

# CLERICAL



# Acknowledgements

Sincere appreciation and acknowledgement is given to the following companies, agencies and individuals for their assistance and encouragement in the development of this resource:

## Phase 1

**Project Staff:** Sue MacDonald, Connie Morgan

**Reference Committee:** Connie Morgan (Barrie Literacy Council); Debbie Soucie (Barrie & District Association for People with Special Needs); MaryAnne Myers (Simcoe County District School Board); Wanda Minnings (Simcoe/Muskoka Literacy Network).

**Administrative Support Staff:** Bonnie Patton

**Pilot Sites:** Thanks to all who piloted the original materials.

**Funded by:** National Literacy Secretariat, Human Resources Development Canada, Ontario Ministry of Colleges Training and Universities

## Phase 2

**Project Manager:** Stephanie Hobbs (Executive Director, Simcoe/Muskoka Literacy Network)

**Resource Developers and Writers:** Ann Kelland, Alison Wasielewski

**Design and Layout:** Ann Kelland

**Reference Committee:**

- Ann Bilodeau (KW Habilitation Services – Waterloo Region);
- Jennifer Ellis (Midland Area Reading Council);
- Stephanie Hobbs (Simcoe/Muskoka Literacy Network);
- Connie Morgan (Barrie Literacy Council);
- Kelly Scott (Ontario Works).

**Focus Group:** Thanks to the many individuals from the following agencies:

- Barrie Literacy Council;
- Employment Resource Centres of Barrie, Midland and Orillia;
- Job Connect (Georgian College);
- KW Habilitation Services;
- Midland Area Reading Council;
- Ontario Works (Muskoka & Simcoe);
- Simcoe Community Services;
- Simcoe/Muskoka Literacy Network.

**Pilot Sites:**

- Barrie Literacy Council;
- Canadian Hearing Society (Toronto);
- CCE Community Living Hamilton : ARC (Hamilton-Wentworth District School Board)
- CCE Mountain Learning Centre (Hamilton-Wentworth District School Board)
- Extend-A-Family : Working Adults Learning Empowering Skills (Waterloo Region);
- KW Habilitation Services;
- Midland Area Reading Council;
- Open Door Centre for Learning (Waterloo Region District School Board);
- The Literacy Group of Waterloo Region.

**Administrative Support:** Elizabeth Martz

**Special thanks to**

- Bank of Canada for permission to reproduce images of Canadian money;
- Waterloo Region District School Board for permission to use the Essential Skills section from the *On the Way to Work* manual and the Alignment Charts linking the Essential Skills to the Literacy and Basic Skills Outcomes (developed by Lesley Brien, Ann Kelland and Alison Wasielewski for the *Construction Zone* and *On the Way to Work* manuals);
- Employers who participated in the project by giving authentic documents, copyright permission, and job experience to our students;
- Amanda Steinhoff and Krista Wasielewski for typing support.

**Funded by:**

- Office of Literacy and Essential Skills, Human Resources and Social Development Canada, Service Canada.

# Bridging the Employment Gap

- Focus on Level 1 Essential Skills
- Based on National Occupation Code Profiles for jobs in 5 sectors
  - Clerical
  - Grounds Maintenance
  - Janitorial
  - Kitchen Help
  - Retail
- Emphasis on community partnerships with job coaches / job developers and with employers
- Student units include Learning Activities (Essential Skills identified), Teaching Aids, Student Activity Sheets, and Demonstrations (including instructor notes, tasks, and assessment.)

## **READY FOR WORK** includes

- **ESSENTIAL SKILLS** training module for tutors
  - Exploring the Essential Skills
  - LBS / ES alignment charts
  - How to Use the Ontario Skills Passport (including NOC)
- **STUDENT UNITS** focused on skills all people need – especially the “soft skills”
  - **Before Applying for the Job**
    - Choosing a Job
    - Fit for the Job
    - Keep Fit
    - Using a Personal Information Wallet Card
    - Going for the Interview
  - **On the Job**
    - Pay Information
    - Form Filling
    - Succeeding in the Workplace: Personal and Interpersonal Skills
      - Working with Others
      - Employee Responsibilities
      - Employer Responsibilities
    - Messages
    - Bus Smart
    - Time
      - Units of Time Measurement
      - Digital Clock
      - Analog clock
      - Measuring Elapsed Time
      - Managing Time
- **EVALUATION**
  - For the Employer
  - For the Support Worker
  - For the Student

## CONTENTS OF SECTOR MANUALS

### CLERICAL

- Safety
- Collating
- Photocopying
- Preparing Envelopes for Mailing
- Taking Telephone Messages
- Making a Telephone Call

### GROUNDS MAINTENANCE

- Safety
- Understanding Hazardous Product Labels
- Tools and Fasteners
- Lawns and Gardens: Tasks and Tools
- Lawnmowers
- Flower Gardens
- Communicating on the Job

### JANITORIAL

- Safety
- Understanding Hazardous Product Labels
- Understanding Signs
- Garbage Bags and Recycling
- Floors, Tables and Windows
- Cleaning the Washroom

### KITCHEN HELP

- Safety
- Loading and Unloading the Dishwasher
- Counting and Patterns
- The Condiment Station: Sorting and Storing Food
- Setting Temperatures: Burners and Ovens
- Measuring Ingredients

### RETAIL

- Safety
- Counting Money
  - Previous experience
  - Loonies and toonies
  - \$5
  - \$10 & \$20
  - Pennies
  - Quarters
  - Nickels & Dimes
  - Putting it all Together
- Sorting Sizes
- Matching UPC Numbers
- Stocking Shelves

# Table of Contents

<b>INTRODUCTION</b>	
Background	<b>1</b>
How to Use This Resource	<b>3</b>
National Occupation Profiles and the Essential Skills	<b>6</b>
Summary of Level 1 Tasks	<b>9</b>
Level 1 Essential Skills (reprinted from profiles)	<b>12</b>
What I Have Learned and Skills Practised	<b>19</b>
<b>SAFETY</b>	<b>21</b>
Safety	<b>23</b>
Essential Skills Chart	<b>25</b>
Learning Activities	<b>27</b>
Teaching Aids	<b>37</b>
Student Activity Sheets	<b>51</b>
Demonstration Instructor Page	<b>59</b>
Demonstration Tasks	<b>61</b>
Demonstration Assessment	<b>75</b>
<b>COLLATING</b>	<b>77</b>
Collating	<b>79</b>
Essential Skills Chart	<b>81</b>
Learning Activities	<b>83</b>
Teaching Aids	<b>95</b>
Student Activity Sheets	<b>107</b>
Demonstration Instructor Page	<b>113</b>
Demonstration Tasks	<b>115</b>
Demonstration Assessment	<b>121</b>
<b>PHOTOCOPYING</b>	<b>123</b>
Photocopying	<b>125</b>
Essential Skills Chart	<b>127</b>
Learning Activities	<b>129</b>
Teaching Aids	<b>147</b>
Student Activity Sheets	<b>163</b>
Demonstration Instructor Page	<b>173</b>

<b>Demonstration Tasks</b>	<b>175</b>
<b>Demonstration Assessment</b>	<b>179</b>
<b>PREPARING ENVELOPE FOR MAILING</b>	<b>181</b>
<b>Preparing Envelopes for Mailing</b>	<b>183</b>
<b>Essential Skills Chart</b>	<b>185</b>
<b>Learning Activities</b>	<b>187</b>
<b>Teaching Aids</b>	<b>199</b>
<b>Student Activity Sheets</b>	<b>201</b>
<b>Demonstration Instructor Page</b>	<b>215</b>
<b>Demonstration Tasks</b>	<b>217</b>
<b>Demonstration Assessment</b>	<b>225</b>
<b>TAKING PHONE MESSAGES</b>	<b>227</b>
<b>Taking Phone Messages</b>	<b>229</b>
<b>Essential Skills Chart</b>	<b>231</b>
<b>Learning Activities</b>	<b>233</b>
<b>Teaching Aids</b>	<b>257</b>
<b>Student Activity Sheets</b>	<b>267</b>
<b>Demonstration Instructor Page</b>	<b>279</b>
<b>Demonstration Tasks</b>	<b>281</b>
<b>Demonstration Assessment</b>	<b>285</b>
<b>MAKING TELEPHONE CALLS</b>	<b>287</b>
<b>Making Telephone Calls</b>	<b>289</b>
<b>Essential Skills Chart</b>	<b>291</b>
<b>Learning Activities</b>	<b>295</b>
<b>Introduction</b>	<b>295</b>
<b>Looking Up Phone Numbers</b>	<b>298</b>
<b>Planning the Call</b>	<b>309</b>
<b>Dialing the phone Number</b>	<b>316</b>
<b>Phone Conversations</b>	<b>323</b>
<b>Answering Machines</b>	<b>328</b>
<b>Teaching Aids</b>	<b>331</b>
<b>Student Activity Sheets</b>	<b>339</b>
<b>Demonstration Instructor Page</b>	<b>353</b>
<b>Demonstration Tasks</b>	<b>355</b>
<b>Demonstration Assessment</b>	<b>359</b>

# Background

This is part of Phase 2 of ***Bridging the Employment Gap for Learners with Low Level Literacy Skills***, a project begun in 2001. The focus of Phase 1 of the project was students with the lowest level literacy and basic skills, especially the developmentally challenged population. These students are the hardest to place in jobs and they face significant challenges in getting and keeping employment.

Phase 1 produced job specific sector manuals. These manuals presented step-by-step learning activities for selected tasks in the following sectors:

- Clerical
- Grounds Maintenance
- Janitorial
- Kitchen Help
- Retail.

Activities and teaching aids, as well as some demonstrations, were produced for each of the above sectors. Tasks selected were representative of jobs in which students were being placed. These manuals have been successfully used by a number of agencies, and this led to requests for their augmentation and fuller circulation.

In Phase 2, the focus was expanded to include all Essential Skill Level 1 learners, not just those who are developmentally challenged. To accomplish this, more activities requiring greater skill were created. All the activities have been aligned to the Essential Skills and to the selected National Occupation Classification (N.O.C.) profiles. A summary of the N.O.C. profiles and their Level 1 tasks is included; however, some of the Level 1 tasks from the profiles have yet to be developed. Demonstrations and authentic documents have been added to complement the activities.

As a result of focus group meetings with representatives from Ontario Works, Job Connect, Employment Resource Centres, community-based literacy programs, job coaches, job developers and literacy instructors, a need for the development of the “soft skills” was identified. There are many other non sector-specific job related skills needed by all employees, for example, form filling skills. **Ready for Work** is the resource which has been developed to address these needs. **Ready for Work** should be used as a complement to each sector manual.

The **Clerical** binder will help individuals who may have the opportunity to work in an office setting. It includes six main units: Safety, Collating, Photocopying, Preparing Envelopes for Mailing, Taking Phone Messages and Making Telephone Calls.



# How to Use This Resource

## NATIONAL OCCUPATION CLASSIFICATION AND THE ESSENTIAL SKILLS

Several N.O.C. profiles were used in planning what tasks to include in the resource manual. The Level 1 skills for the several profiles are printed as they appear in the profiles, and they are also summarized in chart form. Indication is made as to whether that task has been addressed, and if so, in which manual: Clerical, Ready for Work, another sector manual. Sometimes, the specific task has not been taught, but the necessary skill has. If the task has not been taught, it is one that could be developed at some later time, if funding becomes available. Instructors and students can access the full profile by going to the Essential Skills website (Google “Essential Skills.”)

## UNIT ORGANIZATION

### • INTRODUCTION

These pages outline the intent of the unit as a whole, and they include the following sub-headings:

- Description of unit
- Prerequisite and additional skills not taught in this unit
  - Skills a student should have before attempting the activities and tasks.
- Objectives
  - Measurable goals which should be met by the end of the unit.
- Materials
  - Materials the instructor/job coach/volunteer will need to gather prior to teaching the unit.
- Vocabulary
  - The words the students will need to be able to recognize, read or hear by the end of the unit. Specific vocabulary exercises are not provided.
  - Instructors/job coaches/ volunteers should be prepared to teach new vocabulary as it arises.
  - New words could be written on vocabulary cards which should then be laminated for multiple usages.
  - Some students will only recognize the words orally, while others may be able to copy and/or spell the words.
  - Some students may benefit from making their own vocabulary cards.
- Resources
  - Sources of information used to develop the unit plus other resources which could be used to augment the learning.

### • ESSENTIAL SKILLS CHART

- The Essential Skills are named across the top of the chart (the abbreviations noted above have been used)

- The Activity Descriptions are listed numerically down the left-hand column of the checklist.
  - The final activity, named D, is the Demonstration.
  - Each learning activity in the unit has been named, numbered and the Essential Skills used in the activity are identified and leveled. This will enable instructors / job coaches/ volunteers to locate tasks which will develop particular skills.
- **LEARNING ACTIVITIES**  
The Learning Activities contain detailed steps which are necessary for low level students. Some students may be able to omit steps in certain units depending upon their expertise in a particular area.  
A listing of the Essential Skills contained in the activity and the materials needed to complete the activity precede the instructions.
  - **DOCUMENTS**  
Authentic documents have been used as appropriate. We encourage everyone using this resource to gather authentic materials appropriate to their geographic area and /or job placement.  
e.g. Local bus schedules/time-tables  
Local business application forms
  - **TEACHING AIDS**  
These materials are cross-referenced in the Learning Activities. Their inclusion should facilitate the preparation process. Some of the Teaching Aids incorporate role play situations. These should be laminated or mounted on card stock to make them durable for posting and multiple usage
  - **STUDENT ACTIVITY SHEETS**  
Students will work on these sheets. They will be required to fill in forms, charts, checklists and/or answer questions. These should be photocopied as needed.  
  
On the CD, doc and docx forms of the student sheets are included so that instructors may individualize these for their students.
  - **DEMONSTRATION - INSTRUCTOR PAGE**  
This page acts as a summary for the instructor/job coach/volunteer. The skills and achievement indicators of the unit are itemized.
  - **DEMONSTRATION TASKS**  
Demonstration Tasks will be completed by the student at the end of the unit. The skills inherent in the tasks have been taught and practiced throughout the unit (in the Learning Activities and in the Student Activity Sheets.) These demonstration tasks act as a summation of the unit, and may be collected for a student portfolio or for a workplace portfolio. The Task sheets should be photocopied as required.

- **DEMONSTRATION - ASSESSMENT**

This form will show how the student has performed on the tasks and will be a useful tool for instructors/job coaches/volunteers and employers. It could be included in a portfolio to be taken to a job placement or interview. An indicator on all demonstration assessments is student self-assessment. This will help the individual to recognize his or her areas of strength as well as the skills he or she will need to practise further in order to meet with success in the workplace.

## **WHAT I HAVE LEARNED AND SKILLS PRACTISED**

This is a standard self assessment form that can be used at the completion of each demonstration. The object is for the student to understand what Essential Skills have been practiced in the unit and shown in the demonstration. This form may be included in a portfolio, or may be used with a job developer or job coach as a resume is being written. It will also help the student to feel confident about his or her skills, and hopefully will help the student to be able to articulate strengths when interviewed for a job.

## **ABBREVIATIONS USED FOR ESSENTIAL SKILLS (on charts)**

<b>RT</b>	Reading Text
<b>DU</b>	Document Use
<b>W</b>	Writing
<b>N</b>	Numeracy
◦ <b>MM</b>	◦ Money Math
◦ <b>SBA</b>	◦ Scheduling or Budgeting and Accounting
◦ <b>MC</b>	◦ Measurement and Calculation
◦ <b>DA</b>	◦ Data Analysis
◦ <b>NE</b>	◦ Numerical Estimation
<b>TS</b>	Thinking Skills
◦ <b>PS</b>	◦ Problem Solving
◦ <b>DM</b>	◦ Decision Making
◦ <b>JTPO</b>	◦ Job Task Planning & Organization
◦ <b>SUM</b>	◦ Significant Use of memory
◦ <b>FI</b>	◦ Finding Information
<b>WWO</b>	Working With Others
<b>CU</b>	Computer Use
<b>CL</b>	Continuous Learning

## NATIONAL OCCUPATION PROFILES AND THE ESSENTIAL SKILLS

**Several NOC profiles are included in this sector: 1411 – General Office Clerks, 1413 – Records Management and Filing Clerks, 1414 – Receptionist and Switchboard Operators, and 6435 – Hotel Front Desk Clerks,**

**NOC 1411:** General office clerks type and file correspondence, reports, statements and other material, operate office equipment, answer telephones and perform clerical duties of a general nature according to established procedures. They are employed in offices throughout the public and private sectors.

General office clerks perform some or all of the following duties:

- Key in, edit, proofread and finalize correspondence, reports, statements, invoices, forms, presentations and other documents, from notes or dictaphone, using computers
- Respond to telephone, in person or electronic enquiries or forward to appropriate person
- Provide general information to clients and the public
- Photocopy and collate documents for distribution, mailing and filing
- Maintain and prepare reports from manual or electronic files, inventories, mailing lists and databases
- Process incoming and outgoing mail, manually or electronically
- Send and receive messages and documents using fax machine or electronic mail
- May perform bookkeeping tasks such as preparing invoices and bank deposits
- May sort, process and verify applications, receipts, expenditures, forms and other documents
- May order office supplies, service office equipment and arrange for servicing in the case of major repairs.

**NOC 1413:** Records management clerks process, code, store and retrieve records and documents and apply retention and disposal schedules according to established policies and procedures. File clerks file papers, records, documents and other material according to subject matter or other filing system. Records and file clerks are employed throughout the private and public sectors. This unit group also includes health records technicians, who maintain systems for the collection, storage, retrieval and retention of health information. Health records technicians are employed by hospitals, clinics and other health care institutions.

Records management clerks perform some or all of the following duties:

- Classify, code, cross-reference, log and store records
- Maintain indexes for classification systems

- Operate information retrieval systems and respond to requests for records
- Review files periodically to ensure they are complete and correctly classified
- Label files according to retention and disposal schedules and prepare files for disposal
- Maintain access lists for security classified records
- Compile statistics and reports on activities within records services.

Filing clerks perform some or all of the following duties:

- Sort material that is to be filed according to particular filing systems
- File material in drawers, cabinets and storage boxes
- Locate and remove materials from files when requested
- Keep records of materials filed and removed.

Health records technicians perform some or all of the following duties:

- Classify, code, cross-reference and store health records and related information
- Maintain indexes for classification systems
- Operate information retrieval systems and respond to requests for health record information
- Prepare medical, social and administrative statistics
- Apply knowledge of medical terminology, physiology and treatments.

**NOC 1414:** Receptionists and switchboard operators greet people arriving at offices, hospitals and other establishments, direct visitors to the appropriate person or service, answer and forward telephone calls, take messages, schedule appointments and perform other clerical duties. They are employed by hospitals, medical and dental offices, and in other offices throughout the public and private sectors

The following is a summary of the main duties for some occupations in this unit group:

- Receptionists greet people coming into offices and other establishments, direct them to the appropriate contacts or services, and provide information in person and by phone and may perform clerical duties and maintain front desk security and security access lists.
- Hospital admitting clerks interview patients to obtain and process information required to provide hospital and medical services.
- Medical and dental receptionists greet patients, schedule appointments, using manual or computerized systems, receive and record payment for services, and direct patients to appropriate areas.
- Switchboard operators operate a telephone system or switchboard to answer, screen and forward telephone calls, taking messages and providing information as required; and may perform clerical duties.
- Answering service operators answer telephones and record and relay messages.

- Front desk clerks in a variety of institutional and commercial settings direct customers to appropriate areas, record bookings, handle credit card checks, receive payment, issue receipts, arrange tour reservations and deal with emergency situations.

**NOC 6435:** Hotel front desk clerks make room reservations, provide information and services to guests and receive payment for services. They are employed by hotels, motels and resorts

Hotel front desk clerks perform some or all of the following duties:

- Maintain an inventory of vacancies, reservations and room assignments
- Register arriving guests and assign rooms
- Answer enquiries regarding hotel services and registration by letter, by telephone and in person, provide information about services available in the community and respond to guests' complaints
- Compile and check daily record sheets, guest accounts, receipts and vouchers using computerized or manual systems
- Present statements of charges to departing guests and receive payment.

## SUMMARY OF LEVEL 1 TASKS

Essential Skill	Sample tasks	This resource	Ready for Work	Other	To be developed
READING TEXT	<ul style="list-style-type: none"> <li>• Memos, notes re duties, policies, procedures, etc.</li> <li>• Incoming mail - distribute</li> <li>• Notes, letters, etc to decide for filing</li> <li>• Phone messages – forward</li> <li>• Faxes – use information to make bookings etc.</li> <li>• Log books at beginning of shift for information</li> <li>• Files to locate misfiled material</li> </ul>	<ul style="list-style-type: none"> <li>•</li> <li>✓</li> <li>✓</li> </ul>	✓	All	<ul style="list-style-type: none"> <li>✓</li> <li>✓</li> <li>✓</li> <li>✓</li> <li>✓</li> </ul>
DOCUMENT USE	<ul style="list-style-type: none"> <li>• Look up phone numbers and addresses</li> <li>• Labels read and produce</li> <li>• Directories</li> <li>• Mail addresses</li> <li>• Lists</li> <li>• Complete various forms</li> </ul>	<ul style="list-style-type: none"> <li>✓</li> <li>✓</li> <li>✓</li> <li>✓</li> <li>✓</li> <li>✓</li> </ul>	✓	All	✓
WRITING	<ul style="list-style-type: none"> <li>• Email</li> <li>• Notes to self and others</li> <li>• Lists</li> <li>• Form letters</li> <li>• Records Retrieval Log</li> <li>• Telephone messages</li> <li>• Receipts</li> <li>• Complete various forms</li> <li>• Entries in log books</li> </ul>	<ul style="list-style-type: none"> <li>✓</li> <li>✓</li> </ul>	<ul style="list-style-type: none"> <li>✓</li> <li>✓</li> </ul>		<ul style="list-style-type: none"> <li>✓</li> <li>✓</li> <li>✓</li> <li>✓</li> </ul>
NUMERACY Money Math	<ul style="list-style-type: none"> <li>• Handle petty cash</li> <li>• Weigh mail for postage</li> <li>• Accept payments from clients, verify amount, prepare receipts</li> <li>• Prepare charge slips for couriers and faxes etc. and charge to client accounts</li> </ul>			Retail  Retail	<ul style="list-style-type: none"> <li>✓</li> <li>✓</li> <li>✓</li> </ul>

Scheduling or Budgeting & Accounting	<ul style="list-style-type: none"> <li>Compare invoices and packing slips</li> <li>Enter information to accounts</li> <li>Prepare deposit sheets</li> <li>Refer to reservation schedule re bookings</li> </ul>		✓	Retail	✓ ✓ ✓
Measurement & Calculation	<ul style="list-style-type: none"> <li>Weigh mail</li> </ul>				✓
Data Analysis	<ul style="list-style-type: none"> <li>Compare simple data: phone calls, bookings, etc</li> </ul>				✓
Numerical Estimation	<ul style="list-style-type: none"> <li>Estimate office supply needs</li> <li>Estimate size of packaging required</li> <li>Estimate time for task</li> </ul>	✓	✓	Grounds Kitchen Grounds	✓ ✓ ✓
ORAL COMMUNICATION	<ul style="list-style-type: none"> <li>Phone calls – make and accept</li> <li>Interact with co-workers</li> <li>Talk with couriers, suppliers, other service providers</li> <li>Interact with clients</li> <li>Greet clients, guests</li> <li>Receive information, instructions</li> </ul>	✓ ✓	✓ ✓	All	✓ ✓ ✓
THINKING SKILLS					
Problem Solving	<ul style="list-style-type: none"> <li>Tasks take longer than anticipated</li> <li>Errors in documents, billing, filing,</li> <li>Mail returned as undeliverable</li> <li>Lost files</li> <li>Client requests – can it be done?</li> <li>Unhappy guests or clients</li> </ul>		✓ ✓	Retail	✓ ✓ ✓ ✓ ✓
Decision Making	<ul style="list-style-type: none"> <li>Telephone – interrupt? Hold?</li> <li>Refer phone call or request to someone else</li> <li>Need for supplies</li> <li>File management</li> <li>Allocation of rooms (bookings)</li> </ul>	✓ ✓		Retail Grounds	✓ ✓ ✓ ✓
Job Task Planning & Organization	<ul style="list-style-type: none"> <li>Repetitive tasks – plan own job tasks based on information from supervisors and coworkers</li> </ul>	✓	✓	All	

Significant Use of Memory	<ul style="list-style-type: none"> <li>Names and faces of clients &amp; suppliers</li> <li>Office administration procedures including codes, passwords, file locations</li> <li>Messages (especially phone) – make notes</li> </ul>	✓	✓	All	✓ ✓
Finding Information	<ul style="list-style-type: none"> <li>Look up phone numbers &amp; addresses in directories</li> <li>Refer to databases</li> <li>Retrieve files from established system</li> <li>Find billing numbers (similar skill to phone numbers)</li> <li>Calendars and reservation logs</li> <li>Locate information within files</li> </ul>	✓		Retail	✓ ✓ ✓ ✓ ✓
WORKING WITH OTHERS	<ul style="list-style-type: none"> <li>Independently or as member of team</li> <li>Exchange information with coworkers</li> <li>Coordinate work with others</li> </ul>	✓ ✓ ✓	✓ ✓ ✓	All All All	
COMPUTER USE	<ul style="list-style-type: none"> <li>Access information in files</li> <li>Produce copies of information from computer</li> <li>Use databases to manage information</li> <li>Computerized equipment, including switchboard</li> <li>Specific software</li> </ul>	✓ (411)  ✓			✓ ✓ ✓ ✓ ✓
CONTINUOUS LEARNING	<ul style="list-style-type: none"> <li>New computer programs</li> <li>Customer service skills</li> <li>Organizational policy and procedure changes</li> <li>On the job and courses</li> </ul>	✓  ✓	✓ ✓ ✓	Retail All All	✓  ✓ ✓

**Level 1 Essential Skills:****Reading Text**

- May read memos regarding new systems, employees, policies and procedures.
- May skim incoming mail to see if they can deal with it, or if it has to be forwarded to another employee.
- Scan files to locate misfiled documents.
- Read memos with information about new procedures or policies.
- Scan notes, letters, invoices and reports to determine where to file them.
- Read phone messages and pass them along to the appropriate individual.
- Read memos regarding policy, procedures, security, personnel changes or daily events.
- Read mail and forward it to the appropriate individual, along with any necessary forms.
- Read incoming faxes from clients to make reservations, ensuring that all of the required information is provided.
- Read memos to get information, such as information on new programs for frequent guests and the availability of computerized games for children.
- Read log books at the beginning of every shift to obtain information on special requests, incoming groups or issues that need attention.

**Document Use**

- May look up phone numbers and addresses in phone books and office directories.
- May read labels on supplies, shelves and incoming mail and produce mailing labels for outgoing mail.
- Read file and file box labels to organize files and groups of files.
- Use the phone book and internal office directories to look up a phone number or the spelling of a name.
- Read the labels on bags of inter-hospital mail.
- Read lists of patients admitted and discharged from the hospital each day.
- Complete Chart Request forms.
- Read lists of codes, such as for governmental agencies
- Create file and file box labels to organize files and groups of files.
- Read labels on parcels in order to deliver them to the appropriate recipients.
- Read phone lists of employees, major clients and suppliers.
- Scan various forms and forward them to the appropriate recipients.
- Refer to phone books to look up addresses for hotel guests.
- Read computer-generated lists to allocate guest rooms. The lists indicate whether rooms are vacant, occupied or being cleaned.

**Writing**

- May write e-mail messages to supervisors and co-workers.
- Write notes to themselves as reminders and notes to co-workers to clarify instructions or obtain information.
- Write reminder notes to themselves and notes to others to clarify requests.
- Write lists of files created, indicating the file type, name and number.
- Complete various form letters.
- Write notes requesting more information when they are unsure of where to file a document.
- Keep an up-to-date record of files that have been removed by entering information in a Records Retrieval Log.
- Write down the substance of telephone requests.
- Write telephone messages to pass them on to other staff.
- May complete receipts for customers and record billing information in account books.
- Complete phone message forms.
- Complete computerized forms to make reservations, noting information such as guests' names, the number of rooms required and any special requests.
- Maintain log books to pass information to co-workers on the next shift.

**Numeracy**

- Money Math
  - May handle the petty cash in the office and pay bills, such as rent and utility bills.
  - May weigh mail to determine the cost of postage.
  - May accept payments by cash or cheque from clients, verify the amount received, give change, and issue receipts.
  - Prepare charge slips for services, such as couriers and faxes, and post them to guests' accounts.
  - Receive payment for guests' accounts, issuing receipts and providing change as required.
- Scheduling or Budgeting and Accounting
  - Compare totals on invoices and purchase orders to ensure that they match.
  - Enter information on the accounting day sheet including the patient's name, receipt number, date, description of services, fees charged, payment, current and previous balances.
  - Prepare deposit sheets at the end of their shift, balancing the change float and totalling all payouts.

- Accept or reject incoming requests for room reservations, considering the reservation schedule.
- Measurement and Calculation
  - May weigh mail to determine the cost of postage.
- Data Analysis
  - May make simple comparisons of data, for example, comparing monthly reports.
  - Compare enrolment numbers or program participation to those in the last few years to see if there has been an increase or a decrease.
  - Compare the number of incoming calls to outgoing calls on certain projects to clarify workload requirements.
  - Compare past, current and future numbers of reservations and guests at the hotel to note changes.
- Numerical Estimation
  - May estimate office supply requirements, such as photocopy paper, based on an analysis of past usage and knowledge of planned activities.
  - Estimate how much paper can fit into a box by judging the size of the box and the thickness of the paper.
  - Estimate the length of meetings to inform staff when rooms will be available.
  - Estimate how long it will take to get a room ready.

### **Oral Communication**

- Interact with other employees, in person or by telephone, to share information about tasks, meetings, deadlines, work methods and the location of various documents.
- Talk to clients, in person or on the phone, and provide them with information. They are often the clients' first contact with the office.
- Interact with couriers to clarify pickup and delivery times.
- May page employees over an intercom system.
- Talk with contractors and suppliers to discuss discrepancies in invoices or to order supplies.
- Interact with clients to receive instructions and clarify requests.
- Exchange information with co-workers about locating files or the status of particular requests.
- Speak with couriers when sending or receiving packages.
- Speak with off-site storage companies when they need information about the retrieval of files.

- Book appointments, speak to clients and servicers on the phone and transfer calls to other employees.
- Relay messages to co-workers and other staff and exchange information with them.
- Greet clients, determine the reason for their visit, provide them with basic information and direct them to the appropriate individual or department.
- Speak with suppliers to order services, materials and equipment.
- May show clients to waiting rooms.
- receive instructions and updates on daily activities from supervisors and ask opinions regarding procedures and materials to purchase
- Answer phones to make reservations, transfer calls and take messages as required.
- may greet guests in a friendly and approachable manner as they enter the hotel.
- Communicate with service providers to accept deliveries.
- Interact with customers to check them in and out and resolve service problems. Customer service is an important aspect of this job.

### Thinking Skills

- Problem Solving
  - May have trouble getting tasks completed within a set time frame, such as when a document is held up at the printing office. In that case, they may have to adjust their schedule to make sure they will be ready to give priority to the delayed document as soon as it arrives.
  - May notice an error in a document. They contact the individual who produced the document to find out what wording was intended.
  - May find discrepancies in the dollar figures when reconciling the accounting ledger. They compare slips and ledger entries to find the error.
  - May have mail to clients returned as undeliverable. They check with co-workers or make phone calls to locate a correct address
  - May have to cope with a lost file. They attempt to locate it by checking probable locations and contacting individuals likely to have it.
  - May receive requests from clients or staff on short notice. They examine the schedule to determine if requests can be met.
  - May find errors in billing. They recheck paperwork to find the source of the error
  - May deal with disgruntled guests who were not told in advance that they would be charged for any mini-bar items used. They explain the policy and, if necessary, offer a good will gesture, such as a discount, to make amends

- Decision Making
  - Decide when to interrupt telephone conversations and put people on hold.
  - Decide to whom to refer callers, based on the subject matter and the availability of staff.
  - Decide when to ship boxes of files for off-site storage.
  - Decide when supplies are needed and prepare a list for their supervisor.
  - Decide how to arrange the file management area for easy access and efficiency
  - Decide when to interrupt phone calls or put people on hold.
  - Decide on the allocation of rooms, considering customers' preferences (e.g., non-smoking, away from the elevator) and room availability

#### Job Task Planning and Organization

- Records management and filing clerks perform repetitive tasks. They organize and plan their own job tasks based on information provided by supervisors and co-workers.
- Significant Use of Memory
  - Remember the names and faces of clients and suppliers.
  - Remember office administrative information, such as codes for transferring calls and completing bills and the location of particular files
  - Answer the phone while serving guests at the front desk. They remember callers' requests until there is an opportunity to write them down.
  - Remember the names and faces of hotel guests to provide personalized customer service and greetings.
- Finding Information
  - Look up names, addresses, phone numbers and sources for supplies and materials in the white and yellow pages of the phone book or in supplier directories.
  - refer to databases to locate information on clients or companies
  - Retrieve files from an established file system.
  - Contact co-workers who produce files to get information about the contents and possible categories of files.
  - Find billing numbers. For example, the medical receptionist refers to the physician registry for billing numbers and addresses.
  - Access information on room availability from hotel computer systems.
  - Refer to events calendars to respond to guests' requests for specific information on special events and attractions.
  - Check movie listings in newspapers to advise guests of details as requested.

**Working With Others**

- General office clerks mainly work independently. They may work as members of a team or with a partner or helper on large tasks, such as the preparation of proposals or when completing tasks with a strict deadline.
- Records management and filing clerks generally work independently or alone filing, managing and retrieving files and records. They may work with a partner or helper or as a member of a Records Department team, exchanging information about files and discussing classification problems
- Receptionists and switchboard operators mainly work independently, co-ordinating their work with others. They are members of a team, co-operating to ensure a smoothly functioning and efficient office environment.
- Hotel front desk clerks work independently most of the time as part of a team dedicated to customer service. Depending on hotel size and volume of business they may work with a partner. They co-ordinate with managers, co-workers and external service providers, such as airline representatives, as necessary to meet the needs of guests.

**Computer Use**

- They respond to prompts on a screen when looking up information for a client. They then transfer this information to a paper copy for the client
- Records Management and Filing Clerks access file information on a computerized database of file topics, names and numbers. Some complete data entry by responding to prompts on the computer screen, with no requirement for the creation of new documents
- Use other computer applications. They may use computerized switchboard equipment
- Use other computer applications. For example, reservation software designed specifically for the hotel industry which provides integrated database and accounting capabilities. For example, they may use it to check in guests and prepare invoices when guests check out, keying in responses or highlighting a choice.

**Continuous Learning**

- General office clerks learn about new computer programs, software and applications and must keep up to date on changes in policy and procedures

- Records management and filing clerks have an ongoing need for on-the-job learning. They need to keep up-to-date with their organization's activities and the latest technical changes. They learn from co-workers, supervisors and users of documents. They may take courses in computer applications and file management.
- Receptionists and switchboard operators have an ongoing need to learn. They upgrade their computer skills, take client service training and learn about new products
- Hotel front desk clerks continue to learn to upgrade their computer and customer service skills. They acquire new learning on the job and through independent reading. Some hotel front desk clerks participate in company-sponsored service or sales seminars or tourism courses available in their communities

### **Other Information**

- Physical Aspects
  - General office clerks spend most of their day sitting at their desks. They stand and walk to perform various office tasks such as handling files or office supplies, operating the photocopier and carrying out errands outside their office.
  - Receptionists and switchboard operators sit at a desk most of the time, greeting visitors, using the phone, working on the computer and completing paperwork. They walk around the office to complete tasks such as filing or photocopying and to speak with co-workers. Medical and dental receptionists escort patients to examination areas and labs.
- Attitudes
  - The general office clerks interviewed felt that general office clerks should have good interpersonal communication and listening skills. They should be positive, meticulous, patient, organized, hardworking, understanding, calm, precise and responsible. They should be able to learn new procedures quickly.
  - The records management and filing clerks interviewed felt that records management and filing clerks should have good listening and interpersonal skills and be patient, accurate, flexible, detailed and organized.
  - The receptionists and switchboard operators interviewed felt that receptionists and switchboard operators should have excellent interpersonal skills. They should be polite, patient, friendly, effective at relaying information to others and flexible in dealing with changing schedules. They should be sensitive to customer and staff needs and professional in representing their company or organization. Receptionists should also be able to work under pressure.
  - The hotel front desk clerks interviewed felt that hotel front desk clerks should be outgoing, flexible and able to deal with the public, maintaining their professional composure when resolving problems.

# What I Have Learned and Skills Practised

Name: \_\_\_\_\_ Activity: \_\_\_\_\_

## Essential Skills

<i>Essential Skills Used</i>	Reading Text	Document Use	Writing	Numeracy	Oral Communication	Thinking Skills	Working with Others	Computer Use	Continuous Learning
What I Did									

