Bridging the Employment Gap

Clerical

Simcoe/Muskoka Literacy Network

Human Resources and Social Development Canada
Ressources humaines et Développement social Canada

CLERICAL

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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

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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)

RT	Reading Text
DU	Document Use
W	Writing
N	Numeracy
° **MM**	° Money Math
° **SBA**	° Scheduling or Budgeting and Accounting
° **MC**	° Measurement and Calculation
° **DA**	° Data Analysis
° **NE**	° Numerical Estimation
TS	Thinking Skills
° **PS**	° Problem Solving
° **DM**	° Decision Making
° **JTPO**	° Job Task Planning & Organization
° **SUM**	° Significant Use of memory
° **FI**	° Finding Information
WWO	Working With Others
CU	Computer Use
CL	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					
	· Memos, notes re duties, policies, procedures, etc.	•	✓	All	
	· Incoming mail - distribute				✓
	· Notes, letters, etc to decide for filing	✓			✓
	· Phone messages – forward	✓			
	· Faxes – use information to make bookings etc.				✓
	· Log books at beginning of shift for information				✓
	· Files to locate misfiled material				✓
DOCUMENT USE					
	· Look up phone numbers and addresses	✓			
	· Labels read and produce	✓		All	
	· Directories	✓			
	· Mail addresses	✓			
	· Lists	✓			✓
	· Complete various forms	✓	✓		
WRITING					
	· Email		✓		
	· Notes to self and others	✓	✓		
	· Lists				✓
	· Form letters				✓
	· Records Retrieval Log				✓
	· Telephone messages	✓	✓		
	· Receipts				✓
	· Complete various forms		✓		
	· Entries in log books		✓	Grounds	
NUMERACY Money Math					
	· Handle petty cash			Retail	
	· Weigh mail for postage				✓
	· Accept payments from clients, verify amount, prepare receipts			Retail	✓
	· Prepare charge slips for couriers and faxes etc. and charge to client accounts				✓

Scheduling or Budgeting & Accounting	· Compare invoices and packing slips				✓
	· Enter information to accounts				✓
	· Prepare deposit sheets		✓	Retail	
	· Refer to reservation schedule re bookings				✓
Measurement & Calculation	· Weigh mail				✓
Data Analysis	· Compare simple data: phone calls, bookings, etc				✓
Numerical Estimation	· Estimate office supply needs			Grounds	✓
	· Estimate size of packaging required	✓		Kitchen	✓
	· Estimate time for task		✓	Grounds	✓
ORAL COMMUNICATION	· Phone calls – make and accept	✓	✓		
	· Interact with co-workers	✓	✓	All	
	· Talk with couriers, suppliers, other service providers				✓
	· Interact with clients		✓		✓
	· Greet clients, guests		✓		✓
	· Receive information, instructions	✓	✓	All	
THINKING SKILLS Problem Solving	· Tasks take longer than anticipated		✓		✓
	· Errors in documents, billing, filing,			Retail	✓
	· Mail returned as undeliverable				✓
	· Lost files				✓
	· Client requests – can it be done?		✓		✓
	· Unhappy guests or clients		✓		✓
Decision Making	· Telephone – interrupt? Hold?	✓			✓
	· Refer phone call or request to someone else	✓		Retail	✓
	· Need for supplies			Grounds	✓
	· File management				✓
	· Allocation of rooms (bookings)				✓
Job Task Planning & Organization	· Repetitive tasks – plan own job tasks based on information from supervisors and coworkers	✓	✓	All	

Significant Use of Memory	· Names and faces of clients & suppliers				✓
	· Office administration procedures including codes, passwords, file locations	✓	✓	All	✓
	· Messages (especially phone) – make notes	✓	✓		
Finding Information	· Look up phone numbers & addresses in directories	✓			
	· Refer to databases				✓
	· Retrieve files from established system				✓
	· Find billing numbers (similar skill to phone numbers)			Retail	✓
	· Calendars and reservation logs		✓		✓
	· Locate information within files				✓
WORKING WITH OTHERS	· Independently or as member of team	✓	✓	All	
	· Exchange information with coworkers	✓	✓	All	
	· Coordinate work with others	✓	✓	All	
COMPUTER USE	· Access information in files	✓ (411)			✓
	· Produce copies of information from computer				✓
	· Use databases to manage information				✓
	· Computerized equipment, including switchboard	✓			✓
	· Specific software				✓
CONTINUOUS LEARNING	· New computer programs				✓
	· Customer service skills	✓	✓	Retail	
	· Organizational policy and procedure changes		✓	All	✓
	· On the job and courses	✓	✓	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 applicaitons. 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

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

Safety

Safety

This unit deals with a worker's guide to health and safety in the workplace. It is a generic unit, not sector specific, but it is included in each sector binder. As the authentic material is written for the general population, it may be necessary to read aloud most of the Teaching Aids for students with the lowest literacy skills.

The activities are mostly in discussion format, although tasks related to the classroom, which are transferrable to the workplace, have been included.

Several government publications are available through the Internet to augment these materials. These websites should always be checked before using to be sure that they are up to date.

PREREQUISITE AND ADDITIONAL SKILLS NOT TAUGHT IN THIS UNIT

- Using Internet to access a website
- Filling in a simple chart
- Locating information in lists, charts and texts using key words, skim and scan, etc.
- Making simple inferences
- Filling in blanks with appropriate words
- Reflecting on past experience and thinking about future possibilities

OBJECTIVES

The student will

- Understand the general rights and responsibilities of both employers and workers with regard to workplace safety
- Know how to ask for training in order to be safe
- Know how to refuse unsafe work
- Know about reporting accidents or injuries
- Know how to keep a workplace safe
- Know how to recognize hazards in a workplace

MATERIALS

- **Janitorial** or **Grounds Maintenance** resource manual. These sectors deal more fully with WHMIS issues because of the products used on a daily basis. Offices in factories or other locations that would have chemicals would require this training.
- **Ready for Work** resource manual: The *Succeeding in the Workplace*, *Fit for the Job*, and *Form Filling* units are referenced as providing additional or supportive activities for this unit.
- Collection of articles from newspapers about workplace accidents or injuries. Collect these over time and keep in a file.
- Posters from local safety associations, WSIB, etc. (*In Case of Injury at Work*)

VOCABULARY

- Accidents
- Control
- Danger
- Emergency
- Equipment
- Hazard
- Immediate
- Law
- Long term
- Operating
- Orientation
- Personal
- Procedures
- Protect / Protective
- Responsibility
- Rights
- Safety
- Training
- WHMIS

RESOURCES

- www.worksmartontario.gov.on.ca This is the main site. Select "My Health and Safety at Work" and use the menu to find appropriate resources.
- www.labour.gov.on.ca/english/hs/ohsaguide/index.html This is the Ministry website for the complete Occupational Health and Safety Act, 1990. It is a very long document and not in student-friendly language; however, it is referenced here as a possible resource for specific questions you may encounter.
- www.whsc.on.ca The Workers Health and Safety Centre provides general health and safety training as well as programs and training modules specific to each industry sector
- www.ohcow.on.ca The Occupational Health Clinics for Ontario Workers provides information and diagnostic services about occupational diseases such as repetitive strain injuries, noise induced hearing loss, respiratory problems and cancer.
- www.wsib.on.ca The Workplace Safety and Insurance Board is a comprehensive resource. Search "Launching a Safe Start" and choose "Right and Responsibilities". Download the poster*: In Case of Injury at Work* or order a free copy. This poster must be displayed in any workplace that is covered by WSIB.
- http://www.nald.ca/library/learning/wkplace/cover.htm Go to the chapter on WHMIS.
- http://www.uta.edu/policy/forms/ehs/3ofcsafe.pdf Office safety good resource: how to prevent accidents, strains, etc.
- www.labour.gov.on.ca search for "Protecting Yourself: Tips for Young Workers (This is printed in the Teaching Aids, but there is lots more available here.)
- Contact your local WSIB office to find brochures and use their resource personnel as guest speakers or to help you find additional job specific information or teaching aids.

#	Activity Description	ESSENTIAL SKILLS																
		RT	DU	W	N					OC	TS					WWO	CU	CL
					MM	SBA	MC	DA	NE		PS	DM	JTPO	SUM	FI			
1.	Rights and responsibilities									2	1	1		*				*
2.	Everyone has a part to play	1	1							2	1	1		*				*
3.	The employer plays a part	1	1							2	2	2		*				*
4.	Hazards	1	1							2	2	2		*				*
5.	Learn how to protect yourself									2				*				*
6.	Personal protective equipment (PPE)	1	1							2	1	1		*				*
7.	Safe operating procedures (SOPs)	1	1							2	1	2		*				*
8.	Emergency procedures	1	1							2	2	2		*				*
9.	Protecting yourself	1	1							2	1	1		*				*
10.	Reporting injuries	1	1							2	2	1		*				*
11.	Office safety		1	1						2	1	1		*				*
D	Safety in the Workplace	1	1	1						2	2	1		*				

LEARNING ACTIVITIES

1. RIGHTS AND RESPONSIBILITIES • **Oral Communication 2** • **Thinking Skills** ° Problem solving 1 ° Decision Making 1 ° Significant Use of Memory • **Continuous Learning**	**Materials:** • Teaching Aid: *My Basic Health and Safety Rights*
Explain to students that whenever they start a new job, they need to know their rights and their responsibilities. Ask students if they understand a "right" (something they are entitled to), and a "responsibility" (something they need to do to play their part.) • For example, they can vote after they are 18 years old (right), and they should go and vote (responsibility). • Another example: (right) they have the right to feel safe in their workplace; (responsibility) they must do their part to keep the workplace clean and safe and to treat others fairly. Discuss other scenarios of rights and responsibilities with students. • (If you give new scenarios and ask students to say what they should or should not do, then the Problem Solving and Decision Making become Level 2 as the consequences of not perceiving the complete problem, or of making wrong decisions become more serious.) Refer to Teaching Aid: *My Basic Health and Safety Rights* from Work Smart Ontario website (see RESOURCES).	

2. EVERYONE HAS A PART TO PLAY	Materials:

• **Reading Text 1**
• **Document Use 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Teaching Aid: *The Law*
	• Teaching Aid: *Rights and Responsibilities*.

Explain to students that workers have rights and responsibilities in the workplace. Refer to Teaching Aids: *The Law* and *Rights and Responsibilities.* Read and discuss each bullet. For example:

- They must participate in keeping the workplace healthy and safe. What might be some ways to keep a store healthy and safe? (aisles clear, etc)
- They must recognize and refuse unsafe work. What might be unsafe in a store?
- They must practise safe work procedures. Think of examples.
- They must wear protective equipment required by the job. (steel- toed shoes might be required; hairnets in deli, etc.)
- They must not do anything on the job that would endanger themselves or others. (give examples)

** This Teaching Aid and several that follow are from the WSIB "Launching a Safe Start" resource, which is available on-line. See RESOURCES for website.

3. THE EMPLOYER PLAYS A PART	Materials:

• **Reading Text 1**
• **Document Use 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 2
  ° Significant Use of Memory
• **Continuous Learning**
	• Teaching Aid: *The Law*
	• Teaching Aid: *Rights and Responsibilities.*
	• Student Activity Sheet: *I Don't Feel Safe*

Refer to Teaching Aids: *The Law* and *Rights and Responsibilities.*

Find the employer's responsibilities.

- For example, the employer must make sure that safety equipment is provided and that machinery is used properly and maintained well.
- How do you think an employer might do this?
- Who might help him with this on the jobsite?
- What might happen if the employer does not fulfill his responsibilities? (example, fails to keep machinery in good working order, or does not provide training.)

Use Student Activity Sheet: *I Don't Feel Safe*

4. HAZARDS	Materials:

• **Reading Text 1**
• **Document Use 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 2
  ° Significant Use of Memory
• **Continuous Learning**
	• Teaching Aid: *What is a Hazard?*
	• Teaching Aid: *Hazards*
	• Teaching Aid: *Hazard Control*

Ask students if they understand the meaning of the word "hazard".

- Explain that they encounter hazards every day in their lives: for example, walking across a busy street.
  - Ask what they do to face that hazard.
  - How did they learn this?
  - Did someone teach them?

Refer to Teaching Aid: *What is a Hazard?* The instructor will need to choose examples that relate to students' specific office situations or plans. Do not attempt to read this Teaching Aid directly with students as it is very complex.

Now, say that they will need to be trained to recognize and deal with hazards in the workplace. Each workplace will be different. Discuss examples. (Ask for others.)

- Some offices have constant music playing. If it is too loud, it can be a hazard to hearing.
- If stacks of paper or boxes are left lying in the office space, this could cause a falling hazard.
- Office workers use machines such as photocopiers, guillotines (paper cutters), and staplers, which, if not handled properly can result in injury.
- Products such as toner for photocopiers are toxic, and there will be safe handling procedures to be learned.

Discuss the concepts of immediate and long term hazards.

- Immediate hazards must be rectified right away (such as a spill.)
- Long term hazards (such as uninterrupted repetitive movements,) should be reported promptly but the solution may take time.

Discuss what they should do if they recognize a hazard at work: for example, leaking toner from a photocopier.

- Because there is an immediate danger to anyone in the area, it must be dealt with right away.
- Should they tell someone?
- Should they clean it up themselves? (No one answer)
- What should be done to prevent further problems?

Use Teaching Aids: *Hazards* and *Hazard Control* for further discussion.

5. LEARN HOW TO PROTECT YOURSELF • **Oral Communication 2** • **Thinking Skills** ° Significant Use of Memory • **Continuous Learning**	**Materials:** • **Janitorial** or **Grounds Maintenance** manual • Sample home cleaning products showing WHMIS symbols

Ask if students have heard the term "WHMIS."

- Tell the students the letters stand for "Workplace Hazardous Materials Information System."
- Explain that this system was designed to help workers know how to handle chemicals and other products safely.

Most clerical situations will not have a large focus on the WHMIS symbols and labels. However, you could introduce the idea here. Refer to the section on reading Hazardous Product Labels in the **Janitorial** or **Grounds Maintenance** manual. There are WHMIS websites that may also be used.

Show samples of hazardous industrial cleaning products as they might relate to their jobs, and draw students' attention to labels on the product.

Ask if they have seen some of these symbols on products at home.

- Show a couple of examples.
- Explain that some household cleaning materials might not have a hazardous symbol displayed on the label; however, a manufacturer's size requires a label and these should be recognized by the student.
- Tell students that if a chemical has been poured from a large container to a smaller one, then the workplace is required to display the warning label on the smaller label too.

6. PERSONAL PROTECTIVE EQUIPMENT (PPE)
• **Reading Text 1**
• **Document Use 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	Materials:
	• Teaching Aid: *Hazard Control*
	• Teaching Aid: *Learn How to Protect Yourself*
	• **Janitorial** or **Grounds Maintenance** manual.

Explain that if they are working with chemicals, some protective equipment might be necessary.

- For example, gloves if handling strong detergent or bleach; hairnets if handling food; closed, non-slip shoes or boots anywhere in a store; steel-toed boots if working in a lumber or tool store.

Again, use the **Janitorial** or **Grounds Maintenance** manual for further learning activities.

Use the Teaching Aids: *Hazard Control* and *Learn How to Protect Yourself.*

- Read and discuss each point.
- Make sure students can identify the protective clothing icons.

7. SAFE OPERATING PROCEDURES (SOPS)
• **Reading Text 1**
• **Document Use 1**
• **Oral communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 2
  ° Significant Use of Memory
• **Continuous Learning**
	Materials:
	• Student Activity Sheet: *I Can Do It*
	• **Ready for Work** manual

Ask students what it means to operate a piece of equipment safely.

- Explain that equipment comes in all shapes and sizes: for example, a stapler is a piece of equipment; a can opener is a piece of equipment.
- Some equipment might require a special license for operation, such as a fork-lift.

Explain that all equipment needs to be used safely, and workers need to be shown how to use it properly.

- Ask students what kind of equipment they might have to use in an office: for example, a stapler, a guillotine to cut paper, a photocopier, a computer.

Use common pieces of equipment found in the classroom or at home to demonstrate safe operation.

- First you should give "training" on how to use the equipment safely.
- Then, ask students to demonstrate that they can use the equipment safely.
  - For example: coffee maker, stapler, guillotine.
- Focus on their ability to use "training" that you gave.

Use Student Activity Sheet: *I Can Do It* as a follow up. Add items to the list, and delete ones that you did not use.

Refer to "Fit for the Job" in **Ready for Work.** There is an opportunity to list pieces of equipment they have used, or know how to use, safely.

8. EMERGENCY PROCEDURES	Materials:

• **Reading Text 1**
• **Document Use 1**
• **Oral communication 2**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 2
  ° Significant Use of Memory
• **Continuous Learning**
	• Student Activity Sheet: *Health and Safety in the Classroom*
	• **Ready for Work** manual

Explain that every workplace has emergency procedures and plans. Workers must get to know these emergency procedures as soon as they are hired.

Your classroom is a workplace. The emergency procedures for the classroom will be similar to those in the workplace. Ask students the following. (Add more of your own.)

- Where is the fire exit?
- Where is the first aid kit?
- What should be in the first aid kit? (This will vary from workplace to workplace.)
- What is expected of you in the classroom to keep it safe?
- What is expected of you in the classroom to be respectful to others?
- Do you have to wear protective clothing for any activities? For example, if you are allowed to cook in your classroom, are there oven mitts?

Use Student Activity Sheet: *Health and Safety in the Classroom.*

- Emphasize that all the safety procedures they are using in the classroom are transferrable to workplaces.
- When they start a new job, they will be given an orientation.
  - Safety and emergency procedures should be included.
  - If they are not, what should they do? (Ask for training. See Learning Activity 3 and Student Activity Sheet: *I Don't Feel Safe* if they have forgotten.)

Set up a scavenger hunt in the classroom.

- Before students arrive, make several unsafe situation: spilled water, blocked aisles, overturned chair, too many chairs in a stack, overhead projector cord running across classroom floor, garbage, etc.
- Tell students to find the unsafe or unhealthy things in the classroom.
- Discuss their findings.
- Make sure to correct each situation before proceeding with class.

** The *Succeeding in the Workplace* section in **Ready for Work** contains activities about respect and harassment, which fall under personal safety.

9. PROTECTING YOURSELF	Materials:

• **Reading Text 1**
• **Document Use 1**
• **Oral communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Articles from newspaper about workplace accidents, health or safety
	• Teaching Aid: *Protecting Yourself*

Tell the students that an average of 42 young workers are injured or killed on the job every day in Ontario. Explain that workplace accidents can happen at any job and can cause serious injuries. That is why health and safety is so important.

Refer to Teaching Aid: *Protecting Yourself*.

- Read "Candace's Story" to the students. Discuss the students' reactions to this situation.
- Examine each section on the Teaching Aid and discuss with students. You will probably need to read this aloud, or you could photocopy and enlarge each section to present separately.
- Make flashcards of the bolded words from the final section, "How to Protect Yourself" with the students. Discuss them then display them in the classroom. Encourage students to refer to these frequently.

Ask if students have seen commercials on TV about health and safety in the workplace.

Clip articles from the local paper that report on workplace accidents; keep these in a file or post on the walls to use as discussion starters.

Contact local safety associations for posters, etc. Ask someone to come as a guest speaker from WSIB or other safety association.

10. REPORTING INJURIES	Materials:

• **Reading Text 1**
• **Document Use 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Student Activity Sheet: *I Had an Accident*
	• **Ready for Work** manual

Whenever an accident occurs, or when someone is injured, it must be reported. There will often be a form to complete.

- Who would they report to in the classroom?
- Who do they think they should report to in a workplace?
- How would they know who this person would be?

Role play some possible scenarios for how to report an accident using Student Activity Sheet: *I Had an Accident.*

- The student should say who should be told, and should practise telling it. (Improvise questions to ask the injured person.)
- What does the student think should happen next?

There is a sample Accident Reporting form as the demonstration activity for "Form Filling" in the **Ready for Work** manual.

11. OFFICE SAFETY	Materials:

• **Document Use 1**
• **Writing 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• http://www.uta.edu/policy/forms/ehs/3ofcsafe.pdf
	• Chart paper & markers
	• Magazines, scissors and glue

This website is an excellent resource devoted completely to health and safety issues in the workplace. Since it is in pdf format, you can download and print this as a teaching plan. There are 3 main sections: General Office Safety, Equipment Safety, and Workstation Arrangement.

Consider each section and discuss the topics under the different headings. Have students create posters to show the safe way to work in a office. For example,

- Good housekeeping,
- Stress relieving exercises and practices, etc.

Ontario

Ministry of Labour

www.WorkSmartOntario.gov.on.ca

My basic health & safety rights

The Occupational Health and Safety Act gives every worker important rights.

What are some of my basic rights?

1. **The right to know.** You have the right to know the hazards in your job. Your employer or supervisor must tell you about anything in your job that can hurt you. Your employer must make sure you are provided with the information you need so that you can work safely.

   Want to know more about hazards?

2. **The right to participate.** You have the right to take part in keeping your workplace healthy and safe. Depending on the size of the company, you can be part of the Health and Safety Committee or be a Health and Safety Representative. You also have the right to participate in training and information sessions to help you do your job safely.

   Want to know more about Health and Safety Committees?

3. **The right to refuse unsafe work.** If you believe your job is likely to endanger you, you have an obligation to report the unsafe situation to management. If the situation is not corrected and you feel your health and safety is still in danger, you have the right under the OHSA to refuse to perform the work without reprisal.

   Want to know more about refusing unsafe work?

Ontario

This site maintained by the Government of Ontario, Canada

This information is provided as a public service by the Government of Ontario. Every reasonable effort has been made to ensure the currency and accuracy of the information presented on the site, but readers should verify information before acting on it.

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The Law

Federally regulated workplaces include:

- post office
- airlines
- airports
- inter-provincial transportation
- telephone
- banks

There are two sets of laws and regulations for health and safety in Ontario:

- *Canada Labour Code (CLC), Part II* for workplaces under federal jurisdiction
- *The Occupational Health and Safety Act* (OHSA) for workplaces under provincial jurisdiction

These laws and regulations outline the rights, roles and responsibilities of workers, supervisors, employers and other workplace parties.

Most workplaces in Ontario are provincially regulated. Examples of workplaces under federal jurisdiction are listed at the side.

If you are not sure if your workplace is under provincial or federal jurisdiction, contact the Ministry of Labour office or Human Resource and Skills Development Canada. See who to contact on page 12 for more information.

http://www.wsib.on.ca/wsib/wsibsite.nsf/LookupFiles/PreventionToolsLaunchingaSafeStart_WorkersGuide/$File/ASafeStartWorker.pdf
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Rights and Responsibilities

Worker rights

You have the right to

- Know about hazards in your workplace
- Participate in keeping the workplace healthy and safe
- Refuse unsafe work

Worker responsibilities

- Always practice safe work procedures
- Report unsafe conditions as quickly as possible to your supervisor or employer
- Properly wear any protective equipment the job requires
- Do not do anything on the job that will endanger yourself or others

Employers must

- Take every reasonable precaution to protect a worker's health and safety
- Make sure necessary safety equipment is provided, used properly and maintained
- Inform workers and supervisors of any hazards and how to handle them
- Ensure that safe procedures are followed in the workplace
- Provide information, instruction and competent supervision to protect the health and safety of workers

Supervisors must

- Take every reasonable precaution to protect a worker's health and safety
- Inform workers of job hazards and ensure they are trained to do their jobs safely
- Ensure that workers work safely and use the equipment and protective devices properly where required

http://www.wsib.on.ca/wsib/wsibsite.nsf/LookupFiles/PreventionToolsLaunchingaSafeStart_WorkersGuide/$File/ASafeStartWorker.pdf
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Ontario

Ministry of Labour

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What is a hazard?

A hazard is generally anything that can hurt you or make you ill.

Table of Contents

1. What's the difference between hazards at work and in everyday life?
2. How can I recognize hazards at work?
3. What if I recognize a hazard at work?

What's the difference between hazards at work and in everyday life?

You deal with hazards in your life every day walking across busy streets, driving and playing sports. Generally, you don't worry too much about these situations. Why? Because you've learned from an early age how to deal with everyday hazards.

You've learned from your own experiences, and you've been trained by parents, teachers and coaches. Municipalities install traffic lights and pedestrian crossings, car manufacturers install safety equipment. You might have taken driver's training and you probably wear protective gear playing sports.

But you haven't been trained how to recognize, assess and control hazards found in the workplace. That's one of the reasons why young workers are so likely to be injured at work.

You need to do some quick studying about workplace hazards so you're as comfortable with spotting hazards and dealing with them at work as you are at home, in the car and on the street.

How can I recognize hazards at work?

The first step to protecting yourself is being able to recognize hazards in the work you're assigned and in the conditions you're working in. There are four main types of hazards:

Physical hazards are the most common and will be present in most workplaces at one time or another. They include unsafe conditions that can cause injury, illness and death.

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What is a Hazard, pg 2.

They are typically easiest to spot but, sadly, too often overlooked because of familiarity (there are always cords running across the aisles), lack of knowledge (they aren't seen as hazards), resistance to spending time or money to make necessary improvements or simply delays in

making changes to remove the hazards (waiting until tomorrow or a time when "we're not so busy").

None of these are acceptable reasons for workers to be exposed to physical hazards.

Examples of physical hazards include:

- electrical hazards: frayed cords, missing ground pins, improper wiring
- unguarded machinery and moving machinery parts: guards removed or moving parts that a worker can accidentally touch
- constant loud noise
- high exposure to sunlight/ultraviolet rays, heat or cold
- working from heights, including ladders, scaffolds, roofs, or any raised work area
- working with mobile equipment such as fork lifts (operation of fork lifts and similar mobile equipment in the workplace requires significant additional training and experience)
- spills on floors or tripping hazards, such as blocked aisle or cords running across the floor.

Biological hazards come from working with animals, people or infectious plant materials. Work in day care, hospitals, hotel laundry and room cleaning, laboratories, veterinary offices and nursing homes may expose you to biological hazards.

The types of things you may be exposed to include:

- blood or other body fluids
- fungi
- bacteria and viruses
- plants
- insect bites
- animal and bird droppings.

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What is a Hazard, pg 3.

Ergonomic hazards occur when the type of work, body position and working conditions put strain on your body. They are the hardest to spot since you don't always immediately notice the strain on your body or the harm these hazards pose. Short-term exposure may result in "sore muscles" the next day or in the days following exposure, but long term exposure can result in serious long-term injuries.

Ergonomic hazards include:

- poor lighting
- improperly adjusted workstations and chairs
- frequent lifting
- poor posture
- awkward movements, especially if they are repetitive
- repeating the same movements over and over
- having to use too much force, especially if you have to do it frequently.

Chemical hazards are present when a worker is exposed to any chemical preparation in the workplace in any form (solid, liquid or gas). Some are safer than others, but to some workers who are more sensitive to chemicals, even common solutions can cause illness, skin irritation or breathing problems.

Beware of:

- liquids like cleaning products, paints, acids, solvents especially chemicals in an unlabelled container (warning sign!)
- vapours and fumes, for instance those that come from welding or exposure to solvents
- gases like acetylene, propane, carbon monoxide and helium
- flammable materials like gasoline, solvents and explosive chemicals.

The Workplace Hazardous Materials Information System (WHMIS) is designed to make sure you have the information you need to evaluate any hazards and take action to protect yourself.

Looking for more information on WHMIS?

www.WorkSmartOntario.gov.on.ca
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What is a Hazard, pg 4.

What if I recognize a hazard at work?

Some hazards, such as unguarded machinery, pose immediate dangers: a worker could lose a finger or arm. Other types of hazards, such as ergonomic hazards can injure a worker over a long period of time, but the full extent of the damage (such as chronic strain or a muscle impairment) may not show up until after several months or years of exposure to the hazard.

Both types of hazards need to be fixed. Some require immediate attention because exposure to them can cause injury to you and fellow workers NOW. They can be quickly fixed by cleaning up the floor, putting a guard back on or installing a guardrail, for instance. Hazards that can hurt you in the long term also need to be identified and reported promptly. Interim solutions should be sought right away, such as rotating tasks with other workers, but permanent elimination of the hazard may take a little more time to achieve.

Once you've recognized a hazard, assessing its potential to cause injury and the extent of the hazard is a necessary step in determining how the hazard can be addressed.

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Hazards

What should you do?

Be sure to receive training specific to the equipment, materials and work processes in your workplace.

Ask questions about the potential hazards in your job and the hazards in the workplace around you.

Always be on the lookout for hazards. Report hazards to your supervisor as soon as you identify them.

A workplace hazard is any condition, practice, behaviour, or a combination of these that can cause injury or illness to a person or damage to property. Here are some examples.

Safety hazards

- Poor housekeeping
- Machine belts and pulleys, sharp blades, and moving parts
- Energy hazards: electricity, hydraulics, steam, heat, or gravity
- Material handling using conveyors, lift trucks, tow motors and manual lifting
- Inappropriate or unsafe work practices

Machinery is guarded with a metal cage to protect the worker.

A lockout device is used to ensure that no one can start a machine while a worker is cleaning, repairing or maintaining it.

Health hazards

- Excessive noise
- Radiation
- Biological agents such as infectious diseases
- Ergonomic problems such as repetitive motion, force or awkward body positions
- Chemicals

http://www.wsib.on.ca/wsib/wsibsite.nsf/LookupFiles/PreventionToolsLaunchingaSafeStart_WorkersGuide/$File/ASafeStartWorker.pdf

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Hazard Control

What should you do?

Be aware of hazards that can result in injury or death.

- ✓ slips and falls
- ✓ electrical hazards
- ✓ machinery
- ✓ confined space
- ✓ moving vehicles
- ✓ hazardous chemicals
- ✓ over-exertion
- ✓ falling objects
- ✓ burns
- ✓ workplace violence
- ✓ explosions and fires
- ✓ collapsing platforms or equipment

Hazards should be eliminated or at least controlled to minimize exposure to risk. Here are a variety of ways to control hazards.

- Substitution with a less hazardous material, process or equipment
- Re-engineering equipment or a work process
- Installing physical barriers like machine guarding
- Personal protective equipment (PPE)
- Ventilation

Worker wearing personal protective equipment

Worker in control room isolated from sound and other hazards

Personal protective equipment may be necessary in some environments.

boots

gloves

hardhat

eyegoggles

earmuffs

earplugs

http://www.wsib.on.ca/wsib/wsibsite.nsf/LookupFiles/PreventionToolsLaunchingaSafeStart_WorkersGuide/$File/ASafeStartWorker.pdf
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Learn how to protect yourself

WHMIS

WHMIS is the Workplace Hazardous Materials Information System. This system was designed to make sure that workers across Canada know how to safely handle chemicals. It is also the law. Everyone in the workplace must receive WHMIS training that relates to the workplace, including you.

WHMIS has three parts;

- Warning labels
- Material Safety Data Sheets (MSDS)
- Worker Training

WARNING LABEL

What should you do?

Be sure to receive WHMIS training.

Check warning labels and ask to see the MSDS before you start handling substances.

Read and follow the guidelines for use.

Personal protective equipment (PPE)

You are responsible for properly wearing any special protective equipment that your job requires. Using it will help protect you from injury and illness. Be sure it fits right and meets approved standards.

Here are some examples.

- Hard hats to protect your head
- Hair nets to keep your hair from becoming caught in machine parts
- Non-slip safety boots – look for CSA approval
- Gloves to protect your hands
- Hearing protection to block out dangerous levels of noise
- Safety glasses or goggles to protect your eyes

What should you do?

Ask if there is any protective equipment that you should be wearing when doing your job. If there is, learn how to wear it properly.

http://www.wsib.on.ca/wsib/wsibsite.nsf/LookupFiles/PreventionToolsLaunchingaSafeStart_WorkersGuide/$File/ASafeStartWorker.pdf

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Protecting Yourself

Tips for --Young Workers

Health and Safety Tip Sheets
Issued: June 2004
Print version [118 kb / 2 pages | Get Adobe Acrobat® Reader]
To print this PDF, select Print from the Adobe Reader toolbar. In the Print dialog box, select 'Advanced' and ensure that 'Print as image' is checked. Click OK to close the Advanced dialog box and OK in the Print dialog box.
Other ways to get copies of this Guidleine

By law, you have basic rights, including:

1. The Right to Know about what hazards there are in your workplace and to know what to do to prevent injuries from them.
2. The Right to Participate in health and safety activities in your workplace without fear of discipline.
3. The Right to Refuse work that you reasonably believe can be dangerous to yourself or others.

However, you also have responsibilities including:

1. Work Safely: use all

Don't say it'll never happen

An average of 42 young workers are injured or killed on the job every day in Ontario. Workplace accidents can happen at any job and can cause serious injuries. Just read Candace's story.

Candace's Story

Safety wasn't the first thing on Candace Carnahan's mind when she began a summer job in a paper mill. Tragically, however, in a near fatal episode her foot became caught in a conveyor belt, dragging her helplessly until the machine could be stopped. The catastrophe left her with an amputated leg. It almost claimed her life. Proper safety practices could have prevented this and countless other tragedies, which affect thousands of young workers every year.

Photo compliments of Passport to Safety
Test your safety knowledge at www.passporttosafety.com

www.labour.gov.on.ca/english/hs/tips/tips_youngworkers.html

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machinery and equipment the way you were trained to.

2. Report Hazards: if you know that Ontario's health and safety laws are not being followed, you must report the circumstances to your supervisor or employer as soon as possible.
3. Use or Wear Protective Devices: don't remove a guard or device designed to protect you. Wear your safety gear--it's the law.

Protect yourself. Know your rights and responsibilities.

For more information for young workers go to www.youngworker.ca or www.WorkSmartOntario.gov.on.ca

If you need help with a concern about safety in your workplace, call the local office of the Ontario Ministry of Labour (listed in the blue pages of your phone book) or 1-800-268-8013.

You go to driving school to become a safer, smarter driver, so why not get the same advantage in the workplace? A $9.00 lifetime Passport to Safety membership provides a standardized safety test, a nationally recognized safety transcript for you to attach to your résumé, and 24/7 access to workplace safety resources. Find out more about it at: www.passporttosafety.com

Produced by the Ontario Ministry of Labour, June 2004

The Ontario Ministry of Labour does

Questions we often ask ourselves about our jobs:

- How do I look?
- What will my co-workers think about me?
- Will I be able to keep the job?
- How much money will I make?

However, we need to consider other issues:

- Will I be trained enough in order to do my job safely?
- Am I able to recognize possible hazards?
- Do I know my rights and responsibilities?
- Could an accident disfigure me or cost me my life?

Some signs that a workplace may be unsafe . . .

- Other employees are getting injured on the job
- You work without direct supervision
- You have not been trained properly
- Equipment is unguarded or broken
- Chemical containers aren't labelled
- Shortcuts are used to save time
- Poor housekeeping and maintenance, e.g. floors are slippery and electrical cords are frayed

How to protect yourself . . .

- **Learn** to do the job safely. Are you in any danger?
- **Think** the job through. Know what to do when there's an injury or emergency situation.
- **Ask, Ask, Ask**--There are no stupid questions.
- **Get help,** especially if you have to lift something heavy.
- **Wear the gear**--Find out what to wear to protect yourself, how to wear it and how to maintain it.
- **Inform** your supervisor if you see anything unsafe that may hurt you or someone else.
- **Report injuries**--If you get hurt, it's your job to tell your supervisor.
- Talk to your family about your job. Sometimes they know something you don't know!

Minimum Age Requirements for Working in Ontario	
14 years old	Establishments such as offices, stores, arenas, restaurant serving areas.
15 years old	Factories (other than logging operations), restaurant kitchens and warehouses.
16 years old	Construction, surface mine (except the working face); logging operations; mining plants.
18 years old	Underground mining or a working face of a surface mine; window cleaning.

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not assume and is not responsible for any liability whatsoever for any use of this material. To determine rights and obligations under the laws regulating workplace health and safety, the reader is directed to the provisions of the OHSA and the regulations made under that statute.

If you think your job is unsafe, do something about it.

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Protecting our most valuable resource

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I Don't Feel Safe

Read each situation, or listen to your instructor read it. Role play what you would do with another student or with your instructor as the supervisor.

SITUATION 1

The guard has fallen off the guillotine where you work. The arm has been left in an upward position and appears to be loose. You do not feel safe. What should you do?

SITUATION 2

A cup of coffee was left on the photocopier. You accidentally spilled it and the coffee ran into the machine. There were some sparks. Your boss has given you a load of papers to copy immediately. You do not feel safe. What should you do?

SITUATION 3

You are told to tidy up the storage room at the back of the office. Only one other person will be working with you. This person has frequently made rude or inappropriate comments to you and tried to grab you. You do not feel safe. What should you do?

I Can Do It

For each example, check if you received training, and check when you can do it.

I can	**Took the training**	**Did it**
Use three hole punch		
Use a coffee maker		
Turn off the photocopier		
Shut down the computer		
Use a guillotine to cut paper		
Lift a heavy box of photocopy paper safely		
Use a stapler safely		
Refill a stapler safely		

Health and Safety in the Classroom

Complete the checklist. Anything that you answer "No", you need to ask about. Then go back and answer "Yes".

I know	Yes	No
Where the fire exit is		
Where the first aid kit is		
What protective equipment I need to wear or use		
How to treat others with respect		
How to ask questions		
Who to go to if I have a problem		
How to keep the classroom clean and safe		
Why safety is important		

I Had an Accident

Read each situation. Who should you tell? Role play with another student or with your instructor. That person will ask questions about the accident and you must answer.

Situation 1

You slipped on the snow that had melted just inside the doors. When you fell, you landed on your hands and knees. You are a bit wet and shaken up, but not really hurt.

Situation 2

You dropped a pair of scissors on your foot. The point went into your toe. It hurts a lot, and it is bleeding.

Situation 3

You were changing the toner on the photocopier and dropped it. It broke, and spilled toner all over the floor and a big cloud of toner dust covered you. Some got in your eyes, and now they are stinging.

Situation 4

You cut your hand on the guillotine.

DEMONSTRATION INSTRUCTOR PAGE

Safety in the Workplace

ESSENTIAL SKILLS

- **Reading Text 1**
- **Document Use 1**
- **Writing 1**
- **Oral Communication 2**
- **Thinking Skills**
  - Problem Solving 2
  - Decision Making 1
  - Significant Use of Memory

DEMO DESCRIPTION

The student will identify hazards in a variety of pictured workplace. These will be discussed orally. The student will also identify training requirements in a workplace.

INSTRUCTOR NOTES

- Photocopy and use Tasks 1 & 2.
- Task 1 is oral. The student should be able to identify the right and wrong way to work in several situations
- Provide *What I Have Learned and Skills Practised* to link the demonstration tasks to the Essential Skills.

With student

- Read tasks aloud if necessary.

ACHIEVEMENT INDICATORS

- Located and categorized hazards
- Discussed safety issues in a variety of workplaces and work situations
- Identified equipment requiring training, both shown and not shown
- Made simple inferences
- Assessed own performance

Safety in the Workplace
TASK 1: Spot the Hazards

Look at the pictures. Discuss each picture with your instructor.

- Tell what the hazard is, or what the person is doing safely.
- What safety issues might there be in this workplace?
- Is training needed?

Safety in the Workplace
TASK 1: Spot the Hazards, cont.

Safety in the Workplace
TASK 1: Spot the Hazards, cont.

Safety in the Workplace
TASK 1: Spot the Hazards, cont.

Safety in the Workplace
TASK 2: Happy at Work

Look at the picture of the woman at the computer.

She has had to learn several pieces of equipment shown in the picture.

List the equipment shown she would have had to learn to use safely.

-
-

She works in an office.
What other pieces of equipment might she need to use (not shown in picture.)

-
-
-

Safety in the Workplace
TASK 2: Happy at Work, cont.

Safety in the Workplace
TASK 2: Happy at Work, cont.

What pieces of office equipment must Patsy be trained on?

How is this office prepared for worker comfort and health during hot weather?

DEMONSTRATION ASSESSMENT

Safety in the Workplace

Student:_____

Instructor:_____

Date:_____

Total Time for Demonstration:_____

Help Given? _____Yes _____No
Details:_____

Accommodations?: _____Yes ____No
Details:_____

ESSENTIAL SKILLS:

- **Reading Text 1**
- **Document Use 1**
- **Writing 1**
- **Oral Communication 2**
- **Thinking Skills**
  - Problem Solving 2
  - Decision Making 1
  - Significant Use of Memory

ACHIEVEMENT INDICATORS	BEGINNING	DEVELOPING	ACCOMPLISHED
• Located and categorized hazards			
• Discussed safety issues in a variety of workplaces and work situations			
• Identified equipment requiring training, both shown and not shown			
• Made simple inferences			
• Assessed own performance			

ADDITIONAL COMMENTS

Collating

Collating

A frequent job in many offices is the collating of numerous pages and the preparation of booklets with the collated materials.

PREREQUISITE AND ADDITIONAL SKILLS NOT TAUGHT IN THIS UNIT

- Concepts of same and different; ability to recognize identical and non-identical pages
- Numeric and alphabetical order
- Reads and understands numbers up to at least 20
- Understands concepts of left and right, top and bottom, under and on top of, face down and face up
- Degree of manual dexterity to pick up individual pages, hold several pages without dropping or mixing them.
- Understands the concept of sequence, and can follow a sequence
- Can make simple inferences

OBJECTIVES

Students will

- Count the number of pages to be collated in one booklet
- Collate a complete booklet, 3 – 12 pages, in proper order
- Sort a pile of collated pages into separate and identical packages
- Staple booklets according to instructions
- Use and refill stapler safely
- Use paper clips appropriately
- Check work to ensure accuracy

MATERIALS

- Photocopies: several copies of each of several pages, for sorting into piles of identical pages
- Samples of collated materials, showing different stapling, clipping options.
- Piles of different coloured paper, to be collated
- Long work table
- Paper clips
- Stapler
- Box of staples to fit stapler
- Staple remover
- Few pages of 3-hole punched paper (for marking position of staples)

VOCABULARY

- 3-hole punched
- Attach
- Booklet
- Collate
- Colour
- Count
- Crisscross
- Left
- Margin
- Office
- Order
- Paper
- Paper clip
- Piles
- Right
- Staple
- Staple
- Staple remover

RESOURCES

- Make use of the office in your own teaching situation; there may be opportunities to collate for them, giving real world practice. They will also have samples of booklets that have been collated. They will have supplies of coloured paper, which they may be able to share with you.

#	Activity Description	ESSENTIAL SKILLS																
		RT	DU	W	N					OC	TS					WWO	CU	CL
					MM	SBA	MC	DA	NE		PS	DM	JTPO	SUM	FI			
1.	What is collating		1							1	2	1						*
2.	Number of piles = number of pages		1				1	1		1	1	1		*				*
3.	Out of order	1	1					1		1	1	1		*				*
4.	Left to right		1							1	1	1	1	*				*
5.	Pick up in order		1							2			1	*				*
6.	Stacking the piles									1	1	1	1	*				*
7.	Staple and remove staples		1							1			1	*	1			*
8.	Several ways to staple	1	1							1	1	1	1	*				*
9.	Put in order	1	1					1		1	2	1	1	*				*
10.	Prepare to collate		1							2	2	1	1	*				*
11.	Separate the piles		1							2	2	1	1	*				*
12.	Checking your work	1	1							1	1	1	1	*				*
D	Collate it, please	1	1								1	1	1	*				

LEARNING ACTIVITIES

1. WHAT IS COLLATING?	Materials

• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 1
• **Continuous Learning**
	• Pile of photocopies (identical)
	• Samples of collated material: minutes from meeting, handout packages, small booklets, etc.)

Explain to students that photocopiers print copies of individual pages and one of the jobs in an office is often putting these pages together to make booklets (or small books).

- Putting the pages together is called "collating".
- Sometimes photocopiers can do the collating; often people have to do the work.
- Write the word “collate” on the board.

Look at a pile of photocopies from a photocopier. Note that all pages are identical.

Now, look at collated booklet samples (minutes of a meeting, handout materials, lesson outline, small book, etc.).

- Have students note that each page is different.
- Ask what would happen if a page were missing, (miss some of the important information, would not be able to make sense of what *is* there).
- Stress how important it is that <u>each</u> booklet be complete and put together correctly.

2. NUMBER OF PILES = NUMBER OF PAGES
• **Document Use 1**
• **Numeracy**
  ° Measurement & Calculation 1
  ° Data Analysis 1
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	Materials
	• 3 piles of coloured paper (3 colours)
	• Students Activity Sheet: *How Many Pages*

Give students three piles of coloured paper (each pile a different colour).

- Ask students to count the piles (3).
- Ask students to take one page of each colour and ask how many pages they have (3)
- Point out that the number of piles will always be the same as the number of pages in the collated booklet.
- Ask each student to make two more booklets of three pages (one of each colour).
- Have students check to make sure they have three different pages.

For more practice, give Students Activity Sheet: *How Many Pages?* Read the instructions with the students.

3. OUT OF ORDER	Materials

• **Reading Text 1**
• **Document Use 1**
• **Numeracy**
  ° Data Analysis 1
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Teaching Aid: *The Survivor* (4 pages)

Ask students if the order of pages in a booklet would be important. Why?

Using Teaching Aid: *The Survivor* (4 pages), prepare booklets which are out of order. Give students the out-of-order booklet.

- Read it with the students.
- Ask what the problem is. (out of order, the story does not make sense.)
- Point out that it is difficult to make sense of something if it jumps all over the place. Part of the fun of reading is not knowing what is going to happen. If the ending comes at the beginning, there is no story.
- How could they fix this? (page numbers, ideas of story)
- Have students use the numbers, at the bottom of the booklet pages, to put the story in order.
- Re-read it. Does it make sense now?

4. LEFT TO RIGHT	Materials

• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Job Task Planning & Organization 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Several piles of different coloured paper
	• Long table

Place several piles of different colour paper on a long table. Mark the start point with a "Start" sign.

Tell them that piles of paper are usually collated from left to right, the same direction as we read.

- Ask students how they remember right and left.
- Tell them to raise their left hands.
- Check to ensure all students know their left.

Have them walk down the length of the table from left to right, touching each pile as they go, or picking up a piece from each pile as they go.

- Check to see that each student's collated papers are in the same colour-order, matching the order on the table.

5. PICK UP IN ORDER	Materials

• **Document Use 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Job Task Planning & Organization 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Several piles of different coloured paper
	• Long table

Ask students how they kept the yellow page on top as they took one paper from each pile.

- Have students demonstrate their methods (or you may demonstrate).

Many of us pick up a paper in one hand and transfer it to the other hand.

- Stress that each page must go **under** the one picked up previously to keep the first page picked up on top.
- If the student's dexterity makes this impossible, help the student to discover what will work to keep the pages in order. (For example, if it is necessary for the student to place pages on top of each other, the piles could be arranged from last to first, still maintaining the left to right movement.)

Give students time to practise collating the coloured paper in the correct order.
Vary the order of the piles on the table for further practice.

6. STACKING THE PILES	Materials

• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Job Task Planning & Organization 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Collated piles
	• Variety of paper clips
	• Extra paper (for separating piles or making dividers)

Explain that it usually takes up too much space to lay out all the collated piles on the table. Usually, people want to stack the piles.

Ask students how they can keep the piles of collated paper separate from each other. (There are several possibilities – use a different coloured page between piles; fold the packets, etc. If the papers are 3-hole punched, they may put them immediately in binders; they may use paper clips, or stapler to secure the collated pages. See LA 7 for stapling activities.)

Show them paper clips of various sorts and give them opportunities to practise using them.

If the pages are being left unattached by clips or staples, they could crisscross the collated piles in a stack.

Give practice stacking collated piles.

7. STAPLE AND REMOVE STAPLES	Materials

• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Job Task Planning & Organization 1
  ° Significant Use of Memory
  ° Finding Information 1
• **Continuous Learning**
	• Stapler
	• Box of staples
	• Staple remover
	• Collated piles of paper

Explain that the most permanent way to keep collated pages together is to staple them.

- Explain that stapled booklets do not need to be crisscrossed.

Using a vocabulary card, teach them to sound out the word "staple".

- Then change the word to "staples and "stapler" and ask students to read.
- Ask them to find the word "staples" on the box of staples.

Demonstrate how to use a stapler safely.

- Let students practise using the stapler.

Demonstrate how to refill a stapler safely.

- Have students practise refilling the stapler.

Explain that if they make a stapling mistake, it can be easily fixed. They do not need to rip the pages or even to unbend the staple manually (safety).

- Show them how to remove a staple neatly, using a staple remover.
- Have them practise this, removing their own staples.

8. SEVERAL WAYS TO STAPLE	Materials

• **Reading Text 1**
• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Job Task Planning & Organization 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Stapler
	• Collated piles to practise stapling
	• 3-hole punched paper and pencil
	• Student Activity Sheet: *Staple It!*

There is more than one way to staple pages together. It is important to listen to verbal instructions about how they should be stapled. If no instruction is given, an employee should ask.

Point out that booklets are often stapled in the upper left corner.

- Have students point to the upper left corner.
- Ask students what would happen if the staples were on top of the printing (you couldn't read some of the print, as the pages were turned).
- Have students examine booklets stapled this way – good and bad examples.
- Ask students to staple, in the upper left corner, some of the collated material.

Show students that if books are stapled down the left side in two or three places, this makes the papers look more like a book.

- Ask students to point to the left-hand side of a page.
- Describe how to centre the staples so that they are not just at the top or at the bottom or both right in the middle.
  - Take a piece of 3-hole punched paper and lay it on top of an unpunched collated pile.
  - Use a pencil to mark a dot through each of the holes.
  - Remove the 3-hole punched paper.
  - The dots will show where to staple.
  - Have students practise this.
- If only 2 staples are wanted, these could go between dots 1 and 2 and then between dots 2 and 3.
  - Give practice.

Again, stress that the staples should be out in the margin, not close to the print.

Using this dot method will help them get a sense of where to staple; they need not do this every time!

Use Student Activity Sheet: *Staple It!* So that they have something to put in their notes as a reminder.

9. PUT IT IN ORDER	Materials

• **Reading Text 1**
• **Document Use 1**
• **Numeracy**
  ° Data Analysis 1
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 1
  ° Job Task Planning & Organization 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Teaching Aid: *The Survivor* (4 pages)
	• Student Activity Sheet: *Put in Order*

Review Learning Activity 3, *The Survivor*, to remind students that they can use page numbers to put pages in order.

What could they do if there are no page numbers? (read to figure out order; look for other ordering clues)

- Point out that they don't necessarily have to be able to read every word on the page.
- Sometimes there are headings, which may be numbered or lettered (alphabetically) that give clues to order.
- They may be able to recognize the first page by a title or a heading.
- They may be able to recognize the last page because it may end part way down the page.

Use Student Activity Sheet: *Put in Order* for practice.

Remind students to always check with their supervisor before collating and stapling if there is any confusion. They could put together one pile and have it checked before continuing.

10.PREPARE TO COLLATE	Materials

• **Document Use 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 1
  ° Job Task Planning & Organization 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Material to collate: 3 – 12 pages for each collation
	• Table
	• Teaching Aid: *How to Collate*
	• Stapler

Explain that in the workplace they will often be give a stack of crisscrossed piles of paper to collate.

- Each pile will have the same number of identical sheets.
- Their first job is to lay the piles out on a long table, ready to collate.

Review how they will know which is the first page, etc.

Their second job will be to collate them, stapling if necessary.

Suggest that they make one collated package and have it checked by the supervisor before continuing, if there is any confusion about the order.

Ask them what it means if they have one page left over, or one page missing. (could indicate a mistake in collating or a mistake in photocopying.) In either case, each collated package will need to be checked for accuracy.

Give practice laying out and collating, beginning with three piles and gradually increasing to 10 or 12 piles.

Give students pages to collate, sometimes separated, crisscross fashion, and sometimes as one large pile. Make sure they can find the start and finish of each different set of pages.

Use Teaching Aid: *How to Collate* as a memory aid for the steps they have learned.

11.SEPARATE THE PILES	Materials

• **Document Use 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 1
  ° Job Task Planning & Organization 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Material to collate: 3 – 12 pages for each collation
	• Table
	• Teaching Aid: *How to Collate*
	• Stapler

Sometimes they will be given one huge pile, directly from the photocopier, and they will have to separate the piles of identical pages before laying them out to collate.

Ask them how they will know where one set of pages ends and the next begins. (compare each page with the previous; when the page changes (no longer identical) then the next set of pages has begun.)

Give students a large pile of several pages to separate and then collate, using the Teaching Aid: *How to Collate* as before.

12.CHECKING YOUR WORK	Materials

• **Reading Text 1**
• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Job Task Planning & Organization 1
  ° Significant Use of memory
• **Continuous Learning**
	• Teaching Aid: *Collating— Checking Your Work*
	• Students' collated material

Teach students how to check for accuracy. Read the Teaching Aid: *Collating—Checking Your Work* with the students.

- Count the number of pages. Does it match the number of piles?
- Make sure each page is different.
- Is the front page the right one?
- Is the last page the right one?

Have students check their own collating, using the 4 steps on the Teaching Aid.

Bob wins the one million

dollars!

He will buy a new car and a

new house. He will give some

of his money to his family. He

is the only survivor.

7

Bob falls off the log.

He loses the game.

He is worried.

Will he get voted off the island?

3

They have to stand on one leg on a log stump. Who will last the longest? The hours pass. No one will give in.

2

Now it is up to the others. Who will they vote for? Who will win the million dollars?

? ? ?

6

The

Survivor

Sally does not like Larry.

She does not want him to win.

She and Bob vote him off the island.

4

Sally, Larry and Bob are the only ones left on the island. They started with twelve. Now there are three. Who will survive the next game?

1

Only Bob and Sally are left on the island.

5

How to Collate

1. Lay piles from left to right on a long table.
2. Check to make sure pages are in the correct order.
3. Take one page from each pile, from left to right, placing each new page under previous pages.
4. Stack in crisscross way.
5. Staple or paper clip according to instructions.
6. Check your work.

Collating – Checking Your Work

For each collated packet:

- ✓ Count the number of pages.
  Does it match the number of piles?

  3 piles = 3 pages in each booklet.
  4 piles = 4 pages in each booklet. …

- ✓ Make sure each page is different.

Learning Activities: 1._____ _____ 2._____ _____ _____ ___	3._____ _____ _____ 4._____ _____ _____ 5._____ ____

- ✓ Is the top page the first page, (from the first pile)?

- ✓ Is the bottom page the last page, (from the last pile)?

How Many Pages

For each of the following examples, you must take one page from each pile.

- How many pages will be in your booklet?
- Write the number in the blank.

1. _____pages

2. _____pages

3. _____pages

4. _____pages

Staple It!

Mark where the staples should go on each page.

1. Staple in the upper left corner.

2. Put 2 staples down the left side.

3. Put 3 staples down the left side.

Put in Order

Number the pages in the correct order.

1.

4. _____
_____
_____
5. _____
_____
_____
_____
6. _____

_____

Meeting
_____
1. _____
_____
2. _____
_____
3. _____
_____

_____

_____
_____
7. _____
_____
_____
8. _____

_____

2.

_____
_____
_____
D. Summary
_____
_____

_____

_____
_____
_____
C. Presentation
_____
_____
_____
_____
_____

_____

Lesson 2
A: Introduction
_____
_____
_____
B: Materials
_____
_____

_____

3.

How to Sew
A.Getting Ready
1. _____
2. _____
_____
B. Patterns
1. _____
_____
2. _____
3._____

_____

_____
3. _____
_____
_____

_____

4. _____
C. Cutting
1. _____
_____
2._____
_____
D. Sewing
1. _____
2. _____

_____

DEMONSTRATION INSTRUCTOR PAGE

Collate It, Please.

ESSENTIAL SKILLS

- **Reading Text 1**
- **Document Use 1**
- **Thinking Skills**
  - **Problem Solving 2**
  - **Decision Making 1**
  - **Job Task Planning & Organization 1**
  - **Significant Use of Memory**

DEMO DESCRIPTION

Students will collate materials according to given instructions.
Students will complete an "I Can" checklist.

INSTRUCTOR NOTES

- Provide a variety of coloured paper, several pages of each colour, for collating. Use at least 5 different colours.
- Provide scissors, stapler, staples and paper clips.
- Provide one or two 3-holed pages as aids for student to locate staples.
- You may need to enlarge the "pages" on Task 1 for some students.
- Make sure the coloured collation is in the same order as laid out on table.
- Provide *What I Have Learned and skills Practised* to link demonstration tasks to the Essential Skills.

With student

- Read aloud instructions with student as necessary.
- Review steps of collating. Students may use their "How to Collate" checklist.

ACHIEVEMENT INDICATORS

- Collated booklet using alphabetical clues.
- Collated booklet using coloured cues.
- Attached pages as instructed.
- Completed a checklist.
- Assessed own performance.

Collate It, Please.
TASK 1

Cut out the small pages and put them in order.

Use a paper clip to attach them together.

Put the paper clip in the top left hand corner of the booklet.

e……
……
…….

f……
……
…….

a……
……
……..
b……
……..

Minutes of the Meeting

Dec. 16, 2007

c……
…….
d……
……
…….

……
……
g……
……

Collate it, Please.
TASK 2

You are helping in an office.

You have been asked to collate the papers that are in a crisscross stack on a long table.

The pages are different colours.

They must be collated in the same order as they are stacked: the top colour will be first.

When you have collated the papers, you must staple the booklets in the left hand margin, using 3 staples for each.

You must show your finished work to your supervisor (instructor).

Collate it, Please.

TASK 3

Collating

I CAN	YES
I can arrange papers from left to right	
I can recognize the first page.	
I can put pages in order, using numbers, letters or headings.	
I can staple or paper clip pages together in the top left corner.	
I can staple pages together using 3 staples in the left margin.	
I can staple pages together using 2 staples in the left margin.	
I can concentrate and not get distracted.	
I can check my collated work.	
I can ask for help if I need it.	

DEMONSTRATION ASSESSMENT

Collate it, Please.

Student:_____

Instructor:_____

Date:_____

Total Time for Demonstration:_____

Help Given? _____**Yes** _____**No**
Details:_____

Accommodations?: _____**Yes** ____**No**
Details:_____

ESSENTIAL SKILLS:

- **Reading Text 1**
- **Document Use 1**
- **Thinking Skills**
  - Problem Solving 1
  - Decision Making 1
  - Job Task Planning & Organization 1
  - Significant Use of Memory

ACHIEVEMENT INDICATORS	BEGINNING	DEVELOPING	ACCOMPLISHED
• Collated booklet using alphabetical clues.			
• Collated booklet using coloured cues.			
• Attached pages as instructed.			
• Completed a checklist.			
• Assessed own performance.			

ADDITIONAL COMMENTS

Photocopying

Photocopying

Office assistants will frequently be asked to make photocopies, so in this unit the students will learn the basic steps involved in simple photocopying. Since all photocopiers are not the same, only the main parts, common to all models, will be taught. Although training should be given at each actual work site, it is essential that students have a general understanding of how a photocopier works and of how to use it before being sent to a work location.

Hands-on practice is the best way to learn to use photocopiers. Use the photocopier in your classroom or in the office at your location. If a photocopier is not available in your classroom or office, a trip to a local library, business or an office supply store would be advisable. Many drug stores have photocopiers for public use, as do stores such as Staples.

Because photocopiers are computer controlled equipment, Computer Use at Level 1 is inherent each time the copier is used. If the student is using the copier, it is a Level 1 skill.

PREREQUISITE AND ADDITIONAL SKILLS NOT TAUGHT IN THIS UNIT

- Simple measurement – how to measure and record inches and centimeters
- Letter / sound recognition
- Some decoding skills
- Spatial awareness
- Concept of abbreviations
- Concepts of horizontal and vertical
- Concepts of left and right, top and bottom, front and back

OBJECTIVES

Students will

- Recognize the main parts of a photocopier
- Know the functions of the main parts
- Place originals in appropriate places for copying
- Make single sided copies
- Load paper
- Know the difference between letter and legal size paper
- Recognize symbols which give specific directions, such as “Add toner”.
- Follow written steps in making one or more copies. (transferrable to other photocopying tasks.)
- Understand the rules of safe operation of the photocopier, including when to ask for help.

MATERIALS

- Photocopier
- Instruction booklet for photocopier (paper or on photocopier itself)
- Variety of paper in various colours in both 8½" X 11" and 8½" X 14" sizes
- Collection of other paper sizes: notepads, memos, post-its, etc.
- Overhead projector and transparencies
- Chart paper & markers
- Camera

VOCABULARY

- Add
- Camera
- Cassette
- Clear
- Control panel
- Copy / copies
- Cover
- Darker
- Document
- Feeder
- Gently
- Glass
- Legal (LGL)
- Letter (LTR)
- Lighter
- Margin
- Metal
- Operation
- Original
- Output tray
- Paper
- Platen glass
- Start
- Stop
- Stuck
- Tabs
- Tap
- Toner
- Tray
- Wait

RESOURCES

- Your own office will be a good resource for materials: paper, photocopier, etc.
- A library, local office supply store, print and copy store, or even drug store will often have photocopiers available for public use.

#	Activity Description	ESSENTIAL SKILLS																
		RT	DU	W	N					OC	TS					WWO	CU	CL
					MM	SBA	MC	DA	NE		PS	DM	JTPO	SUM	FI			
1.	Tour – how it works									2							1	*
2.	Tour – label		1							2	1	1		*				*
3.	Tour – review	1	1	1						1	1	1		*				*
4.	Rules, rules, rules	1	1							2	2	1		*				*
5.	Letter size paper		1				1	1	1	2	1	1						*
6.	Legal size paper		1				1	1	1	2	1	1						*
7.	Choose the paper		1							2	1	1		*				*
8.	Platen glass									1	1	1		*				*
9.	Place paper accurately									1	2	1		*				*
10.	Use arrows to locate									1	2	1		*				*
11.	Placing the paper 1		1							1								*
12.	Placing the paper 2	1	1							1	1	1		*	1		1	*
13.	On / off		1							1	1	1		*	1		1	*
14.	Control panel symbols	1	1							1	1	1		*	1		1	*
15.	How many		1							1	1	1	1	*			1	*
16.	Following written directions	1	1							1	1	1	1	*			1	*
17.	Check it									1								*
18.	Paper needed		1							1								*
19.	Loading paper	1	1							1	1	1	1	*			1	*
20.	2-sided copying	1	1							2	2	1	1	*	1		1	*

#	Activity Description	ESSENTIAL SKILLS																
		RT	DU	W	N					OC	TS					WWO	CU	CL
					MM	SBA	MC	DA	NE		PS	DM	JTPO	SUM	FI			
21.	Other specialized functions	**1**	**1**							**1**	**1**	**1**	**1**	*	**1**		**1**	*
D	Copy Cat	**1**	**1**								**2**	**1**	**1**	*			**1**	

LEARNING ACTIVITIES

1. TOUR – HOW IT WORKS • **Oral Communication 2** • **Computer Use 1** • **Continuous Learning**	**Materials** • Photocopier in your office

Take students to the office for a demonstration of how your photocopier works. **

Explain that not all photocopiers look the same or perform all of the same tasks. Ask students what the main function of the photocopy machine is. (to make multiple copies of a document)

Demonstrate how to use your photocopier, talking through each step as you perform it. Show how to make 1-sided copies using both letter and legal size paper. If your machine sorts and collates, show this process too. Remind students that not all machines have this feature.

Have each student make a single sided copy. They must place the original in the correct position and select the correct button to push.

** See introduction on page 101 for what to do if there is not a photocopier available in your teaching location.

2. TOUR - LABEL	Materials

• **Document Use 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Office photocopier
	• Teaching Aid: *Parts of a Photocopier*

Have a set of vocabulary cards ready to label the parts of your photocopier: glass, tray, paper feeder, toner, feeder cover, etc. You may need to add some of your own vocabulary words as each copier has different parts and features that you will want to teach.

- Place labels on the appropriate part of your photocopier.
- Read labels to students.
- Then, ask them to read the labels with you as you point to them.
- After several practices, remove labels.
  - Hold up one label at a time.
  - Ask students to read label out loud. (Some may use the initial sound only as a clue.)
  - Ask students to place each label, as it is read, onto the appropriate part of your photocopier.
- Review again the function of each labeled part.

Use Teaching Aid: *Parts of a Photocopier* for the major parts.

3. TOUR – REVIEW	Materials

• **Reading Text 1**
• **Document Use 1**
• **Writing 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Chart paper & markers
	• Student Activity Sheet: *Label Me*

Upon your return to the classroom, draw a simple outline of a photocopier (that looks like the one you worked with) on chart paper.

- Label each main part.
- Discuss, as a review, the function of each part.

Use Student Activity Sheet: *Label Me* as a review exercise. Read aloud the label words if necessary. (If this picture looks significantly different from the photocopier you have in the office, you may have to help students problem solve what the different parts might be.)

4. RULES, RULES, RULES	Materials

• **Reading Text 1**
• **Document Use 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Teaching Aid: *Rules, Rules, Rules*
	• *Safety* unit in this manual

Although all photocopy machines may not be the same, there are general rules which apply to working with all photocopiers.

Use Teaching Aid: *Rules, Rules, Rules*.

- Read each rule with the students.
- Discuss with the students why each rule might be important (safety issues, damage to machine).
- Place special emphasis on Rule 5.
  - Explain that training should be given on how to use the photocopier at the workplace.
  - If the training is not given, or if a student is not sure of a particular step, the student should ask for help.

Refer to the *Safety* unit in this manual for ideas on how to recognize when you might need help and what to do.

5. LETTER SIZE PAPER	Materials

• **Document Use 1**
• **Numeracy**
  ° Measurement & Calculation 1
  ° Data Analysis 1
  ° Numerical Estimation 1
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
• **Continuous Learning**
	• Sheet of 8½″ X 11” paper
	• Ruler: inches
	• Photocopier

Give each student a sheet of 8½″ X 11” paper.

Using a ruler marked in inches, show students how to measure the width of the paper across the top.

- Write 8½” on the board.
- Ask students to write 8½” in both top corners of the page, drawing a line from side to side.

Then, help students to measure the length of the paper.

- Write 11” on the board, and ask students to write 11” in the top and bottom left corners of the page, drawing a line from top to bottom.

Ask which side is longer. Explain that paper this size is referred to as “letter size” paper.

Sometimes, on photocopiers, the short form LTR is used.

- Write the abbreviation on the board.
- If possible, show them the places where LTR is used on the photocopier (platen glass, paper tray, display screen for paper choice, etc.)

6. LEGAL SIZE PAPER	Materials

• **Document Use 1**
• **Numeracy**
  ° Measurement & Calculation 1
  ° Data Analysis 1
  ° Numerical Estimation 1
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
• **Continuous Learning**
	• 8½” X 11” and 8½” X 14” paper
	• Ruler: inches
	• Photocopier

Give each student a sheet of 8½” x 14" paper.

Help students to measure the width and the length.

- Write the dimensions on the paper as above.
- Which side is longer?

Ask students to put the two pieces of paper on top of each other to find out which sheet of paper is longer.

Explain that this longer paper is referred to as "legal-size" paper.

- Sometimes on photocopiers, LGL is the short-form used.
- Write the abbreviation on the board.
- If possible, show them the places where LGL is used on the photocopier (platen glass, paper tray, display screen for paper choice, etc.)

7. CHOOSE THE PAPER	Materials

• **Document Use 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Variety of paper, letter, legal and non-standard sizes.

To practise recognition of paper sizes, put an assortment of papers on a table. Include non-standard paper as well as the letter and legal size, such as telephone message memos, post-its, deposit slips, etc.

Hold up a letter size paper and ask students to identify it; repeat with legal size.

Ask students to get a piece of legal size, or a piece of letter size paper. You could ask for other papers as well. ("Mark, would you get me a piece of letter size paper, please.")

Make this a role play with students so that they can practise asking politely for something (the piece of paper).

8. PLATEN GLASS	Materials

• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Photocopier

Ask what the purpose is of the glass plate (called the platen glass) on the photocopier? (to allow the camera underneath to take a picture of what is on the original)

Demonstrate by making a copy.

Ask what would happen if the paper was partly off the glass (copy would be missing that part of the print on the page).

- Compare this to taking a photograph of too many people and when the print comes back, some people are cut off.
- To prevent this from happening, most copiers indicate how to fit the paper onto the glass.

9. PLACE PAPER ACCURATELY	Materials

• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Sheets of coloured paper, letter and legal size
	• Tape, table
	• Sheets of white paper, letter and legal size

Use coloured samples of paper, in both letter and legal sizes. Tape these to a table, some in vertical and some in horizontal orientation.

Ask students to place white letter size and legal size papers on top of the ones on the table.

- Stress that each must fit exactly over the coloured papers. This is important as this is how exact they must be when placing papers on a photocopier.
- Review what would happen if the paper isn't placed in the exact position. (some information would not be copied.)

Margins on the original do give some leeway; however, by misplacing and copying, you can demonstrate how sloppy placement affects the quality of the copy: it may be skewed even if all the printing shows. In a business setting, they will need to make copies that look professional, not sloppy.

10. USE ARROWS TO LOCATE	Materials

• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Sheets of white paper, letter and legal size
	• Table with arrows taped to mark corners (letter & legal size)

A photocopier often uses arrows to mark where the original paper should go.

Replace the coloured papers taped to the table with arrows or small lines to mark where the paper should go.

Ask students to place letter and legal size white pages on the table aligned with the arrows, matching the corners exactly.

11. PLACING THE PAPER 1	Materials
• **Document Use 1** • **Oral Communication 1** • **Continuous Learning**	• Teaching Aid: *Placing the Paper 1* • Blackboard or chart paper • 2 different colour markers or chalk

There are two basic orientations used for paper placement on photocopiers. Practising with both will help students to recognize the visual cues on whatever machine they use.

Use Teaching Aid: *Placing the Paper 1*.

- Ask students what LTR stands for.
- Ask what LGL stands for.

Use a blackboard or chart paper as the glass surface:

- Show how to lay the LTR paper on the “glass”.
- Show how to lay the LGL paper on the “glass”.
- (If doing both sizes is too difficult, mark one size of paper at a time.)
- The blackboard or chart paper will allow you to show the overlay of paper: use a different colour marker or chalk to outline the different size papers.

12. PLACING THE PAPER 2	Materials

• **Reading Text 1**
• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of memory
  ° Finding Information 1
• **Computer Use 1**
• **Continuous Learning**
	• Teaching Aid: *Placing the Paper 2*
	• Blackboard or chart paper
	• 2 different colour markers or chalk
	• Student Activity Sheet: *Place Me*
	• Student Activity Sheet: *Place Me Again*
	• Photocopier

Use Teaching Aid: *Placing the Paper 2*.

- Ask students what LTR stands for.
- Ask what LGL stands for.

Using a blackboard or chart paper as the glass surface,

- show how to lay the LTR paper on the "glass".
- Show how to lay the LGL paper on the "glass".
- (If doing both sizes is too difficult, mark one size of paper at a time.)
- The blackboard or chart paper will allow you to show the overlay of paper: use a different colour marker or chalk to outline the different size papers.

This is a visual concept and may be very difficult for some students. Practise as much as is necessary to enable all students to recognize the cues they should use for aligning the different size papers.

Use Student Activity Sheets: *Place Me* and *Place Me Again* for additional practice.

Finally, allow students to place originals on the photocopier as they think they should be aligned, and then to make the copy.

- Did they do it correctly?

13. ON / OFF	Materials

• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
  ° Finding Information 1
• **Computer Use 1**
• **Continuous Learning**
	• Photocopier

Point out when a photocopier is turned on, it often takes some time to warm up.

There is usually a red light near the start button.

- Ask students what does "red" mean? (Stop)
- Explain that whenever the red light appears, the machine is not ready or able to print.
- Sometimes a message may appear as well: PLEASE WAIT. Have students guess at the word "wait" by looking at the sound of the first letter and thinking about the red light.
- Ask what do drivers have to do at a red stop light after they stop?
- Ask students to guess how they will know when it is OK to begin copying *(*green light).

Find the on/ off switch on your photocopier.

- If possible, turn the photocopier off.
- Wait a few minutes then turn it on.
- How do you know **on this photocopier** when it is ready to copy? (Some have a “stand by” function to conserve energy; some should only be shut down at the end of the day. Check with the office before shutting off the photocopier, in case it takes a long time to warm up!)

14. CONTROL PANEL SYMBOLS	Materials

• **Reading Text 1**
• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
  ° Finding Information 1
• **Computer Use 1**
• **Continuous Learning**
	• Teaching Aid: *Control Panel Symbols*
	• Student Activity Sheet: *What Do I Mean?*

Take a picture of the control panel on the photocopier you are using. (Or draw it, or photocopy the appropriate page from the instruction booklet.) Enlarge this, make a transparency and place it on an overhead projector.

Explain that the control panel is how they will tell the photocopier what to do. Ask students what some things might be that they would want the photocopier to do: start printing, stop, make a certain number of copies, make the copies darker or lighter, larger or smaller, etc.

Explain that there are a number of symbols on a photocopier that are on most machines. Using the Teaching Aid: *Control Panel Symbols*, go over the symbols for "start" and "stop", "lighter" and "darker" and the vocabulary words.

Show your template of the control panel on the photocopier in your location, and ask students to find these symbols and words on the panel.

Explain that they will be trained to use the photocopier at their place of work and may have to ask for help if a symbol appears on the panel: for example, some offices have one person who replaces toner, etc.

- Tell students that they must ask for help if they have not been shown how to deal with the symbols which appear on the control panel.
- Ask why it would be better to ask for help than to try to fix something on their own. (Might hurt themselves or do damage to the machine: both are costly to the employer.)

Use Student Activity Sheet: *What Do I Mean?* To reinforce understanding of symbols.

15. HOW MANY	Materials

• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Job Task Planning & Organization 1
  ° Significant Use of Memory
• **Computer Use 1**
• **Continuous Learning**
	• Control panel template
	• Photocopier
	• Several originals

Explain to students that by pressing the numbers, they set the number of copies wanted. Usually the copier is set at one. So if they don't press any number, they will get one copy. If they make a mistake, they can press the "Clear" button and start again.

Give students practice pressing different numbers of copies on the simulated control panel. When possible, have students make photocopies needed in the class, entering the correct numbers. You could also use the keypad on the computer for practice entering numbers accurately. (The visual display on the computer screen allows both student and instructor to verify accuracy.)

Use different originals so that students may have practice removing the original and the number of copies when completed and stacking identical copies with the Original in a pile on a table. They must next put the next original in, key in the number of copies and proceed.

This would be an appropriate time to make sure that students can discriminate identical and non-identical pages in the output tray.

16. FOLLOWING WRITTEN DIRECTIONS	Materials

• **Reading Text 1**
• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Job Task Planning & Organization 1
  ° Significant Use of Memory
• **Computer Use 1**
• **Continuous Learning**
	• Teaching Aid: *How to Make Copies*
	• Photocopier

Use the Teaching Aid: *How to Make Copies*.

- Read each step, one at a time.
- Encourage students to use their known vocabulary to figure out what each sentence says.

If students have access to a photocopier, let them try to follow the directions, step by step, for both ways of placing the originals into a copier.

Stress that students should never try to add more originals, or take out any of the originals, once copying has begun.

When students become familiar with the copier, encourage them to help with office or classroom photocopying.

17. CHECK IT • **Oral Communication 1** • **Continuous Learning**	**Materials:** None
Suggest to students that photocopying work should always be checked to make all of the pages copied properly. This can often be done as the copies come out of the machine into the output tray. Ask what kind of problems they have seen on copies (printing off centre, only printing half a page, two pages going through together, print too light, etc.)	

18. PAPER NEEDED • **Document Use 1** • **Oral Communication 1** • **Continuous Learning**	**Materials** • Teaching Aid: *Control Panel Symbols* • Sample of photocopy paper in packaging
Using Teaching Aid: *Control Panel Symbols,* review the symbol that indicates more paper is needed in the paper tray. Point out that paper must not be damp or curled at the edges. • It is important to store paper in a cool, dry place **in its packaging** so that it doesn't curl. This will also help to keep the paper clean and free of dust. • Add that paper must also not be torn or wrinkled. If it is, it will get stuck in the machine. Stress that office workers must never open the paper tray while the copier is printing.	

19. LOADING PAPER	Materials

• **Reading Text 1**
• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Job Task Planning & Organization 1
  ° Significant Use of Memory
• **Computer Use 1**
• **Continuous Learning**
	• Teaching Aid: *How to Load Paper*
	• Photocopier

Using the Teaching Aid: *How to Load Paper*, read each step one at a time.

- Encourage students to use their known vocabulary to figure out what each sentence says.

If students have access to a photocopier, help students to follow the directions step by step to load the paper into the paper tray.

20. 2-SIDED COPYING	Materials

• **Reading Text 1**
• **Document Use 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 1
  ° Job Task Planning & Organization 1
  ° Significant Use of Memory
  ° Finding Information 1
• **Computer Use 1**
• **Continuous Learning**
	• Photocopier

Students may be asked to do 2-sided copying. This is a skill that must be seen and practiced according to the operating procedures of each machine. Some machines have two-sided copying as an automatic feature on the control panel; others require manual special handling.

The concepts of “place upside down”, “turn over”, and “re-feed” must be understood.

Trial pieces of paper should be fed individually through the machine to discover how that machine does the second side. This can be an excellent problem solving activity.

- For instance, if the second side comes out upside down, what must be done to correct the problem the next time?
- For some students, teaching how to make 2-sicded copies can be an opportunity for you to gauge their ability to remember specific training (Significant Use of Memory skills).

Students should be encouraged to develop problem solving and memory strategies.

21. OTHER SPECIALIZED FUNCTIONS	Materials

• **Reading Text 1**
• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Job Task Planning & Organization 1
  ° Significant Use of Memory
  ° Finding Information 1
• **Computer Use 1**
• **Continuous Learning**
	• Photocopier

Other specialized functions, such as making copies lighter or darker, larger or smaller, could all be taught as is appropriate to the skill level of the student.

Each machine will have its own method for doing these tasks, and the student should either be shown or encouraged to use the instruction booklet, depending on the student's skill level and learning style.

These would be taught in the workplace, but practicing how to learn them is helpful in the classroom.

Parts of a Photocopier

PART	FUNCTION
glass (or platen glass) and glass cover	The original has to be face down on the glass so the "camera" can take a picture of what is on the page. The glass cover holds the original flat and snug against the glass so the picture is sharp.
paper tray (or cassette)	This is where the blank paper is loaded (usually at the bottom). The paper generally moves through the machine in a right to left direction. As it passes by the original, the picture is transferred onto the blank paper.
copy (or output) tray	This holds the copies after they are printed (usually on the left side).
feeder and paper guides	Rather than placing the original on the glass, the original may be automatically fed through the cover to the glass area. The guides hold the paper(s) in line in the right place.
original tray	This holds the originals after they have gone through the feeder and have been copied. Point out that the original is either placed on the glass or is fed automatically through the feeder, but not both.
control panel	This tells the copier when to start and stop, how many copies, etc.

Rules, Rules, Rules

1. Do not eat or drink near a photocopier.

2. Do not put any objects into slots or openings. This could cause a shock or a fire.

3. Unplug the photocopier before cleaning it or moving it.

4. While printing, do not turn it off, unplug it, or open any part of the photocopier. Press “Stop” or “Cancel”. Wait till it stops printing; then you may turn it off, unplug it, or open it.

5. If unsure how to use the photocopier, ask for help!!

Placing the Paper 1

Glass

Placing the Paper 2

Control Panel Symbols

How to Make Copies 1

Using the glass plate:

1. Lift the glass cover.

2. Set the original face down on the glass.

3. Set the original in the correct position (letter or legal).

4. Close the cover gently.

5. Do not press on the cover.

6. Check the settings: paper size, size of copy, etc.

7. Set the number of copies.

8. Press “Start”.

How to Make Copies 2

Using the Feeder (for more than one original):

1. Tap the originals on a desk to get them all even.

2. Set them face down into the feeder.

3. Set them in the same direction as the paper tray (LTR or LGL).

4. Push **gently** until they stop.

5. Make the guides fit the stack of papers

6. Set the number of copies.

7. Press “Start”.

8. As papers come out, make piles of identical copies. (there should be as many copies in each pile as the number selected in Step 6)

How to Load Paper

1. Pull out paper tray.

2. Unwrap paper.

3. Tap paper on the desk to get the edges even.

4. Slide paper into the try.

5. Push corners of paper under the metal tabs.

6. Gently close tray.

7. Press “Start” again.

Label Me

Put the following words in the correct places on the diagram:

- Document guides
- Document feeder
- Output tray
- Front cover
- Paper tray
- Control panel

Place Me

Draw in where you would place your letter size (8½” X 11”) paper on each photocopier below.

Place Me Again

Draw in how you would place your letter size original on the glass of each photocopier below to match the paper in the paper tray.

Place Me Again, cont.

What Do I Mean?

Draw a line to match the symbol to what it means.

Clear

Paper is stuck

Start

Darker copy

Add toner

Add paper

Stop

Lighter copy

DEMONSTRATION INSTRUCTOR PAGE

Copy Cat

ESSENTIAL SKILLS

- **Reading Text 1**
- **Document Use 1**
- **Computer Use 1**
- **Thinking Skills**
  - Problem Solving 2
  - Decision Making 1
  - Job Task Planning & Organization 1
  - Significant Use of Memory

DEMO DESCRIPTION

The student will photocopy several originals, following instructions. The student will assess his / her own work.

INSTRUCTOR NOTES

- Provide access to a photocopier**.**
- Remove all but 2 pieces of paper from the paper trays so that the student must choose and load the appropriate paper.
- Provide *What I Have Learned and Skills Practised* to link demonstration tasks to the Essential Skills.

With student

- Read over the steps for how to make a photocopy, how to load paper in the photocopier, and also the rules for safe use of the photocopier. Clarify any questions that arise prior to the demonstration.
- Read instructions aloud if necessary.

ACHIEVEMENT INDICATORS

- Used the photocopier safely.
- Arranged originals in feeder or on glass, depending on photocopier used.
- Set number of copies
- Set paper size
- Chose and loaded appropriate paper
- Collected photocopied materials
- Sorted and stacked sets of photocopies
- Checked for accuracy
- Assessed own performance

Copy Cat
TASK 1

1. You have been given several pages of material to photocopy.

2. The copies are to be on letter size paper.

3. You must make 5 copies of each page.

4. When you have completed the copying, you have to put each set of 5 identical pages in separate bundles on a table.

5. You may need to add paper if the photocopier runs out.

6. You should check your work.

7. Then, your instructor will check your work.

Copy Cat
TASK 2

I Can Photocopy

I CAN	DATE
I feel comfortable using the photocopier	
I know what letter size paper is.	
I know how to position the original properly.	
I can read the steps for photocopying and follow them.	
I set the number of pages correctly.	
I set the paper size correctly.	
I recognized the error symbol and knew what it meant.	
I selected the right paper.	
I loaded the paper in the paper tray.	
I sorted the finished copies into piles.	
I checked my work.	
I asked for help if I needed it.	
I know how to use the photocopier **safely**.	

DEMONSTRATION ASSESSMENT

Copy Cat

Student:_____

Instructor:_____

Date:_____

Total Time for Demonstration:_____

Help Given? _____Yes _____No
Details:_____

Accommodations?: _____Yes ____No
Details:_____

ESSENTIAL SKILLS:

- **Reading Text 1**
- **Document Use 1**
- **Thinking Skills**
  - Problem Solving 2
  - Decision Making 1
  - Job Task Planning & Organization 1
  - Significant Use of Memory
- **Computer Use 1**

ACHIEVEMENT INDICATORS	BEGINNING	DEVELOPING	ACCOMPLISHED
• Used the photocopier safely			
• Arranged originals in feeder or on glass, depending on photocopier used.			
• Set number of copies			
• Set paper size			
• Chose and loaded appropriate paper			
• Collected photocopied materials			
• Sorted and stacked sets of photocopies			
• Checked for accuracy			
• Assessed own performance			

ADDITIONAL COMMENTS

Preparing Envelopes for Mailing

Preparing Envelopes for Mailing

Getting out the mail is a routine task in any office. In this unit, the student will learn how to prepare letters and envelopes for mailing. The student will learn about the different sizes and styles of envelopes in common business use, and will learn to fold letters appropriately to fit the envelope, revealing an address through a window is necessary. The different parts of the address, including abbreviations, will be taught.

PREREQUISITE AND ADDITIONAL SKILLS NOT TAUGHT IN THIS UNIT

- Reading and writing numerals.
- Concepts of left and right, top and bottom, same and different, complete and incomplete.
- Copying accurately.
- Matching words, several at a time, with total accuracy

OBJECTIVES

Students will

- Recognize varying sizes and styles of envelope and choose the appropriate one for a letter or other mailing.
- Fold a business letter into thirds to fit a standard business envelope. (4” X 9”).
- Identify the various parts of a complete address.
- Recognize the common abbreviations used in addresses, including business abbreviations.
- Match an inside address to an address label.
- Copy a return address.
- Know where to place a stamp.
- Prepare a letter and envelope for mailing.

MATERIALS

- Variety of envelopes of various sizes and styles
- Box of business envelopes, 4” X 9”
- Samples of business envelopes, addressed and stamped (collected from self or students and colleagues), including those with windows.
- Several sheets of 8½” X 11” paper
- Address labels
- Stamps, (used is fine)
- Return envelopes with windows, for practice inserting pre-addressed return stubs (photocopy some from personal mail, blanking out personal or private information)
- 3 plastic file baskets

VOCABULARY

- Abbreviation
- Address
- Business
- Complete
- Edge
- Envelope
- Fold / folded
- Incomplete
- Letter
- Mail
- Name
- Return address
- Stamp

RESOURCES

- Your own office will be a good resource – for supplies, samples of mail, samples of envelopes, etc.
- Visit the office where you work, or some other local business to see how mail is sent out (among other office tasks which students are learning.)
- **work*write: Volume 1 (Book 1 - 3),*** by Aleksandra Popovic, Karen Geraci . Preparatory Training Programs 2002 ISBN: 0-9689048-4-X . This is a good source for letters and other business writing.

#	Activity Description	ESSENTIAL SKILLS																
		RT	DU	W	N					OC	TS					WWO	CU	CL
					MM	SBA	MC	DA	NE		PS	DM	JTPO	SUM	FI			
1.	Experience sending letters		1							1				*				*
2.	Fold it in three	1	1				1		1	2	1	1	1	*				*
3.	What goes on an envelope	1	1	1						2	1	1		*				*
4.	Parts of an address		1							2	1	1		*	1			*
5.	Parts of the return address		1							2	1	1		*	1			*
6.	Decode the envelope	1	1								1	1		*	1			*
7.	Abbreviations	1	1							1	1	1		*	1			*
8.	Complete addresses	1	1							1	1	1		*	1			*
9.	The right letter in the right envelope	1	1							2	3	2		*	1			*
10.	Envelopes with windows		1							2	2	1		*				*
11.	Self-addressed envelopes	1	1	1						2	1	1		*	1			*
12.	In the mail room		1	1						1	2	2	1	*	1			*
D	Getting out the mail	1	1	1							1	1	1	*	1			

LEARNING ACTIVITIES

1. EXPERIENCE SENDING LETTERS • **Document Use 1** • **Oral Communication 1** • **Thinking Skills** ° Significant Use of Memory • **Continuous Learning**	**Materials** • Samples of addressed and stamped mail – letter size, legal size, 9 " X 12" kraft (brown) envelopes
Discuss their experiences sending letters or bills in the mail. Explain that an office usually has a lot of mail. Office assistants need to be able to put letters into envelopes and to make sure that the envelope is addressed and stamped correctly. Show samples of various sized envelopes, which have been addressed and stamped (could be mail received). • Display these three common size envelopes and make a vocabulary card for each: letter, legal/ business (4 ⅛" X 9 ⅛"), brown "kraft" envelopes of varying sizes. • You could also show them bubble mailers and discuss what they would be used for.	

2. FOLD IT IN THREE	Materials

• **Reading Text 1**
• **Document Use 1**
• **Numeracy**
  ° Measurement & Calculation
  ° Numerical Estimation
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Job Task Planning & Organization 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Letter size paper and business envelopes
	• Teaching Aid: *Folding a Letter*
	• Student Activity Sheet: *Which is Folded Correctly?*

Explain that business letters are written on letter size (8½" X 11") paper and must be folded into three equal parts in order to fit into a business sized envelope. Show both the paper and the envelope.

Show how to fold a business letter into 3 equal parts. Use Teaching Aid: *Folding a Letter.* Obtain a piece of paper and business envelope.

- Begin by saying that normally the letter will be facing up, so that when it is folded, the words are inside. (This is not the case when folding to reveal a preprinted address through an envelope window.
- Show students how they can use a business envelope to measure up from the bottom of the paper to find where their first fold should be: the paper folded up must be a little smaller than the envelope height.
- Make the first fold, pressing across the page to make a neat crease.
- Bring the top edge of the paper toward the folded edge – it may not quite reach the folded edge. Crease neatly as before.

Ask what might happen if the letter is not folded into 3 **equal parts.** (It will be too wide and will not fit into the envelope, making it impossible to fold the envelope flap over neatly to seal.)

Provide students paper to practise folding technique. Have them test their results with an envelope. Do as much practice as is required to achieve skill.

Use Student Activity Sheet: *Which is Folded Correctly?* to reinforce the concept.

3. WHAT GOES ON AN ENVELOPE	Materials

• **Reading Text 1**
• **Document Use 1**
• **Writing 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Selection of used, addressed envelopes
	• Prepared vocabulary cards
	• Student Activity Sheet: *What Goes on an Envelope?*

Ask students to examine the selection of addressed and stamped envelopes.

Locate the STAMP.

- Tell them that it is **always** put in the upper right hand corner.
- Some may be stamps they lick or stick, and some may be printed on the envelope itself (by a machine).

Locate the NAME AND ADDRESS that the envelope was **sent to**.

- Tell them that this is always in the middle of the envelope, sometimes to the left side but still midway down.

Locate the RETURN ADDRESS.

- Tell them that it is always located in the upper left hand corner.
- If the "sent to" address is on the left side, the return address is still above it.

Use prepared vocabulary cards. Attach these to a large sample envelope posted on the board for easy reference.

Use Student Activity Sheet: *What Goes on an Envelope?*

4. PARTS OF AN ADDRESS	Materials

• **Document Use 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
  ° Finding Information 1
• **Continuous Learning**
	• Collection of addressed envelopes (bills, letters, etc. collected from various sources)

Show students mail that has come into the office, or have students bring in some envelopes from home. Locate the name and address that the mail was sent to.

Choose one envelope to work with together. Enlarge if possible.

- Read the first line. What is this? (Name of a person or a business.)
- Read the second line. What is this? (Street address: number and name)
- Look to see if there is an apartment number, a suite number, or a unit number as well.
- Read the third line. What is this? City and Province (or state)
- Is the country named on this envelope?
  - Explain that often the country is not named if the mail stays within the country.
  - If the mail is going outside the country, then the country that it is going to must be named.
- Read the final line. What is this? (Postal code)
  - In Canada, this is 2 sets of 3: letter/number/letter (space) number/letter/number.
  - Ask if they know their own postal code.

Look at several more envelopes and locate the same information. Note that the order stays the same, with the exception that the apartment or unit number may either come before or after the street address.

5. PARTS OF THE RETURN ADDRESS	Materials

• **Document Use 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
  ° Finding Information 1
• **Continuous Learning**
	• Collection of addressed envelopes (bills, letters, etc. collected from various sources)

Repeat the process in Learning Activity 4, looking at the return address. • Explain that sometimes the name of the sender is omitted. Notice that some businesses have envelopes that have the return address printed on them already. Some people have stickers with their return address that they stick on the envelope.	

6. DECODE THE ENVELOPE	Materials

• **Reading Text 1**
• **Document Use 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
  ° Finding Information 1
• **Continuous Learning**
	• Student Activity Sheet: *Solve the Envelope*

Use Student Activity Sheet: *Solve the Envelope* to reinforce the learning from the previous two learning activities.	

7. ABBREVIATIONS	Materials

• **Reading Text 1**
• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
  ° Finding Information 1
• **Continuous Learning**
	• Student Activity Sheet: *Abbreviations in Addresses*
	• Playing cards if desired

Ask students how they recognize the street address (number, name and often abbreviation for road, street, etc.)

Teach the most common street abbreviations: Rd., St., Dr., Ave., Blvd., Cr/Cres., Ct., Pl..

Teach other abbreviations commonly found on envelopes. (Use the collected envelopes as a source.); Apt., P.O.Box, #, R.R., CA or Can., Co., Ltd., ON (use appropriate province or state abbreviations for your location.)

Use Student Activity Sheet: *Abbreviations in Addresses* for practice matching abbreviation to full form.

You could make a game of this.

- Write the abbreviation on one side of a playing card, and the full form on the other.
- Have students look at one side and say or print what would be on the other side of the card.

OR

- Make a set of abbreviation playing cards, and a set of full word cards.
- Place face down and match pairs (*Concentration)*

8. COMPLETE ADDRESSES	Materials

• **Reading Text 1**
• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
  ° Finding Information 1
• **Continuous Learning**
	• Student Activity Sheet: *Is the Address Complete?*

Discuss what would happen if part of an address is missing. Often that would result in the mail being undeliverable. Sometimes it will be returned to the sender (if the return address is complete.) Use Student Activity Sheet: *Is the Address Complete?* To reinforce their understanding of addresses.	

9. THE RIGHT LETTER IN THE RIGHT ENVELOPE • **Reading Text 1** • **Document Use 1** • **Oral Communication 2** • **Thinking Skills** ° Problem Solving 2 ° Decision Making 2 ° Significant Use of Memory ° Finding Information 1 • **Continuous Learning**	**Materials** • Student Activity Sheet: *Match the Letter to the Envelope*

Sometimes the envelope will have the address already printed on it, or will have a preprinted address label to stick on.

In this case, when they put letters into envelopes for mailing, they **will** have to check that the name on the letter matches the name on the envelope.

Ask if they know where to look for the name on the letter.

- Usually, the letter begins "Dear…"
- However, a person may not be named. (Dear Sir,)
- Sometimes, above the "Dear" is the name and address of the person the letter is being sent to.
  - This is called the "inside address".
  - This is not the same as the "return address".

Use Student Activity Sheet: *Match the Letter to the Envelope* for practice.

***This is a very complex topic as businesses use a wide variety of styles in writing letters. Some use letterhead that incorporates the business name and address. Some put the return address on the left top side; others put it at the top and centred. Some use an inside address; some do not. Most entry level employees would not have to make this level of decision. They are more likely to "stuff" envelopes, sending identical letters to many different people or businesses. There is no matching problem encountered here.

10. ENVELOPES WITH WINDOWS	Materials

• **Document Use 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Envelopes and enclosures that used the "window" method of displaying address

Explain that companies use a simpler form of stuffing envelopes that ensures that the letter gets to the right person. There is no need to match the letter to its envelope.

Show the students an envelope that has a window for the main address. It may also have a window for their company return address, or it may be simply printed on the envelope.

- Examples such as bills from Bell Canada, government cheques or income tax forms, GST rebates may be used.

Explain that the office assistant needs to be careful when folding the letters or documents to make sure that the address will show through the window.

For student practice, use an actual bill that arrived this way.

- Blank out any personal information.
- Photocopy the page (2 sided) to eliminate the original folds.
- Now have the student fold it so that the address will show through the envelope window.

11. SELF-ADDRESSED ENVELOPES	Materials

• **Reading Text 1**
• **Document Use 1**
• **Writing 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
  ° Finding Information 1
• **Continuous Learning**
	• Selection of self-addressed envelopes
	• Selection of envelopes with "windows"
	• Selection of bills or invoices that use the "window" system for return mailing. (Make copies of these for students to practise folding and stuffing correctly.)
	• Student Activity Sheet: *Return Address*

Discuss the meaning of the term "self-addressed envelope."

- Show students some of these envelopes. (Bell Canada, Hydro, Union Gas, Canada Customs, etc.)
- Ask what is different with these envelopes: some have an address already printed; others have "windows" on them.

Explain that sometimes self-addressed envelopes are included with bills. The company does this because they want to make sure that the payment gets mailed to the right place.

If there is a window, it means that there is a paper stub to be returned with the payment.

- Explain that the stub will have the company's address printed on it.
- It may be tricky to fold or fit the stub correctly into the envelope so that the company address is showing through the window.
- Demonstrate how to do this and give the students opportunity to practise.

Remind the students that they still have to write the return address of the company they are working for in the upper left hand corner.

Use Student Activity Sheet: *Return Address* for further practice. You may need to read the instructions to the student.

12. IN THE MAIL ROOM	Materials

• **Document Use 1**
• **Writing 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 2
  ° Job Task Planning & Organization 1
  ° Significant Use of Memory
  ° Finding Information 1
• **Continuous Learning**
	• 3 plastic file baskets
	• Envelopes of varying sizes and styles
	• Stickers to use as stamps, or used stamps
	• Address labels
	• Variety of business letters, invoices, etc. (photocopy some that you have gathered over a period of time, blanking out private information)

Set up a mail room in the classroom. • Label baskets: TO BE STUFFED, TO BE STAMPED; READY FOR MAILING. • Discuss what each heading means. Have students work through the baskets. (Fill the baskets appropriately with materials you have collected)	

Folding a Letter

STEP 1: Collect a sheet of paper and an envelope.

STEP 2: Locate the first fold line.

STEP 3: Make the first fold, from the bottom up.

STEP 4: Bring the top to the folded edge.

Which is Folded Correctly?

Which letters are being folded correctly into thirds?
The dark lines show the fold lines.

- Circle the letters being correctly folded.

1.

2.

3.

4.

5.

6.

What Goes on an Envelope

Copy the words where each should go on the envelope below.

- Name and Address
- Stamp
- Return Address

Solve the Envelope

Look at the addressed envelope.

- Highlight the stamp location in pink.
- Highlight the return address in blue.
- Highlight the name and address the letter is sent to in yellow.

25 Main Street
Orillia, ON
S4V 2D6

ABC Paper Ltd.,
1189 Johnson St.,
Halifax, NS
Q4Y 3R2

Copy the requested information from the address the letter is sent to.

Name_____
Street Number_____
Street Name _____
City or town _____
Province _____
Postal Code _____

Abbreviations in Addresses

Draw a line from each short form (abbreviation) to the word (or words) it stands for. You do not have to be able to read the words. The first few letters will give you a clue.

Avenue	Dr.
Street	ON
Drive	Can.
Crescent	Co.
Ontario	St.
Post Office Box	R.R. 2
Canada	Cr.
Boulevard	P.O.Box
Apartment	Ave.
Company	Blvd.
Rural Route 2	Rd.
Road	Apt.

Is the Address Complete?

Put a ✓ if the address is complete.
Put a X if the address is missing something.
Tell your instructor what is missing.

1. Beth's Beading C.
33 Jones Blvd.
Newmarket, ON
L8L 4T5

2. R.J.Toys
Burlington, ON
L6T 3W4

3. 78 Poole Rd.
Kelowna, BC
J9J 2Z6

4. Sally Henderson
98 Napir Cr.
Apt. 407
Toronto, ON

5. ERTM Trucks Ltd.
549 Porter Ave.
Grimsby, BC
V5Y 8U4

6. Patty Harris
9 Mapleview Dr.
Barrie
L7T 8Z7

7. Dawson Garage
4009 Fig St.
MAN
M5T 4H4

8. P.O.Box 89
Sudbury, ON
R4D 8W3

Match the Letter with the Envelope

Draw a line from each letter to the correct envelope, matching the addresses.

ACBrass
Keman Dr
Oakville, ON

A.B.Burns
14 Blyth St.
Cambridge, ON
N4R 6Y7

Dear……

E.P.Oak
Wasie Pl.
Kingston, ON

John Smith
16 Annex Pl.
Radisson, MAN
T5T 6U7

Dear John,……

T Heal Co.
123 Sun Ave.
Toronto, ON

S.A.King & Co.
245 Spring St.
Toronto, ON
M4M 8T8

Dear Sir,

John Smith
16 Annex Pl.
Radisson, MAN
T5T 6U7

A.B.Burns
14 Blyth St.
Cambridge, ON
N4R 6Y7

S.A.King & Co.
245 Spring St.
Toronto, ON
M4M 8T8

Return Address

1. You work for ABC Trucking Company in Midland, Ontario. The street address is 459 King Street, and the postal code is L4R 7U1.
   This self-addressed envelope with a window was received along with the hydro bill. Write the correct return address on the envelope.

_____
_____
_____
_____

Hydro One
POBox 5700
Markham, ON
L6P 7P9

2. You work for Shirley's Catering Service at 123 Main Street in Orillia, Ontario. The postal code is L4N 6T9.
   Last week you got a bill from Enbridge for gas. The self-addressed envelope was enclosed. You must write the return address.

_____
_____
_____
_____

Enbridge Gas Company
PO Box 644
Scarborough, ON
M1K 5H1

DEMONSTRATION INSTRUCTOR PAGE

Getting Out the Mail

ESSENTIAL SKILLS

- **Reading Text 1**
- **Document Use 1**
- **Writing 1**
- **Thinking Skills**
  - Problem Solving 1
  - Decision Making 1
  - Job Task Planning & Organization 1
  - Significant Use of Memory

DEMO DESCRIPTION

The student will prepare a letter and envelope for mailing. The letter is to be folded in thirds to fit in a business (4 ⅛" X 9 ½") envelope. The student will choose the correct address label based on the inside address on the letter, will copy the return address appropriately and will affix the stamp in the correct location. Legibility, neatness and address conventions are all important.

The student will also complete an "I Can" checklist and assess own performance.

INSTRUCTOR NOTES

- Provide a copy of the letter, envelopes of varying sizes, address labels, and stamp (use a sticker or a used stamp.)
- You **could** print the address labels on the computer, using actual self-adhesive labels, or even cut the ones provided and attach them to self-adhesive labels.
- Provide *What I Have Learned and Skills Practised* to link demonstration tasks to the Essential Skills.

With student

- Read the letter and instructions to the student if necessary; do not tell student which is the return address or the "send to" address.
- Tell student that Task 1 should be completed quickly but carefully and accurately.

ACHIEVEMENT INDICATORS

- Folded a letter into thirds to neatly fit in envelope.
- Chose correct size envelope.
- Chose correct address label and attached it in appropriate place on envelope.
- Completed the return address correctly on envelope.
- Applied stamp to appropriate place on envelope.
- Completed Task 1 in 5 minutes or less
- Assessed own performance

Getting Out the Mail
TASK 1

You work in the office of Touchstone Decorative Paving.

You must send out a business letter that your supervisor has given you, using the correct size envelope.

You must complete the envelope neatly, with everything in the right place.

- Choose the correct envelope for the letter.
- Fold the letter to fit the envelope.
- Choose the correct address label, and attach it with glue.
- Copy the return address on to the envelope,
- Put the stamp on the envelope.

Touchstone Decorative Paving
4598 Snider Street, Elmira, ON, N6T 6R8
519-888-9767

Janet Johnson
Newton's Quarry
34 Stone Road
Cambridge, ON
N3G 3F5

Dear Ms. Johnson,

We are pleased to tell you that we have replaced the cheque which was destroyed in the fire that occurred last week in your offices.

We have always been happy with the quality of your products and service and we are delighted that the firm experienced only minor damages.

We trust that our account with you is now paid in full.

Yours truly,

Sandra Jenkins
Office Manager

Encl.

Getting Out the Mail
TASK 1 cont.

Choose the correct address label.
Cut it out and use glue to attach it to the envelope.

Ms. Janet Johnson
Newton's Quarry
Cambridge, ON
N3G 3F5

Mr. J. Johnston
34 Stone Road
Cambridge, ON
N3G 3F5

Janet Johnson
Newton's Quarry
34 Stone Road
Cambridge, ON
N3G 3F5

Ms. Sandra Jenkins
Touchstone Decorative Paving
4598 Snider Street
Elmira, ON
N6T 6R8

Ms.Janet Johnson
Newton's Quarry
43 Stone Road
Cambridge, ON
N3G 3F5

Ms. Janet Johnson
34 Stone Road
Cambridge, ON

Getting Out the Mail

TASK 2

I Can Prepare the Mail

I Can	Date
I can fold a letter into thirds to fit in an envelope.	
I can match the inside address to an address label.	
I can tell if an address is complete or incomplete.	
I can place the address label correctly on the envelope.	
I can find the address to use as the return address.	
I can copy a return address in the correct place on the envelope.	
I can prepare an envelope neatly and completely.	
I know where to place the stamp on an envelope.	
I use capitals and abbreviations correctly in addresses.	

DEMONSTRATION ASSESSMENT

Getting Out the Mail

Student:_____

Instructor:_____

Date:_____

Total Time for Demonstration:_____

Help Given? _____Yes _____No
Details:_____

Accommodations?: _____Yes ____No
Details:_____

ESSENTIAL SKILLS:

- **Reading Text 1**
- **Document Use 1**
- **Writing 1**
- **Oral Communication 1**
- **Thinking Skills**
  - Problem Solving 1
  - Decision Making 1
  - Job Task Planning & Organization 1
  - Significant Use of Memory

ACHIEVEMENT INDICATORS	BEGINNING	DEVELOPING	ACCOMPLISHED
• Folded a letter into thirds to neatly fit in envelope.			
• Chose correct size envelope.			
• Chose correct address label and attached it in appropriate place on envelope.			
• Completed the return address correctly on envelope			
• Applied stamp to appropriate place on envelope.			
• Completed Task 1 in 5 minutes or less			
• Assessed own performance.			

ADDITIONAL COMMENTS

Taking Telephone Messages

Taking Telephone Messages

This unit will prepare a student to answer an office phone in a professional manner, and to take a simple phone message using either a preprinted message pad or blank note paper. The student will take messages from a caller and from an answering machine.

PREREQUISITE AND ADDITIONAL SKILLS NOT TAUGHT IN THIS UNIT

- Listens actively
- Expresses self verbally
- Some sight reading vocabulary
- Writes the alphabet in small and capital letters
- Signs and spells own name
- Can read and write phone numbers
- Can read and write dates and times
- Writing is legible and properly spaced
- Knows when to use capital letters
- Can express a simple idea in writing, spelling identifiable
- Comfortable using the phone
- Basic phone etiquette (see *Making Telephone Calls* in this resource)

OBJECTIVES

Students will

- Answer the telephone in a friendly, courteous and businesslike manner
- Listen carefully to the caller to get details
- Write a simple message on a preprinted message form
- Write a simple message without using a form
- Give feedback to a caller to ensure message was correct
- Ask caller for clarification or spelling as necessary

MATERIALS

- Phones for practice (disconnected)
- Tape recorder
- Overhead projector and transparencies
- Note paper
- Message pads, including some with company name (collected from various sources)
- Taped phone messages
- Magazines and newspapers: pictures

VOCABULARY

- Again
- Call
- Call / called
- Company
- Date
- Message
- Name
- Phone
- Please
- Return / returned
- Signed
- Telephone / telephoned
- Time
- Urgent

RESOURCES

- Writing it Down
- Stein & Romanek, *Communication Skills that Work, Books 1 & 2.* Chicago: Contemporary Books, 1991.
- *Messages* in **Ready for Work** manual in **Bridging the Employment Gap** (Simcoe/Muskoka Literacy Network)

#	Activity Description	ESSENTIAL SKILLS																
		RT	DU	W	N					OC	TS					WWO	CU	CL
					MM	SBA	MC	DA	NE		PS	DM	JTPO	SUM	FI			
1.	Experience answering phones									2	2	1		*				*
2.	How many rings?									2	2	1		*				*
3.	Answering the phone									2	2	1		*		*		*
4.	May I speak to?									1	1	1		*		*		*
5.	I'm sorry, unavailable									2	1	1		*		*		*
6.	Would you like to leave a message?	1	1	1						1	1	1		*				*
7.	Pass it on									2	2	1		*				*
8.	Memory games									2	2	1		*		*		*
9.	Active listening									2	2	1		*		*		*
10.	Obstacles to good listening									2	2	1		*				*
11.	Asking questions to aid listening									2	2	1		*		*		*
12.	Rude receptionist									2	2	1		*		*		*
13.	What do you need?		1							1	1	1		*				*
14.	Message pad		1							1	1	1		*				*
15.	Where the information goes		1							1	1	1		*	1			*
16.	Spelling names	1	1	1						1	1	1		*		*		*
17.	Message boxes	1	1	1						1	1	1		*				*

#	Activity Description	ESSENTIAL SKILLS																
		RT	DU	W	N					OC	TS					WWO	CU	CL
					MM	SBA	MC	DA	NE		PS	DM	JTPO	SUM	FI			
18.	Write the number		1	1						1	1	1		*		*		*
19.	Take the message	1	1	1						1	1	1		*		*		*
20.	Ending the call									2	2	1		*				*
21.	Further practice	1	1	1						1	1	1		*		*		*
22.	Getting the main ideas		1							2	1	1						*
23.	Summarize the message									2	1	1		*				*
24.	Message from an answering machine		1	1						1	1	1		*				*
25.	Role plays		1	1						1	1	1		*		*		*
26.	No message pads		1	1						1	1	1		*		*		*
D	Give Tom a message	1	1	1						1	1	1		*		*		

LEARNING ACTIVITIES

1. EXPERIENCE ANSWERING PHONES
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 1
  ° Significant Use of memory
• **Continuous Learning**
	Materials
	• Tape recorder

Ask students if they enjoy answering phones. Why or why not?

How do they think they sound on the phone to others?

- Have they ever listened to their voice on an answering machine message? (If not, you might have them figure out what they would say on an answering machine, and actually have them tape it and then listen to it.)

Ask them to critique their own voices:

- Do they sound friendly and interested? Is their voice clear?
- Do they speak too slowly or too fast?
- Too softly or too loudly?

If they don't like the sound of their voice, ask them to improve their expression or tone and retape if necessary.

2. HOW MANY RINGS
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	Materials:
	• Office phone with "hold" button

Ask students if they have ever called a business or place of work?

- Ask if they have ever had to wait for the phone to be answered.
- How did that make them feel?
- Often, people get annoyed and hang up if it takes too long to get through.
- Ask how many rings they think the phone should ring before they pick it up. (2 – 4)

Point out that many businesses try to answer the phone on the first ring. It certainly should not ring ten times.

Why do they think the phone might not be answered on the first ring? (on another call, away from the desk, etc.

Tell the students that office phones often have several "lines" (all have the same phone number,) so that a receptionist would see a light flashing to know that another call is ringing.

Do they know what the receptionist can do? (Use the "Hold" function)

- If possible demonstrate how this button would be used (if your classroom does not have a phone with that feature, perhaps the office does.)

Explain that some businesses have an automatic answering feature that will perform the hold function for them. Calls are lined up "held in sequence for the next available operator".

- Ask if they have they ever heard a message like this.
- Large companies often have this answering feature: you could try phoning one so that students can hear the recorded message.
  - Tell them that they may have to wait for several minutes before the call is actually answered.

3. ANSWERING THE PHONE	Materials

• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 1
  ° Significant Use of Memory
• **Working With Others**
• **Continuous Learning**
	• Two disconnected phones for practice

Ask student to remember when they called an office: the doctor's office, the school office, a store.

Ask how the receptionist or secretary answered the phone. What are the important things to say?

- The name of the company and who is speaking.
  - Ask why it would be important to identify the company? (so the caller knows he dialed the right number)
  - Why is it helpful for the receptionist to identify him/herself? (so the caller knows who he is speaking to)
- What are other things people sometimes say? (Hello. *Good* morning. May I help you?)
  - Ask what these statements add (friendly tone, interest in the caller, creates a good impression of the business).

Point out that everyone who answers the phone has to work out what is comfortable for them. If saying too much feels awkward, then they will sound hesitant and will not create a good impression for the company.

Ask each student to practice with another student answering the telephone for "Learning Unlimited", a new company that you have just created.

- Students should sit back to back and should practice until they feel comfortable with whatever lines they choose.

Ask each student to demonstrate for the others how they would answer the phone.

4. MAY I SPEAK TO ?	Materials

• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Working With Others**
• **Continuous Learning**
	• 2 disconnected phones

Talk about what an office worker should say when the caller asks to speak to a particular person. ("Yes, just a minute please. Could I tell her who is calling?")

Ask why this is a good response (it is polite; implies that you will get this person right away, but gives the other worker a chance to prepare mentally for the call).

Mention that it is important to call the person to the phone right away, but that, in an office, they would **never** yell for the person to get the phone.

Practice with the disconnected phones, in pairs. The student making the call may invent who they wish to speak to.

5. I'M SORRY, UNAVAILABLE	Materials

• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Working With Others**
• **Continuous Learning**
	• 2 disconnected phones

Talk about what an office worker should say when the person that the caller would like to speak to is not available.

- "I'm sorry, Mr_____is not available right now, (or in a meeting right now, or has just stepped away from his desk, or won't be in to the office today)."
- They should not lie about why the person is unavailable.

Discuss with students why it could be helpful to know why this person is not available:

- Gives some idea of how long it will be before they can talk to this person;
- Helps the caller feel that the person just doesn't want to talk to them.

Point out that it may be none of the caller's business what the person is doing – may be in the washroom, for example.

It is helpful to give some information, but be tactful and don't give out private information.

6. WOULD YOU LIKE TO LEAVE A MESSAGE?
• **Reading Text 1**
• **Document Use 1**
• **Writing 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	Materials
	• Paper and pencil
	• Student Activity Sheet: *Unavailable*

Point out that it is good to let the caller know you are willing to take a message.

Ask the students to write down what they would say. Then ask each one to see the variety of responses.

- Could I take a message?
- Would you like to leave a message?
- May I tell _____ that you called? Is there any message?
- I would be glad to give_____ a message.
- Is there a number where you can be reached?)

Use Student Activity Sheet: *Unavailable* to reinforce what they are learning so far.

7. **PASS IT ON**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	Materials: None

Discuss with students their experiences relaying messages to others (either verbally or in writing).

- Was it always passed on?
- In time?
- Correctly?

Play a game of "telephone" where one person whispers a message to the next person and so on down the line.

- Try with a very simple message; then make it more complex.
- They may be successful with a few words, but probably not if it is long and detailed, with numbers, dates, times, etc.
- Discuss what happened to the original message by the time it got to the last person.
- Talk about why the message got changed (poor memory for information; someone didn't give all the important information so following people filled in the details themselves; each person interpreted the message differently; people made assumptions and didn't listen, etc.)

8. MEMORY GAMES
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 1
  ° Significant Use of Memory
• **Working With Others**
• **Continuous Learning**
	Materials: None

It may be necessary to help students develop their listening skills and auditory memories. Discuss before, and again after, what memory strategies they could or did use. Ask which worked best.

- You might play an auditory version of Kim's game where you give students a list of things to remember and then ask them to write down as many of the items as they can.
- You might give the students an irregular-shaped rock (or an abstract drawing) and ask each student what it looks like.
  - Students have to listen carefully to each other and are not allowed to repeat what someone else says.
  - Take notes and after the game, ask who said "...".
- “I packed my suitcase and in it I put ….”
  - Each student repeats what was said before, recalling each person’s contribution in sequence before adding his / her own.

9. ACTIVE LISTENING
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 1
  ° Significant Use of Memory
• **Working With Others**
• **Continuous Learning**
	Materials: None

Ask students for their ideas about what they might do to ensure they passed on the correct messages (listen actively and carefully, ask for details, write notes, read the message back to the sender).

Explain that **active listening** involves **paying attention** and **thinking** about what the person is saying.

Ask students if they have ever been talking to someone who was nodding their heads, but didn't hear one word that they said.

- Ask how that made them feel?
- Stress that people all like to be listened to: it makes us feel important.

To practice active listening, divide students into pairs.

- Ask one student to talk to the other student for one or two minutes about one of their favorite activities.
- The other student must not talk, only listen.
- At the end of the time, ask the listener to repeat back to the speaker as much as they can remember.
- Encourage the students to retell what was said from the speaker's point of view, not their own.

10. OBSTACLES TO GOOD LISTENING	Materials: None
• **Oral Communication 2** • **Thinking Skills** ° Problem Solving 2 ° Decision Making 1 ° Significant Use of Memory • **Continuous Learning**	

Ask students if they have ever watched a TV ad or a whole TV news program and afterwards realized they had no idea what was said.

Ask what the blocks are to good listening. Why didn't they hear what was said?

- Point out if they are thinking about the hockey game last night or what they will do when they get off work, they won't be listening.
- They will also "turn off listening" if they are bored or don't understand what is going on.
- Sometimes people are thinking about what they will say next, so they can't pay attention to what is being said.

Stress that answering telephones on the job requires paying full attention to what the callers are saying.

11. ASKING QUESTIONS TO AID LISTENING	Materials: None
• **Oral Communication 2** • **Thinking Skills** ° Problem Solving 2 ° Decision Making 1 ° Significant Use of Memory • **Working With Others** • **Continuous Learning**	

Point out that, in real life, if they are active listeners, they will probably ask questions.

- Questioning keeps the listener more involved: it shows the speaker that the listener is interested, and will also mean that the listener gets more detailed, and thus better information.

Divide students again into their listening pairs.(see Learning Activity 9)

- Have students *reverse* speaking and listening roles, but this time, the listener should ask questions.
- At the end of the two minutes, ask the listener to retell what the speaker said.
- Compare the two exercises.
- Was it easier to listen when asking questions?
- Did they get more information?

12. RUDE RECEPTIONIST	Materials: None

• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 1
  ° Significant Use of Memory
• **Working With Others**
• **Continuous Learning**
	• Disconnected phones

You might ask one of the students (or another instructor) to do a role-play with you of a telephone conversation.

Use a pair of disconnected phones and sit back to back.

- The student will make the call, and you will be the receptionist.
- Play the part of a receptionist who is rude, disinterested, interrupts the caller, and doesn't listen.
- The caller could be phoning for any reason (to find out if an order had come in, to get a prescription refilled, to talk to someone else about a meeting, etc.)

After the role-play, ask the students what was wrong and what the receptionist should have done or said.

Role play the conversation again, reversing the roles, with the student this time being the receptionist.

13. WHAT DO YOU NEED?	Materials

• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Teaching Aid: *What Do You Need to Take a Message?*

Reviewing the previous learning activities, ask students what they think they need when they are taking a phone call in an office.

Use the Teaching Aid: *What Do You Need to Take a Message?*

Discuss each item and why it would be helpful.

14. MESSAGE PAD	Materials

• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
  ° Finding Information 1
• **Continuous Learning**
	• Teaching Aid: *Message For*
	• Sample message pad
	• Message form with company name, if possible, collected from various sources
	• Prepared vocabulary cards

Ask students to think of what information will be needed as part of a written message.

- Write their ideas on the board (who called, the date and time, the caller's number, why they called, what the message is, etc.)

Show students a preprinted message notepad.

- Explain that it is a simple form that helps the listener get the information needed. The headings remind them to ask for specific information and help to organize the writing.

Use Teaching Aid: *Message For*, either as is, or make an overhead transparency if for a group.

Go over some of the vocabulary for this unit (words that are on the message pad).

- Note that some pads use small letters and some use capital letters.
- Help students to sound out the words if possible.
- Ask students to find each word on the blackboard and then on the message pad.

Explain that it is not hard to fill out a form when they already know what is on it. Although each form is different, they all contain the same basic information.

Explain that companies often give out these message pads free in order to advertise their own businesses.

- Ask students where the company would likely put their name on the form (right at the top).
- Stress that this is just advertising and has nothing to do with the form.
- Show some with the company name at the top if possible.

15. WHERE THE INFORMATION GOES	Materials

• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
  ° Finding Information 1
• **Continuous Learning**
	• Standard message pads
	• **Ready for Work:** *Time* unit for practice writing dates and times.

Go over each part of the message form.

Ask what "To" or "For" means.

- What would go in this space? (the name of the person that the message is "for" or goes "to")
- Mention that there is usually a directory of workers in each company so that names should be available for the receptionist to copy. (needs to be accurate)
- Point out that "To" or "For" is usually at the top of each form.
- Give students several message forms from a standard message pad. Have students find this section.

Use a variety of situations: for example, Mr. Frost called for Bertha Smith.

- Have them point to where Mr. Frost's name would go.
- Then have them point to where Bertha Smith's name should go.
- Practise this several times, changing the names and reversing the order in which you ask the names, till they are confident and competent with where each name should be written.
- At this point, do not have them actually write the names (That would slow the process; the goal is where each name would go.)

Next, find where the date and the time are written down.

- Ask why date and time might be important (might have a lot of calls to make and have to put calls in order of priority, might be a question of time later)
- Review how to write the date and time. (Refer to *Time* unit in the **Ready for Work** resource for practice writing dates and times.)
- Point out to students that date and time information can be added to the form after the phone conversation has ended.

Ask students where they would put their own name on this form (signed or signature or "By").

- Point out that this space is usually at the bottom of the form.
- Ask why the message should be signed (so if the person receiving the message has any questions about it, he knows who to ask).

16. SPELLING NAMES	Materials

• **Reading Text 1**
• **Document Use 1**
• **Writing 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Working With Others**
• **Continuous Learning**
	• Student Activity Sheet: *What's That Name*

Ask students what they should be writing down *during* the phone conversation if possible (name of caller, company if given, phone number to call back, any message details).

Why should this be written down during the phone call? (because they can check spelling and details while the caller is on the line.)

Point out that spelling names is difficult for everyone, even good spellers. This is because names, even common names, are sometimes spelled differently.

Ask students what they should do to get the correct spelling of the name (ask the caller).

- Point out that usually the name is the first information given.
- It would not be a good idea to interrupt the caller if he/she keeps talking.
- What could they do? (jot down the name on a scrap of paper and ask for the spelling later if needed)S

For practice, ask students, in turn, to spell their last names out loud.

- Ask the other students to write the names as they are spelled.
- Remind students that names begin with capital letters.

Put students in pairs. Use Student Activity Sheet: *What's That Name.*

- Students should sit back to back so neither can see what the other is reading or writing.
- Have one student read the information and the other put the names in the correct places on a standard message pad.
- The student doing the writing should ask for the spelling if he / she is unsure.
- The speaking student will then read the letters aloud, slowly and clearly.
- The two students should then compare the result with the original.
- Switch roles and try a different pair of names.

17. MESSAGE BOXES	Materials

• **Reading Text 1**
• **Document Use 1**
• **Writing 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Standard message pads
	• Teaching Aid: *Message For*
	• Student Activity Sheet: *Check the Boxes*

Use Teaching Aid: *Message For* and other standard message forms.

Have students look at the options listed in the boxes on a standard message form. This section will help to get the message down quickly, since they will not have to write the words.

Make sure students understand what is meant in each box.

- Usually, the first few boxes tell whether the caller phoned, returned a call that had been made earlier in the day, or came in person to the office.
- The last group of boxes tells the person who will call whom - will the caller phone back or should the other person phone when he/she is free?
- Be sure to explain the meaning of the word "Urgent".

Give students different messages orally. Ask them what box or boxes they would check.

a) Tom dropped by the office. He will call back later in the afternoon.
b) Mrs. Anders phoned and would like Susan to call her back when she gets a free minute.
c) Dr. Henry phoned for Jack. He stressed that it is very important that he call the office as soon as possible.
d) Donna returned the call that Sam made earlier in the day.

For additional practice with these boxes, give Student Activity Sheet: *Check the Boxes*.

18. WRITE THE NUMBER	Materials

• **Document Use 1**
• **Writing 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Working With Others**
• **Continuous Learning**
	• Phone message forms from previous activity; or use new forms

Ask students what important information they must get from the caller if the message is to "call back" (phone number).

Ask students where on the message form they would write the caller's phone number.

Point out that people often recite their phone numbers very quickly. It is a good idea to recite back the numbers they have written down and then ask the caller to repeat the remaining numbers.

- Demonstrate how this can be done politely.

For practice writing phone numbers, ask each student, in turn, to say their phone numbers.

- The other students should try to write the numbers as quickly, but as carefully, as they can. If students can't get all the numbers down, they should ask politely for the numbers to be repeated.

Use the message pad forms from the previous activity, so that students can fill the numbers in on the appropriate lines.

19. TAKE THE MESSAGE	Materials

• **Reading Text 1**
• **Document Use 1**
• **Writing 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Working With Others**
• **Continuous Learning**
	• 2 disconnected phones
	• Standard message pad
	• Student Activity Sheet: *Check the Message*

Discuss with students the reasons for repeating the message back to the caller (only way to ensure that the message is correct). Explain that this is called "feedback".

Ask students what they might say to the caller ("I just want to make sure I have this right." "Your number is ____", "You said ___", "Let me see now if I have it right." or "Let me say that back to you just to make sure I have it right.")

- Point out that it is good to repeat the whole message back to the caller, especially if it is a complicated message.
- Stress how important it is for them to repeat spellings and phone numbers back to the caller.

Use Student Activity Sheet: *Check the Message.*

- Put students in pairs. They should sit back to back and use the disconnected phones for the role play.
- One student will read Message 1 and the other will fill in a message form.
- The student receiving the call is to say that the person is not available and ask if the caller wants to leave a message.
  - He / she should check spelling, phone number and correctness of the message.
- Students will reverse roles for Message 2.
- When they have completed the exercise, review what boxes they have checked off (Phoned, Please Call) and check to make sure that the name, date and time have been filled in.

Have the students make up other calls with messages to be left in order to further practise this skill. Check as above.

20. ENDING THE CALL	Materials: None

• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**	

Talk about how to conclude the conversation appropriately.

Ask the students what the caller would probably like to hear (that you will be sure to give the person the message).

- Point out that this is often a good way to end the conversation and then say Good-bye.

Ask students if they have other ways to say Good-bye.

- Talk about which would be appropriate in an office setting.

21. FURTHER PRACTICE	Materials

• **Reading Text 1**
• **Document Use 1**
• **Writing 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Working With Others**
• **Continuous Learning**
	• 2 disconnected phones
	• Standard message pad
	• Student Activity Sheet: *Take a Message*

For additional practice, use Student Activity Sheet: *Take a Message*.

- Role-play the situations, using the disconnected phones and sitting back to back, so the office worker can ask for feedback if needed.

22. GETTING THE MAIN IDEAS	Materials

• **Document Use 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
• **Continuous Learning**
	• Pictures from magazines or newspapers that show situations – something happening

Explain that messages should be only the main or most important ideas.

To help students realize the difference between the main idea and details, give students pictures taken from newspapers or magazines.

- Ask what is the main thing happening in each picture?
- Then point out some of the details (what people are wearing, time of day this happened, what might have caused this to happen, etc.)

23. SUMMARIZE THE MESSAGE	Materials

• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Teaching Aid: *Summarize the Message*
	• Standard message pads

Point out to students that with messages, it is important to summarize a long explanation or reason into one (or at the most two) sentences. Some details,(e.g. times) may be important to the message.

Use Teaching Aid: *Summarize the Message*. Work through situation 1 as a group.

- Ask students what is the main point of the message. - What does the caller want Chris to do? (call after 4:00 today but before tomorrow morning).
- How would this message be marked in the boxes (Please call, URGENT).
- Ask students what other detail needs to be written: (phone number)
- Ask students if there would be any reason to tell Chris why she can't call before 4:00 p.m. (makes no difference to the desired action).
- Would there be any reason to tell her why she must phone tonight (yes, so she realizes why this call is urgent).
- What is the reason? (the design sent last week goes to the printer tomorrow)
- Ask students to make up a sentence for the message form.

Point out that spelling and grammar and punctuation are not critical, as long as the message can be understood. However, encourage students to do their best, especially if the message is going to a fellow worker or the boss at work.

Read the other situations, having the students decide what to write in the message. They can ask questions in order to get more details needed to complete the message form.

Review the results.

24. MESSAGES FROM AN ANSWERING MACHINE
• **Document Use 1**
• **Writing 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	Materials
	• Teaching Aid: *Taped Messages*

Remind the students that sometimes in an office, messages may have been left on an answering machine because someone was away, it was after hours, or the person was on another line at the time.

Ask how taking a message from an answering machine might be harder. (can't get feedback).

- How would it be easier ?(can play it over and over if needed)

Use Teaching Aid: *Taped Messages* to give students practice taking a phone message from an answering machine.

- Have them retell orally what the message is.
- Ask them what details need to be written *while listening (name.,* phone number, times or places involved).
- Then repeat the phone message for them so they can write down these details.
- After the message is completed, give students time to write the rest of the message.
- Point out that it is a good idea to listen to the message a third time to check what they have written.

25. ROLE PLAYS	Materials

• **Document Use 1**
• **Writing 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Working With Others**
• **Continuous Learning**
	• Disconnected phones
	• Message pads

When students feel comfortable filling out the message form from a taped message, practice with role-play situations.

Divide the students into pairs.

- Ask one to play the role of the office worker for an adult learning centre. (Note: the office worker is not the teacher.)
- Ask the other student to be a client at the centre who is phoning for a particular reason, (see situations below).

For each situation, reverse roles so both students have a chance to practice message-taking. Remind them to be active listeners and ask questions. The reasons for the call might be:

- To explain to the teacher why he/she will not be attending today (due to illness or a doctor's appointment)
- To ask the teacher to call the counselor at the employment centre (make up a name and phone number)
- To ask for specific information about the program that the office worker cannot answer
- To return a call from a teacher who is presently in class
- To arrange an appointment for initial assessment with Marilyn who is not available at the time to take the call
- To tell everyone how well he/she is now doing in the community college program

26. NO MESSAGE PADS	Materials

• **Document Use 1**
• **Writing 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Working With Others**
• **Continuous Learning**
	• Teaching Aid: *No Message Pad*
	• Previous Teaching Aids with messages

Point out that sometimes there are no preprinted message forms available.

- Explain that in that case, the office worker must know what important information to get from the caller, and write the note on blank notepaper.

Review what information is basic to a message: who the message is for, who called, date and time, the message and who wrote it.

Demonstrate how a message is often written (like a short letter or note).

- Ask where the date (and time) might go.
- How does one usually start a letter? Remind students of the comma after the salutation.
- Ask what goes at the end of a letter (name of sender).
- Ask students to check that all the essential parts of any message are included.

Show Teaching Aid: *No Message Pad* as an illustration.

Practise taking messages this way, using the situations from any of the previous Teaching Aids, or make up your own.

What Do You Need to Take a Message?

MESSAGE FOR

_____

WHILE YOU WERE OUT

_____

OF _____

PHONE NO _____

TELEPHONED

RETURNED YOUR CALL

CALLED TO SEE YOU

PLEASE CALL

WANTS TO SEE YOU

WILL CALL AGAIN

MESSAGE _____

_____

_____

_____

DATE _____ **TIME** _____

RECEIVED BY _____

Summarize the Message

1. Mary and Chris are working on a design for a new flyer. Mary calls Chris, but Chris has gone out. She wants Chris to call her back, but not before 4:00 p.m. She goes on to say that she is going shopping this afternoon in Toronto, but wants to get back before the rush hour starts. She plans to leave Toronto by 3:00 p.m. It is important that Chris call today though, because her meeting with the printer is at 9:00 a.m. tomorrow morning. She wants her to okay the design that she faxed over last week.

2. Joan said, "I won't be able to make it to the meeting tomorrow because my sister was in a car accident this morning. She is in the hospital and has a broken leg, two broken ribs and a possible spinal injury. She's in pretty bad shape and I will need to be at the hospital with her. Tell the Board that I am sorry I can't make it."

3. Lynn called to say that she would be coming by the office around noon to pick up the red file folder that contains all the articles for the office newsletter. She would like Ann to have it ready for her because she has no time to waste-she has a lunch meeting with Rick and then has a doctor's appointment at 1:30.

4. Carl is placing an order for wall tiles for his client, Jerry. He can't remember what colour was listed on the work order. He phones the office to ask Betty to check for him, but everyone has gone home. He must have this information by 10 a.m. the next morning. You are cleaning the office and take the call, but the file cabinet is locked. Write the message.

Taped Messages

Record these on a tape recorder to use as messages on an answering machine. Students will listen to the taped messages and write the message on the pad.

1. Hi, this is Amy Smith. I think I left my house keys on Fred's desk when I was in to talk to him this morning. Please look and call me right away. I have to go out this afternoon at 3:30 p.m. My number is 376-2149. Thanks.

2. Hello. This is Ed Barnes from *ABC* Real Estate. I think I have some office space for Mr. Andrews to look at. I will call at 1:00 p.m. to set up an appointment for this afternoon. Talk to you later.

3. Hello. Frank Lovell calling for Kay Maddon. I'm phoning from Hamilton and I am very interested in the services you offer. My name again is L-0-V-E-L-L and my number is 905-728-0560.

4. Hi everyone. It's Jane Doe calling. I really miss you guys since I left there. I was just wondering how you are all doing. If you're ever up to North Bay, please drop by or give me a call. My number is 506-4188. Hope to see you soon.

No Message Pad

Aug. 15 @ 10:15 a.m.

Dear Chris,

Mary called. She wants you to call after 4:00 p.m. today. This is URGENT because flyer design must go to the printer tomorrow.

Joan.

Unavailable

You are working in an office at the Seebright Eye Clinic.

The eye doctor is busy with a patient, Mrs. Ida Patch.

The phone rings and you answer it.

- Fill in what you would say.

You: _____

Man: This is Mr. Jenkins. Could I speak to Dr. Spy please?

You: _____

Man: Well, maybe you could help me.

You:

_____

What's That Name

Read each sentence to your partner who might ask you how to spell a name. Spell it slowly and clearly. Your partner will fill the names in the message pad.

1. Hello. This is Jeff Black calling. May I speak to Betty Clark, please?

2. Hello. I am calling to talk to Bill Brown. My name is Jim.

3. Hi. Brian here. Can I talk to Sue please?

4. Hello. I want to speak with Harold Robertson please. My name is Myron Bertolacki.

5. Hello. May I speak to Stephanie Curtain please? It is her husband calling.

6. Hello. It's Gordie returning Cho Ching's call.

Message Boxes

For each of the following messages, check the right boxes on the message form.

1. Mrs. Benson called. She said that she needed to speak to Bill and would try again around noon.

Telephoned		Please Call		URGENT	
Came to see you		Will Call Again		Wants to see you	
Returned your call		No message			

2. Ashley phoned the office this afternoon. She was just returning Mr. Smith's call. She said she would be at work until 5:00 p.m. today if he wanted to try again.

Telephoned		Please Call		URGENT	
Came to see you		Will Call Again		Wants to see you	
Returned your call		No message			

Message Boxes, cont.

3. Rob came in this morning while Nancy was out. He really wanted to meet with her right away. He left his number so that Nancy could call to make an appointment.

Telephoned		Please Call		URGENT	
Came to see you		Will Call Again		Wants to see you	
Returned your call		No message			

4. While Mark was out for lunch, Jill returned his call. She said she would call again this afternoon, because she really wants to get together with him.

Telephoned		Please Call		URGENT	
Came to see you		Will Call Again		Wants to see you	
Returned your call		No message			

Message Boxes, cont.

5. The delivery company called in a panic, wanting to know why some items for pickup were missing. They need to know right away what action to take.

Telephoned		Please Call		URGENT	
Came to see you		Will Call Again		Wants to see you	
Returned your call		No message			

6. Don Davidson, an old friend of Peter's, was in town and dropped by the office. However, Peter was in an important meeting. Don said to just tell Peter that he had been there.

Telephoned		Please Call		URGENT	
Came to see you		Will Call Again		Wants to see you	
Returned your call		No message			

Check the Message

Read the phone call to your partner. Your partner will say that the person you want is not available. You will read the message and your partner will write it down on a message pad.

1. Hello. This is Phil Cummings calling. I want to speak to Phyllis Barton.

   (not available)

   OK. Please ask her to call me later today with the cost of the window blinds that I ordered yesterday. I can be reached at 705-686-8345 from 1 till 5.

2. Hello. I am calling from Johnson's Hardware Store for George Dunlop.

   (not available)

   Please tell him that the parts he ordered are in and can be picked up any time. The total bill is $15.89.

DEMONSTRATION INSTRUCTOR PAGE

Give Tom a Message

ESSENTIAL SKILLS

- **Reading Text 1**
- **Document Use 1**
- **Writing 1**
- **Oral Communication 1**
- **Working With Others**
- **Thinking Skills**
  - Problem Solving 1
  - Decision Making 1
  - Significant Use of Memory

DEMO DESCRIPTION

The student will receive a phone call from the instructor. The instructor will ask to speak with someone who is not available, so will leave a message. The student must use a standard message pad to take the message, and may ask questions for clarification or spelling, and should give feedback to the caller. The student will assess his / her own confidence and skills in taking phone messages.

INSTRUCTOR NOTES

- Prepare a scenario for the phone call. Tom is a co-worker and you will leave a message for him.
- Provide 2 disconnected phones and a standard message pad.
- Provide *What I Have Learned and Skills Practised* to link demonstration tasks with the Essential Skills.

With student

- Role play a phone conversation with the student, using disconnected phones, and sitting back to back.

ACHIEVEMENT INDICATORS

- Answered the call politely, identifying self and the company
- Indicated that the person desired was unavailable, giving appropriate details
- Used a standard message pad to take the message
- Wrote names and dates accurately, asking for clarification if needed
- Re-read message to caller, giving feedback and verifying accuracy
- Ended call politely
- Was courteous, friendly and business-like throughout call
- Assessed own performance

Give Tom a Message
Task 1

Your instructor will role play a phone call with you.

You work as the receptionist at Atlas Glass Company.

You get a phone call for Tom from his co-worker. Tom is not back from the building where he was measuring a set of windows. Offer to take a message for him.

- Use the message pad that your teacher will give you.
- You may ask any questions you want or need.

Give Tom a Message

Task 2

I Can Take Phone Messages

I CAN	DATE
I can answer the phone for a business.	
I can identify myself and the company	
I can ask to take a message	
I can use a message pad	
I know where all the details go on a message pad	
I can summarize a message	
I know how to get the name spelled correctly	
I can check for accuracy of the message	
I can end the call correctly	
I can take messages from an answering machine	
I can write a message in a note or memo style	
I always use a polite, friendly and business-like voice and language.	

DEMONSTRATION ASSESSMENT

Give Tom a Message

Student:_____

Instructor:_____

Date:_____

Total Time for Demonstration:_____

Help Given? _____Yes _____No
Details:_____

Accommodations?: _____Yes ____No
Details:_____

ESSENTIAL SKILLS:

- **Reading Text 1**
- **Document Use 1**
- **Writing 1**
- **Oral Communication 1**
- **Thinking Skills**
  - Problem Solving 1
  - Decision Making 1
  - Significant Use of Memory
- **Working With Others**

ACHIEVEMENT INDICATORS	BEGINNING	DEVELOPING	ACCOMPLISHED
• Answered the call politely, identifying self and the company			
• Indicated that the person desired was unavailable, giving appropriate details			
• Used a standard message pad to take the message			
• Wrote names and dates accurately, asking for clarification if needed			
• Re-read message to caller, giving feedback and verifying accuracy			
• Ended call politely			
• Was courteous, friendly and business-like throughout call			
• Assessed own performance			

ADDITIONAL COMMENTS

Making Telephone Calls

Making Telephone Calls

This unit will prepare students to use the telephone to a limited extent. They will look up phone numbers both in an index or phone directory and on the Internet, dial numbers, plan and make simple calls. Through role playing, they will learn to use the phone in a polite, friendly, yet businesslike manner, leaving messages with someone else or on an answering machine in the workplace setting.

Because this is a large unit, it has been subdivided into six sections: Introduction, Finding a Phone Number, Planning the Call, Dialing the Number, Phone Conversations, and Answering Machines.

PREREQUISITE AND ADDITIONAL SKILLS NOT TAUGHT IN THIS UNIT

- Knows names and sounds of letters
- Knows alphabetical order (this is reinforced and practiced, but not taught)
- Understands concepts of before and after
- Can remember sequence of numbers or letters (at least 3)
- Reads and writes numbers
- Basic level of listening skills – can hear and repeat simple message
- Expresses self verbally, both own thoughts and repeating a message being passed on
- Simple planning and inference skills
- Can make simple predictions

OBJECTIVES

Students will

- Use a telephone directory to find names and phone numbers
- Use the Internet to find a phone number for a given name or business
- Make notes to plan a business call
- Make notes from a phone call
- Dial phone numbers accurately
- Participate in a professional, courteous, businesslike phone conversation
- Convey all appropriate information in a phone call
- Respond appropriately to other person on a phone call
- Leave a message on a voice answering machine

MATERIALS

- Phones for examination and practice (try to show both dial and touch tone, including an office phone with a variety of extra button features)
- Local phone directory
- Sample of Rolodex card file used by offices for frequently called numbers
- Paper for taking notes and planning conversations
- Tape recorder
- Computer with Internet access

VOCABULARY

- Business
- Call
- Cell phone
- Dial
- Hold
- Keypad
- Line
- Message
- Number sign #
- Phone
- Pound
- Redial
- Speaker phone
- Speed dial
- Star *
- Telephone

RESOURCES

- Stein & Romanek, *Communication Skills that Work, Books 1 & 2.* Chicago: Contemporary Books, 1991.
- The office in your setting. Visit them to see what they use for storing frequently dialed numbers, their phones, etc.
- **Ready for Work,** Bridging the Employment Gap. The section on Messages has activities that would complement those here. There are a number of social and conversational skills covered in several units of that resource.

#	Activity Description	ESSENTIAL SKILLS																
		RT	DU	W	N					OC	TS					WWO	CU	CL
					MM	SBA	MC	DA	NE		PS	DM	JTPO	SUM	FI			
INTRODUCTION																		
1.	Experience making calls									2	1	1		*				*
2.	Face to face versus on the phone									2	1	1		*				*
3.	Voice and feelings		1							2	2	1		*	1	*		*
LOOKING UP PHONE NUMBERS																		
4.	Vocabulary	1	1							1	1	1		*	1			*
5.	Order in phone directories		1							1	1	1		*				*
6.	Before – after game		1							1	1	1		*		*		*
7.	Phone index files		1							1	1	1		*				*
8.	Find the lettered section		1							1	1	1		*	1			*
9.	File it and find it	1	1	1						2	1	1		*	1			*
10.	The phone directory		1							2	1	1		*	1			*
11.	Guide words		1							2	1	1		*	1	*		*
12.	Skim to find the name		1							2	2	1		*	1	*		*

#	Activity Description	ESSENTIAL SKILLS																
		RT	DU	W	N					OC	TS					WWO	CU	CL
					MM	SBA	MC	DA	NE		PS	DM	JTPO	SUM	FI			
13.	Remembering the number		1	1						2	2	1		*				*
14.	411	1								1	1	1		*		*		*
15.	Internet 411	1	1							1	1	1		*	1		2	*
16.	Internet 411 for a business	1	1							1	1	1		*	1		2	*
PLANNING THE CALL																		
17.	Call		1							2								*
18.	Step 2	1	1							1	2	1		*				*
19.	Plan the call	1	1	1						2	1	1		*				*
20.	Plan a second call	1	1	1						2	1	1		*				*
21.	Plan a third call	1	1	1						2	1	1		*				*
22.	Planning calls alone	1	1	1						2	1	1		*		*		*
23.	Reading from a script	1								2	1	1		*				*
24.	Write it yourself	1		1						2	1	1		*		*		*
DIALING THE PHONE NUMBER																		
25.	Rotary and touch tone		1	1						1				*				*
26.	0, *, and #		1							2	1	1		*				*

#	Activity Description	ESSENTIAL SKILLS																
		RT	DU	W	N					OC	TS					WWO	CU	CL
					MM	SBA	MC	DA	NE		PS	DM	JTPO	SUM	FI			
27.	Dial, line, hold, speaker phone, redial, and speed dial	1	1							2	1	1		*	1			*
28.	Dial tone									1	1	1		*				*
29.	Practise dialing		1							1	1	1		*				*
30.	Step 4	1								1	1	1		*				*
31.	Long distance		1							1				*				*
32.	911									1	1	1		*				*
PHONE CONVERSTAIONS																		
33.	Identify yourself									2	1	1		*				*
34.	Courtesy									2	1	1		*				*
35.	May I leave a message	1	1							1	1	1		*				*
36.	No slang	1	1	1						2	1	1		*		*		*
37.	Role play calls	1	1							2	1	1		*		*		*
38.	Personal calls									2	1	1		*				*
39.	Step 7	1								1	1	1		*				*
40.	Role play									*	*	*		*		*		
ANSWERING MACHINES																		

#	Activity Description	ESSENTIAL SKILLS																
		RT	DU	W	N					OC	TS					WWO	CU	CL
					MM	SBA	MC	DA	NE		PS	DM	JTPO	SUM	FI			
41.	Be prepared	1		1						1	1	1		*				*
42.	Practice	1								2	2	1		*		*		*
D	Make the call	1	1	1						2	1	1	1	*	1	*		

INTRODUCTION

Students will have a wide range of experience and comfort in using the phone. By discussing previous experience and the difficulties they may have encountered, the instructor can decide which of the subsequent units need to be done. For instance, if the student uses a dictionary successfully, then all of the activities in *Looking up a Number* will not be necessary, although the student might not yet know how to use the Internet to accomplish that task.

Students will also explore their own voices and how emotions can be expressed through changes in the voice. They will begin to practise using a friendly and courteous tone when making business calls.

LEARNING ACTIVITIES

1. EXPERIENCE MAKING CALLS
• **Oral communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant use of Memory
• **Continuous Learning**
	Materials: None

Discuss students' experiences making telephone calls and their feelings and fears about the phone.
• What are the main reasons they have used the telephone?
 	
Ask students to think of how making business calls (e.g. to the bus terminal) and personal calls (e.g. to a friend) differ. They should consider
• what they would talk about,
• any preparation needed for the calls, and
• how they would speak
  ° Specific topic vs. a variety of topics,
  ° Less personal vs. personal,
  ° Spontaneous vs. careful thinking (even planning),
  ° Formal vs. casual speech.	

2. FACE TO FACE VERSUS ON THE PHONE
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	Materials: None

Ask how using a phone is different from talking to someone face-to-face. Explain that because people can't see each other on the phone, it is necessary to be very clear about everything, including who is calling. Also point out that they can't pick up any clues from facial expressions or hand gestures or other types of body language. Ask how they might know how the other person is feeling (either through words or tone of voice).	

3. VOICE AND FEELINGS	Materials

• **Document Use 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 1
  ° Significant Use of memory
  ° Finding Information
• **Working with Others**
• **Continuous Learning**
	• Tape recorder and recordings of various voices and emotions
	• Teaching Aid: *Mood Bingo*

Demonstrate to students through your voice how you are feeling and let students guess. Turn your back to the students (so they can't see your facial expressions or body language) and say the phrase, "How are you today?" (or any other phrase) using different tones of voice. Pretend to be:

- Very excited or happy
- Angry
- Sad or depressed
- Nervous
- Totally disinterested

You might have students try this, using their voices to convey different feelings.

Record different voices on a tape recorder; some of your colleagues could help. Ask people making the recording to use a variety of emotions.

Use Teaching Aid: *Mood Bingo.*

- Turn on the recording.
- As students hear a voice, have them mark the emotion of the speaker on the card, beginning with a 1 for the first voice, a 2 for the next, etc..
- Compare results.

Ask students why a company they work for would want their workers to sound friendly and helpful on the phone (to make a good impression of the company so people would buy their product or service).

LOOKING UP PHONE NUMBERS

In this section, the student will find phone numbers in both a printed directory and online. The printed format could be a file card system, in a box or on a roll, a printed booklet, or a standard phone directory.

LEARNING ACTIVITIES

4. VOCABULARY
• **Reading Text 1**
• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
  ° Finding Information 1
• **Continuous Learning**
	Materials
	• Teaching Aid: *Making Phone Calls*.
	• Poster size version of *Making Phone Calls* to post in classroom. (enlarge on photocopier)

Show the vocabulary words "phone" and "telephone". Ask students to find the word "phone" in the word "telephone". Point out both words mean the same. Look at the Teaching Aid: *Making Phone Calls*. (Post large version for reference.) • Ask them to find the word "phone" in the title. • Read the title. Ask students what they think would be the first step in making a call. Then read Step 1 together.	

5. ORDER IN PHONE DIRECTORIES	Materials

• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Set of alphabetical letter tiles (like Scrabble)

Explain that in most phone directories, names (and phone numbers) are listed in alphabetical order. Make sure all students know the alphabet in order. Give them a set of scrabble letters to arrange in alphabetical order.	

6. BEFORE – AFTER GAME	Materials

• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Working With Others**
• **Continuous Learning**
	• Copy of alphabet, posted, if desired or needed

To work with alphabetical order, play a "Before-After" game similar to the "High-Low" game on the Price is Right. • Have one student choose a letter of the alphabet, but keep it secret. (It would be a good idea to write it down so the others can't see it.) • The others try to guess the letter. • After each guess, the student (with the secret letter) says "Before" or "After" to tell the students which way to go in the alphabet. • The first one to guess the letter is the winner. • If this is too difficult, let students look at the letters of the alphabet in order while playing.	

7. PHONE INDEX FILES	Materials

• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Samples of phone index, such as Rolodex, or personal address book

Explain that companies usually keep an index file of phone numbers of their customers and suppliers.

Ask students if they have an index file of phone numbers at home. Look at the phone index file you have brought.

Ask what is the purpose of the letters (order & organize)?

Students could visit the office in your location and ask how they store frequently used numbers.

8. FIND THE LETTERED SECTION	Materials

• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
  ° Finding Information 1
• **Continuous Learning**
	• Card file box with lettered dividers or binder with lettered dividers
	• Blank cards or pages for above

Ask students where in the card file they would expect to find a name that starts

- With A?(near the beginning);
- With W? (near the end);
- With P? (in the middle);
- With C? (near the beginning);
- With T? (near the end).

Tell students that usually the letter card comes at the start of that letter's section.

Using a card file box with letter dividers, or a binder with lettered dividers, ask students to go quickly to given letters that you call out; later you could give them cards or pages to put in the correct sections.

Put only a single letter on the sheet or card.

9. FILE IT AND FIND IT	Materials

• **Reading Text 1**
• **Document Use 1**
• **Writing 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
  ° Finding Information 1
• **Continuous Learning**
	• Student Activity Sheet: *File It Under*

Point out that the **last** name (or surname)of a person is listed first in a directory.

Ask students what their surname is.

- What is the first letter?
- Reinforce that this is the letter that their name would be filed under.
- You could have them put their name on a card and place it in the file box used in the previous activity.

Give the students a name: Allan Becker.

- Ask which name will be listed first in the directory?
- What sound does "Becker" begin with?
- What letter?
- Under what letter will they find Allan Becker's phone number?

Explain that if it is a company name, the **first** word in the company name is used for filing.

For the company “Grandma's Bakery”,

- Which word will be listed first?
- What sound does it begin with?
- Under what letter will they find "Grandma's Bakery" in the card file?

Use Student Activity Sheet: *File It Under* for practice using alphabetical order with a card file.

- Read and explain the instructions.

10. THE PHONE DIRECTORY	Materials

• **Document Use 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
  ° Finding Information 1
• **Continuous Learning**
	• Local phone directory

Ask how many students have used a phone book to look up a number.

Find the word "phone" or "telephone" on the cover of the book.

Also look to see if the phone directory is just for your city or for the areas surrounding as well. That information can be found on the cover of the directory.

Ask them to write the name of the city where they live, if they are able.

- If not, ask them what letter it begins with.
- Write the name on the board if necessary.

It is important to make sure you are in the correct section of the phone book by location.

- Tell them that the cities or towns will be listed alphabetically.
- Show them where to look on any page in the directory for the city or town name (centred at the top of the page.)
- Ask them to find their town or city's section of the phone book.

11. GUIDE WORDS	Materials

• **Document Use 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
  ° Finding Information 1
• **Working With Others**
• **Continuous Learning**
	• Local phone directory

Point out that a phone book has a lot more names in it than a company's index file. It would take a long time to look through all of the names under any one letter to find a phone number.

Explain how to use guide words (if provided) at the top of each page to find the name that is wanted.

- Remind students about alphabetical order. (When all the words begin with the same letter, they go to the second letter, and so on.)
- Point out that the first word is the first name on the page and the second word is the last name on the page. (Mention that dictionaries also use guide words to help people find the word they are looking for.)
- Ask students to open the phone books at any page in their city and point to the guide words.
- If the phone directory has multiple columns, show how the last word in the first column comes just before the first word in the next column, etc. The top and bottom words in each column are the guide words for the column.

Use the local phone directory to practice using guide words to find the correct page in the phone book.

- Begin by photocopying 3 or 4 consecutive pages (top section only is required) showing the guide words.
- Ask which page they would look on for names that you have preselected from those pages.
- When they are comfortable with that, give them a name and ask them to find the page on which that name would be found, using the guide words.

This could be a game where students compete to find the page the most quickly.

- You could give students a list of names to find, and have them write the page number beside the name.
- They do not have to locate the name itself, just the page on which the name would be found.
- The student who correctly locates all the pages most quickly wins.

12. SKIM TO FIND THE NAME	Materials

• **Document Use 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 1
  ° Significant Use of Memory
  ° Finding Information 1
• **Working with Others**
• **Continuous Learning**
	• Local phone directory

Explain that once the page is located, students should skim the page, looking for the name wanted.

- Explain that skimming means moving the eyes quickly over the page, without reading it.

Using a page from a phone book, see who can find a given name the fastest.

- When they locate a name, they should call out the phone number and then write it down on a piece of paper.
- Again, this could be made into a game involving several students.

Ask what they think they could do if they find more than one listing for a given name. For example, there may be many J. Smiths listed.

- What is different about all of the same names? (the addresses).
- Suggest that they could ask their supervisor for the address of the person, if this happened.

13. REMEMBERING THE NUMBER	Materials: None

• **Document Use 1**
• **Writing 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**	

Students often have a difficult time remembering several numbers at one time.

Use any phone number.

- Encourage students to look at the first three numbers and then look away.
- What are the three numbers?
- Say them out loud.
- Then write them down.
- Repeat for the last four numbers. They could try remembering all four together, or as 2 pairs. (1,6,8,7 or 16,87)

If students remember the numbers, but in the wrong order, try covering up the numbers and showing one at a time.

Or write three numbers on a blackboard, one at a time. Then cover them up and ask the student to write them down.

- Try to discover if the student has a better visual or auditory memory.

Sometimes recognizing patterns in numbers will help more advanced students to remember them, e.g. 456 (forward sequence) or 987(backward sequence) or 257 (2+5=7).

Tell students that when they have looked up a number, it is useful to copy it on to a slip of paper to take to the phone. That way their eyes will not be distracted by all the other listings on the page.

Or, they could highlight the number in the phone directory (although this might not be most helpful in an office setting.

14. 411
• **Reading Text 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Working With Others**
• **Continuous Learning**
	Materials
	• Teaching Aid: *411*
	• phone

Ask students if they have ever heard of or used 411 as a way to find a phone number.

Explain that this is a system where they will connect to an automated service.

- They will answer questions such as "What province and what city? What name? Business or residential?
- Either an operator or the automated service will then look up and give the number.
- HOWEVER, this is not free. There is a charge every time you use the 411 phone service, so most businesses will not want their employees doing that.

If possible, practise this call with students. You could actually make a 411 call, or simply use the script on Teaching Aid: *411.* The instructor should read the prompts and the student answer. (You may have to model this first, with a student or colleague asking the questions.)

15. INTERNET 411	Materials

• **Reading Text 1**
• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
  ° Finding Information 1
• **Computer Use 2**
• **Continuous Learning**
	• Computer with Internet access

There is an alternative way to use 411: on the Internet. (This works for most names; however, because of the variety of service providers, and because there are occasionally errors in listings, the search may still not yield a desired number. Check first before doing this with a student.)

Use a search engine such as Google to locate the 411 website (411.ca or 411.com).

- Locate the toolbar that asks “Find a business” and “Find a person”. Click on “Find a person.”
- If the student has a phone (not a cell phone) and it is registered to him or her (the bill is in the student’s name), then use that name. If not, use the name of someone the student knows, especially if the address is known.
- Note the red asterisk (*) beside the field for surname. This is the only box that MUST be completed. However, the more information that is given the more likely the desired listing will be found immediately. You could enter surname only, and then click search, and the student will see that a long list of people with that surname will appear; now they must read through to find the one they want.
- Enter the first name or initial, the address, and the province, in the correct fields.
- Finally, click Search.

16. INTERNET 411 FOR A BUSINESS	Materials

• **Reading Text 1**
• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
  ° Finding Information 1
• **Computer Use 2**
• **Continuous Learning**
	• Computer with Internet access

Go to the 411 website (411.ca or 411.com)

- Locate "Find a business". Click on it.
- Use a local business, such as a grocery store.
- Type in the business name, the city and province.
- Click "Search".

You can do a search by category of business, such as pizza shop. Not all businesses are listed as they may have to pay to be included. (There is a button for adding a business.) Check the business name that you will use, before asking students to do this.

PLANNING THE CALL

In this section, the students will make simple plans for sample business calls. These include introducing themselves, knowing the purpose of the call, thinking of questions they have or that they might need to ask, predicting what they might be asked, and being prepared to take notes or give information.

LEARNING ACTIVITIES

17. CALL • **Document Use 1** • **Oral Communication 2** • **Continuous Learning**	**Materials** • Teaching Aid: *Making Phone Calls*
Ask students to look at Step 2 on the Teaching Aid: *Making Phone Calls*. Read the vocabulary word "call". If appropriate for your students, think about the different ways the word "call" is used (to shout, the sound a bird makes, to cry out, to visit someone, to read names out, to demand, to summon, to phone) and how each meaning has some connection to a phone "call".	

18.STEP 2
• **Reading Text 1**
• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	Materials
	• Teaching Aid: *Making Phone Calls*

Help your students to read Step 2 on the Teaching Aid: *Making Phone Calls.* Ask students what they should think about before making a business call. Use their guesses to help them read the next four sentences.	

19. PLAN THE CALL	Materials

• **Reading Text 1**
• **Document Use 1**
• **Writing 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Teaching Aid: *Making Phone Calls*
	• Chart paper and markers

Give an example that is familiar to students. For example, they need to call a client to see if an appointment can be changed. (Many students have called to change their own appointments or school schedules.)

Refer to Step 2 of the Teaching Aid: *Making Phone Calls,* that you have posted.

- Using chart paper, write down the plan that they come up with.
- Students could copy the final plan into their notes for future reference.
  - What is the purpose of the call? (to cancel an appointment and get a new one) Ask students to put this request into words.
  - What questions should they ask? (Will this create any problems for the client? What is the best day and time for the client? Can any work be completed at home in the meantime?)
  - What questions might the client ask you? (might suggest an alternate date that you will have to check against a calendar.)
  - Ask what they should have with them at the phone (their own schedule, a calendar, pencil, paper.)

20. PLAN A SECOND CALL	Materials

• **Reading Text 1**
• **Document Use 1**
• **Writing 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Teaching Aid: *Making Phone Calls*
	• Chart paper and markers

Give students another example.

They have been asked to call a local restaurant to book a table for 6 for a business lunch at 12:30. Their boss has asked that a booth in a quiet corner be reserved.

Plan the call. Use chart paper as before.

- Why are they calling? (to book a table) Ask students to put their reason for calling into words.
- What questions should they ask? (Is a booth in a quiet corner available?)
- What questions should they be prepared to answer? (If the booth is not available, do they want a regular table in the corner? Or a booth in the main dining area?)
- Ask what they will need to have at the phone with them when making this call? (office phone number, name for the reservation.)

21. PLAN A THIRD CALL	Materials

• **Reading Text 1**
• **Document Use 1**
• **Writing 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Teaching Aid: *Making Phone Calls*
	• Chart paper and markers

Give students a third example.

You have just received an order of books. As you go through the order, you notice that one book is missing. You have already paid for the books, so you must call the book company.

Ask students how they would plan this call.

- Discuss with students the purpose of the call - Is it to "tell the book company off" or is it to ensure that the missing book is sent? What words will they use?
- What questions would you ask?
- Will the book company ask you anything? (Was the box open or damaged when it was received? Invoice number.)
- Do they need anything with them at the phone?(invoice)

22. PLANNING CALLS ALONE	Materials

• **Reading Text 1**
• **Document Use 1**
• **Writing 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Working With Others**
• **Continuous Learning**
	• Teaching Aid: *Making Phone Calls*
	• Student Activity Sheet: *Planning the Call*

Use Students Activity Sheet: *Planning the Call* and help them read the situations if necessary.

More than one answer can be correct - just encourage students to think of good questions to ask and discuss the different possibilities.

Since they will be the only one reading the notes, they can jot down their questions in whatever way will help them to remember what they want to ask.

They could work in pairs to do this, and eventually be able to plan calls on their own.

23. READING FROM A SCRIPT	Materials

• **Reading Text 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Teaching Aid: *I'm Phoning to Let You Know*
	• Tape recorder

Explain that sometimes all the words are written down for the workers to read over the phone. They may be asked to phone many people with the same message, perhaps offering a special sale price to certain customers, or notifying them of a change in time of meeting, etc.

Ask how many of them have received calls from telemarketing companies trying to sell a product or service.

- Ask them if it bothers them when someone reads a "script" over the phone.
- Why or why not?
- Point out that, if they are given the exact words to say, it is a good idea to practice reading it aloud over and over until it sounds pretty natural.

Use Teaching Aid: *I'm Phoning to Let You Know.*

- Refer back to Learning Activity 3 where students practiced various voices to communicate feelings.
- Work on achieving a good rate, loudness, and intonation, as well as fluency.
- A tape recorder could be useful here.

What should the student do if the person says they do not want to listen to the call, not interested? (Thank them politely and end the call.)

What will the student need to do if the person asks questions?

What should the student have by the phone? (paper and pen to take down notes or information .)

24. WRITE IT YOURSELF	Materials

• **Reading Text 1**
• **Writing 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Working With Others**
• **Continuous Learning**
	• Paper and pen

You might encourage students to write out exactly what they might say over the phone in any of the situations already discussed.

- If the student will have trouble with the writing, offer to write it for them as they dictate.
- Then have the student read what is written, over and over, until it sounds natural.

This is not something that could happen at work – no one will sit down and write what the worker dictates, so this is an intermediate practice skill only.

DIALING THE PHONE NUMBER

In this section, students will practise dialing the phone number. A disconnected phone is necessary for this unit. As well, the student could practise on the keypad of a computer (the number pads that are arranged in a block formation, similar to a touch tone phone). The advantage of this is that the "dialed" number will appear on the screen, and it can be checked against the desired number for accuracy. The entries can also be printed off for inclusion in the portfolio as a demonstration of accuracy, or for later marking by the instructor.

LEARNING ACTIVITIES

25. ROTARY AND TOUCH TONE • **Document Use 1** • **Writing 1** • **Oral Communication 1** • **Thinking Skills** ° Significant Use of Memory • **Continuous Learning**	**Materials** • Sample rotary and touch tone phones, preferably connected
Ask students to read Step 3 in "Making Phone Calls". • Explain that there are two types of dials: the older dials with holes that you put your finger right into (pulse dials)[no longer in common use] and the touch-tone phones which most companies will have. • Show students an office phone. • Give students a single number and ask them to press that number key. • Ask what they hear. (touch tone phones – a sound, tone; rotary phones – no sound.) Have students draw the touch tone keypad. • Ask them to write the numbers and letters where they appear. • Show how this is used when a phone number is given using words: eg. 7GO-PLAY = 746-7529	

26. 0, *, AND #	Materials

• **Document Use 1**
• **Oral communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Sample touch tone phone

Ask students if they know what happens if a person dials 0 (and nothing else).

- Some phones may say Op or Oper on the 0 key.
- Explain that this is a short form for operator.)
- Ask students when they might call the operator. (having difficulty reaching a certain number, etc.)

** Dialing 0+ other digits is part of overseas calls or of calls being billed to another number, but they will not be using that feature in the offices where they work.

Look at the two symbols, * (star key) and # (number or pound key) on a telephone.

- Explain that they have no particular function, but a message may say "Press the pound key when you are finished" or "Press the star key to exit the answering service".

27.HOLD, SPEAKER PHONE, REDIAL & SPEED DIAL	Materials

• **Reading Text 1**
• **Document Use 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
  ° Finding Information 1
• **Continuous Learning**
	• Prepared vocabulary cards
	• Office phone
	• Students Activity Sheet: *Special Phone Buttons*

Go over the vocabulary cards for "Dial", "Line", "Hold" and "Speaker Phone".

- Help students to sound out these words.
- Make sure students understand their meanings.
- Ask for student suggestions for meanings before explaining.

Dial

- Explain that often, they can use a phone directory on the phone itself, select a number , then press “Dial” instead of punching in each number themselves. Ask why they might do this (fewer errors in entering the number, faster).

Line

- The office may have more than one phone line so that several calls can come in to different extensions at once, or so that several people can place calls at once from different parts of the office. The “Line” button will enable a caller to both see which lines are in use, and to choose one that is free.

Hold

- Ask students if they have ever been put on “Hold”. Do they know what it means? Tell them that it is a way for the phone to keep the call on the line while the operator transfers it to an extension, or while another incoming call is answered, etc.

Speaker Phone

- “Speaker Phone” allows everyone in the immediate area to hear the person phoning. That way more people can take part in the conversation.

Then show the cards "Redial" and "Speed Dial" and make sure students see the word "dial" in both words.

(next page)

Redial

- Explain that the "Redial" can be used when you get a busy signal or no answer and don't want to have to keep dialing the number. It will automatically redial ONLY the last number you dialed.

Speed Dial

- Explain that you can put commonly used phone numbers into the “Speed Dial” function. When you want to make one of those calls, you press the appropriate name that will appear on a screen, or you may have a number that corresponds to each name and will press that number, and the speed dial automatically dials the correct number.

Have students write all the words in block (capital) letters.

Then have students match these words to the office phone.

Use Students Activity Sheet: *Special Phone Buttons* to work on vocabulary and symbols.

28. DIAL TONE	Materials

• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Operational phone

Explain that when they pick up a phone, there should be a dial tone.

- Let all students listen to what a dial tone sounds like.

Ask what would cause there to be no dial tone: someone is on another line, an extension phone got left off the hook, the phone has been disconnected, the phone is not working.

Ask what they would do if there was no dial tone: check all the phones; if all on the hook and no one is talking on another line, call the telephone repair service.)

29. PRACTISE DIALING	Materials

• **Document Use 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Disconnected phone
	• Computer

Give students an opportunity to practise dialing phone numbers.

- Use any phone numbers, at least some of which are new to the student.
- This could be combined with a looking up in the phone book activity.

Use a disconnected phone for practice, or use the keypad on the computer: this enables the student and/or instructor to verify accuracy since the keyed in digits will appear on the screen and can be compared to the target number, or could be printed off for later marking or for inclusion in portfolio.

Encourage students to read and remember three or four digits at a time.

Ask students why it is important to dial the right number (so don't waste time and don't annoy others).

Ask students what they would say if they dialed the wrong number. (Sorry, I must have the wrong number.)

30. STEP 4	Materials

• **Reading Text 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Teaching Aid: *Making Phone Calls*

Ask how long they should let a phone ring before hanging up if no one answers. (8-10 rings)

Read Step 4 of "Making Phone Calls". That gives a busy person time to get to the phone; but doesn't waste too much of their own time.

Many answering machines are programmed to pick up after a set number of unanswered rings; since it may require 6 – 10 rings to get to the answering machine, the caller should wait that long.

31. LONG DISTANCE	Materials
• **Document Use 1** • **Thinking Skills** ° Significant Use of Memory • **Continuous Learning**	• Bell Canada phone directory: long distance section

Ask if they know how to make a long-distance call.

Show them the long distance section in the Bell Canada phone directory.

- Explain that they have to dial "1" first, then the area code, and then the seven-digit number.
- Stress that calling the operator to make a long-distance call is more expensive, so, when possible, it should be dialed directly by the worker.
- If the call is to another country, there may also be a country code to enter, as well as a city or area code.

Ask what they will need to think about if the long distance call is to a place on the other side of Canada, or the world?

- The time will be different.
- This will mean that care must be taken to phone when the person or business will be able to receive the call.

32. 911
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	Materials: None

Ask students for the number for *emergency* calls. (911)

When should they use this number?

- Discuss what is and is not an emergency.
- Remind them that they must not use this number for non-emergencies.

What will they need to do if they do call 911

- Give the kind of emergency, their location, etc. as prompted by the operator.

PHONE CONVERSATIONS

In this section students will practise the actual conversations they will have when placing calls in the workplace setting. This will include how to introduce and identify themselves, what is businesslike language and style, and what to do if they cannot speak to the person whom they are calling.

LEARNING ACTIVITIES

33. IDENTIFY YOURSELF
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	Materials:
	• Teaching Aid: *Making Phone Calls*

Explain that people calling an office or business may sometimes forget to identify themselves and the company for whom they work. • Ask why would this be a problem. Role-play a phone conversation between a worker and a supply company in which the caller does not introduce him/herself fully. • The caller just begins, "Hello. It's Joe here. Did you get my order yet?" • Ask students what is wrong with this introduction. Ask students what the caller should say after the other person answers with "Hello". • Give their name **and** the company name, and then the reason for calling. Read Steps 5 and 6 from the Teaching Aid: *Making Phone Calls* to reinforce this point. • Remind students to speak with a friendly voice, even if making a complaint.	

34. COURTESY	Materials: None
• **Oral Communcation 2** • **Thinking Skills** ° Problem Solving 1 ° Decision Making 1 ° Significant Use of Memory • **Continuous Learning**	

Discuss courtesy briefly.

- When should people say, "Please"?
- What are other ways of politely making a request.
- When should people say, "Thank you"?
- What are other ways of expressing thanks?
- When should people say, "Sorry"?
- What should someone say when they don't understand a request or an explanation? (Pardon me, Would you mind repeating that?)

35.MAY I LEAVE A MESSAGE	Materials:
• **Reading Text** • **Document Use** • **Thinking Skills** ° Problem Solving 1 ° Decision Making 1 ° Significant Use of Memory • **Continuous Learning**	• Student Activity Sheet: *Leave a Message?*

Discuss with students what they would say if the person they are calling is not available to speak with them.

- Stress the importance of **asking**, "May I leave a message?"

Ask students how they would decide whether or not to leave a message (simple message vs. information requiring explanation, simple information vs. questions)

What would be the alternatives to leaving a message? (Call back later or leave your number for the person to call.)

Ask students when they would not leave a number for the person to call them. (If they were going to be out most of the day).

For practice deciding which message to leave, give Student Activity Sheet: *Leave a Message*?

- Help students read each situation, if needed.
- More than one answer is acceptable if students can give good reasons for their choice.

36. NO SLANG	Materials

• **Reading Text 1**
• **Document Use 1**
• **Writing 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Working With Others**
• **Continuous Learning**
	• Student Activity Sheet: *I Am Calling You*

Remind students that it is very important to choose their words carefully when making any phone call. They want to communicate clearly and do not have the advantage of face to face conversation: words are all they have.

Describe how the use of words changes when making a **business** call.

- For example, would you say "yes", "yeah", or yep?
- Stress that the use of slang may give a bad impression.
- Point out that they should try to use the best English possible in order to give a good impression of the company they work for.
- That's why it is so important to think ahead of time of what to say and even write it out. (Slang may be OK in personal, friendly calls, but not in the workplace.)

To reinforce what should be said when calling, complete Student Activity Sheet: *I Am Calling You.*

- Discuss students' responses with the whole group.
- Ask students to read their own part and you can play the role of Mr. Hart.

37. ROLE PLAY CALLS	Materials

• **Reading Text 1**
• **Document Use 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Working With Others**
• **Continuous Learning**
	• Plans from Learning Activities 19 - 22

Use some of the plans made for phone calls previously. (Learning Activities 19 – 22.)

Make up a name for a company and ask students to role-play what they would say in each situation after the initial "Hello".

- To make the conversations more realistic, students could sit back to back with hand-held phones.
- They should take turns playing the caller.

38. PERSONAL CALLS	Materials: None

• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**	

Discuss making personal calls at work. • When should it be allowed? • Why is it important to keep personal calls to a minimum? (ties up a company line; wastes work time; when you are working, your time belongs to the company.) • Ask when they could make their personal calls? (on breaks or on lunch)	

39. STEP 7	Materials

• **Reading Text 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	• Teaching Aid: *Making Phone Calls*

Read Step 7 from the Teaching Aid: *Making Phone Calls*. • Ask what kind of information they might want to write down from the phone call (information gained, answers to questions, phone numbers).	

ANSWERING MACHINES

In this section, students will learn how to leave a voice message on an answering machine when they cannot get through to the person they are calling, and when there is no one at the other end to take down a message. This is more and more common in the workplace as a method of managing messages.

LEARNING ACTIVITIES

40. BE PREPARED
• **Reading Text 1**
• **Writing 1**
• **Oral Communication 1**
• **Thinking Skills**
  ° Problem Solving 1
  ° Decision Making 1
  ° Significant Use of Memory
• **Continuous Learning**
	Materials
	• Chart paper and markers
	• *Taking a Message* section in this resource binder
	• *Messages* section in **Ready for Work**

Point out that often calls don't get through. Instead, the caller gets an answering machine.

Encourage students to talk about their experiences with answering machines.

- Ask how being prepared for an answering machine might help.

Ask students what information should be given when leaving a message on an answering machine (name and phone number and a brief message).

- You could refer to or use parts of the *Taking A Message* section in this resource binder.
- The same information needed for the telephone message pad should be left on the answering machine.
- Ask students to write out what they might say in each of the earlier situations (Learning Activity 37) if there was no answer when the call was made.

There are activities in the *Messages* section of **Ready for Work** that also deal with answering machines.

- Write answers on chart paper and have students read it back.

41. PRACTICE	Materials

• **Reading Text 1**
• **Oral Communication 2**
• **Thinking Skills**
  ° Problem Solving 2
  ° Decision Making 1
  ° Significant Use of Memory
• **Working With Others**
• **Continuous Learning**
	• Phone

Encourage students to practice reading their messages into a tape recorder; play them back and critique them together later to make sure the message was clear and complete and left a good impression. Point out that sometimes, the answering machine message may say, "Press the pound key (or the star key) when you are finished". • Ask students to show you which key they will press.	

Mood Bingo

Unfriendly	Nervous
Quiet	Happy
Sad	Friendly
Not interested	Angry

Making Phone Calls

1. Look up phone number and write it down.

2. Plan the call:
   - Why are you calling? Put this reason into words.
   - Do you have any questions to ask?
   - What might they ask you?
   - Is there anything you need at the phone?

3. Make sure you dial the right number.

4. Allow time for the person to answer (10 rings).

5. Identify yourself and your company.

6. Tell why you are calling.

7. Be prepared to take notes

411

When you dial 411, you will hear a computer voice ask you questions that you must answer. Each phone company has its own service.

The Bell Canada 411 sounds like this.

Bell Directory Assistance

For English, say “English”; for French …

411: For what city? _____

411: Do want a residential listing? (Say Yes or say “Business”) _____

411: What name? _____

411: The number is ……..

OR

Transferring to an operator. (The operator will ask you more questions.)

I'm Phoning to Let You Know

SCRIPT:

I am calling on behalf of Mr. Jones of Jones & Adams Hardware.

The meeting time and date have been changed.

The new date is March 19th.

The new time is 1:15 p.m.

Are you able to attend?

Thank you for your time.

File It Under

For each of the following names, write the letter of the index file where you would look for the phone number.

- Gary Marshall _____
- Woodland Service Centre _____
- Samantha Eves _____
- Charles Pearson _____
- Kingsley Pools _____

Write the letter of the card file which comes:

1. after C _____
2. before H _____
3. after Q _____
4. before P _____
5. between B and F _____
6. between L and N _____
7. between S and U _____
8. before C and after A _____
9. before K and after I _____
10. before X and after V _____
11. at the very beginning _____
12. at the very end _____

Planning the Call

Read each situation below. Then answer the questions.

1. You have been asked to phone several companies to get the best price for paper.
   a) Why are you calling? _____
   b) What questions will you ask?
   _____
   _____
   c) What might they ask you?
   _____
   d) What should you take to the phone?
   _____

2. Your boss has asked you to make an appointment with the bank manager one day next week.
   a. Why are you calling? _____
   b. What questions will you ask?
   _____
   c. What questions might they ask you?
   _____
   _____
   d. What should you take to the phone?
   _____

Special Phone Buttons

Draw a line to connect the word or symbol to what it does.

LINE	Allows everyone in the office to hear and speak to the person who called
*	Dials numbers for people automatically, often by pressing one key
REDIAL	Wire phone connection between two phone extensions, so that more than one person can use the phone at once
SPEAKER PHONE	Number or pound key, used for different purposes
HOLD	Dials the last number dialed
SPEED DIAL	Makes one caller wait while you answer the other line
#	Star key, used for different purposes

Leave a Message?

For each of the following situations, write the number of the type of message that you would leave if you can't reach the person you are calling.

#1 Leave the information with the person who answers the phone.

#2 Say that you will phone back later and ask when will be a good time to call.

#3 Leave your number for the person to call you.

Situation A:
Mary Ann said she would like to help with the window display. You want to talk to her about her ideas. This is the third time you have tried to reach her with no luck. She is a very busy person. # _____

Situation B:
You want to remind Bill of a board meeting, including the date and time. # _____

Leave a Message? Cont.

Situation *C*:
You are leaving on vacation tomorrow and want to explain to the worker who will replace you how to operate the new photocopier. You will be in and out of the office today. #_____

Situation D:
While you were out, Mr. Jones called. You have no idea what he wants.
He left his number for you to call him, but when you call, he is in a meeting. # _____

I Am Calling You

You are working in the *office* of XYZ Printing Company. Mr. Hart from Monroe Paper called earlier but you were in a meeting. He has asked that you return his call.

Fill in the missing lines in the conversation.

Woman: Good afternoon. Monroe Paper.

You: _____

Mr. Hart: Hart here.

You: _____

Mr. Hart: Thanks for calling back. I wanted to let you know that we are having a pre-Christmas sale on all of our paper. I wondered if you wanted any.

You: _____

Mr. Hart: Fine. We'll be in touch.

You: _____

Leaving a Message

You work for Carol Swift, of The Paper Place. The phone number there is 705-342-5578.

You are phoning a supplier, but there is no answer. You get the answering machine.

- Fill in the blanks, using your name, then practise reading the message, saying the phone number **slowly** and **clearly**.
- Read it into a tape recorder.
- Listen. Is it clear?

Hello. My name is _____.

I am calling on behalf of _____.
(name of company)

I am sorry to have missed you. Please call_____ as soon as you can for an important message.

My name again is _____ and the company phone number is _____.

DEMONSTRATION INSTRUCTOR PAGE

Make the Call

ESSENTIAL SKILLS

- **Reading Text 1**
- **Document Use 1**
- **Writing 1**
- **Oral Communication 2**
- **Working With Others**
- **Thinking Skills**
  - Problem Solving 1
  - Decision Making 1
  - Job Task Planning & Organization 1
  - Significant Use of Memory
  - Finding Information 1

DEMO DESCRIPTION

The student will look up a number in the local phone directory and copy it down. The student will plan a call based on a scenario, then make the call, role playing it with the instructor.

INSTRUCTOR NOTES

- Enter a full name taken from the local phone directory in the instructions. Choose one that is unique, or give the address as well to assist in choosing the correct name if there is more than one entry for the chosen name.
- Provide a disconnected phone.
- Role play the phone conversation with the student, sitting back to back (no visual cues), asking how much the repair has cost, what time they are open to, etc.
- Provide *What I Have Learned and Skills Practised* to link demonstration tasks with the Essential Skills.

With student

- Read the instructions if necessary.
- Do not assist with locating the phone number in the directory.

ACHIEVEMENT INDICATORS

- Located the phone number in under 5 minutes
- Copied the number accurately, remembering more than one digit at a time.
- Planned the call, making notes.
- Dialed the number correctly, not looking at every digit each time.
- Used a friendly, polite and businesslike manner in making the call.
- Gave the message clearly.
- Answered customer's questions.
- Ended the call appropriately
- Assessed own performance.

Make the Call

TASK 1

You work in the office of a car service centre. Mr. _____ brought his car in to repair the brakes. The job is done. You have been asked to phone Mr. _____ to tell him that his car is ready. You forgot to get his phone number when he was in.

1. Look up his phone number in your local phone book. Copy down the number.

2. Think about what you will say to him and what you need to ask him. You may make notes.

3. What questions might he ask you?

4. Do you need to have anything with you at the phone when you make the call? (Make up any information that you need.)

5. Dial the number without looking at every number each time.

6. Your instructor will play the part of Mr. _____. Sit back to back. Use the phone and role play the conversation.

Make the Call

TASK 2

I Can Make the Call

I CAN	DATE
I can use alphabetical order to find the number in the phone book quickly.	
I can copy the phone number correctly, remembering 3 or 4 numbers at a time.	
I can make written notes to help me plan the call.	
I can dial the number correctly and quickly.	
I can introduce myself properly, and say the reason I am calling.	
I can choose my words carefully, using no slang or poor English.	
I can give my message clearly and sensibly.	
I can ask good questions.	
I was prepared for questions I might be asked.	
I was polite and friendly, and businesslike.	
I can end the call appropriately.	

DEMONSTRATION ASSESSMENT

Make the Call

Student:_____

Instructor:_____

Date:_____

Total Time for Demonstration:_____

Help Given? _____Yes _____No
Details:_____

Accommodations?: _____Yes ____No
Details:_____

ESSENTIAL SKILLS:

- **Reading Text 1**
- **Document Use 1**
- **Writing 1**
- **Oral Communication 2**
- **Thinking Skills**
  - Problem Solving 1
  - Decision Making 1
  - Job Task Planning & Organization 1
  - Significant Use of Memory
  - Finding Information 1
- **Working With Others**

ACHIEVEMENT INDICATORS	BEGINNING	DEVELOPING	ACCOMPLISHED
• Located the phone number in under 5 minutes			
• Copied the number accurately, remembering more than one digit at a time.			
• Planned the call, making notes.			
• Dialed the number correctly, not looking at every digit each time.			
• Used a friendly, polite and businesslike manner in making the call.			
• Gave the message clearly.			
• Answered customer's questions.			
• Ended the call appropriately			
• Assessed own performance.			

ADDITIONAL COMMENTS