and records. | ☐ yes ☐ yes but I need more practice ☐ no |
| I have practiced some data entry into input or entry forms. | ☐ yes ☐ yes but I need more practice ☐ no |

**Comments:** (write down thoughts you have about the section. Use a blank sheet of paper if you need more space).

________________________________________________________________

________________________________________________________________

________________________________________________________________
Office Clerical

Module 6: Communication

Unit 1: Introduction
Unit 2: Non-Verbal Communication
Unit 3: Verbal Communication
Unit 4: Written Communication
Unit 5: Communicating with Email
Unit 6: The Telephone
Unit 7: Active Listening
Unit 1: Introduction

Communication skills are required in every part of your daily life. In this module, we will be discussing how to communicate with people, especially those with whom you are working. You will be building on skills that you have already learned and learning new ones.

The development of good interpersonal communication skills is an important key to success in any job. How well an office runs depends on how effective its workers’ communication skills are. Of course, employers want people who can do the hands-on work of the job, but they also look for employees who can communicate well.

Interpersonal communication skills are the tools we use to let others know what we think, feel, need and want. These tools also help us let others know that we understand what they think, feel, need and want. Effective communication is about delivering your messages to other people clearly. It's also about clearly receiving information that others are sending to you.

Communication is only successful when both the sender and the receiver understand the same information as a result of the communication.

In spite of the increasing importance placed on communication skills in today’s workplace, many people still have trouble communicating their thoughts and ideas. Most of us have already developed ways to communicate, right or wrong. This often makes us less successful at communicating with each other than we would like. Improving your communication skills will help to increase your overall effectiveness at a new clerical job and in the future.
The Communication Quiz  
Learning Activity #1

Are you an effective communicator already? Take this short quiz to find out. For each statement, put a check mark in the column that you think most describes you. When you are finished, total your score and check your result using the scoring table on the next page. (This quiz has been adapted from the Mind Tools web site. If you prefer, you may complete the quiz online at http://www.mindtools.com/pages/article/newCS_99.htm.)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Not at all</th>
<th>Rarely</th>
<th>Sometimes</th>
<th>Often</th>
<th>Very Often</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. When I write a message or note, I give all the information and detail I can to make sure that my message is understood.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. If I don't understand something, I usually keep it to myself and figure it out later.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. I'm sometimes surprised to find that people haven't understood what I've said.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. I tend to say what I think, and not worry about whether the other person understands. I assume that we can work it out later.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. When people talk to me, I try to see their point of view.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. When I finish writing an email, I scan it quickly for typos, and then send it off right away.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. When I’m talking to people, I pay attention to their body language.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Before I speak or write, I think about what I want the person to know, and the best way to get my point across.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. When someone's talking to me, I think about what I will say next to make sure I get my point across correctly.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Before I communicate, I think about the best way to do it (in person, by phone, via email, and so on).</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Module 6: Communication

Circle the number in the column that matches the answer for each question from the quiz above. Add up the circled numbers and put your total in the space below the table. Discuss your answers with your instructor.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Not at all</th>
<th>Rarely</th>
<th>Sometimes</th>
<th>Often</th>
<th>Very Often</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>2.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>3.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>4.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>5.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>6.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>7.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>8.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>9.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>10.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

My Total Score: ________

<table>
<thead>
<tr>
<th>Score</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>39-50</td>
<td>Excellent! You understand your role as a communicator, both when sending messages, and when receiving them. You anticipate problems, and you choose the right ways of communicating. People appreciate your clear communication and your listening skills.</td>
</tr>
<tr>
<td>25-38</td>
<td>You're a capable communicator, but you sometimes experience communication problems. Thinking about your approach to communication, and focusing on receiving messages effectively as much as sending them, will help you improve.</td>
</tr>
<tr>
<td>10-24</td>
<td>You need to keep working on your communication skills. You are not expressing yourself clearly enough, and you may not be receiving messages correctly either. The good news is that by paying attention to communication, you can be much more effective at work and enjoy much better working relationships!</td>
</tr>
</tbody>
</table>

Which of the following Essential Skills were used to complete this Learning Activity?

- [ ] Reading
- [ ] Document Use
- [ ] Numeracy
- [ ] Writing
- [ ] Oral Communication
- [ ] Working with Others
- [ ] Computer Use
- [ ] Continuous Learning
- [ ] Thinking Skills
- [ ] Problem Solving
- [ ] Decision Making
- [ ] Critical Thinking
- [ ] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory
Unit 2: Non-Verbal Communication

We can divide communication into two major groups, Verbal and Non-Verbal. Verbal Communication is any communication that relates to or consists of words.

Non-verbal communication, on the other hand, is any communication that doesn’t use words as its base. It is communication through sending and receiving wordless messages. These messages are communicated through gestures, touch, posture, personal appearance (e.g. clothing or hairstyle), voice quality, emotion and speaking style. Non-verbal communication is often referred to as “Body Language”. When we speak (or listen), we focus our attention on words, but our brains are processing messages received through body language as well. We process both verbal and non-verbal communication at the same time, even if we aren’t aware of doing it.

In a conversation, we communicate by words - by the way the words are spoken and by body language. A recent study indicates that 55% of communication comes from body language, 38% from the way words are spoken (tone of voice) and only 7% from the words we use. So it makes sense to pay attention to what your body language is telling others, as well as learning to read non-verbal cues from them.

Your body sends out signals or messages to someone without you having to say a word. You could be talking, and your body language will ‘say’ something entirely different than what you are ‘saying’ with words. Watching people is a great way to learn about body language.

Knowing some basic body language signs will help you to make a good impression during job interviews. It will make it easier to learn the job and settle into the office routine once you are hired.

There are many different types of non-verbal communication. Using the following non-verbal signals and cues will help you to communicate with others.
Facial Expressions

Facial expressions are easy ways to communicate your emotions, and unlike some forms of non-verbal communication, they are universal. The facial expressions for happiness, sadness, anger, surprise and fear are the same across cultures. Have you ever heard the expression, “It’s written all over her face”? Does a frown mean he’s thinking, or that he disagrees with what you are saying? Look in a mirror to see what your face looks like when you are trying to communicate the emotions of happiness, surprise, fear or anger. Laughter and smiles are almost magic. A smile, for instance, can send a positive message of warmth, welcome, confidence and relaxation.

Body Movements and Posture

Body movements and posture play a big part in getting a non-verbal message across. Your opinions of people are affected by the way they sit, walk, stand or even the way they hold their heads. Tilting your head slightly to one side tells others that you are listening. Good posture gives a look of confidence and improves your personal appearance as much as good grooming. Try relaxing your shoulders when you don’t want to appear worried or stressed. When you talk to someone, turn your body so that you face the person squarely and lean in to them slightly to show that you’re interested and paying attention. Nod your head occasionally to tell someone you understand and are interested in what they are saying.
Gestures

Gestures are woven into the fabric of our daily lives. Hands perform an important role in body language. Unlike facial expressions, the meaning of gestures can be very different across cultures and regions. You must be careful to avoid a misunderstanding. We wave and point and use our hands when we’re arguing - often without thinking. When you keep your hands active and gesture during a conversation, it shows involvement and energy. Using motions that keep your palms facing up indicates that you are open, friendly and welcoming. As an added point of interest, a recent study has shown that talking with our hands or gesturing may actually make thinking easier for us. The study found that people who gestured while explaining remembered more than those who kept their hands still.

Eye Contact

Eye contact is very important, since sight is the dominant sense for most people. The way you look at someone can communicate many things, including interest, affection, hostility or attraction. When you look at someone and make frequent eye contact, you show an interest in that person and in what she is saying. When your eyes shift all over the room during a conversation, it makes you seem uncomfortable and disinterested. Eye contact is important in keeping a conversation flowing and for watching to see how the other person feels about what you are saying.
Touch

Touch is a great non-verbal communicator. Think about the message you send with each of the following:

- A timid tap on the shoulder
- A warm bear hug
- A reassuring pat on the back
- A patronizing pat on the head
- A controlling grip on your arm
- A firm, confident handshake

Space

Have you ever felt uncomfortable during a conversation because the other person was standing too close and invading your space? We all have a need for physical space, although the amount of space needed is not the same in every culture or situation. We need to be careful not to invade someone’s personal space by standing or sitting too close. You can use physical space to communicate many different non-verbal messages, including signals of intimacy, aggression, dominance, or affection.
If you want to get a certain message across with non-verbal communication, here are some hints.

**Body language tools used to project:**

### Friendliness
- Smiling
- Nodding
- A handshake
- Steady eye contact
- Softened eye expression
- Facing the other person square-on

### Confidence
- Steady eye contact
- Upright posture
- Open gestures
- A relaxed facial expression
- A genuine smile

### Calm
- Measured breathing
- No fiddling or fidgeting
- Smooth, synchronised body movements
- Sitting back in your seat
- Lowered shoulders, not tensed or hunched
Non-Verbal Communication on the Telephone

You might be surprised to learn that body language also affects our telephone conversations. If we can’t see the message sender’s body, how can it be used to transfer a message to us?

Voices are used to communicate, even when we aren’t using words. This is done by using tone, pitch and volume to change the way our voices sound. When we speak to someone, they actually “read” our voices while they are listening to our words. These non-verbal speech sounds provide clues into our true feelings and what we really mean. Think about how tone of voice, for example, can indicate sarcasm, anger, affection or confidence.

The body has a large effect on our breathing pattern, which in turn has an effect on the way our words are spoken. Breathing patterns play a major role in how words are spoken. As the air from our lungs is exhaled, it passes over the vocal chords which vibrate to make a sound. This sound affects the way we say words. So, breathing either quickly or slowly, or taking a shallow breath, has a major effect on the vibration.

Try this simple exercise:

1. Stand up straight so your air passage is open and say ‘good morning’.
2. Sit down and get comfortable in your chair so that your shoulders and chin are relaxed. Now, say ‘good morning’ again. Can you hear the difference?
3. Now, remain seated but sit up tall in your chair. Look straight ahead, chin up, and repeat the ‘good morning’. Can you hear the difference this time?
4. Have someone go where they can’t see you, but can still hear you, or use a blindfold. Repeat the steps above. Did the other person can hear a difference?
We have all heard the comment – you can hear someone smiling, and it’s true. When we smile, our voices are lighter, and higher. On the other hand, if we show anger on our faces, our voices will be deeper and more stressed.

Facial expressions and gestures affect our voice. The voice then transfers the message to the listener so that she understands what is being communicated. Whether the conversation takes place on the telephone or face to face, the facial expressions and gestures, which are part of body language, play a major role in the communication process.

**Remember:**

Gestures - lead to facial expression. Facial expressions affect the voice and the way the voice says the words.

Breathing patterns - affect the way words are spoken.

Body language can almost always be interpreted in more than one way and one single element of body language may not tell the whole story. Someone who avoids eye contact may be embarrassed or lying, or just plain shy. Don’t assume the worst based on this cue alone. Be sure to take into consideration all the non-verbal cues that may be given. Remember to be aware of your own body language and make sure that your non-verbal message matches your verbal one.
The Job Interview
Learning Activity #2

1. Non-verbal communication is important in a job interview. Listed below are some body language cues. Circle either ‘True’ or ‘False’ for each one. Can you fill in the blank for the last cue?

2. If you can, try these body language cues out with another person, taking turns to be the “sender” and the “receiver of the body language.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>a)</strong> Offering a firm handshake makes a good first impression.</td>
<td>True</td>
</tr>
<tr>
<td><strong>b)</strong> Steady, measured breathing shows that you are calm, relaxed and ready for the interview.</td>
<td>True</td>
</tr>
<tr>
<td><strong>c)</strong> Facing the interviewer “square-on” will make you appear aggressive and pushy.</td>
<td>True</td>
</tr>
<tr>
<td><strong>d)</strong> Fidgeting (shifting in your chair, moving your hands and legs constantly) shows that you are nervous.</td>
<td>True</td>
</tr>
<tr>
<td><strong>e)</strong> Keeping steady eye-contact makes people uncomfortable because they feel you are invading their personal space.</td>
<td>True</td>
</tr>
<tr>
<td><strong>f)</strong> Hand gestures that keep your palms up indicate openness and friendliness.</td>
<td>True</td>
</tr>
<tr>
<td><strong>g)</strong> When you relax your shoulders, it shows that you are depressed.</td>
<td>True</td>
</tr>
<tr>
<td><strong>h)</strong> A smile shows ______________________________.</td>
<td>True</td>
</tr>
</tbody>
</table>

**Which of the following Essential Skills were used to complete this Learning Activity?**

- [ ] Reading
- [ ] Document Use
- [ ] Numeracy
- [ ] Writing
- [ ] Oral Communication
- [ ] Working with Others
- [ ] Computer Use
- [ ] Continuous Learning
- [ ] Problem Solving
- [ ] Decision Making
- [ ] Critical Thinking
- [ ] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory
Communication with Body Language
Learning Activity #3

For the questions below, circle the letter (‘a’, ‘b’, or ‘c’) for what you think shows the best way to communicate non-verbally in each situation. In the space following each question, write a short explanation of why you chose that letter. (We have completed #1 as an example.)

1. a) When I meet someone for the first time, I wait for the other person to introduce themselves to me.
   b) When I meet someone for the first time, I introduce myself with a smile and offer a handshake or quick nod of the head.
   c) When I first meet someone, I hug them.

The best answer is (b). It’s good to be the one to start the introduction and do it with a handshake (or quick nod if shaking hands is difficult) and a smile. This shows confidence and helps to build a connection.

2. a) I tend to be serious and don’t smile very often while I am talking.
   b) I smile all the time while carrying on a conversation.
   c) I smile at appropriate times during a conversation.

3. a) I make eye contact with the person to whom I am talking.
   b) I sometimes make eye contact while talking with someone.
   c) I never make eye contact with the person to whom I am talking.
Module 6: Communication

4. a) During a conversation, I hold my head perfectly still at all times.
   b) When I am talking to someone, I nod my head at appropriate times during the conversation.
   c) While I am talking to someone, I nod my head constantly.

5. a) I stand less than half a metre away or as close as I can get to the person to whom I am talking.
   b) When I am talking to someone, I try to stand one and a half to two metres from him or her.
   c) I like to stand at least four metres from the person I am talking to, so that I don’t crowd them.

6. a) When someone is talking to me, I cross my arms over my chest and stare at him.
   b) During a conversation, I often lean back and turn my body away from the speaker.
   c) When I’m listening to someone, I always face my body toward her and lean slightly forward so that they know I’m interested.
Unit 3: Verbal Communication

Now that we have discussed how to communicate non-verbally with tools such as sounds, tone of voice and gestures, it’s time to examine how we can improve our Verbal Communication skills.

REMEMBER: Verbal Communication occurs when two or more people communicate using 'words' in some form, (e.g. speech, writing or sign language).

Communication Through Speech

Talking is easy for most people. Communication, which means transmitting your message so that it is understood, requires greater skill. Good communication involves listening and speaking (or conversing) skillfully, not just talking mindlessly.

Speaking skills are important in the workplace as the basic way you express yourself to your co-workers, supervisor and others. Many competent workers miss opportunities for promotion because they lack the necessary speaking skills.

Though everyone speaks everyday, not everyone can do it well. Some people are difficult to follow, some explain their thoughts in a complicated manner and some are simply boring.

Imagine that your cover letter and resume have made a good impression and the employer has called you in for an interview. Now it’s time to make sure that you also have the right speaking tools to make a good impression in the job interview. Good conversation skills by themselves will not land you the job you’re applying for, but they can give you a big edge in the interview.

Are your spoken messages organized and coherent or rambling and unfocused? Do you know when to talk, when to listen and when to ask questions? Every time you talk to someone, you have a chance to make a good impression. Develop the skills to take advantage of this.
Hints for developing good speaking skills:

☑ Don’t mumble. Speak clearly using simple, easy to understand words.

☑ Speak loudly enough to be heard, but don’t shout.

☑ Don’t speak too quickly. Talk at a comfortable speed so that your words aren’t slurred or running together.

☑ Use simple, complete sentences so that the message is easier to understand.

☑ Pause between sentences and ideas to give the listener some time to think and understand what you are saying.

☑ Connect your ideas or arguments and present them in a logical manner. This makes it easier for the listener to follow what you are saying.

☑ Make sure you don’t chew gum or eat while you’re talking.

During conversations or discussions that you have at work, you can’t always be as relaxed as you are when you talk with your friends. Instead, you must be careful of the words and expressions you use. Pause and think before you speak so that you avoid repeating or explaining yourself with “What I meant to say was”. When you speak correctly, people are able to understand what you say the first time you say it.

Speaking habits to avoid:

☒ Swearing

☒ Poor grammar

☒ Using slang

☒ Putting in extra words, such as: like, you know, he goes, um or eh.
Listed below are ten different “communications”. Read them over and check off beside each one whether you think it falls into the Verbal or Non-verbal communication category. Discuss your choices and reasons for them with another learner or your instructor.

<table>
<thead>
<tr>
<th>Item</th>
<th>Verbal</th>
<th>Non-Verbal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not disturb sign</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>A hug</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>A memo from your boss</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Signing to a deaf friend</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Whistling or humming</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>A birthday card</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Singing a song</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>A wink</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Message on an answering machine</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>A handshake</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>
Unit 4: Written Communication

In today's information overload world, your written communications need to be clear, to the point and effective. Examples of writing you might be expected to do in an office range from taking a telephone message to emails, office memos, business letters and reports.

No business owner can afford to ignore the importance of writing skills in their employees. Would it surprise you to learn that a survey of 120 corporations found that one third of all workers don’t meet employers' expectations for written communication skills? Half of all companies take writing ability into consideration when hiring a new employee. Assessing the writing skills of job applicants is a big part of the hiring process.

Why is writing so important in the workplace?

When things are badly written, readers waste valuable time trying to figure out the sender’s message. Spelling mistakes, incomplete sentences, and paragraphs that are long and confusing can make it difficult to find the information you need.

Make sure that what you write will be read the way you meant it. Words on a page generally have no emotion - they don’t ‘smile’ or ‘frown’ at you while you’re reading them.

You probably don't need us to tell you that writing errors will not only make you look unprofessional but can also make your message harder to understand. The better your writing skills are, the better the impression you'll make on the people around you - including your boss. You never know how far these good impressions will take you!
Getting Organized

The first step to writing clearly is choosing the best format. Do you need to send an informal memo or email, write a detailed report, or write a formal letter? Whether you are writing a memo to your co-worker or a report for your boss, you should first decide what information you want to get across and how you will organize it. Below are four steps to help you do this.

1. List each item you need to discuss.

2. Put the items in order from most to least important.

3. Write a brief summary of what you want to say - this will be your first paragraph.

4. Expand on each item listed in step one.

Handwriting

Good handwriting doesn't get the emphasis it did years ago, due to technology. Today, in many schools, writing tests require students to compose on computers. However, in an office, legible handwriting is still an asset. The most complete and accurate phone messages are useless if the information can’t be read because of bad handwriting.

Grammar and Spelling

It's essential to learn proper grammar and spelling. This will help you avoid common mistakes that your “grammar-checker” or “spell-checker” won't find. Some of the people who read your memos or emails won’t be perfect at spelling and grammar. They may not notice if you make mistakes, but don’t use this as an excuse. There will always be someone (just your luck it will be your supervisor) who will notice! Because of this, everything you write should be of a quality that every reader will find acceptable.
A memo (short for memorandum) is a commonly-used form in the workplace. We use it to provide updates or cover other internal issues in an office. Memos have a basic format which you should follow. In a previous module, we included an explanation on how to write a good memo. Do you remember how to do it? Check back in Module 4: Documents and Forms for the Memo on How to Write an Effective Memo.

Memorandum

To: All Staff
From: Jane Gray
Priority: Important
Date: 12/10/2010
Re: Proper Message Taking

Lately there have been problems with incorrect or incomplete telephone messages. I would like to remind all employees to use the proper form (see attached) and to make sure it is filled in correctly and completely. I have included the following helpful tip:

When taking a telephone message, be sure to repeat the caller's name, number, and message to confirm that you have the correct information before you hang up.

Correct Telephone Message Form
(Attachment for office memo.)
When writing, take the time to do the following:

✔ Avoid wordiness. Keep sentences short and to the point.

✔ Use simple language - you don’t want the reader to need a dictionary to figure out what you are trying to communicate.

✔ Stay away from jargon or slang. A frequent complaint from business owners is that slang, shorthand and texting lingo are invading the workplace. Many workers seem unaware that phrases like LOL are not appropriate in the office.

✔ Pay attention to grammar, punctuation, and spelling. Keep a good dictionary within reach at your workstation and make use of the “check grammar” and “spell-check” features in your word processing software.

✔ Proofread what you have written before you send the message. Check for tone and attitude. If you think the message may be misunderstood, it probably will. Take the time to make it clear.

Remember:

Remember: If you are using word processing software, turn on your grammar and spell checkers.

Remember: Keep a dictionary and/or a thesaurus handy when you are writing.
Communication Skills
Learning Activity #5

You may answer the questions below in the spaces provided or use a word-processing program on a computer to write your answers.

1. Why is writing so important in the workplace? How do you think good writing skills might help you in applying for a job?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

2. What are four speaking habits that you should **avoid**?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

3. In this module, seven hints for developing good speaking skills were listed. Can you name four of them?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

4. List examples of writing you might be expected to do in an office?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
5. What communication skills (verbal and non-verbal) you have read about in this module would be a benefit to you in a job interview?

________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________________
Unit 5: Communicating with Email

Emails are an important part of business communication. For many offices it is now the standard way of communicating within the organization and with customers.

Emails have largely replaced memos in the modern office.

All emails, whether they’re updates to your family, a letter for a job application, or a request for shipping costs on an Ebay purchase, have the same basic parts:

- The recipient’s email address (who the email is being sent to).
- The date the message is sent.
- The subject line.
- The return or sender’s email address (who the email is being sent from).
- The body of the email (the content or main part) which includes:
  - A salutation (A word or phrase of greeting used to begin a letter or message.)
  - The sender’s name, acting as a signature, as well as contact information.

There are many different email software programs that we can use to send and receive email. Different software programs may show the above parts in a different order, and the order may vary depending on whether you are sending or receiving, but the basic parts will all be there.

The examples on the next page are from Windows Mail. Other email programs will look slightly different.
Incoming email

Sender’s name and email address

Recipient’s name and email address

Answering/Outgoing email

Sender’s name and email address

Recipient’s name and email address

Subject same as incoming but has “Re:” in front

Details of message you are answering

Click to send reply

Click to reply

Body

Salutation

Message

Signature
Recipients

The email address of the main person or people that you are emailing goes in the “To” section at the top of the email. If you want others to get a copy, you enter their email addresses in the “Cc” or “Bcc” sections. Cc stands for carbon copy and Bcc stands for blind carbon copy. (Other recipients can’t see that you sent a copy to a Bcc.)

Email addresses are personal information. When your email is being sent to many people who don't always know one another, use the Bcc option. Only the “To” or “Cc” addresses are actually printed on the email for all to see. That way everyone’s privacy will be protected.

Subject Line

A subject line is a lot like the title of a story, it should give a good idea of the email’s contents. It’s best to keep the subject line short and simple, yet clear and informative. For example, Order No. 2348X - Delayed Delivery.

Don’t leave the subject empty and don’t use headings like ‘Good News’, ‘Hello’, ‘Hi’, or ‘Message from Mary’. These are common in messages containing viruses and most email filters will automatically send any message with such a subject directly to the “junk mail folder”.

Salutation

It’s a good idea to start the body of your email with a salutation. You greet people when you meet them on the street; you say “Hello” when you answer the phone; and the same courtesy applies to email. What you use as your salutation depends on whom you are sending the email to and how well you know them. For example, if you are emailing your Mother, you’ll probably just use “Hi Mom!” However, you wouldn’t want to be so casual with a future employer. “Dear Mr. or Mrs. Last Name:” or “To Whom It May Concern:” would be more appropriate. Usually a simple “Hello” and the first name are used for casual business emails. If you're not sure how formal to be when emailing someone new, choose politeness. If you write, "Dear Ms. Andrews," and she replies, "Hey, Will," then go with her tone from that point on.
Body of Email

What you put in the body of your email is up to you, but like any business writing, it should have a purpose, not just some random jumble of thoughts.

A well-structured and well-thought-out email is always the best. Don't use ALL CAPITALS for the entire text. It's harder to read and in “cyber” (computer) speech it means you are angry and shouting.

- The Beginning - Start with a clear statement of what the message is about (why you are emailing) in the first paragraph.

- The Middle - This is the main body of your email and may be short or several paragraphs long. However, emails should be as short and to the point as possible. Bullets are acceptable. Email writing should be casual and easy to read.

- The End - After you’ve finished the main part of your email, you should close with a call to action. Ask yourself….

  - Is the email for information only?
  - Do you want the reader to do something, and if so, what exactly, and by when?
  - Do you need to tell the reader what you will do next? (“I’ll write you again tomorrow.”)

Contact Information

After your name, it’s a good idea to include information on how the recipient can get in touch with you. For example, you could include your phone number or mailing address. You can put as little or as much as you want. Offering more options is always best, but if you aren’t comfortable giving out your phone number or address, don’t do it.
Points to Remember

- Email is much less formal than a written letter. Emails are usually short and to the point.
- When writing to someone that you know well, feel free to write as if you are speaking to the person.
- Abbreviations are okay (he is → he's, we are → we're, etc.)
- It’s not necessary to include your email address. The recipient can just reply to the email.
- When replying take out all the information that isn’t necessary. Only leave the sections of text that relate to your reply. This will save your reader time when reading your email.
- Use bullets and numbering to help the reader to identify specific points. With plain text email, to ensure that the reader sees what you sent, insert bullets (use the asterisk character) and numbers manually, rather than relying on the formatting options in the email editor.
- Unless you know the recipient well, don't use text messaging short forms or emoticons 😛 in a business email.
- Use a spell checker. Although people tend to overlook mistakes more in emails than other forms of written communication, many spelling or typing errors suggests that you are lazy.
Email Etiquette
Learning Activity #6

The rules of email-writing etiquette are not yet set in stone. The experts still disagree on several important points. For instance, while one expert insists on polite salutations and courteous endings, another says that isn’t important at all. Expert Peter Post claims that emoticons have no place in business email. Two other experts, Will Schwalbe and Mark Hurst feel that because irony and humour are both so often misunderstood in emails, the emoticon is a quick, easy way to get your feelings across and should be allowed.

You may answer the following questions in the space provided below and on the next page or you may create your own document in a word processing program on the computer.

1) Do an online search for “email etiquette”, and check out a few of the sites that you find. List three sites you found that you thought were informative and helpful. Don’t forget to use your Critical Thinking skills.

2) Write down anything new or interesting that you learned from doing the search. (You may write the answer to this and to #3 by hand in the space below and on the next page or use a computer and word processing program.)

3) Did you find any rules of email etiquette, besides the ones mentioned above, that the experts disagreed about? Write these down too.
Module 6: **Communication**

Which of the following Essential Skills were used to complete this Learning Activity?

- [x] Reading
- [ ] Document Use
- [ ] Numeracy
- [x] Writing
- [ ] Oral Communication
- [ ] Working with Others
- [ ] Computer Use
- [ ] Continuous Learning

**Thinking Skills**

- [ ] Problem Solving
- [ ] Decision Making
- [ ] Critical Thinking
- [ ] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory
Unit 6: The Telephone

To use your telephone effectively as a tool for workplace communication, you need to manage its use. We talked a bit earlier about the effect body language has on telephone communication. In this section, we will discuss telephone etiquette and other useful tools. These tools will help you get your message across and make a good impression when speaking on the telephone.

Breathing

A good telephone voice requires lots of power or air. Before you pick up the phone, take a deep breath. Most of us are what are called "shallow breathers". We take only small breaths in and out. We therefore sound tired when we answer the phone. The goal is to sound like you enjoy your job and you are glad the person called.

To keep your voice sounding terrific throughout the call, take frequent pauses to breathe. A one or two second pause at the end of a statement or at the end of a thought is plenty. There are additional benefits to pausing. A pause eliminates non-words, like ‘ah’, or ‘um’ that make you sound unsure. It also gives you time to gather your thoughts to get your message across the first time.

Another tip is to slow your speech down slightly when you are on the phone or when you call to leave someone a message. How many times have you had to re-play your answering machine or ask someone to repeat themselves in order to understand what they were saying or the phone number that they rattled off too fast?

Identify yourself

The proper greeting when answering a call helps build a good connection and avoid misunderstandings and wasted time. It is also the polite thing to do. If you were talking face to face with this person, you would shake hands and greet them.
The three elements of an appropriate greeting when answering the phone are:

- Identifying your company or place of work.
- Giving your name and job title/department.
- Asking how you can help the caller.

Gathering information

A telephone call always has a purpose. There is a reason that the person called or that you placed the call to him. It is up to you to find or give that reason as quickly and as clearly as possible. It might be as simple as taking a message, so all you need to do is ask for the caller's name and phone number. In more complex situations, you will need to use questioning techniques to obtain the facts. So the first thing to do is find out the nature of the call or problem.

Finishing the Call

It is important to end your telephone calls in a polite and efficient manner. When you close the call you should:

- Make sure that the caller has no more questions.
- Thank the caller.
- Let the caller put down the receiver first so they don't feel you have cut them off.

Telephone etiquette

Just because you can't see the caller doesn't mean the normal rules of politeness don’t apply.

- Always be sure to get the caller’s name and use it frequently during the call.
- Don’t interrupt while the person is explaining the reason for their call.
- Listen carefully and be helpful to the caller, even if the subject of the call is not your field of responsibility. This means trying to find someone who can help now, or someone who can ring the caller back later.
• Try not to put callers on hold, but if it is necessary, ask their permission to do so and tell them how long you will be gone. You might say something such as: “Ms. Johnson, do you mind if I place you on a brief hold while I check that information for you? I won’t be more than two minutes. Thank you.”

• It's easy to fall into the trap of believing that because your callers can't see you, they won't be affected by what you are doing and what's going on around you. You should always devote your full attention to the call. Misunderstandings and mistakes will arise if you are doing something else at the same time as you are talking on the phone.

**Remember not to:**

• Let the phone ring more than four times before answering.
• Eat and drink while talking on the phone.
• Be too familiar.
• Talk to someone else in your office while you’re talking on the phone.
• Have too much background noise.
• Speak too quietly, too loudly, or too quickly.
When you talk, you give out signals by the tone and pitch of your voice, the clarity with which you speak and how fast you speak. Speaking on the telephone requires a combination of skills if we want to communicate well. In addition, 'Hints for developing good speaking skills' and 'Speaking habits to avoid', covered in a previous unit, are important to remember when talking on the phone. Combine these with the ideas discussed above and good non-verbal communication skills and you will be well on the road to successful telephone communication.
Test Your Phone Voice
Learning Activity #7

This activity will help you assess your own voice when you talk. You will need a way to record yourself. Most computers have a sound recorder in the Accessories section, but you will need to have a microphone. Otherwise, a tape recorder will do. If you can’t get either one, take turns with a partner assessing each other’s voice.

1. Do you remember the elements of a proper greeting? After you have decided how you will record or listen to your voice, think of a script for a greeting that contains those elements and write it in the space below. (You can use your own name or make one up along with the name of the company.) Think how you would like to be greeted.

________________________________________________________
________________________________________________________
________________________________________________________
________________________________________________________

2. Record yourself reading out the script you created for question 1. Play back your recording. Fill in the first section of the assessment sheet on the next page.

3. Now, record yourself again, while making each of the following changes. Fill in the rest of the sections of the assessment sheet after listening to each recording.

   a. Make your voice sound like you are busy and being interrupted.

   b. Make your voice sound bored.

   c. Talk very fast, running your words together.

   d. Chew on something while you are talking. (Be careful not to bite your tongue!)
4. Now record yourself again, while remembering that callers to your workplace will want to hear a voice that is friendly and professional.

5. Listen to your first recording and pay close attention to how you sound. Below, mark the boxes ☒ or ☐ as you think each of the statements applies to this recording.

- ☐ You say words clearly and correctly.
- ☐ You separate words instead of slurring or running them together.
- ☐ You talk at a comfortable speed, not too fast or too slow.
- ☐ You speak loudly enough to be heard, but don’t shout.
- ☐ You make sure you don’t eat candy or chew gum.
- ☐ You put a friendly, welcoming tone in your voice that says, “I’m glad you called”.

If I was the caller, I would want to call again because I felt like I

____________________________________________________

____________________________________________________

6. Listen to your second recording and pay close attention to how you sound. Below, mark the boxes ☒ or ☐ as you think each of the statements applies to this recording.

- ☐ You say words clearly and correctly.
- ☐ You separate words instead of slurring or running them together.
- ☐ You talk at a comfortable speed, not too fast or too slow.
- ☐ You speak loudly enough to be heard, but don’t shout.
- ☐ You make sure you don’t eat candy or chew gum.
- ☐ You put a friendly, welcoming tone in your voice that says, “I’m glad you called”.

If I was the caller, I would want to call again because I felt like I

____________________________________________________

____________________________________________________
7. Listen to your third recording and pay close attention to how you sound. Below, mark the boxes ☑ or ☐ as you think each of the statements applies to this recording.

☑ You say words clearly and correctly.
☑ You separate words instead of slurring or running them together.
☑ You talk at a comfortable speed, not too fast or too slow.
☑ You speak loudly enough to be heard, but don’t shout.
☑ You make sure you don’t eat candy or chew gum.
☑ You put a friendly, welcoming tone in your voice that says, “I’m glad you called”.

If I was the caller, I would want to call again because I felt like I
________________________________________________________________________
________________________________________________________________________

8. Listen to your fourth recording and pay close attention to how you sound. Below, mark the boxes ☑ or ☐ as you think each of the statements applies to this recording.

☑ You say words clearly and correctly.
☑ You separate words instead of slurring or running them together.
☑ You talk at a comfortable speed, not too fast or too slow.
☑ You speak loudly enough to be heard, but don’t shout.
☑ You make sure you don’t eat candy or chew gum.
☑ You put a friendly, welcoming tone in your voice that says, “I’m glad you called”.

If I was the caller, I would want to call again because I felt like I
________________________________________________________________________
________________________________________________________________________
9. Listen to your fifth recording and pay close attention to how you sound. Below, mark the boxes ☐ or ☑ as you think each of the statements applies to this recording.

☐ You say words clearly and correctly.
☐ You separate words instead of slurring or running them together.
☐ You talk at a comfortable speed, not too fast or too slow.
☐ You speak loudly enough to be heard, but don’t shout.
☐ You make sure you don’t eat candy or chew gum.
☐ You put a friendly, welcoming tone in your voice that says, “I’m glad you called”.

If I was the caller, I would want to call again because I felt like I

10. Listen to your last recording and pay close attention to how you sound. Mark the boxes ☐ or ☑ as you think each of the statements applies to this recording.

☐ You say words clearly and correctly.
☐ You separate words instead of slurring or running them together.
☐ You talk at a comfortable speed, not too fast or too slow.
☐ You speak loudly enough to be heard, but don’t shout.
☐ You make sure you don’t eat candy or chew gum.
☐ You put a friendly, welcoming tone in your voice that says, “I’m glad you called”.

If I was the caller, I would want to call again because I felt like I

Which of the following Essential Skills were used to complete this Learning Activity?

☐ Reading
☐ Document Use
☐ Numeracy
☐ Writing
☐ Oral Communication
☐ Working with Others
☐ Computer Use
☐ Continuous Learning
☐ Thinking Skills
☐ Problem Solving
☐ Decision Making
☐ Critical Thinking
☐ Finding Information
☐ Job Task Planning & Organizing
☐ Significant Use of Memory
To Say or Not to Say
Learning Activity #8

Examples of slang expressions and how they could be rephrased.

<table>
<thead>
<tr>
<th>Don’t Say</th>
<th>Instead Say</th>
</tr>
</thead>
<tbody>
<tr>
<td>He goes</td>
<td>He said</td>
</tr>
<tr>
<td>Huh?</td>
<td>I’m sorry; I didn’t hear what you said.</td>
</tr>
<tr>
<td>No way for that, man.</td>
<td>I’m sorry, but we wouldn’t be able to do that.</td>
</tr>
</tbody>
</table>

1. Rewrite the following statements, as you think they should be worded in an office telephone conversation.

   a. Hang on a sec an I’ll check it out for ya.

   ____________________________________________________________.

   b. Run that by me again, honey.

   ____________________________________________________________.

   c. I’m right on it. You should receive that in, like, two days.

   ____________________________________________________________.

   d. Yeah, yeah, I got it. I’m not deaf, ya know.

   ____________________________________________________________.

   e. Ummm, yeah, I guess we can do it, but it’ll cost ya.

   ____________________________________________________________.
Role-play is a form of drama, where you and others take on “roles” to act out a ‘what if’ or imaginary situation. The fun part of role-play is that you can ‘become’ anyone you like for a short time. Life-like situations can be created and you can benefit by practicing or viewing various actions. Mistakes can be made with no terrible consequences. Role-play often is improved by props and settings like telephones and furniture.

Do the following role-play activities with a partner. Your partner may be another learner or your tutor or instructor. If possible, do these activities in a group with you and other learners taking part as both actors and audience.

Take time after each role-play to discuss the results.

- How did the person playing the receptionist think the role play went?
- How did the person playing Chris (the customer) think the role play went?
- What did you learn?
- What might you each do next time?
- What did the rest of the group (the audience if there was one) think of the role-play and what did they learn?
- What did your instructor think?

1. Role-play the following positive and negative Making a Hair Appointment over the Telephone scenarios.

   a. Wrong way:
      - **Receptionist**: Style Plus, watcha want?
      - **Chris**: Hi, I’d like to make a hair appointment please.
      - **Receptionist**: Fer when?
      - **Chris**: Tomorrow morning.
      - **Receptionist**: Lemme check. Yeah, we can do ya then.
      - **Chris**: Great. I’ll take it.
      - **Receptionist**: What’s yer name?
      - **Chris**: Chris Nelson.
b. Right way:

**Receptionist:** Good Morning. Style Plus Hair Salon, Can I help you?
**Chris:** Hi, I’d like to make a hair appointment, please.
**Receptionist:** Okay, when would you like to come in?
**Chris:** Tomorrow morning.
**Receptionist:** And what would you like done?
**Chris:** Just a haircut, please.
**Receptionist:** Ok. We do have an opening for a cut tomorrow, at 10:30am.
**Chris:** Great. I’ll take it.
**Receptionist:** May I have your name, please?
**Chris:** Chris Nelson.
**Receptionist:** Thank you. We look forward to seeing you tomorrow.

2. Role-play Cancelling an Appointment over the Telephone scenarios.

a. Wrong Way:

**Receptionist:** Hi.
**Chris:** Hi, is this the dentist’s office?
**Receptionist:** Yup.
**Chris:** This is Chris Nelson. I need to cancel my appointment for Thursday.
**Receptionist:** Yup.
**Chris:** Should I call back to make another appointment?
**Receptionist:** Yup.
**Chris:** OK then, Bye.
**Receptionist:** Right, see ya.

b. Right Way:

Now do a scenario of your own to take an appointment cancellation the right way from Chris for the chiropractic clinic. It might help you to write out a script first, but you can ad lib if you like.
3. Role-play Taking a Parts Order over the Telephone scenarios.

a. Right Way:

**Receptionist:** Hello, how may I help you?

**Chris:** I want to order a new wheel for my lawn mower.

**Receptionist:** Certainly, do you have the mower product number?

**Chris:** Yes, it’s *(say 327432156 very quickly and not very clearly)*

**Receptionist:** Sorry, I didn’t quite get the whole number.

**Chris:** That was *(say 327 432 156 very slowly and clearly)*

**Receptionist:** Thank you, that was 327 432 156?. Let me just check to see if we have it in stock. *(pause to check).* Yes, we do have it. I have placed your order and you may pick it up at the parts desk anytime.

**Chris:** Thank you.

**Receptionist:** You are welcome. Have a good day.

b. Wrong Way:

*Now is your chance to have some fun* and create your own script to complete the parts ordering scenario the wrong way. Give your receptionist role some character and use a lot of slang!
Unit 7: Active Listening

Effective oral communication in the workplace is not just about getting your message across clearly to other people. It’s also about receiving, and understanding clearly, information that others are sending to you. This requires a skill we call Active Listening.

Hearing is a physical ability, while listening is a skill. Listening skills allow you to make sense of and understand what another person is saying. You probably spend more time using your listening skills than any other kind of skill. Just like your other skills, listening takes practice.

Good listening skills make workers more productive. The ability to listen carefully will allow you to:

- Better understand assignments you are given and what is expected of you.
- Build rapport with co-workers, bosses, and clients.
- Work better in a team-based environment.
- Resolve problems with clients, co-workers and bosses.

Communication Filters

What someone says and what we hear can be surprisingly different. Our personal filters, assumptions, judgements, and beliefs can distort what we hear. In any communication, there are two people: the sender who speaks or writes the message, and the receiver who listens to or reads the message.

It is important that both the sender and the receiver are doing their part. Otherwise, the receiver will not get the message that the sender meant to deliver. Did you ever play the “telephone game” as a child? In this game, one person whispers a message into the next person’s ear, and so on down the line to the last person. The last person usually got a wrong message. Well, that is a good example of what can happen if communication is “filtered” by other people or by other things.
Some filters (barriers) to clear communication are:

- **Beliefs and Experiences** - As we said in the Critical Thinking section of the Thinking Skills module, our beliefs can cause a bias or prejudice that can affect the message. A history of bad experiences could also colour your judgement about what someone says.

- **Interpretation** - Often we are told, “So-and-so said ....”. This is just like the ‘telephone game’. We are hearing an interpretation of what the original person said, not the actual message. The message has been filtered by the people in between. As much as possible, when receiving a message, you should get the message straight from the sender and, when sending a message, give it right to the receiver.

- **Distractions** - When someone speaks to you, do they have your full attention? Are you distracted by external things like background noise or the view out the window? Internal things, such as feeling tired or planning what you still need to do today can also be distracting. Removing or reducing these distractions will make it easier to pay attention to the conversation at hand.

- **Emotions** - Moods greatly affect communication. You tend to have trouble transmitting your message to others or understanding a message you are listening to when you are upset. A few of these emotional barriers or filters include anger, resentment and fear.

- **Stress** - One of the major communication barriers faced by employees in most workplaces is stress. When a person is stressed, they may find it difficult to understand the message, leading to a communication failure.

- **Bias** – We discussed bias in the Thinking Skills Module. If you have already decided how you feel about someone or something, it can change how you receive and interpret a message.
Active listening has three basic steps.

1. **Hearing.** The first step in listening is to actually hear or catch what the other person is saying. For example, you are listening to someone give a talk on zebras and she mentions that no two are alike. If you can repeat this fact, then you have heard what has been said and you have completed the first step.

2. **Understanding.** The second part of listening happens when you take what you have heard, interpret it in a way that you understand and feel that makes sense to you. When you hear that no two zebras are alike, you think about what that might mean. Maybe this means that the pattern of stripes is different for each zebra.

3. **Concluding.** After you are sure you understand what the speaker has said, then you can think about whether it could be true. This means using your Critical Thinking skills. Do you believe what you have heard? How could the stripes be different for every zebra? But then again, fingerprints are different for every person. You may conclude that what she says is believable and a true statement.

We’re listening!
What do you think? Different stripes?
Can you spot 5 differences?
Roadblocks to Good Listening Skills

There are behaviours that tend to switch people off or cause us to end up getting the wrong information from them. These are sometimes referred to as roadblocks. Here are a few:

- Interrupting before someone has finished their sentence.
- Expressing indifference or superiority.
- Arguing with or lecturing the speaker.
- Preaching or telling people what to say or do.
- Disagreeing with, judging or criticising what the speaker is saying.
- Agreeing, approving, or praising too much.

Helpful Hints for Good Listening

The following are helpful hints to use while listening to your instructor, your boss, your co-workers or your clients.

✓ Focus your attention.

Keep the person you are listening to at the centre of your attention. Don't look out the window or at other activities going on in the room. When you glance away to watch things around you or listen to a nearby conversation, you decrease your chance of understanding the speaker’s message.

✓ “Tune-in” to understand.

Make sure your mind is focused, not just your ears. It can be easy to let your mind wander, especially if you think you know what the person is going to say next. If you feel your mind wandering, try changing the position of your body and try to concentrate on the speaker's words. Hear not only what the person is saying, but also how he is saying it. Listen with your senses as well and look for non-verbal messages.
✓ **Hear the Speaker out.**

Finish listening before *you* begin to speak. You aren’t listening properly if you are busy thinking about what you want to say when your turn comes. Listen for the main point the speaker is trying to communicate. Pay special attention to statements that begin with phrases such as "My point is..." or "The thing to remember is..."

✓ **Repeat or restate whenever possible.**

To show you are listening and to be sure you have understood the message correctly, every so often, repeat what you think the person said. Don’t be a parrot, instead restate in your own words what you heard. For example, “Let’s see if I’m clear about this . . .”

✓ **Summarize and ask questions.**

Bring together the pieces of the conversation to check understanding - for example, “So it sounds to me as if . . .” Or, “Is that it?” Encourage the person to tell you more by asking questions. Ask for their opinion, to make sure you understand what they are telling you. If you are still not sure you understand what the speaker has said, ask again until the message is clear.

**Remember:** Communication is only successful when both the sender and the receiver understand the same information as a result of the communication.
Communication Break-Downs
Learning Activity #10

In the following situations, answer the a), b) and c) questions about communication “break-downs”.

1. Yesterday when you scheduled your job interview over the telephone, you were also listening to the radio, now you don’t know what time the interview is.
   a. What “communication filter” might have caused the problem?

   ____________________________

   b. What could happen in this situation?

   ____________________________
   ____________________________
   ____________________________

   c. What would have prevented this situation?

   ____________________________
   ____________________________

2. You start a new job today and you decide to wear your favourite jeans and blue top. When you arrive at work, people are staring at you. When you report to your supervisor, she is shocked to see you wearing jeans. She asks you, “Why aren’t you dressed in business attire, according to the dress code that I told you about at our interview?”

   a. What “communication filter” might have caused the problem?

   ____________________________
b. What could happen in this situation?
___________________________________________________
___________________________________________________
___________________________________________________

c. What would have prevented this situation?
___________________________________________________
___________________________________________________
___________________________________________________

3. You work as a receptionist at a 24 hour walk-in medical clinic, along with your friend Gina. While you are chatting on the phone with Gina on your day off, she tells you that your schedule has changed and you don’t work Tuesday anymore. Tuesday morning you get a call from your manager asking why you aren’t at work as scheduled.

a. What “communication filter” might have caused the problem?
___________________________________________________

b. What could happen in this situation?
___________________________________________________
___________________________________________________
___________________________________________________

c. What would have prevented this situation?
___________________________________________________
___________________________________________________
___________________________________________________

Which of the following Essential Skills were used to complete this Learning Activity?

- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Thinking Skills
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory
Learner Self-Assessment

Now that you have completed Module 6 – Communication, assess your performance. In the comments section, you can write down thoughts you have about the section. Use a blank sheet of paper if you need more space.

I started this module on (date) _______________ and finished on (date) ___________. I think I worked through it in a reasonable time □ yes □ no

<table>
<thead>
<tr>
<th>Clerical: Module 6 – Communication</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Unit 1 – Introduction</strong></td>
</tr>
<tr>
<td>I completed a communication quiz and found that I am a good communicator. □ yes □ I need more time to decide □ no</td>
</tr>
<tr>
<td><strong>Unit 2 – Non-verbal Communication</strong></td>
</tr>
<tr>
<td>I know the difference between verbal and non-verbal communication. □ yes □ yes but I need more practice □ no</td>
</tr>
<tr>
<td>I understand that there are many different types of non-verbal communication and that these can affect the message I am sending or receiving. □ yes □ yes but I need more practice □ no</td>
</tr>
<tr>
<td>I have learned that non-verbal communication can even effect my telephone conversations. □ yes □ yes but I need more practice □ no</td>
</tr>
<tr>
<td><strong>Unit 3 – Verbal Communication</strong></td>
</tr>
<tr>
<td>I have learned good speaking habits and bad speaking habits to avoid. □ yes □ yes but I need more practice □ no</td>
</tr>
<tr>
<td><strong>Unit 4 – Written Communication</strong></td>
</tr>
<tr>
<td>I know that it is important for me to organize, write neatly and avoid grammar and spelling mistakes when I am writing. □ yes □ yes but I need more practice □ no</td>
</tr>
<tr>
<td>My writing will be better if I avoid wordiness, don’t use slang, do use simple language, use a dictionary and proofread my work. □ yes □ yes but I need more practice □ no</td>
</tr>
</tbody>
</table>
### Unit 5 – Communicating with Email

<table>
<thead>
<tr>
<th>Statement</th>
<th>Yes</th>
<th>Yes but I need more practice</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>I understand the various parts of an email.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I have learned eight important points to remember when using email for business.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Unit 6 – The Telephone

<table>
<thead>
<tr>
<th>Statement</th>
<th>Yes</th>
<th>Yes but I need more practice</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>I understand proper telephone etiquette for the workplace.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I have practised my “good” telephone voice.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Unit 7 – Active Listening

<table>
<thead>
<tr>
<th>Statement</th>
<th>Yes</th>
<th>Yes but I need more practice</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>I understand the importance of active listening and the steps to active listening.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I have learned roadblocks and helpful hints for active listening.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Comments:** (Write down thoughts you have about the section. Use a blank sheet of paper if you need more space.)

____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
Office Clerical

Module 7: In the Office

Unit 1: Working with Others
Unit 2: Customer Service
Unit 3: Office Safety
Unit 1: Working with Others

Working with Others is one of the Essential Skills. In this unit, we will show you ways to use it with the other Essential Skills.

Links with other Essential Skills

In order to work well with others, a number of the other Essential Skills are important. You need:

**Good Thinking Skills** - Problem solving, decision-making, critical thinking, job task planning and organizing, memory use and finding information are all “essential” to getting along and working well with others.

**Good Communication Skills** - If your communication skills are poor, you won’t be able to make yourself understood. You won’t understand others and you will make mistakes.

**Continuous Learning Skills** - A person who is always willing to learn and change with circumstances is a welcome employee. No one minds when someone makes a mistake now and then, but everyone objects to someone who doesn’t learn from a mistake.
Working with Others can be broken down into four categories. They are:

- **Working alone** - Even employees who work by themselves must follow instructions and report to a supervisor or boss about their work.

- **Working independently** - These workers are not physically alone. They work side-by-side with others. Each person has their own job to do but they coordinate their work with others.

- **Working jointly with a partner or helper** - When two people work together, they help each other to get the work done.

- **Working as a member of a team** - A team is a group of workers who get the job done through combined effort and cooperation.
Getting Started

Whether you are attending training or beginning a new job, you want to start on the right foot. You will want to impress your instructor, your boss and the people that will work with you. The following tips can help.

Attitude

Attitude is the key to success. Good workers have good attitudes. A worker with a poor attitude doesn’t make any effort to get along with others. He doesn’t willingly do his share of the work.

Plan Ahead

Find out as much as you can about your new job, its products and services before you start. Try to remember things from your interview. Remember the people you meet, including their names and titles. Check out the route you will take to get to work. Think about what you will be able to eat for your meal break.

Prepare

Organize what you are going to wear. Your clothes should be clean and not wrinkled. You should have good personal hygiene. When you look your best, you feel confident and feeling confident is very important in a new job.

Be On Time

Stick to your work schedule; people are depending on you. Find out when you can take meals and other breaks. Find out what time you are to start and when you should leave.

Be Reliable

If you miss days during training, you miss important information that you will need to do the job or to pass the course. Do the job that you are expected to do. Work the hours that you are scheduled to work. If you say you’re going to do something, do it.
Smile

Make a good first impression. Having a smile on your face, an enthusiastic manner and a friendly personality will make people look forward to working with you.

Be Friendly

Get to know the people at work, especially those you will work with often. You will need their help and support. Treat everyone with respect.

Ask Questions

It’s okay if you don’t know everything, especially when you are learning a new job. Ask questions. People are usually more than happy to help. Be sure to do more listening than talking. You’ll gain respect and absorb more information. Make sure you understand what is expected and if you’re not sure, ask.

Take Notes

When you ask questions, write down the answers. This will save you from asking the same question twice. It’s also a good idea to write down procedures, names of key people and contact numbers for future reference. Use some of the other “Memory Tips” that we covered in the Thinking Skills Module.

Get Feedback

Asking for feedback is important, but it is something that people are often uncomfortable doing. This shows that you are interested in doing a good job. Keep a positive attitude. Accept criticism and suggestions for improving your work.
How Do You Work Best?
Learning Activity #1

1. Using a computer and word-processing program write a paragraph about each of the four ways of Working with Others. In your writing, explain what you would find easiest and what you would find hardest about each way and why it would be easy or hard for you.

Remember the rules of good written communication that you learned in Module 6, Unit 4. Don’t forget to review and self-assess your writing before giving it to your instructor to check. In any clerical job it is expected that you would do your best and check your work before giving it to your boss or a customer.

a. Working Alone
   What I would find easiest and Why.
   What I would find hardest and why.

b. Working Independently
   What I would find easiest and why.
   What I would find hardest and why.

c. Working Jointly with a Partner or Helper
   What I would find easiest and why.
   What I would find hardest and why.

d. Working as a Member of a Team
   What I would find easiest
   What I would find hardest and why.

Which of the following Essential Skills were used to complete the Learning Activity on the previous page?

- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory
Getting Started
Learning Activity #2

1. Choose three of the tips for Getting Started listed previously, and explain how you feel the tip can help you and why it is important. You may fill your answers in below or type your answers on the computer. Use good written communication and your Thinking Skills!

   a. Tip ____________________________________________________

      How it can help me? ______________________________________
      _______________________________________________________

      Why is it important? _____________________________________
      _______________________________________________________

   b. Tip ____________________________________________________

      How it can help me? ______________________________________
      _______________________________________________________

      Why is it important? _____________________________________
      _______________________________________________________

   c. Tip ____________________________________________________

      How it can help me? ______________________________________
      _______________________________________________________

      Why is it important? _____________________________________
      _______________________________________________________

Which of the following Essential Skills were used to complete the Learning Activity on the previous page?

- [ ] Reading
- [ ] Document Use
- [ ] Numeracy
- [ ] Writing
- [ ] Oral Communication
- [ ] Working with Others
- [ ] Computer Use
- [ ] Continuous Learning
- [ ] Thinking Skills
- [ ] Problem Solving
- [ ] Decision Making
- [ ] Critical Thinking
- [ ] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory
Being a Team Player

In today’s business world, employers consider teams and teamwork the best way to work. They are not looking for a “shooting star” that rises to the top as a one-man show. Employers are looking for people who can work together.

A team is not just a group of people working at the same place. In a team, the members do not think only about themselves. They think about the entire team and they depend on each other. They work towards what the team needs to do. In a true team, each team member is equally responsible for doing the team’s work. A workplace where the employees get along well and still get the job done is a successful business.

So, are you a team player? If you fit in with your team, you’ll be much more likely to keep a job and be happier doing it!!!

“Team Player”
A member of a group who cooperates with other people and who puts his or her personal interests aside to work toward a common goal.
Steps to being a team player:

1. **Be reliable.** People should be able to count on you to do your share of the work. It’s important to be dependable.

2. **Communicate positively.** To be a valuable team player, you must be able to express your thoughts and ideas clearly, directly, honestly and with respect for others. You must also listen.

3. **Treat others with respect.** If you don’t like someone, try to keep it to yourself. Don’t gossip. When you run others down, you look bad.

4. **Be an active participant.** Take the initiative and help make things happen with an attitude of "What contribution can I make to help the team achieve success?" Cooperate to do what is best for the team and the company as a whole.

5. **Share information.** Be willing to share information, knowledge and experience. Keep other team members (your co-workers and boss) informed on a day-to-day basis. Help newer employees.

6. **Be flexible.** Change is normal when you're working on a team. Good team players adapt. They don't complain or become stressed-out when the team tries something new.

7. **Be a problem-solver.** A good team player is willing to deal with all kinds of problems to find solutions. Instead of being a problem-dweller, problem-blamer or problem-avoider, valuable team members choose to be problem-solvers.
Solving Problems at Work

There is always more than one way to handle a situation. You make choices based on what you know and what you think is right. You use your Critical Thinking, Decision Making and Problem-solving skills to help you decide the best thing to do.

Do I deal with the situation or ask for help?

This is often one of the hardest questions to answer, especially for new employees. For situations that come up often, there will be guidelines to follow to let you know what decisions you can make for yourself, what decisions the team will make and what decisions your supervisor will make. Don’t do something without permission and have to apologize later.

If you have an issue, problem or concern, report it as soon as possible, even if you have already dealt with it yourself. You and the other team members or your boss can discuss how the problem was solved and whether this would be the best way to deal with something similar in the future.

Remember, though, that you are just one employee and one member of the team. Don't take more than your fair share of the team’s or a supervisor’s time dealing with every little situation or problem. Instead, explain the issue and your solution. Use your Thinking Skills and consider, “Is this a concern for the business?”
Teamwork
Learning Activity #3

Below are some words that describe either people who work well as part of a team or people who don’t. Choose words that are positive for good teamwork, then find and circle them in the word search puzzle on the next page.

<table>
<thead>
<tr>
<th>trustful</th>
<th>argue</th>
<th>kind</th>
</tr>
</thead>
<tbody>
<tr>
<td>bossy</td>
<td>fights</td>
<td>complains</td>
</tr>
<tr>
<td>agreeable</td>
<td>helpful</td>
<td>friendly</td>
</tr>
<tr>
<td>know it all</td>
<td>hurtful</td>
<td>takes advice</td>
</tr>
<tr>
<td>team member</td>
<td>sharing</td>
<td>pouts</td>
</tr>
<tr>
<td>gossip</td>
<td>selfish</td>
<td>caring</td>
</tr>
</tbody>
</table>

Which of the following Essential Skills were used to complete the Learning Activity on the previous page?

- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory
Word Search

Z T X V A A T A J V R Q K T U J I L Z
Z E D R R T R E B M E M M A E T H U X
G F G G L C S C B U C L A A T C G F V
Q P U P W N Y W M O R B S R R F M T T
Y E O O X W V U M T S O U D G E Q X D
S Z Y U M L Y P X G O S S I P U S Z N
H U R S F U L K B Y T S Q S P Q E T T
Q A J T I A D C O F M Y F R N K L U L
B K H G I N N H U H I Z A I G T F O V
J I R N I J E L B A E E R G A B I U S
L W S K K S I Y U D X W F C E I S V N
X C T L Z E R D E E H G N I R A H S M
D A H E L P F U L S L U F T R U H X J
A B G C M I L L A T I W O N K G F H Q
D S I R D R E C I V D A S E K A T I D
O T F B M G N I R A C X D N I K N O H

© LLEO 2011, Clerical Essential Skills Training
Mike worked in the office of a large trucking firm. He did his job well, was always on time and was seldom sick. However, it wasn’t Mike, but Sue, who got the promotion when the senior clerk retired. Mike had more experience and couldn’t understand why he didn’t get the job.

Even though Mike worked hard, he didn’t get along with others. He didn’t try to be friendly to anyone and he made fun of fellow workers when they made mistakes. If anyone found something wrong or criticized him, Mike argued loudly. Mike’s opinion was that he was the best at his job and he took every chance to point it out.

1. What good work skills do you think Mike had?

______________________________________________________________________________________________________________________________________________________________

______________________________________________________________________________________________________________________________________________________________

2. What bad work habits do you think he had?

______________________________________________________________________________________________________________________________________________________________

______________________________________________________________________________________________________________________________________________________________

3. What are two tips you could give Mike on ways that he could improve how he gets along with others?

______________________________________________________________________________________________________________________________________________________________

______________________________________________________________________________________________________________________________________________________________

4. Discuss with a partner or group how you feel that Mike’s behaviour and attitude toward others may have affected his job.
Getting Along with Others
Learning Activity #5

In each of the following situations, circle the letter that describes the best choice for getting along with others in an office. If possible, discuss your choices in a group of other learners.

1. You and another office worker share a job. She wants to divide the work so that each person does half the invoicing. It’s harder for you because you’re new, so you don’t think that’s fair.
   
   a. ‘Buck-up’ and really make an effort to do your share.
   
   b. Tell the others you want a smaller share of the work.
   
   c. Complain to your boss.

2. You don’t like one of the other employees you have to work with.
   
   a. Be honest and say so.
   
   b. Keep it to yourself and try to be nice.
   
   c. Tell your boss that you won’t work with that person.

3. One of the workers in your office is handicapped.
   
   a. Make jokes about it. The person should be used to it.
   
   b. Accept the person and help them when they need it.
   
   c. Avoid the person.

4. An older employee often tells you how to do things. You’d rather do it your way.
   
   a. Listen to the advice. She may know something you don’t.
   
   b. Tell the person not to bother you.
   
   c. Ignore her. She’s probably out of date anyway.
5. You disagree with your co-worker’s plan for doing a job.
   
   a. Tell her why in a calm way, giving her reasons.
   
   b. Laugh at her.
   
   c. Argue loudly so that everyone will see how smart you are.
Working Together
Learning Activity #6

You have been working on the same project at work for several weeks. It involves deleting old records, re-labelling files and generally cleaning up the filing cabinets. This is such a big job, that another worker, Anna, has been assigned to the task as well. Although you are supposed to share the work, Anna has gradually taken charge and tells you what to do and when to do it. Is it your imagination, or are Anna’s lunch and coffee breaks always scheduled when it is her turn to help out? You think you seem to do more than your share of the work and now the boss is wondering why, with two workers, the project still hasn’t been completed.

1. Using the Steps to Problem Solving covered in the Thinking Skills module and the first four steps of the chart on the next page, answer the following questions.

   a. What do you think the problems are in the Office? (State the problems.)

   b. What are the issues? (Organize the facts.)

   c. Come up with some solutions to work out the issues. (List the solutions.)

   d. What might cause some positive results and what might be some difficulties? (possible roadblocks/consequences)

   e. What is the best solution and what steps would you take to put your solution in place. (Verify the solution.)

   f. Now you need feedback and to Evaluate. Discuss your answers with group members or your teacher.

Remember: Use the acronym - SOLVE
and you won’t forget the steps to problem solving.
1. **State** the Problems:

2. **Organize** the facts

   _____________________________________________________
   _____________________________________________________
   _____________________________________________________

3. List Solutions

   Possible Solution 1 | Possible Solution 2 | Possible Solution 3
   _____________________________________________________
   _____________________________________________________
   _____________________________________________________

   Roadblocks/Consequences | Roadblocks/Consequences | Roadblocks/Consequences
   _____________________________________________________
   _____________________________________________________
   _____________________________________________________

Which is the best solution?

4. **Verify** your choice: ____________________________________________

   _____________________________________________________

Get feedback

5. **Evaluate** your solution ___________________________________________
Which of the following Essential Skills were used to complete this Learning Activity?

- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Thinking Skills
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory
Getting Along with Your Boss

When we are working with others, we also need to think about getting along with the person we work for - our employer, supervisor, boss or “team leader”.

You need to get along with the person in charge, even if it isn’t always easy. You may not always agree with this person, or like everything about her, but there are things you can do to get along.

Be friendly. This doesn’t mean that you have to be best friends and do things together outside work. It means smiling, making eye contact and saying a simple greeting such as hello.

Listen. It’s important to listen carefully and follow through on your supervisor’s directions.

Be dependable. Be on time, or even a little early, for work. Lateness and frequent absence are two of employers’ greatest complaints about workers.

Do your best, all the time! Work isn’t always fun, but doing a good job will certainly give you a good feeling. On the other hand, trying to do as little as possible won’t make you or your boss feel very good. Take pride in your work.

Show respect for the person in charge. Don’t say bad things behind her back. If you say something nasty, someone may repeat it to her. Respect from your supervisor is something you will have to earn. Working hard, doing your best and following these hints are good ways to earn respect. Respect works two ways. When you treat people with respect, they will respect you in return.

Finally, accept that your boss or instructor is human. Just like you, she has bad days, and makes mistakes. A supervisor is important to the work team and to you.
Pleasing the Boss
Learning Activity #7

Circle the best way to get along with your boss in each of the following cases. If possible, discuss these answers in a group.

1. It is very important to your boss that the desks and tables in the office are left clean and tidy at the end of each shift. You should:
   a. Spend a few extra minutes cleaning up.
   b. Try to get him to loosen up.
   c. Get him to do that part of the job himself.

2. You think your boss may have forgotten about an important order. You should:
   b. Remind her privately.
   c. Tell everyone you remembered, but she forgot. She will be impressed with your memory.

3. The boss gives you a new job to do. You should:
   a. Explain why you don’t have time to do it.
   b. Groan loudly and complain about your work-load to everyone who will listen.
   c. Accept the job pleasantly.

4. The boss gives you directions to do a job. You’ve tried to understand, but you really don’t. You should:
   a. Ask for more directions.
   b. Pretend to understand so you don’t look stupid.
   c. Keep trying to figure it out on your own the best you can.
5. Your boss tells you he doesn’t like the way you did a job. He wants it done differently. You should:
   a. Immediately tell him why your way is better.
   b. Get upset. Let him know how hard you worked.
   c. Stay calm. If you have a good reason, explain why you did it your way. If he still disagrees, do it over his way.

6. On your first day, your boss asks you to do a simple, boring sorting and filing job. You should:
   a. Refuse to do it. You’re above all that.
   b. Do your best on each task you’re given.
   c. Try to get away with the least work possible.

7. One or two of the other workers are often late to work and they seem to get away with it. You should:
   a. Be on time anyway.
   b. Come in as late as they do, but no later.
   c. Tell the boss on them.

8. Some of the rules of your new company seem too strict. You should:
   a. Follow the rules even if you don’t like them.
   b. Follow only the rules that you agree with.
   c. Complain to all your co-workers.

Which of the following Essential Skills were used to complete this Learning Activity?

- [ ] Reading
- [ ] Document Use
- [ ] Numeracy
- [ ] Writing
- [ ] Oral Communication
- [ ] Working with Others
- [ ] Computer Use
- [ ] Continuous Learning
- [ ] Problem Solving
- [ ] Decision Making
- [ ] Critical Thinking
- [ ] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory
Worker Control
Learning Activity #8

While a supervisor controls many things about your work life, you have control of your work life, too. For example, it is in your control to make your job more pleasant with a good attitude.

Listed below are some things that are part of doing a job. Put a check in the box that you think shows how much control the worker has over each thing. Explain why you made that choice. There can be more than one right answer.

1. Being happy with your job. ☐ a lot ☐ some ☐ none

2. Getting along with your boss. ☐ a lot ☐ some ☐ none

3. Being accepted as part of a work team. ☐ a lot ☐ some ☐ none

4. Getting a raise or a promotion. ☐ a lot ☐ some ☐ none

5. Doing your job well. ☐ a lot ☐ some ☐ none

6. Being given more responsibility. ☐ a lot ☐ some ☐ none

7. Being known as a dependable person. ☐ a lot ☐ some ☐ none
Dealing with Criticism

Accepting criticism from anyone can be very difficult. When an instructor or supervisor criticizes or corrects you, it can make you feel upset and uncomfortable. However, constructive criticism is part of any job.

**Constructive Criticism:** Advice or opinions that are carefully considered and meant to be helpful for improvement, often with an offer of possible solutions.

Constructive criticism can help make us better workers. It can help us to think about how we act and how we work with others. We need to listen to the suggestions. Remember, a positive attitude will help us to build strong relationships and earn the trust and respect of others.

Things to remember, if you make a mistake:

- Don’t whine.
- Don’t make excuses.
- Don’t blame someone else.
- Learn from your mistake and do better next time.
- Ask for help if you need it.

When you make a mistake, take responsibility for it. Take the time to say that you are sorry, and create a plan, either by yourself or with help from your instructor or boss, to do better the next time. Remember, while no one expects you to be perfect all the time, no one expects you to make mistakes all the time either.

**Remember:**

Learn from mistakes! Don’t repeat them!
Constructive Criticism
Learning Activity #9

In each of the following situations, imagine that your boss is criticizing or correcting you. Write what you feel would be an appropriate response. If possible discuss your answers with another person or in a group. You could also act this out in a Role Play.

Situation #1

**Boss:** “I’m not happy with the reports you have been writing.”

**You:**

__________________________________________________________________
__________________________________________________________________
__________________________________________________________________

Situation #2

**Boss:** “You have been late for work twice this week.”

**You:**

__________________________________________________________________
__________________________________________________________________
__________________________________________________________________

Situation #3

**Boss:** “You haven’t been following the office rules about lunch breaks. You may take a lunch break only when there are no patients left in the waiting room.”

**You:**

__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
Situation #4

**Boss:** “You didn’t unplug the photocopier when you were servicing it this morning. As I explained to you when you started, you need to follow the office safety rules.

**You:**

__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
Unit 2: Customer Service

Customer service is a high profile topic in the business world. Companies understand just how important customer service is and have started to find ways to improve and measure the service they provide. There is usually a choice of services or businesses in any area, so you have to make the customer want to choose yours. That is what makes quality service so important. If you are grumpy or rude, the customer gets a bad impression of the whole company. Friendly contacts in a company can actually make the customer want to use that service again.

Even when your job doesn’t require you to deal directly with clients or customers, customer service is necessary in your dealings with other company departments and co-workers.

There are three levels of customer service:

- Rudeness.
- Indifference (not interested).
- Quality service.

Sixty-eight percent of the time, when customers or clients stop doing business with a company, it is due to rudeness or indifference.
Internal Customer Service

Internal customer service is the service we provide fellow employees. Many people deal with ‘customers’ within their own companies. These internal customers are people and employees who work in the same company - other departments within our own company, our suppliers and anyone else with whom we work.

Internal customer service is what we provide when a co-worker asks for information she needs to complete her main task for the day. It is what we say when someone from marketing asks for the addresses of good contacts and how we greet the boss when he walks into our office with an "I need something from you" expression on his face.

It is important to remember that the quality of customer service co-workers provide to each other shows up with outside customers. Sadly, not all co-workers treat each other with the kind of respect and care that they should.

Below are some internal customer service tips for creating an atmosphere of sharing and helping:
Your view of things.

Think about fellow employees and other departments as your customers. Understand that helping your co-workers do their jobs successfully helps you and the company - and its customers, too.

Interruptions are opportunities.

If you tend to view every interruption as a nuisance, or pothole in your road to success, re-examine those interruptions. If someone interrupts you to share gossip, that's a pothole. If he interrupts to ask for figures needed for analysis of sales team performance, that's a necessary lane change and an opportunity to help. Take pride in helping co-workers and enjoy your role in sharing information and providing services that help others get their jobs done. Your willingness to help others will lead them to readily assist you when you need it.

Exceed expectations.

When someone does better than you expect, how do you feel? Most people feel upbeat and very positive about that person and her organization. Think what you can accomplish in your workplace by exceeding the expectations of fellow employees. For instance, if payroll asks for time sheets by 3:00 p.m., provide them by 1:00 p.m. so payroll can relax, knowing they have the time sheets in hand. If human resources asks for a list of important points to cover in an employee orientation, take time to think about it and provide a thorough list of what you would want to know if you were being introduced to a new job and company.

Say thank you.

A simple, genuine "thank you" goes a long way in creating an atmosphere of sharing and helping. Even when it is a person's job to provide information or a product to you, tell them "thank you" when they have done it. Show them how pleased you are when they do things for you.
Customer Service Top Ten

1. Appearance - First impressions last a long time.
2. Attitude - Make it positive.
3. Friendliness - Be generous, give smiles without question.
4. Impression - What’s left in the room after you’re gone.
5. Response-ability - Do it and do it better than anyone expects.
6. Commitment - Your dedication to service and teamwork.
7. Team Thinking - Your actions affect everyone you work with.
8. Communication - Active listening and positive responses.
10. Personal Excellence - Believe in yourself - you can make a difference.
There have been many studies done on what good customer service means. One study – the SERVQUAL model (short for service quality) – lists things people look for from you in five different areas of customer service.

These areas are:

<table>
<thead>
<tr>
<th>Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reliability</td>
<td>People can count on you. You are dependable.</td>
</tr>
<tr>
<td>Assurance</td>
<td>You make people feel it is safe to trust you.</td>
</tr>
<tr>
<td>Tangibles</td>
<td>Things that you can actually see or touch.</td>
</tr>
<tr>
<td>Empathy</td>
<td>Understanding; feeling someone else’s feelings.</td>
</tr>
<tr>
<td>Responsiveness</td>
<td>How do you react to an event or situation?</td>
</tr>
</tbody>
</table>

How would the RATER mark your Service in these areas?

OR

Customer service

Excellent

Poor
Handling a Difficult Situation

People come in all shapes, sizes and personalities. Not everyone is happy and pleasant. You will run across those who are angry or mean. These people, whether customers, clients or co-workers, are never easy to deal with. By following a few simple tips, you can make the situation as positive as possible.

Prepare yourself. At times, customers or co-workers may swear, make fun, threaten, frighten or harass you. Unfortunately, some people feel that it’s alright to treat others this way.

Rude, difficult or abusive individuals have learned that when they rant and rave, they often get what they want. This behaviour is a form of bullying.

While most people don’t react this way...the few who do, really make it rough for everyone. It is not a good idea to respond to someone’s bad attitude with the same kind of behaviour. Giving back as good as you get will only make the situation worse. You do need to deal with the person, but try not to react to the anger. Instead, you should stay calm, act in a professional manner and get the situation under control.

Remember:
Follow the GOLDEN RULE…
Treat others the way you would like to be treated yourself.
In order to deal with angry people, it helps to know some reasons why they behave the way they do.

**A Person Who is Upset Wants...**

***…To Be Taken Seriously***

Someone who is upset doesn’t want a response like, “You’re kidding!”, “No way”, or “You have to be joking!” She wants you to be professional and confident, and to respond seriously to her concern.

***…To Be Treated With Respect***

The upset person doesn’t want you to look down on him or feel that you think you are a better person than he is. He wants you to treat him and his concerns with respect. He wants you to understand why he is angry. This may be difficult if he is at fault but trying to blame you.

***…Immediate Action***

This person doesn’t want you to look into it next month, next week, or even tomorrow. She wants you to do something now. Show your concern by moving quickly to solve the problem.

***…Compensation***

A person who is upset wants someone to pay for the damage done, and perhaps his time, inconvenience, or pain.

***…To Have Someone Take the Blame***

Make sure that she knows someone will look after the problem, even if you are not the person in charge. Report the incident to your supervisor, so he can take measures to avoid similar problems in the future.
Customer Service
Learning Activity #10

What does customer service mean to you? It’s hard to put it into words, but you know it when you find it, and so will your customers. Best of all, you have actually had training in customer service – you have been a customer yourself. This means that you can learn a lot just by thinking about your own experiences, good and bad.

1. Keeping in mind the Customer Service Top Ten, think about a very bad experience you have had as a customer. What happened that made you angry about the service? Tell someone your story or write it below or on a computer.

______________________________________________________
______________________________________________________
______________________________________________________
______________________________________________________

2. Now, think about a very positive customer service experience you have had. What made it especially nice? Write your answer below or on a computer. Discuss it with a partner or group if possible.

______________________________________________________
______________________________________________________
______________________________________________________
______________________________________________________
Module 7: In the Office

3. Think of a recent time when you received excellent customer service. Answer the following questions.
   
   a. What did the employee say to you or do that made the service great?  
      ____________________________________________________________
   
   b. How did the employee make you feel?  
      ____________________________________________________________
   
   c. What was your response to the employee and the situation?  
      ____________________________________________________________
   
   d. Have you, or would you ever return there?  □ yes  □ no

4. Share your positive customer service experience with your instructor, another student or a small group. Practise your listening skills and give one another feedback, as you would a customer. This may take practice.
Unit 3: Office Safety

We know there is dangerous work in many industries, but few people think about the risks found in office environments. In fact, a large percentage of workplace accidents and injuries occur in office buildings. Office work requires preventive measures and safe work practices to ensure a healthy environment.

Common causes of office accidents include:

- Slipping, tripping and falling hazards.
- Burning, cutting and pinching hazards.
- Improper lifting and handling techniques.
- Unobservant and inattentive employees.
- Improper office layout and arrangement.
- Dangerous electrical wiring.
- Exposure to toxic substances.
- Horseplay.

Although offices are not considered to be high-hazard work environments, injuries can happen when risks are not controlled or when people get careless. You should:

- Always practise safe work habits.
- Find out what hazards are in your workplace.
- Know where the office first aid kit is kept and who has been trained to give first aid.
- Watch for potential risks and fix or report them to your supervisor or health and safety officer.
- Make sure you know and understand the emergency procedures for dealing with power failures, fires and workplace violence.
Falls

The most common accident in the office is a fall. Falling down also causes the most disabling injuries. In fact, office workers are 2 to 2.5 times more likely to suffer a disabling injury from a fall than non-office workers.

The most common causes of office falls include:

- Tripping over an open desk or file drawer, electrical cords or wires, loose carpeting, or objects in hallways/walkways.
- Bending or reaching for something while seated in an unstable chair.
- Using a chair in place of a ladder.
- Slipping on wet floors.
- Inadequate lighting.

How to avoid these common hazards:

- Look before you walk.
- If you’re finished with a drawer, close it immediately.
- Don’t stretch to reach for something while seated.
- Report any loose carpeting, electrical cords, etc.
- Help keep the office fall-proof.
- Use a stepladder not a chair.

Remember: The office is not a sterile working environment; common workplace hazards can be extra dangerous when you ignore them.
Hazards and Preventative Measures
Learning Activity 11

1. Picture an office environment or consider the work areas of your learning centre. Now, think of accidents that could possibly take place there. Using your own words, write an example for each hazard and a preventative measure for it.

   **Preventative Measure:** An action taken in advance to protect against possible danger, failure, or injury. A precaution or safeguard.

   a. Slipping, tripping and falling hazards:

      __________________________________________________________
      __________________________________________________________
      __________________________________________________________

   b. Burning, cutting and pinching hazards:

      __________________________________________________________
      __________________________________________________________
      __________________________________________________________

   c. Improper lifting and handling techniques:

      __________________________________________________________
      __________________________________________________________
      __________________________________________________________
d. Unobservant and careless employees:

________________________________________________________

________________________________________________________

________________________________________________________

e. Improper office layout and arrangement:

________________________________________________________

________________________________________________________

________________________________________________________

f. Horseplay:

________________________________________________________

________________________________________________________

________________________________________________________
Oops, Ouch, Aargh!
Learning Activity #12

1. Using the Office Hazards picture on the next page, fill in the form below using the hazards found in the picture.

<table>
<thead>
<tr>
<th>Hazard</th>
<th>Type of Hazard</th>
<th>Recommendation to Correct Hazard</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. The following website has a virtual office game. See if you can find and select the right answers to fix all the hazards.
http://www.safework.sa.gov.au/contentPages/EducationAndTraining/ActivitiesAndTests/VirtualOffice/vofficeframe.htm
From Oops, Ouch, Aargh! Workbook [http://www.cnxnotts.co.uk/about/kangaroo/index.html](http://www.cnxnotts.co.uk/about/kangaroo/index.html)
Used with permission from developers Indigo Multimedia LTD. [www.indigomultimedia.com](http://www.indigomultimedia.com)
Clerical Worker

Practitioner Guide
To the Practitioner:

Introduction

The job profiles for Clerical Worker, on which this curriculum is based, covers mostly ES levels 1 to 2, with more complex tasks fitting into ES level 3. Further information regarding the Essential Skills profiles can be found at the following website:

http://www.hrsdc.gc.ca/eng/workplaceskills/essential_skills/general/home.shtml

When working with this curriculum and presenting it to a learner or group of learners, it is important to understand and emphasize that the intent and focus is the acquisition of transferable Essential Skills.

We do not claim to have written the ‘ultimate tool’ for teaching your learners to be Clerical Workers. It is a start. The intention and the hope is that your learners will work through these pages of readings, learning activities and demonstrations, and then be able to enter the workforce in entry-level positions. Some students may work through it for interest only. Some may only want to do sections of it.

This curriculum will not provide by itself the sole method of instruction of the required Essential Skills for employment. Learners will still require your instruction and, possibly, other resources and activities to support this material. If you find that learners are struggling with a concept or idea, take them out of the curriculum and offer supplementary work until they understand it. Put them back into the curriculum when they are ready.

The curriculum, learning activities and demonstrations were written in a way that would allow for group work or one-on-one. A combination of the two is the ideal, with group work allowing for discussion and teamwork.

Most of the information you will need to know in order to teach this curriculum is found within the modules written for the learners. This guide gives additional information, as well as guidelines for evaluating the learning activities.

Many of the activities rely on you and the learner researching and downloading information from the Internet. Use the Internet as a tool. Use the Internet to supplement the material provided to create the best learning environment for your students.
Remember: Websites Change and Links are Lost

This curriculum contains many websites that you’ll be asked to visit. Please remember that websites are not permanently available. They change all the time. Web addresses change. Content changes.

Some of the links provided may not work. You may need to search for the appropriate site. Use key words. You may see a text box reminder like the one below.

Keyword Internet Search:

Canada’s Labour Market Information
Look for a website that is from the Government of Canada.

The Information You Find

Remember: Not all information on the Internet is true, current, or applicable to you. Look for dates on the website. Always check to see what the source is when researching information. Information from a site called Joe’s Clerical Worker Stuff might not be the best source. You might also find information from another province or the United States, which could have different policies and rules.

Take notes, and if need be, call a local company that hires clerical workers to confirm what you’ve read.

Favourites

If you are working on a computer that you are allowed to mark favourites on, it’s helpful to do so. You could possibly visit so many sites, that you’ll lose track of them. Be sure to ask your instructor if it’s permitted.
Practitioner Guide

**Learner**

The Learner folder includes the Curriculum Cover page, Acknowledgements page and the Modules.

Modules (or Chapters) and numbered sequentially and each builds on the information from the previous. Within each Module are Units (Topics) which relate to a theme attached to the Module. The header of the content pages identifies the Module number and name (left side) and the Unit number and name (right side). The header for a Learner Activity identifies the Module number and name only.

Units may also have Sub Units (Sub Topics). These deal with more details of the Unit.

Learning Activities are tasks the learner is to complete. These are throughout each Module and refer to the material covered in the preceding Unit or Sub Unit. The Learning Activities allow the learner to practice the new skills and to identify the Essential Skills needed to complete the task (see Essential Skills Boxes for more information). The learner should pass completed Learning Activities to you to be evaluated using the Answer key provided.

**Note: Some agencies copy the learning activities in advance to pass to the learner so the original stays clean.**

The Learner Self Assessment is located at the end of most Modules. This tool allows the learner to reflect on the content of the Module and decide if more work on certain topics would be beneficial. The Learner Self Assessment is not scored but may be used as a tool for discussion with the learner (e.g. about progress or areas of difficulty).

**Practitioner**

This folder contains the Practitioner Guide and Answers (to the Learning Activities). It is recommended you read the Practitioner Guide before the learner begins the curriculum.

The Answers contain the suggested answers for all the Learning Activities. The completed Essential Skills boxes for the Learning Activities in the later Modules are also included in this file.
Learning Activities

The Answers file contains the answers to all the learning activities. Along with the specific answers, the objectives of the learning activity are included. (e.g.; the object of the question is to offer an opinion, no matter what that opinion is).

The developers of the curriculum discussed the issue of marking. There is no marking scheme with the training. You will decide what the questions will be worth. Just remember that students will be marked differently based on their current skill level. You, the instructor, know your student’s strengths and weaknesses. Mark accordingly. For example, if your student needs to work on spelling, then gradually change how you handle spelling mistakes. At the beginning of the material, underline the spelling mistakes. As that student progresses, require more self-editing. The most important thing to look for is answers that are complete and show that the student has considered the question carefully.

The choice is yours as to how to grade learners’ work. As the writers, we believe that it depends on the learner. Some may choose a percentage mark for each learning activity. Others feel that offering a grade of Excellent, Satisfactory, and Unfinished would be more meaningful than a numerical mark. Still others feel that a discussion of errors and steps to improvement is sufficient. The important thing to remember is that learning is a progression and the purpose is for the learner to acquire the skills before he/she receives a certificate. For example, a learner may not be able to read and answer questions in the first or second module but may have sufficiently acquired the skill by the fifth or sixth and therefore adequately “pass” the curriculum.

When learning activities ask for an opinion, then no matter what the opinion is, if the learner writes one, then the answer is correct. If, while marking it, you believe the information in the opinion is wrong, do not take marks away for being incorrect, but rather write a note to the learner or discuss with them a more suitable answer.

Wherever possible, learners are asked to write in their own words. If they do not follow that prompt, technically, the answer is wrong. Following written instructions is a large part of what is being taught.

Feel free to adapt or omit certain activities to suit the needs of your learners. But, please note that any certificate of recognition or completion awarded at the end should indicate these changes.
Learner Self-Assessment

At the end of each module is a learner self-assessment. This is meant as a tool for learners to self-assess the skills and tasks that they are guided to do in the curriculum. It can be useful for a practitioner to sit with a learner and go over the completed self-assessment with them, in order to help learners develop the skill of being able to honestly self-assess. It can be used as the basis for a verbal test of sorts (i.e., “I know that there are nine Essential Skills and can name at least two.”)

Demonstrations

Demonstrations are ‘chunky’ activities or tasks that require a number of Essential Skills to complete. They are based on topics from the curriculum. The learner can complete a demonstration to show the ability to complete the tasks while using the required Essential Skills. These may be the evidence needed to demonstrate a learner is ready to move on to the next phase (e.g. more training, employment).

Demonstrations are a form of exit assessment. The demonstrations include matrices for evaluating the learner’s performance.

Demonstrations include the Essential Skills and Complexity Levels required to complete the tasks. The learner and practitioner can discuss the demonstrations, timelines, etc. The demonstrations also include information for the practitioner and the learner.

Essential Skills Boxes

The Essential Skills boxes are found at the end of each Learning Activity.

The following Essential Skills were used to complete this Learning Activity.

- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory

The intention of the Essential Skills boxes is to get the learner thinking about the Essential Skills by placing them in a familiar context (such as completing an activity). It is also hoped that the learner will be able to identify the Essential Skills being used to complete tasks and come to understand that these skills are
transferrable. The Essential Skills boxes also provide the opportunity for the learner and you to define the Essential Skills and how they are used.

In the early Modules, the Essential Skills the learner uses to complete the Learning Activity are identified by the checked box.

In the later Modules, the learner should identify the Essential Skills used to complete the Learning Activity by placing a check mark in the box next to the skill.

The following Essential Skills were covered in this Learning Activity.

- [x] Reading
- [x] Document Use
- [ ] Numeracy
- [ ] Writing
- [ ] Oral Communication
- [ ] Working with Others
- [x] Computer Use
- [ ] Continuous Learning
- **Thinking Skills**
- [ ] Problem Solving
- [ ] Decision Making
- [ ] Critical Thinking
- [x] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory

DISCLAIMER:
The materials in this publication have been compiled from sources believed to be reliable and to represent the best current opinions on the subject, as of the publication date. Every effort has been made to ensure the validity of the material. Neither LLEO nor any quoted sources are responsible for any errors or omissions. They are also not liable for any loss, claim, or demand arising from any use, misuse, or reliance upon the information. This manual is intended to help practitioners provide basic guidelines for safe practices inside a literacy setting. Do not assume, therefore, that all necessary warnings, precautionary measures, and legal standards are contained in this document and that other or additional measures may not be required.
Clerical Answers
Module 1 – Essential Skills

Answers

ACTIVITY 1

1. This Activity is a learner self-assessment of the computer skills that learners should have before working on this curriculum. Instructor assistance could be required, as this may be some learners’ first experience with self-assessment. Learners may also have difficulty with filling in charts in a document.

2. Answers are not necessary for this Activity. If learners have insufficient computer skills to do this curriculum, they are to ask their instructors for help in finding basic computer training. If computer training is not available at your learning centre, online options have been provided.

ACTIVITY 2

Answers will vary, as the question refers to the learner’s prior knowledge of clerical work. However, the answer should show four “soft skills” that would be important for someone working in the clerical field. “Soft Skills” were defined in this module to include the following Essential Skills: Thinking Skills (Problem solving, Decision-making, Critical Thinking, Job Task Planning and Organizing, Significant Use of Memory and Finding Information), Working with Others and Continuous Learning.

ACTIVITY 3

On the line in front of the problem, the learner should write the short form for the “Soft-Skill(s)” that would need to be improved by the employee. The following is a list of the “soft” Essential Skills and the applicable codes: Working with Others (WO), Continuous Learning (CL), Problem solving (PS), Decision-making (DM), Critical thinking (CT), Job task planning and organizing (PO), Significant use of memory (M), or Finding information (FI). As this is an early look at the Essential Skills, learners are not expected to note all the possible choices. Discussion may need to take place to ensure that the learner has an understanding of the various Essential Skills.
Employee doesn’t show up for work on time or doesn’t call in when he/she is unable to get to work.

Employee takes too much time for breaks and lunch.

Employee doesn’t follow the work schedule.

Employee doesn’t get along with other workers.

Employee talks back to the boss.

Employee doesn’t follow instructions.

Employee talks with friends instead of working.

Employee waits to be told what to do instead of looking for things that need to be done.

Employee uses shortcuts that result in poor work quality.

Employee lets personal problems cause poor performance on the job.

Employee uses drugs or alcohol at work.

Employee misuses company property.

Employee hides work to get out of doing it.

Employee makes or gets too many personal phone calls.

Employee takes too many days off from work without a good reason.

Employee swears and uses bad language around customers and other workers.

**ACTIVITY 4**

1. For this Activity learners were to go on the Internet and look up the definitions of some words used in this curriculum. The purpose is to help them learn how to find meanings for words, no matter where they may come across unfamiliar words.

2. Oral Communication and Problem Solving

3. Answers to this section will vary, as the learner has to choose only two examples of each of the nine Essential Skills from the profile. You should print out the profile or refer to the learner’s copy to ensure that
they have taken an example from the profile and that it was under the appropriate skill.

ACTIVITY 5

1&2 Answers to this Activity will vary, depending on what the learner feels he/she is good at and what skills he/she can bring to the job. It would be beneficial if the learners can discuss their suggestions with someone else or in a group if possible.

ACTIVITY 6

1. See chart on next page.
2. Answers to this Activity will vary.
3. Answers to this Activity will vary.
<table>
<thead>
<tr>
<th>NOC Code and Title</th>
<th>Example Titles</th>
<th>Employment Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>1411 General Office Clerk</td>
<td>general office clerk office assistant</td>
<td>• Completion of secondary school is usually required.</td>
</tr>
<tr>
<td></td>
<td>office clerk typist word processor operator</td>
<td>• Completion of secondary school or college business or commercial courses is usually required.</td>
</tr>
<tr>
<td>1414 Receptionists &amp; Switchboard Operators</td>
<td>admitting clerk answering service operator business receptionist dental receptionist front desk clerk (except hotel) hospital admitting clerk medical receptionist reception clerk receptionist switchboard operator telereceptionist</td>
<td>Gr. 12 diploma, on the job training may be provided.</td>
</tr>
<tr>
<td>1422 Data Entry Clerks</td>
<td>data control clerk data entry operator data input clerk data processor payment entry clerk</td>
<td>Gr. 12 diploma, College or other courses in data entry maybe required.</td>
</tr>
</tbody>
</table>

**ACTIVITY 7**

Answers to this Activity will vary, depending on what occupation the learners are interested in and what they feel they need to learn or improve. It would be beneficial if the learners can discuss their suggestions with someone else or in a group, if possible.
Module 2 – The Clerical Field

Answers

ACTIVITY 1

1. Answers will vary depending on which ads are chosen, but should include the skills and duties of those jobs. The purpose of this Activity is to increase the learners “Finding Information” and “Document Use” skills, while acquainting the learner with job search and increasing knowledge of the clerical field.

2. Answers will vary but learner should include the similarities and differences to start using some “Critical Thinking” skills.

3. The learner should print out the results of the quizzes taken and discuss them in their group or with the instructor.

ACTIVITY 2

1. This Activity is a learner self-assessment of how much the learner knows about software applications commonly used in offices. The learner may need help finding definitions for computer terms that are unfamiliar. We have suggested Webopedia as a source, however you may have other sources that are better for your learners to use.

   The learner should go over the self-assessment with their instructor. Reading, Finding Information and Document Use are as important as Computer Use in Activity. Learners may need help in Critical Thinking and Decision Making.

2. This Activity explores sources of training in computer applications. The learner should discuss this Activity with their instructor to find out what options are available at your learning centre or in your community, as well as online.

3. The learner should discuss this Activity with their instructor after researching the possibilities of training. Help may be needed in considering the options and making decisions. Adjustments should be made to the learner’s training plan or personal schedule, in order to include training on the computer skills required for clerical work.
ACTIVITY 3

1.

2. Answers for questions 2 – 4 will vary depending on what the learner chooses to do. Again, adjustments to the learner’s training plan may be needed, in order for the learner to increase his/her keyboarding skills to the levels required for a clerical job.

ACTIVITY 4

1. Sit back in your chair. Sit up as straight as possible (within reason!).

2. Have your hands placed so that you are able to keep your index, middle and ring fingers on their home keys. Both pinky fingers should be able to reach the shift keys without bending your wrist sideways.

3. Keep your forearms horizontal to the keyboard, or slightly slanted, with hands a little lower than elbows (keeps the blood flowing to the hands!).

4. Keep your wrists straight, so that the tendons in your wrists aren’t restricted through the carpal tunnel.

5. Have the first line of text on your screen at eye level.
6. The backs of your hands should be parallel to the keyboard. Keep your fingers relaxed, curved and upright like you are “scratching” the keyboard.

7. Keep your feet flat on the floor.

8. Take frequent breaks! Get up and walk around. Do a different type of work.

**ACTIVITY 5**

1. 

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>control panel</td>
<td>A collection of lights, digital displays or switches used to monitor and control the operation of a machine.</td>
</tr>
<tr>
<td>sleep mode</td>
<td>To reduce power usage.</td>
</tr>
<tr>
<td>platen</td>
<td>The glass plate where you put a document to be copied.</td>
</tr>
<tr>
<td>multi-feed tray</td>
<td>A document feeder where you put documents to be copied.</td>
</tr>
<tr>
<td>letter-size paper</td>
<td>8 ½ X 11.</td>
</tr>
<tr>
<td>legal-size paper</td>
<td>8 ½ X 14.</td>
</tr>
<tr>
<td>duplex</td>
<td>Double sided copying – copies to both sides of the paper.</td>
</tr>
<tr>
<td>collate</td>
<td>Copies are in groups with each group getting one copy of each page (1,2and 3).</td>
</tr>
<tr>
<td>sort</td>
<td>Copies are printed in groups of all of the same pages ex:111,222,333.</td>
</tr>
</tbody>
</table>
2 to 4 Answers for questions 2 – 4 will vary depending on what features the centre’s copier has.

**ACTIVITY 6**

1. That information is confidential. You should not read any information that you do not need to know and information should only be discussed with people who have the authority to see it.

2. Confidentiality and Non-disclosure Agreements are used by businesses to ensure that the employee’s knowledge of the company and client information is kept private and confidential.

3. Learner should have the Confidentiality Agreement filled out on the previous page with his/her name and the current date.

4. a) The agreement is between the Frontenac Health Centre and the learner.

   b) The learner may use own wording.

   To preserve the confidentiality of any and all information.

**ACTIVITY 7**

1. That information is confidential. You should not read any information that you do not need to know and information should only be discussed with people who have the authority to see it.

2. Confidentiality and Non-disclosure Agreements are used by businesses to ensure that the employee’s knowledge of the company and client information is kept private and confidential.

3. Learner should have the Confidentiality Agreement filled out on the previous page with his/her name and the current date.

4. a) The agreement is between the Frontenac Health Centre and the learner.

   b) The learner may use own wording.

   To preserve the confidentiality of any and all information.
To refrain from divulging or disclosing anything to anyone.

To use my best efforts to preserve the confidentiality of all information.

c) It shall remain in effect during and after my term of appointment, engagement or employment, (in other words – forever.)

d) You could be fired and or sued for losses.

5. Answers may vary. The purpose of the question is to get the learner thinking about the Essential Skills he/she is learning and using.
Module 3 – Thinking Skills

Answers

ACTIVITY 1

1. The Information Skills Process (ISP).

2. Defining.

3. Answers may vary. Examples are colour coding, position (adjacent and overlapping).

4. Answers may vary depending on which stage of the process is chosen. However, the learner should have been able to choose one stage and complete the chart for the Stage Title, Describing Question and Steps in Process.

Which of the following Essential Skills were used to complete this Learning Activity?

- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Thinking Skills
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory

ACTIVITY 2

1. Ask, Read, Search.

2. Someone who knows the answer such as an expert, supervisor or instructor.

3. Skim, scan and use the extra features such as table of contents, index, titles, etc.

4. Answers may vary but should relate to being able to find the information quickly, without reading all the text or flipping through the whole book.

5. Free Microsoft Word training.
6. Learners may need help with saving their file to a location suitable to your program’s procedures (ex. Learner folder, USB jump/flash drive, etc.) The answer should include all ten tips: *Use the advanced search field, Be specific, Search with a phrase, Use alternative search words, Insert a plus or minus sign, Search domain name, Explore “best of” sites, Eliminate inappropriate content, Save time with a search toolbar, Specialize your search engine.*

<table>
<thead>
<tr>
<th>Essential Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reading</td>
</tr>
<tr>
<td>Document Use</td>
</tr>
<tr>
<td>Numeracy</td>
</tr>
<tr>
<td>Writing</td>
</tr>
<tr>
<td>Oral Communication</td>
</tr>
<tr>
<td>Working with Others</td>
</tr>
<tr>
<td>Computer Use</td>
</tr>
<tr>
<td>Continuous Learning</td>
</tr>
<tr>
<td>Thinking Skills</td>
</tr>
<tr>
<td>Problem Solving</td>
</tr>
<tr>
<td>Decision Making</td>
</tr>
<tr>
<td>Critical Thinking</td>
</tr>
<tr>
<td>Finding Information</td>
</tr>
<tr>
<td>Job Task Planning &amp; Organizing</td>
</tr>
<tr>
<td>Significant Use of Memory</td>
</tr>
</tbody>
</table>

**ACTIVITY 3**

1. Answers may vary but should reflect that the main idea is a job listing for a permanent, part time reception –typist position with Act Toronto.

2. NOC 1414. It should be circled on the advertisement.

3. Completion of high school should be circled.

4. Education.

5. Yes.

6. 20.

7. Hours.

8. The Essential Skills paragraph should be circled on Job Advertisement.


10. Titles, headings, words in bold and colour.
11. Answers may vary depending on whether or not this type of job would be good for him/her.

Which of the following Essential Skills were used to complete this Learning Activity?
- ✔ Reading
- ✔ Document Use
- √ Numeracy
- ✔ Writing
- ☐ Oral Communication
- ☐ Working with Others
- ☐ Computer Use
- ☐ Continuous Learning

Thinking Skills
- ☐ Problem Solving
- ☐ Decision Making
- ☐ Critical Thinking
- √ Finding Information
- ☐ Job Task Planning & Organizing
- ☐ Significant Use of Memory

ACTIVITY 4

1. It snows more in Ontario than it does in Prince Edward Island.
   ✔ Fact  ☐ Opinion (*This one may trick them, but it can be proven.*)

2. It’s all right to call your employer to say that you are sick when you want to keep a doctor’s appointment.
   ☐ Fact  ✔ Opinion

3. You need a university degree to work in a general clerical position.
   ☐ Fact  ✔ Opinion

4. Someone who is colour blind would not make a good house painter.
   ☐ Fact  ✔ Opinion

5. Andrea thinks that the skiing is better in British Columbia.
   ☐ Fact  ✔ Opinion

6. Ottawa is the capital of Canada.
   ✔ Fact  ☐ Opinion

7. Boys are better hockey players than girls.
   ☐ Fact  ✔ Opinion

Which of the following Essential Skills were used to complete this Learning Activity?
- ✔ Reading
- ☐ Document Use
- ☐ Numeracy
- ☐ Writing
- ☐ Oral Communication
- ☐ Working with Others
- ☐ Computer Use
- ☐ Continuous Learning

Thinking Skills
- ☐ Problem Solving
- ☐ Decision Making
- ☐ Critical Thinking
- ☐ Finding Information
- ☐ Job Task Planning & Organizing
- ☐ Significant Use of Memory
ACTIVITY 5

1, 2, 4 are examples of Critical Thinking.

ACTIVITY 6

1. You arrive second. Logic - if you overtake the second person, you take his place.

2. You can’t overtake the LAST person. Logic – there is no one behind the last person.

3. The correct answer is 4100. Did you get 5000? Check with your calculator. The decimal sequence confuses our brain, which always jumps to the highest decimals (100s instead of 10s).

4. A square manhole cover can be turned and dropped down on the diagonal of the manhole. A round manhole cannot be dropped down the manhole.

5. Yes, they have a 1st of July, but they don’t celebrate it.

6. One birthday - the day he was born, but he celebrates it yearly.

7. All of them (12) have at least 28 days whether or not they have more.

8. Because he isn’t dead if he is LIVING in Canada.

9. The answer is 70. Thirty divided by 2 would have made the total 25, but 30 divided by ½ = 60, plus 10 = 70.

10. No. Since his wife is his widow, he would be dead.

11. You have 2 bananas, because YOU took 2 away.

12. Halfway, or to the middle, because after that she would be running out of the woods.

Which of the following Essential Skills were used to complete this Learning Activity?

- [x] Reading
- [ ] Oral Communication
- [x] Document Use
- [ ] Working with Others
- [ ] Numeracy
- [ ] Computer Use
- [ ] Writing
- [ ] Continuous Learning
- [x] Thinking Skills
- [ ] Problem Solving
- [x] Decision Making
- [x] Critical Thinking
- [ ] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory
13. Nine are left, because he said all but 9 died.

14. He weighs meat.

15. A dozen of anything is still 12.

**ACTIVITY 7**

Answers will vary, however the log should be completed and instructors should ensure that learners understand how they are “using” their time. Discussion should take place about which activities would not be appropriate time “users” in a business setting.

The learner should have assigned a “realistic” time estimate for each task and totalled these times to fit into the seven hour time frame they were to cover. Did the learner include a lunch break?
ACTIVITY 8

1. Answers will vary but should be broken into the smart goal model.

2. The goal board should relate to the learners choice of goal. Information on goal board was to be found at http://www.ehow.com/how_4678676_goal-board.html or the learner can do a web search for goal boards.

ACTIVITY 9

1. Answers will vary, however the group or instructors should discuss and ensure that learners understand the five points when setting daily goals:

   Break big tasks up into smaller, more manageable things-to-do.

   Prioritise your goals for the day and do the most important ones first.

   Stick to a policy of doing something now rather than later.

   Always think of how you can best use the present time.

   Do your best to make every day count.

2. Answers may vary. It is important that learners see the link between, and transferability of the Essential Skills used in their home life, at school and at work.
## ACTIVITY 10

1. Answers will vary. Example below. Learners should be thinking sensibly about the pros and cons of two decision choices.

| **Issue:** Whether or not to take new job.  
Decision Option 1 | **Take new job** | Decision Option 2 | **Stay in old job** |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pros</strong></td>
<td><strong>Cons</strong></td>
<td><strong>Pros</strong></td>
<td><strong>Cons</strong></td>
</tr>
<tr>
<td>* Would have more independence</td>
<td>* Won’t be able to get a ride to work</td>
<td>* Able to get a ride to work</td>
<td>* Get bored</td>
</tr>
<tr>
<td>* Better future</td>
<td>* Hours are longer</td>
<td>* Won’t have to worry about longer hours or harder work</td>
<td>* Won’t be able to afford a car</td>
</tr>
<tr>
<td>* Raise in pay</td>
<td>* Work is harder</td>
<td></td>
<td>* Stuck in same job without a good future</td>
</tr>
<tr>
<td>* Hours are longer, so still more money</td>
<td>* Able to save for car faster</td>
<td></td>
<td></td>
</tr>
<tr>
<td>* Able to save for car faster</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
2. Answers will vary. Example below. Learners should be thinking sensibly about the pros and cons of two decision choices.

**Issue:** Whether or not to go to work to cover for another employee.

<table>
<thead>
<tr>
<th>Decision Option 1</th>
<th>Decision Option 2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pros</strong></td>
<td><strong>Pros</strong></td>
</tr>
<tr>
<td>• Would be able to relax</td>
<td>• Could earn an extra day’s pay</td>
</tr>
<tr>
<td>• Could get things done at home</td>
<td>• Manager would appreciate it</td>
</tr>
<tr>
<td>• Could go out with friends</td>
<td>• Might help to get promotion or raise in future</td>
</tr>
<tr>
<td><strong>Cons</strong></td>
<td><strong>Cons</strong></td>
</tr>
<tr>
<td>• Manager will remember that I didn’t help</td>
<td>• Wouldn’t get my day off</td>
</tr>
<tr>
<td>• Might badly affect promotions or raises</td>
<td>• Wouldn’t get things done at home</td>
</tr>
</tbody>
</table>

Which of the following Essential Skills were used to complete this Learning Activity?

- [x] Reading
- [x] Document Use
- [ ] Numeracy
- [x] Writing
- [ ] Oral Communication
- [x] Working with Others
- [ ] Computer Use
- [x] Continuous Learning
- [x] Thinking Skills
  - [x] Problem Solving
  - [x] Decision Making
  - [x] Critical Thinking
- [ ] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory
ACTIVITY 11

1. Answers may vary but should relate to problem. eg: Damaged headset.

2. Answers may vary but should relate to finding facts for eg: Stretched headset cord too far and wires pulled out.

3. Organize, list solutions, examples: Don’t tell the co-worker, Lie or Need to replace the item.

4. Answers may vary but should relate to evaluating the best solution for the problem. Need to replace the item.

Which of the following Essential Skills were used to complete this Learning Activity?
- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory

ACTIVITY 12

1. Answers may vary as learners may write the important phrase, the first sentence or the whole paragraphs. The best answer would be the important phrase, but the others are not wrong.

Repeat it.

Practise it.

Write the information down.

Visualize the information.

If you don’t understand, ask.

Create an Acronym (a word using the first letter of each thing you want to remember).

Make up a little chant.

Highlight important information.
2. Create an Acronym, DEAD is one option.

<table>
<thead>
<tr>
<th>Essential Skills</th>
<th>Used for Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Use</td>
<td>☑</td>
</tr>
<tr>
<td>Writing</td>
<td>☑</td>
</tr>
<tr>
<td>Thinking Skills</td>
<td>☑</td>
</tr>
<tr>
<td>Critical Thinking</td>
<td>☑</td>
</tr>
<tr>
<td>Significant Use of Memory</td>
<td>☑</td>
</tr>
</tbody>
</table>

© LLEO 2011, Clerical Essential Skills Training
Module 4 – Documents & Forms

Answers

ACTIVITY 1

1. Yes, it is to all staff – B.
2. How to write an effective memo – A.
3. The heading and the body – B.
4. Third paragraph – B.
5. Follow the 4 rules – para 1– main idea, para 2 – expand on details, para 3– continue with details, para 4 outline action required. – C.
6. No, you could skim, scan and read specific areas for details.

Which of the following Essential Skills were used to complete this Learning Activity?

- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Thinking Skills
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory

ACTIVITY 2

1. Think about why you are reading, Preview or look over the text, Picture it while you read, Check your understanding, Slow down and try to find solutions, Apply what you’re learning, and Use the graphics provided with the written information.

2. The learner should be able to follow the instructions to download the manual on-screen. If this manual is no longer available you may substitute another manual and have the learner complete the remainder of the questions using the replacement. Adjust the following answers accordingly.

3. The learner was to print the Table of Contents found on Page xi.
   a. 1-7.
b. 2-5.


5. Yes to them all.

**ACTIVITY 3**

1. Below, you will find a table. Referring to the table, do the following:
   a. Circle the second column label (see below).
   b. Highlight the header row (see below).
   c. How many lists make up this table? _____4_____.
   d. What is the primary list? _____Asset No._____.
   e. What information does this table provide? **Asset Records** (including number, name, date purchased and cost).
   f. When was asset #1584161 purchased? _____06/01/10_____.
   g. What is asset #1587922? _____Vacuum_____.
   h. What was the cost of asset # 1578084? _____$1,575_____.

<table>
<thead>
<tr>
<th>Asset Records</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Asset No.</strong></td>
</tr>
<tr>
<td>1563126</td>
</tr>
<tr>
<td>1563190</td>
</tr>
</tbody>
</table>

Which of the following Essential Skills were used to complete this Learning Activity?

- ✔ Reading
- ✔ Document Use
- ☐ Numeracy
- ☐ Writing
- ☐ Oral Communication
- ☐ Working with Others
- ✔ Computer Use
- ☐ Continuous Learning
- ☐ Problem Solving
- ✔ Decision Making
- ☐ Critical Thinking
- ✔ Finding Information
- ☐ Job Task Planning & Organizing
- ☐ Significant Use of Memory
2. 
   a. Receiving.
   b. Andrea Jamison 555- 1212.
   c. Tommy Chang, Shipping.
   d. Yuri Bronsky, Truck Maintenance.
   e. Alphabetic order by employee’s last name.
   f. Name, Department, Direct Phone #.

ACTIVITY 4

1. The learner may use his/her own words but the general idea should be that when we don’t fill out forms properly, clearly and completely, this communication is broken and information is lost or misinterpreted. There are consequences. If nothing else, people will waste time trying to get the correct information.

2. Identifying information - who the form is from and to, the date of form, space for details or description of info required, possibly a place to sign and date.

3. 
   a. Packaging Slip.
   b. Frank’s Produce.
   c. Tony Marselli of Luigi’s Market.
ACTIVITY 5

1. Dale Medical Clinic.

2. Patient Registration Form.

3. | **Question** | **Keywords or keyphrases used:** | **Answer** |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Is the patient married?</td>
<td>Marital Status</td>
<td>Separated</td>
</tr>
<tr>
<td>Does the patient have insurance?</td>
<td>Insurance</td>
<td>No</td>
</tr>
<tr>
<td>What is the patient’s home phone number?</td>
<td>Home Phone</td>
<td>(555) 225-6422</td>
</tr>
</tbody>
</table>
   | Who would you contact if the patient had an emergency? | Emergency | Phillip Ramsay 
Brother 
Home (555) 336-0691 
Work (555)-375-6763 |
   | When did the patient register? | Date | August 20, 2010 |

The following Essential Skills were used to complete this Learning Activity.
- ☑ Reading
- ☑ Document Use
- ☑ Numeracy
- ☑ Writing
- ☑ Oral Communication
- ☑ Working with Others
- ☑ Computer Use
- ☑ Continuous Learning
- ☑ Problem Solving
- ☑ Decision Making
- ☑ Critical Thinking
- ☑ Finding Information
- ☑ Job Task Planning & Organizing
- ☑ Significant Use of Memory
ACTIVITY 6

1. Answers will vary depending on the forms the learner chooses. The learner should set up a table, be able to find information for five forms and make reasonable judgment as to their usage.

2. Learner should complete the employment application form with all sections of the form completed.

3. Answers may vary but should relate to what each word means.
   a. Applicant: Person filling out the form.
   b. References: Individuals an employer can call that will say whether or not you would be suitable for the job for which you are applying.
   c. Disclaimer: Is something you sign stating everything you have answered is true and you understand what actions may be taken if found to be false.

Which of the following Essential Skills were used to complete this Learning Activity?

- ✓ Reading
- ✓ Document Use
- Numeracy
- ✓ Writing
- Special Skills
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Thinking Skills
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory

ACTIVITY 7

1. Answers will vary, however the on-line calendar should be completed with events pertinent to the learner. Instructors should ensure that learners understand how to use organizing calendars.

2. Answers will be individual, but should be one or two short paragraphs. A word processing program should be used and spelling and grammar checks should be completed.

Which of the following Essential Skills were used to complete this Learning Activity?

- ✓ Reading
- ✓ Document Use
- Numeracy
- ✓ Writing
- Special Skills
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Thinking Skills
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory
ACTIVITY 8

1. Fill in the blanks in the following time conversion table.

<table>
<thead>
<tr>
<th>12hr Time</th>
<th>24hr Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>12:25 am</td>
<td>00:25 hrs</td>
</tr>
<tr>
<td>1:00 am</td>
<td>1:00 hrs</td>
</tr>
<tr>
<td>2:35 am</td>
<td>02:35 hrs</td>
</tr>
<tr>
<td>4:30 pm</td>
<td>16:30 hrs</td>
</tr>
<tr>
<td>5:15 am</td>
<td>05:15 hrs</td>
</tr>
<tr>
<td>4:00 pm</td>
<td>1600hrs</td>
</tr>
<tr>
<td>7:10 am</td>
<td>07:10hrs</td>
</tr>
<tr>
<td>8:12 am</td>
<td>08:12 hrs</td>
</tr>
<tr>
<td>11 pm</td>
<td>2300 hrs</td>
</tr>
<tr>
<td>8:00 pm</td>
<td>20:00hrs</td>
</tr>
<tr>
<td>1:37 pm</td>
<td>13:37 hrs</td>
</tr>
<tr>
<td>5:15 pm</td>
<td>17:15 hrs</td>
</tr>
</tbody>
</table>

2.
   a. 0 two hundred hours.
   b. Twenty ten hours.

3.
   a. 06:59 hours.
   b. 07:00 hours.
   c. 23:30 hours.

Which of the following Essential Skills were used to complete this Learning Activity?

- [ ] Reading
- [ ] Oral Communication
- [x] Document Use
- [x] Working with Others
- [x] Numeracy
- [ ] Writing
- [ ] Computer Use
- [ ] Continuous Learning
- [ ] Thinking Skills
  - [ ] Problem Solving
  - [x] Decision Making
  - [ ] Critical Thinking
  - [ ] Finding Information
  - [ ] Job Task Planning & Organizing
  - [ ] Significant Use of Memory
ACTIVITY 9

1 to 3. Answers will vary, but learner should have a completed table of their survey and have created a pictograph including a title, legend and x and y axes symbols. Pictures should relate to topic.

ACTIVITY 10

1. The one that is the tallest or longest.

2. 
   a. New.
   b. 150.
   c. Increasing.

3. 
   a. Western.
   b. 10.
   c. 85.
   d. 60.
ACTIVITY 11

1. Line graphs are used to display data or information that changes value continuously over time.

2. 

3. 
   a. Peanut Crisp.
   b. Almond Clusters.
   c. Chewy Bites.
   d. 2010.

Which of the following Essential Skills were used to complete this Learning Activity?

- [ ] Reading
- [X] Document Use
- [X] Numeracy
- [ ] Writing
- [ ] Oral Communication
- [ ] Working with Others
- [ ] Computer Use
- [ ] Continuous Learning
- [ ] Problem Solving
- [ ] Decision Making
- [ ] Critical Thinking
- [X] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory
ACTIVITY 12

1. Answers may vary but should describe how a whole thing is divided into parts.

2. Answers may vary but should reflect that it looks like a pie with various cuts for proportions or pieces.

3. 
   a. Latin American.
   
   b. Not a Visible Minority, South Asian and Chinese.
   
   c. No, because the segments of the pie and the legend are in the same order with the pie chart starting at the top or 12 o’clock position.

4. 
   a. 19.3%.
   
   b. Yellow.
   
   c. Natural Gas.

5. 
   a. Atkins (induction phase).
   

6. a. to d. Answers will vary but, by following the instructions, students should be able to fill in the table in Excel and then create a pie chart including all information.

Which of the following Essential Skills were used to complete this Learning Activity?

- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory
Module 5 – Records Management

Answers

ACTIVITY 1

1. Documentation, Consistency, Accuracy.

2. Answers may vary, as it is asking for the learner’s opinion on which element is the most important and why.

3. Student should complete the on-line tutorial.

ACTIVITY 2

1. Association of Records Managers and Administrators, Inc.

2. 1) John | A. | Smith
   2) Dom’s | Auto | Parts
   3) Kingston | Whig-Standard
   4) Fashion | 101 | Boutique
   5) Hendrix | Business | Supplies
   6) Katy | Simons

3. Order should be 4, 6, 5, 3, 8, 9, 7, 1, 2.
ACTIVITY 3

1. Persons last name (surname).

2.  
   1) McPherson  
   2) St. Jacques  
   3) Van Kleiff  
   4) de la Roche

3. Using ARMA rules, break down the following into filing units?

<table>
<thead>
<tr>
<th>NAME</th>
<th>UNIT 1</th>
<th>UNIT 2</th>
<th>UNIT 3</th>
<th>UNIT 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oscar de la Renta</td>
<td>DELARENTA</td>
<td>OSCAR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>J. van Tol</td>
<td>VANTOL</td>
<td>J.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dianne Andrew-Allen</td>
<td>ANDREWALLEN</td>
<td>DIANNE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sister Therese James</td>
<td>JAMES</td>
<td>THERESE</td>
<td>SISTER</td>
<td></td>
</tr>
<tr>
<td>Betty-Joe Braydon</td>
<td>BRAYDON</td>
<td>BETTYJOE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Father Bernard</td>
<td>FATHER</td>
<td>BERNARD</td>
<td></td>
<td></td>
</tr>
<tr>
<td>S. J. Campbell-Jones</td>
<td>CAMPBELLJONES</td>
<td>S</td>
<td>J</td>
<td></td>
</tr>
<tr>
<td>Mary Anne Kipling</td>
<td>KIPLING</td>
<td>MARY</td>
<td>ANNE</td>
<td></td>
</tr>
<tr>
<td>Taylor Livingston III</td>
<td>LIVINGSTON</td>
<td>TAYLOR</td>
<td>III</td>
<td></td>
</tr>
<tr>
<td>Daniel Saint Pierre</td>
<td>SAINTPIERRE</td>
<td>DANIEL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dr. John Thompson</td>
<td>THOMPSON</td>
<td>JOHN</td>
<td>DR</td>
<td></td>
</tr>
</tbody>
</table>
4. The numbers are in red following the names. It may help the learner to create a table of the filing units. This activity could be done with real file folders, and have the learner label them and put them in order.

R. T Sampson   2
Captain R. T. Sampson  3
Robert T. Sampson  7
Dr. Robert Sampson  6
Robert T. Sampson, Sr.  10
Robert T. Sampson Jr.  9
Robert Sampson  5
Robert T. Sampson, C.P.A.  8
Dr. Sampson  1
Father R. T. Sampson  4

ACTIVITY 4

1.

<table>
<thead>
<tr>
<th>NAME</th>
<th>UNIT 1</th>
<th>UNIT 2</th>
<th>UNIT 3</th>
<th>UNIT 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tip Top Cleaners</td>
<td>TIP</td>
<td>TOP</td>
<td>CLEANERS</td>
<td></td>
</tr>
<tr>
<td>The Corner Pub</td>
<td>CORNER</td>
<td>PUB</td>
<td>THE</td>
<td></td>
</tr>
<tr>
<td>CKTV</td>
<td>CKTV</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Which of the following Essential Skills were used to complete this Learning Activity?

- [ ] Reading
- [ ] Document Use
- [ ] Numeracy
- [ ] Writing
- [ ] Oral Communication
- [ ] Working with Others
- [ ] Computer Use
- [ ] Continuous Learning

Thinking Skills

- [X] Problem Solving
- [X] Decision Making
- [ ] Critical Thinking
- [ ] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory
2. In the following order 3, 2, 1, 4, 6, 9, 8, 5, 7. This activity could be done with real file folders, and have the learner label them and put them in order.

3. Learner should complete the on-line filing Activity.

Which of the following Essential Skills were used to complete this Learning Activity?

- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory

**ACTIVITY 5**

1. To be able to locate a file quickly and with less potential for confusion.

2. When unclear which is the person’s surname and which is the first name.

   Some cultures where a person’s name is reversed.

   Hyphenated names.
Alternate names (use more than one name).

Compound names.

When acronyms are used.

3. COLEMEYERS, Laurie

MEYERS, Laurie Cole

The following Essential Skills were used to complete this Learning Activity.

- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Thinking Skills
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory

ACTIVITY 6

1. Code, Title, Author/Publisher, Date Entered.

2. One record or book.

3. Alphabetically, by title.

4. 4.

5. *Advanced Learner’s English Dictionary* should be highlighted.

6. *Advanced Learner’s English Dictionary* and *Advanced Reading Power*.
ACTIVITY 7

1. a.
b.

Best Doors Manufacturing
Maurice Bouchard
Clerk
(613) 555-2420
(613) 555-6789
2246 Best Ave.
Kingston ON K6U5R7

2246 Best Ave.
Kingston ON K6U5R7

23 Pleasantview Dr.
Winnipeg MB X2X 1X9

c.

Rosemount Retirement Home
Francie Blasko
Manager
(204) 555-3645
(204) 555-1645
(204) 555-3655
Module 5: Records Management

Answers

d.

2. Answers will vary, with learners adding four new contacts to their Email contact lists.

3. The learner should have sufficient alpha and numeric keyboarding skills. It is suggested that they have access to practice and testing software or websites. Both downloaded software options and a website are offered as suggestions. Please support your learners keyboarding skill acquisition.

Which of the following Essential Skills were used to complete this Learning Activity?

- Reading
- Document Use
- Numeracy
- Writing
- Oral Communication
- Working with Others
- Computer Use
- Continuous Learning
- Thinking Skills
- Problem Solving
- Decision Making
- Critical Thinking
- Finding Information
- Job Task Planning & Organizing
- Significant Use of Memory

© LLEO 2011, Clerical Essential Skills Training  Page 38 of 55
Module 6 – Communication

Answers

ACTIVITY 1

Answers will vary but the answers below are the best responses. Explanations follow on the next 2 pages.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Not at all</th>
<th>Rarely</th>
<th>Sometimes</th>
<th>Often</th>
<th>Very Often</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. When I write a message or note, I give all the information and detail I can to make sure that my message is understood.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>2. If I don't understand something, I usually keep it to myself and figure it out later.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>3. I'm sometimes surprised to find that people haven't understood what I've said.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>4. I tend to say what I think, and not worry about whether the other person understands. I assume that we can work it out later.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>5. When people talk to me, I try to see their point of view.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>6. When I finish writing an email, I scan it quickly for typos, and then send it off right away.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>7. When I’m talking to people, I pay attention to their body language.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>8. Before I speak or write, I think about what I want the person to know, and the best way to get my point across.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>9. When someone's talking to me, I think about what I will say next to make sure I get my point across correctly.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>10. Before I communicate, I think about the best way to do it (in person, by phone, via email, and so on).</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

Planning Your Message (Questions 1, 8).

Before you start communicating, take a moment to figure out what you want to say, and why. Don't waste your time conveying information that isn't
necessary - and don't waste the listener or reader's time, either. Too often, people just keep talking or keep writing. They think that by saying more, they'll be sure to cover all the points. Often, however, all they do is confuse the people they're talking to.

Good communicators use the KISS ("Keep It Simple and Straightforward") principle. They know that less is often more, and that good communication should be efficient as well as effective.

**Creating a Clear, Well-Crafted Message** (Questions 4, 6).

When you know what you want to say, decide exactly how you'll say it. You're responsible for sending a message that's clear and concise. To achieve this, you need to consider not only what you'll say, but also how you think the recipient will perceive it.

We often focus on the message that we want to send and the way in which we'll send it. But if our message is delivered without considering the other person's perspective, it's likely that part of that message will be lost.

With written communication, make sure that what you write will be perceived the way you intend. Words on a page generally have no emotion. When writing, take time to do the following:

- Review your style.
- Avoid jargon or slang.
- Check your grammar and punctuation.
- Check also for tone, attitude, nuance, and other subtleties. If you think the message may be misunderstood, it probably will. Take the time to clarify it!

**Choosing the Right Channel** (Questions 8, 10).

Along with encoding the message, you need to choose the best communication channel to use to send it. You want to be efficient, and yet make the most of your communication opportunity.

Using email to send simple directions is practical. However, if you want to delegate a complex task, an email will probably just lead to more questions, so it may be best to arrange a time to speak in person. And if your
communication has any negative emotional content, stay well away from email! Make sure that you communicate face to face or by phone, so that you can judge the impact of your words and adjust them appropriately.

**Receiving and Interpreting a Message** (Questions 2, 5, 9).

It can be easy to focus on speaking when we want to get our points out there, because we usually have lots to say. However, to be a great communicator, you also need to step back, let the other person talk, and just listen.

This doesn't mean that you should be passive. Listening is hard work, which is why effective listening is called active listening. To listen actively, give your undivided attention to the speaker.

Empathic listening also helps you decode a message accurately. To understand a message fully, you have to understand the emotions and underlying feelings the speaker is expressing. This is where an understanding of body language can be useful.

**Feedback** (Questions 2, 3, 7).

You need feedback, because without it, you can't be sure that people have understood your message. Sometimes feedback is verbal, and sometimes it's not. We've looked at the importance of asking questions and listening carefully. However, feedback through body language is perhaps the most important source of clues to the effectiveness of your communication. You can learn a lot by watching the facial expressions, gestures, and posture of the person you're communicating with.
ACTIVITY 2

1. Answers are in chart below.

2. Learners were to practise being the “sender” and “receiver” of the body language examples below. This would be best done with other learners.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>a) Offering a firm handshake makes a good first impression.</td>
<td>True</td>
</tr>
<tr>
<td>b) Steady, measured breathing shows that you are calm and relaxed and ready for the interview.</td>
<td>True</td>
</tr>
<tr>
<td>c) Facing the interviewer “square-on” will make you appear aggressive and pushy.</td>
<td>True</td>
</tr>
<tr>
<td>d) Fidgeting (shifting in your chair, moving your hands and legs constantly) shows that you are nervous.</td>
<td>True</td>
</tr>
<tr>
<td>e) Keeping steady eye-contact makes people uncomfortable because they feel you are invading their personal space.</td>
<td>True</td>
</tr>
<tr>
<td>f) Hand gestures that keep your palms up indicate openness and friendliness.</td>
<td>True</td>
</tr>
<tr>
<td>g) When you relax your shoulders, it shows that you are depressed.</td>
<td>True</td>
</tr>
<tr>
<td>h) A smile shows warmth, welcome, confidence and relaxation.</td>
<td>True</td>
</tr>
</tbody>
</table>

Which of the following Essential Skills were used to complete this Learning Activity?

- [x] Document Use
- [ ] Numeracy
- [ ] Writing
- [ ] Oral Communication
- [ ] Working with Others
- [ ] Computer Use
- [ ] Continuous Learning
- [ ] Thinking Skills
- [ ] Problem Solving
- [x] Decision Making
- [ ] Critical Thinking
- [x] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory

© LLEO 2011, Clerical Essential Skills Training
ACTIVITY 3

1. Is an example.

2. c) Answer may vary but student should relate to giving a positive message and responding to the other person.

3. a) Answer may vary. Student should know that eye contact shows interest in the other person and what is being said.

4. b) Nodding your head occasionally shows you understand and are interested in what is being said.

5. b) Answers may vary, but should be related to a person’s personal space. 1 ½ to 3 metres is a good personal space for personal and social interactions.

6. c) Answer may vary, but should be related to paying attention, yet being non-aggressive.

Which of the following Essential Skills were used to complete this Learning Activity?

- ✔ Reading
- ✔ Document Use
- ✔ Writing
- ✔ Oral Communication
- ✔ Working with Others
- ✔ Critical Thinking
- ✔ Decision Making
- ✔ Problem Solving
- ✔ Numeracy
- ✔ Computer Use
- ✔ Finding Information
- ✔ Continuous Learning
- ✔ Job Task Planning & Organizing
- ✔ Significant Use of Memory
ACTIVITY 4

1. Learners’ choices should be discussed with other learners or instructor.

<table>
<thead>
<tr>
<th>Item</th>
<th>Verbal</th>
<th>Non-Verbal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not disturb sign</td>
<td>✔</td>
<td>☐</td>
</tr>
<tr>
<td>A hug</td>
<td>☐</td>
<td>✔</td>
</tr>
<tr>
<td>A memo from your boss</td>
<td>✔</td>
<td>☐</td>
</tr>
<tr>
<td>Signing to a deaf friend</td>
<td>✔</td>
<td>☐</td>
</tr>
<tr>
<td>Whistling or humming</td>
<td>☐</td>
<td>✔</td>
</tr>
<tr>
<td>A birthday card</td>
<td>✔</td>
<td>☐</td>
</tr>
<tr>
<td>Singing a song</td>
<td>✔</td>
<td>☐</td>
</tr>
<tr>
<td>A wink</td>
<td>☐</td>
<td>✔</td>
</tr>
<tr>
<td>Message on an answering machine</td>
<td>✔</td>
<td>☐</td>
</tr>
<tr>
<td>A handshake</td>
<td>☐</td>
<td>✔</td>
</tr>
</tbody>
</table>

Which of the following Essential Skills were used to complete this Learning Activity?

- ☑ Reading
- ☑ Document Use
- ☑ Numeracy
- ☑ Oral Communication
- ☑ Working with Others
- ☑ Computer Use
- ☑ Writing
- ☑ Continuous Learning
- ☑ Thinking Skills
- ☑ Decision Making
- ☑ Critical Thinking
- ☑ Finding Information
- ☑ Job Task Planning & Organizing
- ☑ Significant Use of Memory
ACTIVITY 5

This Activity may be answered in the spaces provided or, to provide more computer practice, by using a word-processing program.

1. Answers may vary. The better your writing skills are, the better the impression you will make. Clear writing gets your message across better.

2. Swearing, poor grammar, using slang and putting in extra words, for example: like, um, eh, etc.

3. Don’t mumble. Speak clearly using simple, easy to understand words. Speak loudly enough to be heard, but don’t shout.

Don’t speak too quickly. Talk at a comfortable speed so that your words aren’t slurred or running together.

Use simple, complete sentences so that the message is easier to understand.

Pause between sentences and ideas to give the listener some time to think and to understand what you are saying.

Connect your ideas or arguments and present them in a logical manner. This makes it easier for the listener to follow what you are saying.

Make sure you don’t chew gum or eat while you’re talking.

4. Telephone messages, emails, office memos, business letters, reports, etc.

5. Answers may vary, but skills would include all the non-verbal hints and speaking hints.

6. Answers may vary, but topic should relate so time isn’t wasted trying to figure out the information being written.

The following Essential Skills were used to complete this Learning Activity.

- [ ] Reading
- [ ] Oral Communication
- [ ] Writing
- [ ] Document Use
- [ ] Working with Others
- [ ] Numeracy
- [ ] Computer Use
- [ ] Continuous Learning
- [ ] Critical Thinking
- [ ] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Problem Solving
- [ ] Decision Making
- [ ] Significant Use of Memory
ACTIVITY 6

Answers will vary for questions 1-3. The learner should have found three sites about email etiquette and written some of the points or rules provided by these sites. These should be discussed with the instructor to ensure that the learner used good Critical Thinking skills to sift through the information. This Activity may be answered in the spaces provided or, to provide more computer practice, by using a word-processing program.

ACTIVITY 7

1. Answers will vary for this Activity, but should be discussed with the instructor and/or other learners.

ACTIVITY 8

1. Answers will vary for this Activity, but should relate to the topic or statement and how it should be worded in an office telephone conversation.
ACTIVITY 9

Answers to this Activity will vary but the point is to practise the right and wrong ways to talk to customers, over the telephone. This Activity is a Role-play and can be completed in a group or one-on-one situation with another learner or with you playing the part of Chris (the customer). It is up to you, as the practitioner, to assign the parts to your learners. The most value will be gained by discussion including the following:

How did the person playing the receptionist think the role play went?
How did the person playing Chris (the customer) think the role play went?
What did you learn?
What might you each do next time?
What did the rest of the group (the audience if there was one) think of the role-play and what did they learn?

Finally, you should comment on what you thought and what learners might have missed in their discussion.

The following Essential Skills were used to complete this Learning Activity.

- ✔ Reading
- ✔ Document Use
- □ Numeracy
- ✔ Writing
- ✔ Oral Communication
- ✔ Working with Others
- □ Computer Use
- □ Continuous Learning
- □ Problem Solving
- □ Decision Making
- ✔ Critical Thinking
- □ Finding Information
- □ Job Task Planning & Organizing
- □ Significant Use of Memory

ACTIVITY 10

1. Answers may vary, but we have provided what we feel is the best response.
   a. Distractions. Stress may have also played a part.
   b. You may miss the appointment and not get the job.
   c. Turn off the radio and write down the information so you don’t forget.

2. Answers may vary, but we have provided what we feel is the best response.
Module 6: Communication

a. Beliefs and experiences.

b. Your supervisor will think poorly of you and you may lose your job.

c. You listen to the supervisor and put aside your bias and dress as you are told.

3. Answers may vary, but we have provided what we feel is the best response.

a. Interpretation.

b. Your manager will think poorly of you and you may lose your job.

c. You should get the message straight from your manager.

The following Essential Skills were used to complete this Learning Activity.

- Reading
- Document Use
- Writing
- Numeracy
- Computer Use
- Continuous Learning
- Oral Communication
- Working with Others
- Critical Thinking
- Finding Information
- Problem Solving
- Decision Making
- Significant Use of Memory
- Job Task Planning & Organizing
- Thinking Skills
- Significant Use of Memory
Module 7– In The Office

Answers

ACTIVITY 1

1. Answers will vary for this Activity. *This Activity is to be completed on the computer using a word-processing program*. The learners are to answer in a paragraph covering, for each of the four ways of Working with Others, what they would find easiest and what they would find hardest about each way and why it would be easy or hard for them. Learners are reminded to follow the rules of good written communication provided in Module 6, Unit 4 and to review and self-assess their writing before giving it to their instructor. Learners should have used Critical Thinking in their answers.

Which of the following Essential Skills were used to complete this Learning Activity?

- [ ] Reading
- [ ] Oral Communication
- [ ] Problem Solving
- [ ] Job Task Planning & Organizing
- [x] Document Use
- [ ] Working with Others
- [ ] Decision Making
- [ ] Significant Use of Memory
- [ ] Numeracy
- [x] Computer Use
- [x] Critical Thinking
- [ ] Finding Information
- [ ] Writing
- [ ] Continuous Learning
- [ ] Thinking Skills
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory

ACTIVITY 2

1. Answers will vary for this Activity. Learners have been given the option of completing the answers on the computer. By this time learners should be considering good written communication skills as to clarity, grammar and spelling.

Which of the following Essential Skills were used to complete this Learning Activity?

- [ ] Reading
- [ ] Oral Communication
- [ ] Problem Solving
- [ ] Job Task Planning & Organizing
- [x] Document Use
- [ ] Working with Others
- [ ] Decision Making
- [ ] Significant Use of Memory
- [ ] Numeracy
- [x] Computer Use
- [x] Critical Thinking
- [ ] Finding Information
- [x] Writing
- [ ] Continuous Learning
- [ ] Thinking Skills
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory

© LLEO 2011, Clerical Essential Skills Training
ACTIVITY 3

The following Essential Skills were used to complete this Learning Activity.

- [ ] Reading
- [X] Document Use
- [ ] Numeracy
- [ ] Writing
- [ ] Oral Communication
- [ ] Working with Others
- [ ] Computer Use
- [ ] Continuous Learning
- [ ] Thinking Skills
- [X] Problem Solving
- [X] Decision Making
- [ ] Critical Thinking
- [ ] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory
ACTIVITY 4

1. Answers may vary, but should relate to worker doing his job well, was always on time and was seldom sick.

2. Answers may vary, but should relate to worker not working well with others, bad attitude and no respect for fellow workers.

3. Communicate positively and treat others with respect.

4. Answers will vary for this question, but should be discussed with the group or instructor.

The following Essential Skills were used to complete this Learning Activity.

- [x] Reading
- [x] Document Use
- [ ] Numeracy
- [x] Writing
- [x] Oral Communication
- [ ] Working with Others
- [ ] Computer Use
- [ ] Continuous Learning

Thinking Skills

- [x] Problem Solving
- [ ] Decision Making
- [x] Critical Thinking
- [ ] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory

ACTIVITY 5

This Activity lends itself well to group discussion.

1. a)

2. b)

3. b)

4. a)

5. a)

Which of the following Essential Skills were used to complete this Learning Activity?

- [x] Reading
- [x] Document Use
- [ ] Numeracy
- [ ] Writing
- [ ] Oral Communication
- [ ] Working with Others
- [ ] Computer Use
- [ ] Continuous Learning

Thinking Skills

- [ ] Problem Solving
- [x] Decision Making
- [x] Critical Thinking
- [ ] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory
ACTIVITY 6
Answers will vary for this Activity, but should use the Solve method of problem solving and should be discussed with the instructor.

The following Essential Skills were used to complete this Learning Activity.

- ✓ Reading
- ✓ Document Use
- □ Numeracy
- ✓ Writing
- ✓ Oral Communication
- □ Working with Others
- □ Computer Use
- □ Continuous Learning

Thinking Skills

- ✓ Problem Solving
- □ Decision Making
- ✓ Critical Thinking
- ✓ Finding Information
- □ Job Task Planning & Organizing
- □ Significant Use of Memory

ACTIVITY 7
This Activity lends itself well to group discussion.

1. a)
2. b)
3. c)
4. a)
5. c)
6. b)
7. a)
8. a)

The following Essential Skills were used to complete this Learning Activity.

- □ Reading
- □ Document Use
- □ Numeracy
- □ Writing
- □ Oral Communication
- □ Working with Others
- □ Computer Use
- □ Continuous Learning

Thinking Skills

- □ Problem Solving
- □ Decision Making
- ✓ Critical Thinking
- □ Finding Information
- □ Job Task Planning & Organizing
- □ Significant Use of Memory
ACTIVITY 8

1. Answers will vary for this Activity, but learner should be able to back up their choices. This Activity could also be done as a group discussion.

The following Essential Skills were used to complete this Learning Activity.

- [✓] Reading
- [✓] Document Use
- [☐] Numeracy
- [✓] Writing
- [☐] Oral Communication
- [☐] Working with Others
- [☐] Computer Use
- [☐] Continuous Learning

- [☐] Problem Solving
- [✓] Decision Making
- [✓] Critical Thinking
- [☐] Finding Information
- [☐] Job Task Planning & Organizing
- [☐] Significant Use of Memory

ACTIVITY 9

Answers will vary for this Activity, but responses should be reasonable for a positive office situation. It would be best if this Activity provided discussion opportunities between learners in partners or in a group. It could also be completed in Role play.

The following Essential Skills were used to complete this Learning Activity.

- [☐] Reading
- [✓] Document Use
- [☐] Numeracy
- [✓] Writing
- [☐] Oral Communication
- [☐] Working with Others
- [☐] Computer Use
- [☐] Continuous Learning

- [✓] Problem Solving
- [☐] Decision Making
- [✓] Critical Thinking
- [☐] Finding Information
- [☐] Job Task Planning & Organizing
- [☐] Significant Use of Memory

ACTIVITY 10

Answers will vary for all questions in this Activity. The answers may be done in the space provided, on a computer or spoken. The learner should discuss results with the instructor or a group.

The following Essential Skills were used to complete this Learning Activity.

- [✓] Reading
- [☐] Document Use
- [☐] Numeracy
- [✓] Writing
- [✓] Oral Communication
- [☐] Working with Others
- [☐] Computer Use
- [☐] Continuous Learning

- [☐] Problem Solving
- [☐] Decision Making
- [✓] Critical Thinking
- [☐] Finding Information
- [☐] Job Task Planning & Organizing
- [☐] Significant Use of Memory
ACTIVITY 11

1. a. to f. Answers will vary for this Activity, but should relate to topic of hazard and how to prevent it from happening.

<table>
<thead>
<tr>
<th>Hazard</th>
<th>Type of Hazard</th>
<th>Recommendation to Correct Hazard</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standing on a swivel chair</td>
<td>Unobservant and inattentive employees</td>
<td>Use a stepladder not a chair.</td>
</tr>
<tr>
<td>The kettle</td>
<td>Burning, cutting and pinching hazards</td>
<td>Needs to be moved to a safe area to reduce the risk of serious scalding and trailing electrical wires.</td>
</tr>
<tr>
<td>Open electric bar fires</td>
<td>Dangerous electrical wiring</td>
<td>Get rid of heater - this is old equipment and should not be used. The trailing, tangled wires could trip someone up or make the heater topple over.</td>
</tr>
<tr>
<td>Box with papers piled too high</td>
<td>Improper lifting and handling techniques</td>
<td>Never carry anything you can’t see over.</td>
</tr>
<tr>
<td>Material on top of high shelves</td>
<td>Improper office layout and arrangement</td>
<td>Do not pile up, it could easily topple over and fall on someone’s head. Make shelving lower so you do not have reach over head.</td>
</tr>
<tr>
<td>Overloaded plug sockets</td>
<td>Dangerous electrical wiring</td>
<td>Trailing and tangled wires can trip someone up and also lead to fires.</td>
</tr>
<tr>
<td>Leaving stuff on the floor</td>
<td>Slipping, tripping and falling hazards</td>
<td>Look before you walk.</td>
</tr>
<tr>
<td>Curling carpet</td>
<td>Slipping, tripping and falling hazards</td>
<td>Report any loose carpeting, electrical cords, etc.</td>
</tr>
</tbody>
</table>

The following Essential Skills were used to complete this Learning Activity.

- ✔ Reading
- ✔ Document Use
- ✗ Numeracy
- ✔ Writing
- ✗ Oral Communication
- ✗ Working with Others
- ✗ Computer Use
- ✗ Continuous Learning
- ✔ Problem Solving
- ✔ Decision Making
- ✔ Critical Thinking
- ✗ Finding Information
- ✗ Job Task Planning & Organizing
- ✗ Significant Use of Memory

ACTIVITY 12

1. 
2. The learner should complete the virtual office hazard game.

The following Essential Skills were used to complete this Learning Activity.

- ☑ Reading
- ✔ Document Use
- □ Numeracy
- ✔ Writing
- □ Oral Communication
- □ Working with Others
- ✔ Computer Use
- □ Continuous Learning
- ✔ Problem Solving
- □ Decision Making
- ✔ Critical Thinking
- □ Finding Information
- □ Job Task Planning & Organizing
- □ Significant Use of Memory
Demonstration Activity:
Job Bank Research Demonstration

Date:

Learner: ____________________________  Practitioner: ____________________________

Learner Goal:
☐ Employment
☐ Education/Training
☐ Independence

Purpose of Assessment:
☐ Ongoing
☐ Exit

Description: The learner will do internet research on Canada’s Job Bank to gather and use information on six jobs. For each job, the learner will decide if it would be suitable for his or her skills and interests. The learner will also consider skills that need to be developed. The learner will use computer and reading skills to research employment interests and use writing skills to summarize information and thoughts for others to read.

Guidelines: As this is the first demonstration of the curriculum, it is extremely important that the learner understands the value of demonstrating acquired skills in a holistic activity.

The learner should complete the following steps:
2. Search the Job Bank to find and print out six jobs in the Clerical field.
3. Review each of these jobs and decide whether you would be interested in doing it. For each job write out why you would or wouldn’t be interested.
4. For those jobs that you would be interested in doing, write what skills you think you still need to develop before you could apply for a similar job.
5. Organize your writing, so that it is easy for someone else to read and understand. Include information about the jobs that you have learned from the job ads and your own opinions about the job and your skills.
6. You should use correct paragraphing, sentence structure, grammar, punctuation and spelling. You may use a word processing program, including spell checker and grammar checker.
7. As in any job, it is important that you keep yourself on task, organize yourself and manage your time.

Resources:
- Computer with internet access.
- Computer with a word processing program (spelling and grammar check).

Assistance Allowed:
Ensure that the learner has had training in computer and Internet use.
This may be the learner’s first experience with self-assessing so the learner may need you to

The following Essential Skills were used to complete this Demonstration Activity:
☐ Reading  ☑ Document Use  ☐ Numeracy  ☑ Writing
☐ Oral Communication  ☐ Working with Others  ☑ Computer Use  ☑ Continuous Learning

Thinking Skills
☐ Problem Solving  ☑ Decision Making  ☑ Critical Thinking  ☑ Finding Information
☑ Job Task Planning & Organizing  ☐ Significant Use of Memory
Module 3: Thinking Skills

Demonstration: Job Bank Research

walk through the process.

Evaluation Method:
The instructor and learner should discuss and agree on an appropriate length of time to complete the demonstration.
The learner should complete a self-assessment of his/her work (attached) before handing it in to the practitioner.
The learner and instructor should review and discuss the results of the demonstration, self-reflection and Essential Skill areas that need to be improved.

Results:

The learner achieved the following Essential in this Demonstration Activity:

- [ ] Reading
- [ ] Document Use
- [ ] Numeracy
- [ ] Writing
- [ ] Oral Communication
- [ ] Working with Others
- [ ] Computer Use
- [ ] Continuous Learning

Thinking Skills

- [ ] Problem Solving
- [ ] Decision Making
- [ ] Critical Thinking
- [ ] Finding Information
- [ ] Job Task Planning & Organizing
- [ ] Significant Use of Memory

Comments:

______________________________
Learner’s Signature

______________________________
Practitioner’s Signature
# Job Bank Research Demonstration

## Learner’s Self-Reflection

<table>
<thead>
<tr>
<th>Task</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>I have the skills to use the internet for research.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I was able to find Job Bank ads for Clerical work.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I was able to read what skills were needed for each job.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I was able to decide if I would like to do each job or not.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I know some skills I will need to learn for the jobs I liked.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I organized my writing so it would be clear and easy to read.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I checked for spelling, punctuation and grammar mistakes.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I looked over my work to “self-assess” it before showing it to my instructor.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments:

________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
Module 7: In the Office

Final Demonstration: Clerical Placement

<table>
<thead>
<tr>
<th>Demonstration Activity:</th>
<th>Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clerical Placement Demonstration</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Learner:</th>
<th>Practitioner:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learner Goal:</td>
<td>Purpose of Assessment:</td>
</tr>
<tr>
<td>□ Employment</td>
<td>□ Ongoing</td>
</tr>
<tr>
<td>□ Education/Training</td>
<td>□ Exit</td>
</tr>
<tr>
<td>□ Independence</td>
<td></td>
</tr>
</tbody>
</table>

Description: The learner will complete a placement of at least 15 hours, in an office setting. The placement should include greeting customers, answering telephones, taking messages, filing, photocopying and some computer work.

<table>
<thead>
<tr>
<th>The following Essential Skills will be used to complete this Demonstration Activity:</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Reading</td>
</tr>
<tr>
<td>✓ Oral Communication</td>
</tr>
<tr>
<td>✓ Computer Use</td>
</tr>
<tr>
<td>✓ Writing</td>
</tr>
</tbody>
</table>

Guidelines:

1. The learner, with assistance, will locate and arrange for a suitable placement in an office. This may be at the learning centre or another organization or business. The placement should provide opportunities for the learner to gain work experience and practise greeting customers, answering telephones, taking messages, filing, photocopying and some computer work.

2. The learner should take part in an interview and/or orientation meeting with the placement supervisor. During this meeting, the learner should find out the expectations of the host, what the job placement duties will be, what hours he or she is expected to work, what the dress code is, etc. If the host does not provide information in writing, the learner should ask questions and take notes.

3. The learner will plan for the work placement, solving problems and organizing him or herself in order to be able to attend the placement.

4. The learner will complete the placement, while applying the knowledge and Essential Skills gained through this curriculum.

<table>
<thead>
<tr>
<th>Resources:</th>
<th>Assistance Allowed:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Placement evaluation form (attached)</td>
<td>Help finding, deciding on and arranging for the placement host, including discussion on suitability.</td>
</tr>
<tr>
<td></td>
<td>Help in creating a “script” of questions for the learner to ask the host regarding the job and the host’s expectations.</td>
</tr>
</tbody>
</table>
**Evaluation Method:**
The placement host will evaluate the learner’s performance during the placement using the placement evaluation form attached.
The learner will complete the self-evaluation form attached.
The instructor and learner will discuss the placement experience, the placement evaluation results and next steps.

**Results:**

| Thinking Skills          |  |  |
|--------------------------|  |  |
| Reading                  |  |  |
| Document Use             |  |  |
| Numeracy                 |  |  |
| Writing                  |  |  |
| Oral Communication       |  |  |
| Working with Others      |  |  |
| Computer Use             |  |  |
| Continuous Learning      |  |  |
| Problem Solving          |  |  |
| Decision Making          |  |  |
| Critical Thinking        |  |  |
| Finding Information      |  |  |
| Job Task Planning & Organizing |  |  |
| Significant Use of Memory |  |  |

**Comments:**

____________________________________
Learner’s Signature

____________________________________
Practitioner’s Signature
## Clerical Placement Demonstration

### Learner’s Self-Reflection

<table>
<thead>
<tr>
<th>I was able to find a placement opportunity that was suitable to my learning needs and employment goal.</th>
<th>Yes ☐ No ☐</th>
</tr>
</thead>
<tbody>
<tr>
<td>I took an active part in an orientation interview with my placement supervisor. I asked questions and read material provided to me, in order to understand what was required for the job, what duties I would do and what my hours would be.</td>
<td>Yes ☐ No ☐</td>
</tr>
<tr>
<td>I was able to solve problems and organize myself and my time, in order to complete the placement.</td>
<td>Yes ☐ No ☐</td>
</tr>
<tr>
<td>I was able to do the following job tasks during my placement:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>I had difficulty with the following tasks during my placement:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>I think I need to learn or work more on:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Comments:**
# Placement Evaluation Form

Learning Centre: ___________________________ Date: ________________

Participant: ________________________________

Placement Host: ___________________________ Placement Supervisor: ___________________________

<table>
<thead>
<tr>
<th>Skills, Trait, Characteristic, Behaviour</th>
<th>Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(Please circle level of performance)</td>
</tr>
<tr>
<td></td>
<td>1= Never/Poor……………..5 = Always/Excellent</td>
</tr>
<tr>
<td>Document Use</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Reading Text</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Writing</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Numeracy (Calculations/Measurements/Money)</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Oral Communications</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Working With Others</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Problem Solving</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Decision Making</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Critical Thinking</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Job Task Planning &amp; Organizing</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Significant Use of Memory</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Finding Information</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Computer Use</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Works Willingly &amp; Safely</td>
<td>1 2 3 4 5</td>
</tr>
</tbody>
</table>

Number of Days Worked: ___________________________ Number of Hours Worked: ___________________________

Tasks Performed: ____________________________________________________________________________

_________________________________________________________________________________________

_________________________________________________________________________________________

_________________________________________________________________________________________

Would You Consider Participating in a Work Placement Again?  □ YES  □ NO

Comments: _______________________________________________________________________________

_________________________________________________________________________________________

_________________________________________________________________________________________

________________________________      ______________________
Signature of Work-placement Supervisor     Date

________________________________     ______________________
Signature of Work-placement Participant     Date