



KL&S
Kingston Literacy & Skills

Clerical and Office Administration Curriculum

Practitioner Guide



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ACKNOWLEDGEMENTS

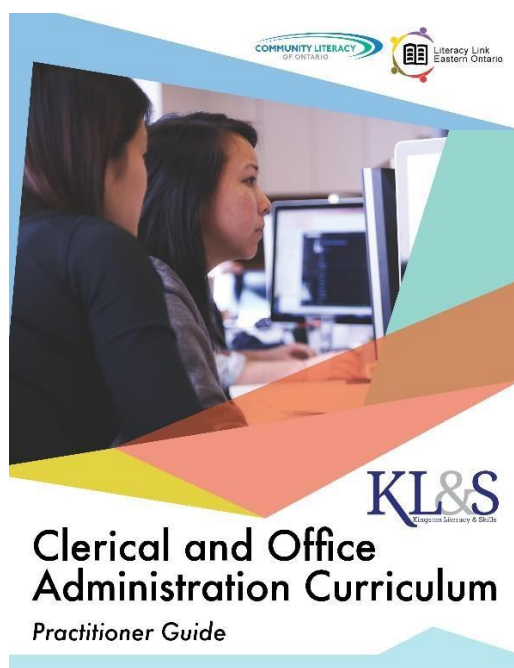
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INTRODUCTION

In May 2018, Community Literacy of Ontario received funding from the Ministry of Training, Colleges and Universities to support curriculum enhancements for Literacy and Basic Skills agencies.

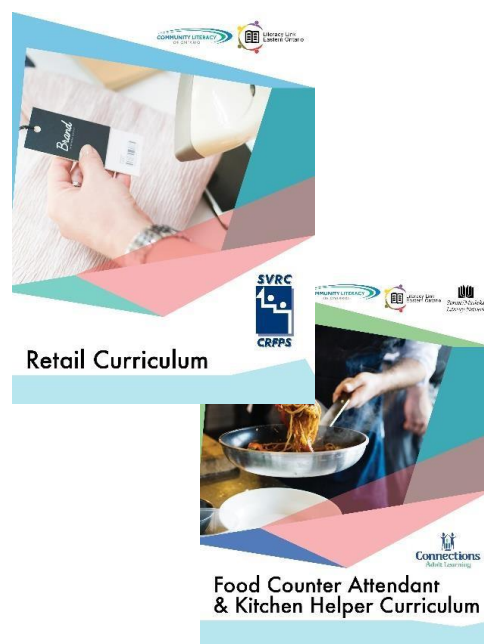
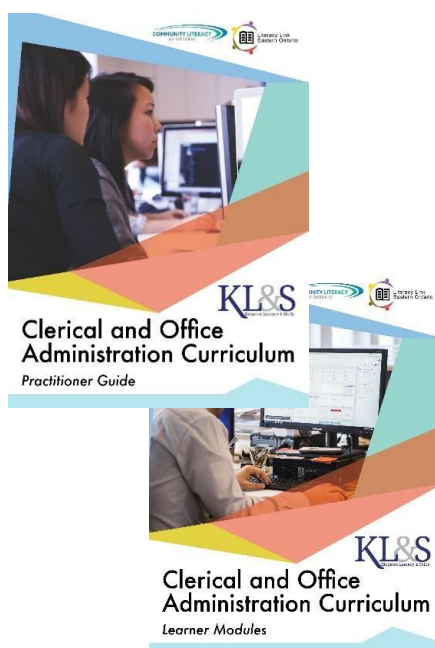
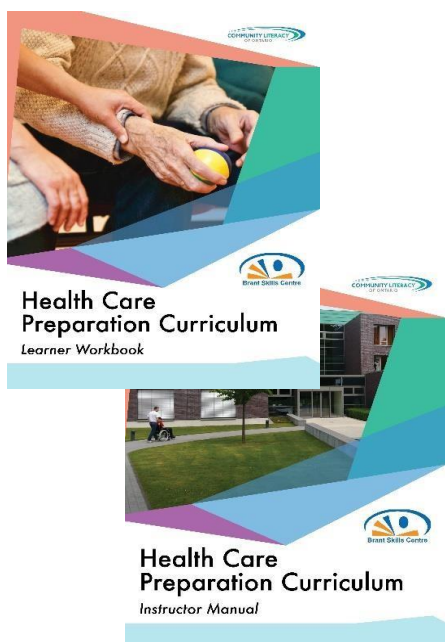
Through discussion with the CLO Board of Directors and various program staff, through exploring labour marketing information, and via our experiential learning research, the importance of developing occupational curriculum was strongly identified. Further, this type of curriculum is often highly popular with learners and useful for literacy practitioners.

We researched curriculum gaps and areas of high demand from learners and practitioners. As a result, CLO worked with four community-based LBS agencies, who have extensive experience in developing occupational curricula, and developed the following curricula:

1. **Clerical and Office Administration** (Kingston Literacy & Skills)
2. **Food Counter Attendants & Kitchen Helpers** (Connections Adult Learning)
3. **Health Care Preparation** (Brant Skills Centre)
4. **Retail** (Sudbury Vocational Resource Centre, Educational and Workplace Training Program)

These curricula are now freely available on CLO's website at:
www.communityliteracyofontario.ca/resources/publications/#Curriculum

Our curriculum development team members are excited to have this opportunity to support adult learners and LBS programs! We sincerely hope that these curricula are helpful to you in the important work you do.



ACKNOWLEDGEMENTS

ABOUT COMMUNITY LITERACY OF ONTARIO

Community Literacy of Ontario (CLO) is a provincial literacy network of 100 community-based literacy agencies located in communities large and small across Ontario. You can learn about CLO and access our amazing resources at: www.communityliteracyofontario.ca/.



ABOUT KINGSTON LITERACY & SKILLS

Kingston Literacy & Skills (KL&S) is a non-profit community organization with offices in Kingston and Napanee. With professional, knowledgeable staff and dedicated volunteers, KL&S delivers literacy upgrading and workforce preparation programming to adults and families in Kingston and surrounding communities.

Kingston Literacy & Skills has extensive experience in developing and delivering occupational curriculum to adult learners.



THANK YOU TO LITERACY LINK EASTERN ONTARIO

Community Literacy of Ontario is honoured to express its deep thanks to Literacy Link Eastern Ontario (LLEO) for allowing its "Clerical" curriculum to be revised, adapted and updated as part of CLO's curriculum project.

We are immensely grateful to Doug Noyes, LLEO's Executive Director, for his strong support. Literacy Link Eastern Ontario has in-depth experience with creating occupational curricula and is considered a strong leader in this area.

Over the past years, LLEO has been involved in developing occupation-specific curricula for adult learners. In fact, Literacy Link Eastern Ontario has developed over 18 different occupational curriculum. As a network and a region, LLEO is proud to have developed valuable curriculum resources for LBS learners across the province.





Clerical & Office Administration Practitioner Guide MODULE 1 – ABOUT THE CURRICULUM

CURRICULUM OVERVIEW

NOTE TO INSTRUCTORS: THE PRACTITIONER GUIDE

We have created a *Practitioner Guide* for the **Clerical and Office Administration Learner Modules**. The *Practitioner Guide* include responses to specific questions, extended activities and lesson suggestions. The *Practitioner Guide* also contains links to suggested OALCF competencies and milestones.

ABOUT THIS COURSE

This class will start on _____

This class will run on _____

Your instructor will be _____

WHAT IS THE PURPOSE OF THIS CURRICULUM?

Clerical and administrative jobs can be working as a receptionist or managing an entire office; office jobs are in high demand, and involve a variety of important skills. This curriculum will help improve your reading, writing, math and digital technology skills while learning more about working in an office environment. Clerical jobs are diverse and this curriculum aims to give you general information that will help you in a variety of roles. Clerical jobs could include a receptionist, an office assistant, a data entry clerk, a file clerk and many more. Each job will have different responsibilities, but the skills needed will be similar. For example, if you are working as a file clerk, you will need to learn about proper filing systems, so organization is very important. Whereas if you are working as a receptionist, you may be responsible for setting appointments and keeping track of information, so you will need strong organization and time management skills. Both jobs you will need to know how to use MS Office Suite programs, but perhaps in different ways. This course aims to give a general overview of the skills required for a variety of clerical and office positions.

CAN I PUT THIS CERTIFICATE ON MY RESUME?

This curriculum can help you prepare for an entry level position such as being a receptionist or a front desk clerk, but does not replace a diploma in Office Administration from a recognized college. However, you can put this certificate on your resume, and it may help your chances of getting an entry level position. It will show that you are interested in continuously learning and working in the clerical field.

WHO SHOULD TAKE THIS CURRICULUM?

This curriculum is appropriate for individuals who are interested in getting a career in Office Administration or as a clerk. It will help you learn about the job, and help you decide if this is the right career for you. For instance, if you like working in an office environment, enjoy working on computers, have a good attention to detail and like working with people then it may be a good career choice for you.

ARE MY SKILLS STRONG ENOUGH TO TAKE THIS COURSE?

Before this program started, you completed a skills assessment with a staff member. The purpose of that assessment was to identify your current skillset, and make sure that your skills are strong enough to begin this course. It is recommended that you have at least basic computer skills, such as turning on a computer, performing basic internet searches and know the basics certain programs such as MS Word. Throughout this curriculum you will also improve your computer, reading, writing and math skills.

SKILLS FOR SUCCESS

The Government of Canada identified specific everyday skills that are needed for employment, learning and living an independent life. **Skills for Success** are the skills that help you in our fast-changing world. Everyone benefits from having these skills. They help you to get a job, progress at your current job or maybe change jobs. These skills also help you become an active member of your community and succeed in learning.

There are nine **Skills for Success**:

1. Adaptability
2. Collaboration
3. Communication
4. Creativity & Innovation
5. Digital
6. Numeracy
7. Problem-Solving
8. Reading
9. Writing



What are Problem-Solving Skills?



Problem-Solving Skills are divided into:

- Identifying
- Analyzing
- Taking Action
- Making Decisions

Problem-Solving helps with addressing issues, monitoring success and learning from experience. For example, as a Clerical worker, you may have to use your problem-solving skills to determine an issue with the printer.

Skills for Success allow you to live independently to train for a job and to maintain employment. Over time, as your job changes within the industry, your **Skills for Success** will allow you to grow and change with it.

Throughout this training, we will indicate which Skills for Success you are building for each learning activity. On the following page, you will see the icons we will use to identify the targeted skills.

LEARNER RIGHTS AND RESPONSIBILITIES

- 9 You will go to all your classes and contact the instructor when you are unable to attend.
- 10 Full participation is expected in this course; however, you will not attend if you are ill or contagious (e.g., you have the flu) or if you are under the influence of drugs or alcohol.
- 11 You will maintain a calm and mature learning environment at all times.
- 12 You will be respectful to all staff, students and volunteers, as they will be to you.
- 13 You will respect the privacy of all staff, students and volunteers.
- 14 You will complete your work in a timely fashion.
- 15 You will receive feedback in a timely fashion.
- 16 You will let the instructor know if you have any issues with completing your work, including difficulty with the material, problems with equipment and issues with other learners.
- 17 You will respect the equipment and classroom space.

ADD YOUR OWN RIGHTS AND RESPONSIBILITIES:

By signing below, you and your instructor are making an agreement that you will both be responsible and accountable for your role in this training.

<i>Learner signature</i>	<i>Date</i>
<i>Instructor signature</i>	<i>Date</i>

GOAL PATH

There are five identified goal paths under the OALCF. For this training, the appropriate goal paths for learners would be:

1. Employment
2. Postsecondary

OALCF – SUGGESTED MILESTONES

OALCF-approved milestones have been suggested for each module. This will help you in building individual learner plans for each participant. It is not required to use all milestones that have been suggested. Using your judgement, determine which skills are in need of development for each learner, and incorporate the appropriate milestones for their training.

	COMPETENCY	MILESTONE	DESCRIPTION
MODULE 2	E.1	57	Clients examine their own goals, strengths and learning.
MODULE 3	B3.2b	30	Create a simple table and sort/organize information
	B2.1	18	Write a note to a colleague
	Learning Activity		Create a timesheet in Excel and use formulas for calculations
	D.2	225	Find an online image, copy/paste it into a word document and print
MODULE 4	B1.1	15	Give clear and simple directions
	B1.1	210	Listen to and transmit a telephone message
	Learning Activity (Optional)		Practice communication skills using VR/BodySwaps
MODULE 5	A3	14	Extract information from a video
MODULE 6	A1	1	Reading communication and responding to questions about the content
	B2	18	Write an email to the employer expressing thanks
	D2	227	Use email components
	D1	54	Logging into an account
MODULE 7	C4.1	48	Find information on a data chart
	C2.2	42	Make calculations using time
	C1.1 or C1.2	37 or 38	Compare costs and make calculations
MODULE 8	B3.2	29	Entries into a somewhat complex form
	B2.2	21, 22 or 23	Write an email to request information
MODULE 9	A2.1	9	Enroll in a course

CULMINATING TASK

Upon completion of this course, administer the culminating task to demonstrate their collective learning.

Learners on an Employment Goal Path can complete:

- ❑ 2022 Office Administrative Assistant culminating task.

Learners on a Postsecondary Goal Path can complete:

- A. 2023 Preparing for Postsecondary culminating task
- B. 2022 Postsecondary Admissions

Culminating tasks can be found online at the OALCF Repository:

<https://oalcf-repository.ca/en>

When you finish:

Before you leave, you will discuss next steps with your instructor. Your instructor will help guide you to the most appropriate next step, such as an employment service agency, further training and more.

After you leave, someone from your school will be in touch with you at 3, 6 and 12 months to check in.



VOCABULARY

In each module, you will learn and practice new words. Please write the new vocabulary here after each module.

Module 2

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.

Module 3

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.

Module 4

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.

Module 5

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.

Module 6

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.

Module 7

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.

Module 8

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.

Other Hard Vocabulary

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.



**Clerical & Office Administration
Practitioner Guide
MODULE 2 – ESSENTIAL SKILLS**

MODULE 2: OALCF – SUGGESTED MILESTONES

COMPETENCY	MILESTONE	DESCRIPTION
E.1	57	Clients examine their own goals, strengths and learning.

LEARNING ACTIVITY 2.1a |

Create a sentence using each of the vocabulary words below:

Assistant
Technology
Responsible
Irresponsible
Decisions
Essential
Productive
Transferable

Answers will vary. When reviewing, look for:

1. **Correct spelling**
2. **Proper grammar structure**
3. **Readability**
4. **Proper usage of the word**










LEARNING ACTIVITY 2.1b |

Use the vocabulary above to complete the following sentences.

- I hope to work as an administrative assistant.
- We could all be a little more responsible/productive at work.
- Technology has changed a lot in the past 10 years.
- Transferable skills are essential skills that we use every day.
- Some decisions are hard to make.
- Your employer expects you to be a productive/responsible person.
- People who are irresponsible have trouble keeping a job.










LEARNING ACTIVITY 2.2a |

List the 9 Skills for Success by matching them to their icon:

ICON	SKILLS FOR SUCCESS	ICON	SKILLS FOR SUCCESS
	Adaptability		Numeracy
	Collaboration		Problem-Solving
	Communication		Reading
	Creativity & Innovation		Writing
	Digital		

LEARNING ACTIVITY 2.2b |

Using your own words, how would you define each of the Skills for Success in one sentence?

SKILLS FOR SUCCESS	AT HOME	AT WORK
	Answers will vary. When reviewing, check for: A. Spelling B. Proper grammar C. Understanding/context D. Learner can correctly apply the skill to a home task	Answers will vary. When reviewing, check for: E. Spelling F. Proper grammar G. Understanding/context H. Learner can correctly apply the skill to a work task
		
		
		
		
		
		
		
		










LEARNING ACTIVITY 2.3a |

List at three Skills for Success skills you've used already today with a brief example of how below.

SKILLS FOR SUCCESS	EXAMPLE OF HOW I USED IT TODAY
	Answers will vary based on individual experiences. Review and make sure the learner is understanding the concept of the essential skills listed.

LEARNING ACTIVITY 2.3b |

← MILESTONE 57

MY RATING 1 – 9 (1 being strongest, 9 being weakest)	SKILLS FOR SUCCESS
Answers will vary	 Adaptability
	 Collaboration
	 Communication
	 Creativity and Innovation
	 Digital
	 Numeracy
	 Problem-Solving
	 Reading
	 Writing

Which three skills do you see as your strongest? Why?

STRONGEST SKILLS	WHY
Answers will vary	

Which skills do you see as your weakest? Why?

WEAKEST SKILLS	WHY
Answers will vary	

LEARNING ACTIVITY 2.4 |

Here is a link that will take you to a Skills for Success Snapshot self-assessment. Make sure to read all the steps below before you start.

Steps to the Self-Assessment Snapshot:

- 3 Click on this link: <https://implus.ca/snapshot/>
- 4 Select “**Start Your Snapshot**”
- 5 A new window will open, read the instructions on how to rate each skill; Select “**Next**”
- 6 Make sure all 9 Skills for Success are checked, and click “**Let’s Begin**”

NOTE TO PRACTITIONERS: Because the learner is only starting this course, have them rate themselves in the “*Before*” column.

Assist learners with printing the summary page. Reflect on this activity at the end of Module 9 and have them repeat the assessment by filling in the “*After*” column.

LEARNING ACTIVITY 2.5 |

Answers may vary based on the examples selected from the Essential Skills profile. Listed below are some examples that may be used.

ESSENTIAL SKILL	HOW YOU WOULD USE IT	LEVEL NEEDED
Reading	<i>Read memos, policies and procedures</i>	1
	<i>Proofread letters, reports and presentations that are being sent to clients</i>	2
Document Use	Look up phone numbers and addresses in phone books and office directories	1
	Complete a variety of forms, such as supply order forms, courier waybills, bill payments, invoices and fax forms	2
Writing	Write emails/messages to supervisors and coworkers	1
	Write reports to justify actions take, such as the reasons for calling in security when there was a commotion at the front desk	2
Numeracy	Handle petty cash in the office and pay bills (such as rent or utilities)	1
	Prepare invoices and billing reports for clients	2
Oral Communication	Receive instructions from supervisors and discuss tasks and priorities with them	2
	Talk with contractors and suppliers to discuss discrepancies in invoices or to order supplies	1
Thinking	Notice an error in a document	1
	Encounter malfunctioning computers or photocopiers; troubleshoot the issue and/or call a technician to repair	2
Digital Technology	Type reports, memos and letters	2
	Produce spreadsheets/tables using software (i.e. Excel, or Lotus)	3

LEARNING ACTIVITY 2.6 |

Theo just started a new job at **Money Financial** as an Administrative Assistant. Below are some situations that his supervisor noted on his first day. Identify which Skill for Success Theo needs to improve upon to become a more productive and responsible employee.

SITUATION	SKILL FOR SUCCESS
Theo was 20 minutes late for work. He took the 7:45 local bus instead of the 7:40 express.	READING or NUMERACY (time management)
Theo had trouble finding his new security pass when he entered the building, and security had to call his supervisor before he could start.	PROBLEM SOLVING
Theo was supposed to answer the phone all morning. He did but struggled to transfer the calls through the building.	DIGITAL
In the afternoon, Theo was supposed to learn the filing system, but he struggled to keep up with the training.	DIGITAL
At the end of the day, Theo's supervisor gave him a bunch of forms to fill out so that he can get a new security pass. Theo had trouble responding to the forms because they seemed very complicated to him.	READING or WRITING

LEARNING ACTIVITY 2.7 |

Question: If you were Theo's supervisor, how could you help be more productive and responsible in his job?

Example: Theo seems overwhelmed and disorganized. If I were his supervisor, I would slow down his training and get him to focus on one responsibility at a time until he had mastered it.

LEARNING ACTIVITY 2.8 |

All answers will vary based on personal experiences.



**Clerical & Office Administration
Practitioner Guide
MODULE 3 – COMPUTERS AND
TECHNOLOGY**

MODULE 3: OALCF – SUGGESTED MILESTONES

COMPETENCY	MILESTONE	DESCRIPTION
B3.2b	30	Create a simple table and sort/organize information
B2.1	18	Write a note to a colleague
Learning Activity		Create a timesheet in Excel and use formulas for calculations
D.2	225	Find an online image, copy/paste it into a word document and print

LEARNING ACTIVITY 3.1a |

MATCH THE SYNONYMS

- Compatible → 6. Well-Suited
- Organize → 8. Arrange
- Available → 2. Open, obtainable
- Comfortable → 7. Confident
- Function → 5. Job, purpose
- Complex → 3. Intricate
- Flexible → 1. Adaptable
- Proceed → 4. Advance

LEARNING ACTIVITY 3.1b |

Use the vocabulary above to complete the following sentences.

- A. A good manager always keeps their employees **organized** and on task.
- B. Not all apps are **compatible** with Apple and Android devices.
- C. A good manager is **flexible** with their employees' schedules.
- D. A computer program usually has several different **functions** it can perform.
- E. Some computer programs are **complex** and difficult to use.
- F. Some computers do not **function** the way they should.
- G. If the work is too hard, it might be difficult to **proceed** to the next task.
- H. A manager is always **available** to speak with his or her employees.

LEARNING ACTIVITY 3.2a |

Before we explore your comfort level with computers, let's look at a skill that is very important for clerical and administrative work: keyboarding.

Answers will vary.

KEYBOARDING		
Can you...	YES	NO
Find the home row quickly and easily?		
Find the question mark, period, comma?		
Use the number pad?		
Make capital letters?		
Use special characters, such as \$, &, #, *, and @?		
Format text by using the <u>underline</u> , bold and <i>italics</i> feature?		
Type 25 words per minute (wpm) without looking at the keyboard?		

LEARNING ACTIVITY 3.2b |

Keyboarding Progress Tracking

Have learners spend 15 mins at the start of each class to practice their typing skills. Learners can track their progress in the chart provided.

KEYBOARDING PROGRESS TRACKING		
DATE (dd/mm/yyyy)	LESSON #	SPEED AT PLACEMENT TEST (words per minute/wpm)

LEARNING ACTIVITY 3.3a |

*Answers will vary.

LEARNING ACTIVITY 3.3b |

Computer self-assessment

1. Learners will need to check **YES** for anything they **CAN** do independently, without help.
2. Learners will check **NO** for anything they **CANNOT** do on their own or can't remember how

Practitioner Note: Review the learners' tallies after they complete the self-assessment. Learners who score 30+ will have no issues with the activities in this course. Learners who score between 20 – 30 would be at the instructor's discretion based on their areas of weakness. Learners who score less than 20 should consider participating in a computer upgrading program with LBS before committing to the Office Admin course as they need more intervention and may not be successful with many of the activities.

LEARNING ACTIVITY 3.4 |

Learners are encouraged to review their self-assessment and list the digital skills they need to improve upon. In the second table, learners need to practice their critical thinking skills by prioritizing which items need to be addressed first.

LEARNING ACTIVITY 3.5 |

Learners are asked to use MS Word to duplicate two notices. Ahead of this activity, review some of the necessary functions needed for MS Word, such as:

1. Formatting text (font, size, etc.)
2. Inserting a text box
3. Inserting/formatting a table

LEARNING ACTIVITY 3.6 |



Answers may vary, but some examples have been provided.

APP	PRICE	3 USEFUL FUNCTIONS		OTHER NOTES
Canva	Starting at \$100/year	1	Offers professional templates	
		2	Create simple but effective presentations	
		3	Photo editing features	
ChatGPT	ChatGPT is free, but Chat GPT Plus costs \$20/month	1	Summarize and/or paraphrase text	
		2	Translate	
		3	Answer questions	
MS Teams	\$5.40/month	1	Video conferencing calls	
		2	File sharing	
		3	Scheduling	

LEARNING ACTIVITY 3.7 |



Responses will vary. Make sure learner is:

1. Fulfilling all aspects of the task
2. Uses proper sentence structure, grammar and tone
3. Provides a suitable app suggestion

LEARNING ACTIVITY 3.8a |



Which level of digital communications do you need for most clerical work?

Most of the digital communications tasks listed on the Essential Skills profile for Administrative Clerk are Level 2. There is a fair number of tasks that are a Level 1, but to be more effective in the role, Level 2 is the most appropriate.

LEARNING ACTIVITY 3.8b |



Learners should select one from each column:

Digital Technology	Continuous Learning
<ul style="list-style-type: none">• Use databases to enter and retrieve data, such as registrations, sales and costs• Use bookkeeping, billing and accounting software to record financial transactions• Use calculators and personal digital assistant (PDA) devices to complete numeracy-related tasks• Use office equipment, such as printers, scanners, fax machines, copiers, binding machines and postage meters, to perform a variety of clerical tasks• Operate point-of-sale equipment, such as electronic cash registers, bar scanners and touch- screens to complete tasks• Use word processing programs to enter data into forms and write letters and memos• Use specialized database software to complete and electronically submit claim forms, registrations and applications• Use contact management software to schedule appointments, generate automated reminders and produce mailing lists• Use graphics software to create slide presentations with imported images• Use spreadsheets to track registrations, times and expenditures• Use intranets and email applications to exchange information and documents with co-workers, customers, suppliers and government agencies• Use browsers to access forms and guidelines on government websites• Use browsers and search engines to locate product information from suppliers, such as costs and specifications• Use the Internet to access training courses and seminars offered by suppliers, employers and trainers• Use specialized Internet applications to send medical records, x-rays and referral information to insurers and medical practitioners• Use bookkeeping, billing and accounting software to generate monthly financial statements	<p>For example, they</p> <ol style="list-style-type: none">1. Receive training in the use of new software as it is added to the work environment2. Take training offered by their employers in areas such as time management and specific job skill upgrading

LEARNING ACTIVITY 3.9 |



LEARNING ACTIVITY

Using basic Excel formulas, answer the following:

3 How many regular hours did Fatima work? **48 hours**


4 How much did she make on her regular hours? **\$1,200.00**

5 How many overtime hours did Fatima work? **3 hours**

6 How much did she make on her overtime hours? **\$90.00**

7 How many total hours did Fatima work? **67 hours**

8 How much did she make in total (before taxes and other deductions)? **\$1,482.00**

WEEKLY EMPLOYEE TIMESHEET							
Employee: Samson Cowell			Week: 05 May 2025				
DATE	LOG IN	LOG OUT	REGULAR HOURS	OVERTIME	ON LEAVE	VACATION	TOTAL HOURS
05 May 2025	8:00 AM	5:00 PM	8	0	0	0	8
06 May 2025	8:00 AM	5:00 PM	8	0	0	0	8
07 May 2025	8:00 AM	5:00 PM	8	0	0	0	8
08 May 2025	8:00 AM	7:00 PM	8	2	0	0	10
09 May 2025	Vacation	Vacation	0	0	0	8	8
10 May 2025	Vacation	Vacation	0	0	0	8	8
11 May 2025	8:00 AM	6:00 PM	8	1	0	0	9
12 May 2025	8:00 AM	5:00 PM	8	0	0	0	8
TOTAL HOURS			48	3	0	16	67
RATE PER HOUR			\$25.00	\$30.00	\$25.00	\$25.00	
TOTAL PAY			\$1,200.00	\$90.00	\$0.00	\$192.00	\$1,482.00

LEARNING ACTIVITY 3.10a |



Answers will vary.

LEARNING ACTIVITY 3.10b |



MILESTONE 225

Products will vary.

SELF-ASSESSMENT

Learners will complete the self-assessment on their own and review their responses with you. If progress is tracking well, move ahead to the next module.



**Clerical & Office Administration
Practitioner Guide
MODULE 4 – COMMUNICATION SKILLS -
PHONE**

MODULE 4: OALCF – SUGGESTED MILESTONES

COMPETENCY	MILESTONE	DESCRIPTION
B1.1	15	Give clear and simple directions
B1.1	210	Listen to and transmit a telephone message
Learning Activity (Optional)		Practice communication skills using VR/BodySwaps

LEARNING ACTIVITY 4.1a |

MATCH THE SYNONYMS

- | | | |
|-----------------|---|----------------------|
| 1. Tactics | → | 6. Strategy |
| 2. Outcome | → | 4. Result |
| 3. Organization | → | 2. Group or company |
| 4. Etiquette | → | 7. Manners |
| 5. Complaint | → | 3. Objection/problem |
| 6. Solution | → | 4. Strategy |
| 7. Interaction | → | 1. Dealings |
| 8. Barrier | → | 8. Obstacle/Problem |

LEARNING ACTIVITY 4.1b |

Write a sentence using each of the vocabulary words below:

TACTICS	Answers will vary. When reviewing, check for: I. Spelling J. Proper grammar K. Understanding/context L. Learner can correctly apply the skill to a home task
OUTCOME	
ORGANIZATION	
ETIQUETTE	
COMPLAINT	
SOLUTION	
INTERACTION	
BARRIER	

Before moving into role-playing activities where the learner must use customer service skills, discuss the importance of being able to communicate clearly. Assess learners on their ability to provide instructions and directions. You may need to prepare a short lesson ahead of time but can follow up by administering **Milestone 15**.



LEARNING ACTIVITY 4.2a |

Role-playing activity. Ensure each learner has a partner, as the instructor, you may have to step in and be a partner depending on the size of your group. Gauge the tone learners are using and ensure they can navigate the conversation fluidly.

LEARNING ACTIVITY 4.2b |

- Which soft skills rule(s) of phone etiquette did the receptionist break?
 - A. *Identification – the receptionist did not indicate the name of the business when answering the phone*
 - B. *Be tactful – the receptionist is not speaking respectfully to the caller and is not providing adequate information*
- What impression do you think the customer had on Wealth Watchers business at the end of the phone call?
 - A. *The caller may have found the interaction unprofessional.*
 - B. *The caller may not show up for their appointment based on the interaction.*
- **Answers may vary. Some examples:**
 - A. *Good afternoon, Wealth Watchers, <name> speaking, how may I help you?*
 - B. *Yes, this is Wealth Watchers. We are an accounting firm. How may I help you?*
 - C. *Yes, we do help clients with a variety of tax-related issues. Would you like to schedule an appointment with one of our accountants?*
 - D. *Sayed is an excellent accountant. He has an opening tomorrow at 9:30am. Does that work with you? If not, we can look at scheduling you with another accountant later in the week.*
 - E. *Please bring your tax documents and government identification. Is there anything else I can help you with today?*
 - F. *Wonderful, we will see you tomorrow at 9:30am. Have a great day!*

LEARNING ACTIVITY 4.2c |

Answers may vary. Make sure the learner uses the rules of phone etiquette and can respond professionally with empathy.

Example: *I'm so sorry for the inconvenience. Are you able to provide me with your order number so that I can investigate this further? It looks like the item was held up at the border but is on its way. Unfortunately, due to the delays at the border, it looks like it won't make it to you by tomorrow. Would you like me to refund your order?*

LEARNING ACTIVITY 4.3 |



Learners are asked to read through the two scenarios and schedule a time with the instructor to role-play ONE of the following phone call scenarios. The instructor is checking to see if the learner has remembered the soft skills we have covered this far in the training, and to make note of how their customer service was received during the role-play.

SCENARIO A:		The Krusty Krab Head Office
<i>Situation</i>	The customer is calling to complain about their experience at a local Krusty Krab. The caller says that service was slow, the staff was rude, and the food was overcooked.	
<i>Barrier</i>	The customer has poor cell reception, and the call keeps cutting out	
<i>Suggestion to Offer</i>		
<i>Desired Outcome</i>	Customer is satisfied by the end of the conversation and plans to revisit Krusty Krab locations in the future.	
INSTRUCTORS NOTES		
<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>		
SCENARIO B:		Degrassi High
<i>Situation</i>	A parent is calling the school to complain about recurring issues that are happening at school between their child and another student. They have tried discussing their concerns with the teacher, but the issues keep happening, and they are frustrated and concerned. The parent would like to meet with the principal as soon as possible.	
<i>Barrier</i>	The principal is away at a conference for the rest of the week.	
<i>Suggestion to Offer</i>	Schedule an appointment with the parents to meet with the principal as soon as possible.	
<i>Desired Outcome</i>	The parent feels respected and validated. They have an appointment scheduled at the principal's earliest convenience.	
INSTRUCTORS NOTES		
<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>		

LEARNING ACTIVITY 4.4a |

Learners have been given a list of possible decision-making situations that may happen at work. Learner is asked to propose a possible solution to each.

SKILL	POSSIBLE SOLUTION
<ol style="list-style-type: none"> 1. <i>Encounter delays due to low stock or resources</i> 2. <i>Encounter delays due to equipment faults</i> 3. <i>Encounter errors in administrative and financial records</i> 4. <i>Encounter delays due to incomplete records</i> 5. <i>Encounter inaccurate or incomplete forms</i> 6. <i>Encounter dissatisfied customers, co-workers</i> 7. <i>Receive inaccurate orders from supplies</i> 	<p>Example provided.</p> <p>Answers will vary. Review each solution the learner proposed and provide feedback about their responses.</p>

LEARNING ACTIVITY 4.4b |

MILESTONE 210

Similar to the previous activity, the learner has been given communication situations that are likely to happen at work. Learners have been asked how to respond to each situation.

SKILL	POSSIBLE RESPONSE
<ol style="list-style-type: none"> 1. <i>You have called a client to give them instructions to follow before their next appointment.</i> 2. <i>A supplier called to notify you that they are out of stock for an item you had ordered.</i> 3. <i>A client tried to call during lunch hour and left a message asking about their upcoming appointment</i> 4. <i>A coworker has come to you to complain about an error on their pay.</i> 5. <i>An unhappy customer has called to complain about an item they purchased and would like to return it.</i> 6. <i>Someone calls, but you are having a hard time understanding them because of the noise in the background.</i> 7. <i>A client hasn't shown up for their appointment yet. This is the second time they haven't shown up.</i> 	<p>Answers will vary. Review each response the learner offered and provide feedback about their communication approach.</p>

SELF-ASSESSMENT

Learners will complete the self-assessment on their own and review their responses with you. If progress is tracking well, move ahead to the next module.

ADDITIONAL ACTIVITIES

If your centre has access to VR headsets, consider having learners do appropriate modules using BodySwaps. Some modules that have been identified as helpful for this module are:

1. Active Listening
2. Clear Communications
3. Customer Service: Waiting at the Station
4. Customer Service: Travelling on the Train
5. Navigating Angry Conversations

Learners will receive a certificate of completion for each module completed. These can be counted as Learning Activities in their learner plan.



**Clerical & Office Administration
Practitioner Guide
MODULE 5 – COMMUNICATION SKILLS – IN
PERSON**

MODULE 5: OALCF – SUGGESTED MILESTONES

COMPETENCY	MILESTONE	DESCRIPTION
A3	14	Extract information from a video

LEARNING ACTIVITY 5.1a |

Learners have been given 8 difficult vocabulary words. In this writing activity, they must write a sentence using the two BUZZ words provided on the left. Answers will vary. Review sentences and make sure learners are using appropriate sentence structure, spelling and grammar.

LEARNING ACTIVITY 5.1b |

Learners must fill in the blanks using the vocabulary words.

ANSWER KEY:

- Using **humour** in the workplace is a nice way to get to know your coworkers.
- Naomi is a very **positive** employee. She is always smiling and friendly.
- Josef is not very organized. It is easy for him to get **distracted**.
- Our team worked very hard today! It was a very **productive** shift.
- Whenever he talks about his family, I get the **impression** that he is a good dad.
- When discussing something that is **private**, make sure no one else is around and that you are quiet.
- Emilio has an appointment with Human Resources. One of his coworkers was offended and completed that his jokes are not **appropriate** for the office.
- Amal is an excellent Administrative Assistant. We are **confident** that she will get promoted soon.

LEARNING ACTIVITY 5.2a |

The following questions ask for the learners to decide how they would respond, and then in the space below, explain their answers. Written answers will vary. The most appropriate responses are:

1 – D 2 – B 3 – C 4 – C

Remember boundaries! When we are at work, our jobs come first, not our friendships. Be polite and considerate of your coworkers, but don't let the friendships interfere with your responsibilities.

LEARNING ACTIVITY 5.2b |

Written expression. Learners have been asked to think of a time when they had a positive friendship at work. Reflecting on that relationship, they need to consider how it may have impacted on their job. This can be positive or negative. Answers will vary based on personal experience.

LEARNING ACTIVITY 5.3 |

Provided is a self-assessment to identify if you make a positive first impression. Learners will answer ALWAYS, SOMETIMES, or NEVER to each of the responses and tally up their answers. This can be opened for a discussion if the group is open to it. Discuss what makes a good impression, what bad habits some may have and solutions on how we can make necessary changes.

LEARNING ACTIVITY 5.4 |

Three scenarios have been provided. As a group, read the scenarios and use the “Think About This” question for discussion.

LEARNING ACTIVITY 5.5a |




Canada has always been multicultural, and now inclusion plays a pivotal role in all workplaces. It is important that people are aware of cultural differences, starting with how we greet one another. Learners have been provided a link to a YouTube Video “**Cultural Etiquette: How Greetings Differ Around the World.**” There is a place for learners to make notes in their books. Discuss the video as a group and then have learners complete Milestone 14.

<https://www.youtube.com/watch?v=lvH4Pq270Jk>

LEARNING ACTIVITY 5.5b |

Learners are asked to reflect on what they have learned so far by answering some questions. Written answers will vary.

LEARNING ACTIVITY 5.6 |

Learners are asked to read  some jokes and determine if they are appropriate or inappropriate for the workplace, and to explain their choice. Some answers may vary.

	FUNNY	NOT FUNNY
"I asked Lucy if I could leave work early the other day, and she said 'yes, if I made up the time.' I said, 'sure, it's twenty past fourteen!'"	X	
This joke is appropriate because it's silly using a play on words. While Lucy meant for the worker to make up the missed time another day, the worker is joking that they made up a time that does not exist.		
"Congrats to Allen for finishing that marathon – and we thought his fastest sprint was towards the lunchroom!"		X
Generally, it is not funny to make fun of a coworker. We are not given context as to Allen's appearance. If he is overweight, then this joke could be viewed as harassment.		
"Classic Omar! He forgot to submit his timesheet – I swear he has dementia."		X
Again, it is not funny to make fun of a worker. Omar may be forgetful, and implying he has dementia because of his forgetfulness is not kind. There could be contributing factors as to why Omar is forgetful. Maybe he has a lot going on in his life and is doing his best to keep up with everything, maybe he suffered an injury that makes it hard for him to remember small tasks, or maybe he does have a health issue. It is never appropriate to make comments like this at work.		
"I'm glad I wore my loose pants today – I see Roxanne brought in her delicious chocolate chip cookies for staff!"	X	
This is considered appropriate because the joke is on themselves. It is a way of complimenting Roxanne's delicious cookies by saying that you won't be able to resist having only one.		
"Lydia was just showing me pictures of her new puppy. She knows that I like big mutts, and I cannot lie."	X	
This is appropriate because the speaker is not being negative towards Lydia. They are simply stating that she has shared photos of her new puppy and then makes a play on words using a popular song title.		
"Magda is in a wheelchair while she heals from surgery. I bet she will win Musical Chairs at the company holiday party."		X
This is inappropriate because the joke is that Magda will be sitting in a wheelchair and therefore will have the advantage in the game Musical Chairs. Because Magda is healing from surgery, this could potentially be viewed as work-appropriate depending on the relationship with Magda and her comfortability with being teased about her condition. But generally, avoid jokes that target a coworker in a negative way.		
"I heard that Stefan left his wife for a woman he met at the gym. I wonder if that relationship will 'work out'."		X
This is considered gossip because the speaker 'heard' that Stefan's marriage ended and is not appropriate for the workplace.		

LEARNING ACTIVITY 5.7 |



Learners have been given a quiz to determine how easily they can stay focused in the workplace.

DO YOU...	Always	Sometimes	Never
... have trouble concentrating when there is a lot of noise?			
... join in every conversation?			
... chat with everyone who walks by?			
... check your social media feed frequently?			
... have trouble doing one task at a time?			
... have your email open constantly?			
... make personal phone calls at work?			

If learners answered “always” to three or more of these questions, they likely need to work on your concentration skills. The good news is concentration and focus are things that you can work on and improve with time and practice. Depending upon how the learners score, encourage them to review and follow the strategies for staying focused and organized at work that were shared in the learner modules.

LEARNING ACTIVITY 5.8 |



This activity has learners working on their multi-tasking skills. They will need to use the timer app on their phones/smart devices. If they do not have one, then you can set up a timer for the entire group.

First, learners need to time themselves writing the sentences provided, then the numbers 1 to 20 on the line below.

Second, learners will time themselves writing one letter from the sentence on one line, then one number from the number line on the line below. They will continue going back and forth until they are finished.

Once finished, learners will reflect on which time was faster and why. It is easier to complete a task when we are focused on one thing at a time. The second time will be significantly longer than the first one, because the learner has to juggle doing two things at the same time. Mistakes likely happened, which slowed up their progress.

SELF-ASSESSMENT

Learners will complete the self-assessment on their own and review their responses with you. If progress is tracking well, move ahead to the next module.

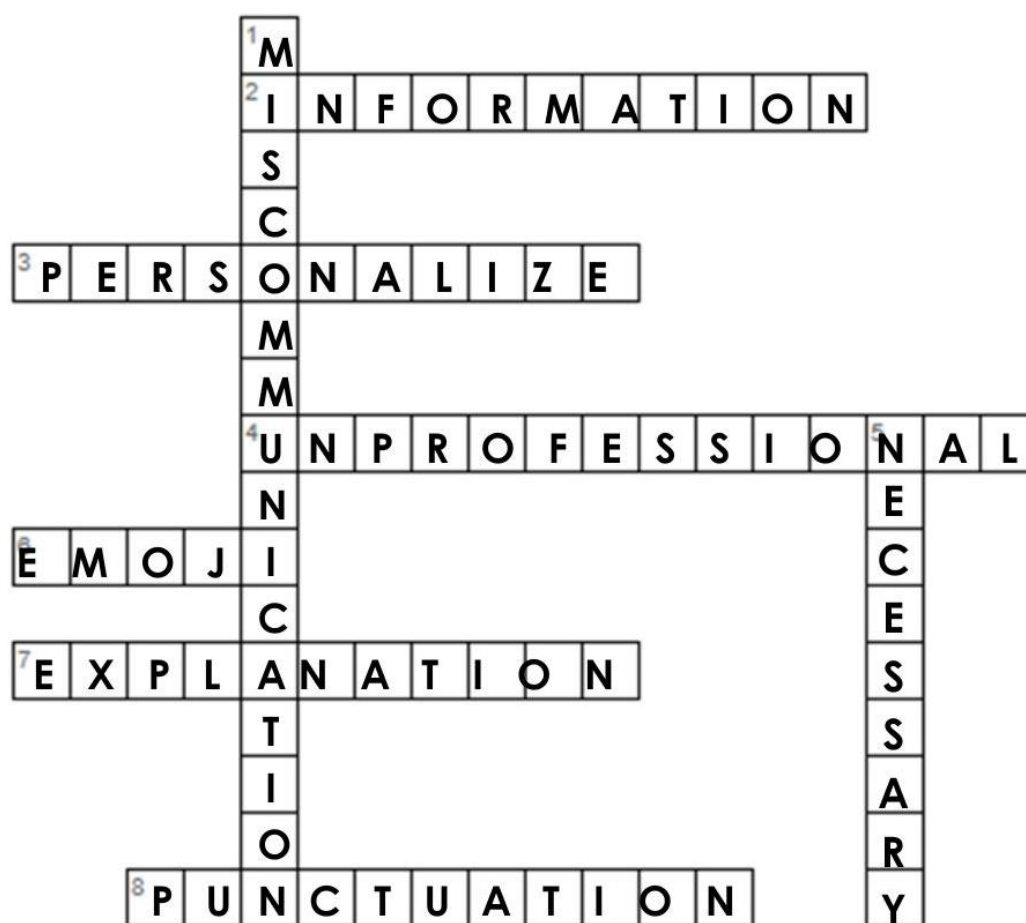


**Clerical & Office Administration
Practitioner Guide
MODULE 6 – EMAIL**

MODULE 5: OALCF – SUGGESTED MILESTONES

COMPETENCY	MILESTONE	DESCRIPTION
A1	1	Reading communication and responding to questions about the content
B2	18	Write an email to the employer expressing thanks
D2	227	Use email components
D1	54	Logging into an account

LEARNING ACTIVITY 6.1a |



LEARNING ACTIVITY 6.1b |

Learners were asked to read an email and fill in the blanks with the correct vocabulary words.

NEW MESSAGE

To: ehannon@dundermifflin.com

Subject: Inappropriate Email Communication

Good afternoon, Erin




It is necessary that I send this email in writing to avoid any miscommunication. To offer an explanation, we have received a complaint from a client that your emails are unprofessional. You did not personalize the email, and the client was not clear if the information was for him. It was also mentioned that your repeated use of emojis and improper punctuation made the client feel you were not serious.



Please be more aware of how your written communication is being received by clients. Should we get more complaints, we will have to look into disciplinary measures.

Sincerely,

Toby Flenderson
Human Resources

SEND

LEARNING ACTIVITY 6.2 |

MILESTONE 1

Reviewing the sample email, learners were to identify where certain functions can be found and how to navigate reading an email. Questions from the sample email were provided:

- The email is being sent to spetrillo@shadypineseo.com
- bdevereaux@shadypinescoo.com was being BCC'd
- The font being used is called Aptos
- The size of the font is 12
- Based on the information provided, the tour seems to be for the upper management of Shady Pines.
 - CEO = Chief Executive Officer
 - CFO = Chief Financial Officer
 - COO = Chief Operating Officer

LEARNING ACTIVITY 6.3 |



MILESTONE 18

Learners were provided with an email to read over, and questions to answer.

1. The email is to allhrstaff@fakemail.com
2. C.C. McDonald's job is Human Resources
3. Examples of inappropriate information shared:
 - Oversharing about their illness
 - Asking if Amanda Richardson was off for 12 days or 21 days
 - Stating how much sick time Amanda was entitled to
 - That she would need to repay that time or get a doctor's note

The comment “who's off that much, anyway?!” is not considered information, as it is a statement based on an opinion – which also should not be shared.

4. Answers will vary. Ensure learners include the pertinent pieces of information but also keeping their emails short and to the point. Here's an example:

Good morning, everyone.

Thank you for covering for me while I was off. I have returned to the office, and I am trying to catch up on my workload. I would like to set up a time to meet with whomever was overseeing the Amanda Richardson file as I have some questions that I need to address. If you were working on this file, please privately respond to me and we can work out a time to meet.

Regards,

**C.C McDonald
Human Resources
Group One Corp.
111 St. Lawrence Blvd., Kingston ON
613-547-####
ccmdonald@fakemail.ca
www.fakewebsite.ca**

LEARNING ACTIVITY 6.4 |



MILESTONE 227

Learners have been asked to email their instructor. The email must:

- Use full sentences and appropriate tone
- Minimal spelling/grammar errors
- Includes a subject line identifying what the email is about
- Include a brief explanation about why they missed class
- Thank the instructor for understanding
- Set up a time to catch up on their missed class

LEARNING ACTIVITY 6.5 |

Learners are asked to review the email addresses below and identify which are appropriate or inappropriate for work and explain their answer.

EMAIL ADDRESS	APPROPRIATE VS. INAPPROPRIATE	WHY OR WHY NOT?
<u>happylover@.....com</u>	Inappropriate	Flirty language
<u>Singh f.t!22.4-5@.....com</u>	Inappropriate	Too many characters, it's confusing to read and easy to mix up
<u>SinghF.12@.....com</u>	Appropriate	Simple adaptation of name
<u>bubblegumgirl@.....com</u>	Inappropriate	Too informal
<u>Amelia.j.Watson2@.....com</u>	Appropriate	Simple adaptation of name
<u>NDP_supporter@.....com</u>	In appropriate	Political
<u>Tories for the win@.....com</u>	In appropriate	Political
YOUR EMAIL ADDRESS _____		

LEARNING ACTIVITY 6.6 |

Learners were provided with a list of written communication and digital tasks that are common job descriptions for office workers. In this activity, learners are going to use their critical thinking skills and determine how the skills connect by completing the chart.

WRITTEN COMMUNICATION	DIGITAL
Use written information to share information	Use word processing programs to create letters to clients.
Collect information from staff regarding their hours for timesheets	Use payroll software to track staff hours and submit timesheets.
Create financial reports that highlight spending.	Use spreadsheets/data entry software and functions to track spending
Schedule client appointments based on staff availability.	Use digital organizers/calendars to schedule and book appointments
Research and collect information that needs to be presented to staff.	Use software to create a presentation for an upcoming meeting.

SELF-ASSESSMENT

Learners will complete the self-assessment on their own and review their responses with you. If progress is tracking well, move ahead to the next module.

ADDITIONAL ACTIVITY


MILESTONE 54

It is not uncommon for people to have two different email addresses: one for work or other professional communications, and one for personal email. Some of our learners may not have an email address, or perhaps they have identified throughout this module that their email address is not appropriate for work.

Creating an email account can be included as an optional activity for those who need it. To set up an email account, first you need to choose the email server you want. Don't just go with the one you've always used. Look around. Some email accounts like Gmail and Outlook offer other services such as word processing programs and more. Some email accounts are free or low cost, while others are expensive.

Have learners research different email options and pick the one that is best suited for them. They can fill out this comparison chart to help them keep their information organized.

EMAIL SERVER	POSITIVE FEATURES	NEGATIVE FEATURES
Gmail	Free, easy to use, connects with Google Drive, etc.	Organizing emails can be confusing, lots of junk emails coming in, etc.

Once they have selected the email server they want to use, they can start the steps to creating an account.

GCF Learn Free offers modules on how to set up an email account. They are clearly laid out and user-friendly: <https://edu.gcfglobal.org/en/topics/emailbasics/>.



**Clerical & Office Administration
Practitioner Guide
MODULE 7 – NUMERACY AT WORK**

MODULE 7: OALCF – SUGGESTED MILESTONES

COMPETENCY	MILESTONE	DESCRIPTION
C4.1	48	Find information on a data chart
C2.2	42	Make calculations using time
C1.1 or C1.2	37 or 38	Compare costs and make calculations

LEARNING ACTIVITY 7.1 |

Learners are encouraged to think about their own math skills by completing a self-assessment of numeracy they feel confident in doing. If a learner discloses that numeracy is an issue, GCF Global has online courses that the learner can sign up for and work on, on their own time.

<https://edu.gcfglobal.org/en/subjects/reading-and-math/>.

• Read a traditional analog clock	• Read a bus schedule	• Read a map
• Make change	• Add multiple integers and carryover	• Subtract multiple integers and borrow
• Multiply	• Divide	• Understand decimals
• Convert numbers to fractions	• Convert fractions to decimals	• Estimate costs
• Use a spreadsheet to track purchases	• Read charts and graphs and understand data	• Understand and use formulas to use in spreadsheets

LEARNING ACTIVITY 7.2 |

Learners are asked to match numeracy skills with daily activities.

Addition	Calculating the amount of time a week you spend at the gym
Subtraction	Calculating how much money you have left in your bank account after paying bills
Multiplication	Calculating how many people in total ride the city buses each week
Division	Calculating how much flour you need to double a recipe
Percentages	Calculating how much tax you will have to pay on a gym membership
Fractions	Calculating how much money each person gets if 6 people won a shared lottery

LEARNING ACTIVITY 7.3 |



Learners are asked to think about the math skills they use daily and add to the chart below. Answers will vary.

	DAILY ACTIVITIES	TYPES OF MATH
1	Calculating how much money was spent shopping	Addition
2	Cutting a recipe in half	Division
3		
4		
5		
6		
7		
8		
9		
10		

LEARNING ACTIVITY 7.4 |



Consider everything you have learned to this point. There are a lot of skills needed to work in an office. Thinking about the different skills and responsibilities for clerical work, think of two examples of money, measurement and data are used.

MONEY	Handling cash
	Tracking invoices
MEASUREMENT	Weighing postage
	Preparing complex documents
DATA	Preparing monthly reports
	Reading reports

LEARNING ACTIVITY 7.5a |



MILESTONE 48

You were asked to change the monthly swimming schedule. You want to add an extra hour to the popular "Seniors Swim" one day a week. Read the survey and answer the questions below.

DAY	AMOUNT OF SENIORS SWIMMING 7:00 – 8:00 AM	AMOUNT OF SENIORS SWIMMING 4:00 – 6:00 PM
Monday	87	52
Tuesday	77	56
Wednesday	45	61
Thursday	56	65
Friday	36	46
Saturday	91	62
Sunday	66	36

Answers:

- Senior swim is very popular
- 458
- 378
- 836
- Friday morning
- Saturday
- 418
- There are a few options, but the learner should give rational. Saturday morning is the best option.
- Learners will enter the times from the calendar into the schedule on the next page. They must remember that to add the extra hour per week, they will have to decide which program to shift.

LEARNING ACTIVITY 7.5b |



Learners have been given a swim schedule for an aquatic centre:

	SWIM PROGRAM	DAYS RUNNING	SCHEDULED TIMES
A	Seniors Swim	M, T, W, Th, F, S, Su	7:00 – 8:00 am; 4:00 – 6:00 pm
B	Seniors Swim	1 extra hour per week	
C	Free Swim	M, T, W, Th, F, S, Su	8:00 – 9:00 am
D	Parent & Tot Swim	M, T, W, Th, F	9:00 – 11:00 am
E	Parent & Tot Swim	S, Su	9:00 – 11:30 am
F	Lessons	M, T, W, Th, F	11:00 am – 4:00 pm
G	Lessons	S, Su	11:30 am – 4:00 pm
H	Swim Yoga	M, T, W, Th, F, S, Su	5:00 – 7:00 am

Using this information, learners must complete the table provided and answer the questions.

TIME	MON.	TUES.	WED.	THURS.	FRI.	SAT.	SUN.
5:00 am	<i>Swim Yoga</i>	<i>Swim Yoga</i>	<i>Swim Yoga</i>	<i>Swim Yoga</i>	<i>Swim Yoga</i>	<i>Swim Yoga</i>	<i>Swim Yoga</i>
6:00 am							
7:00 am	<i>Seniors Swim</i>	<i>Seniors Swim</i>	<i>Seniors Swim</i>	<i>Seniors Swim</i>	<i>Seniors Swim</i>	<i>Seniors Swim</i>	<i>Seniors Swim</i>
8:00 am	<i>Free Swim</i>	<i>Free Swim</i>	<i>Free Swim</i>	<i>Free Swim</i>	<i>Free Swim</i>	<i>Free Swim</i>	<i>Free Swim</i>
9:00 am	<i>Parent & Tot</i>	<i>Parent & Tot</i>	<i>Parent & Tot</i>	<i>Parent & Tot</i>	<i>Parent & Tot</i>	<i>Parent & Tot</i>	<i>Parent & Tot</i>
10:00 am							
11:00 am	<i>Lessons</i>	<i>Lessons</i>	<i>Lessons</i>	<i>Lessons</i>	<i>Lessons</i>	<i>Lessons</i>	<i>Lessons</i>
12:00 pm							
1:00 pm							
2:00 pm							
3:00 pm							
4:00 pm							
5:00 pm	<i>Adult Free Swim</i>	<i>Private Lessons</i>	<i>Adult Free Swim</i>	<i>Children's Lessons</i>	<i>Party Rentals</i>	<i>Party Rentals</i>	<i>Party Rentals</i>
6:00 pm							
7:00 pm							
8:00 pm							

Answers:

1. 8 hours
2. 4 hours
3. 8 hours
4. 2 hours

LEARNING ACTIVITY 7.6a |

Using the internet, learners are asked to find the closest YMCA to their school and fill out the following form. Answers may vary depending on the location and rates of your local YMCA, but an example from Kingston, Ontario has been provided for reference. Learners are encouraged to do math as independently as possible without the use of calculator.



YMCA of Eastern Ontario		
Street Address:	100 Wright Crescent	City: Kingston
Province:	Ontario	Postal Code: K7L4T9
Phone	613-546-2647	
Website	https://eo.ymca.ca/	
COST OF MEMBERSHIPS		
	Monthly	Yearly
Adult	\$64.00	\$768.00
Child	\$37.50	\$450.00
Senior	\$54.00	\$648.00
Student	15 - 17 = \$38.00	\$456.00
	18 - 24 = \$50.00	\$600.00
Family	\$128.00	\$1,536.00

LEARNING ACTIVITY 7.6b |



Using the information from the previous activity, learners must answer the following questions.

- You are selling six new memberships today. Three adult memberships, two family memberships and one senior membership. What is the total sold?

Adult: $3 \times \$64 = \384 ; Family: $2 \times \$128 = \256 ; Senior: $1 \times \$54 = \54

TOTAL = \$694.00

- Six students signed up for a membership. What is the total amount of money collected for memberships?

15 – 17 year olds: $6 \times \$38 = \228.00 ; 18 – 24 year olds: $6 \times \$50 = \300.00

- Two families cancel their monthly registrations. How much money will you lose each month?

1. $\times 128 = \$256.00$

- Consider a single parent with three children. Compare the cost of 1 adult membership and 3 child memberships to the cost of one family membership. How much money is saved in a month? In a year?

Adult: $1 \times 64 = \$64.00$

Child: $2 \times 37.50 = \$112.50$




Total: $\$64 + 112.50 = \176.50

$\$176.50 - \$128 \text{ (Family)} = \$48.50/\text{month}$

$(\$176.50 \times 12) - \$1,536.00 = \$582.00/\text{year}$


The cost of a Family Membership saves this single parent \$48.50 each month or \$582.00/year

LEARNING ACTIVITY 7.7a |

An important part of office work    is dealing with time sheets. The learner has been given a time sheet for Samson Cowell. All the information about the rate of pay and hours worked has been provided, and the learner is asked to calculate his earnings.

Answers:

1. Samson worked 48 regular hours and earned \$1,200.00
2. Samson worked 3 overtime hours and earned \$90.00
3. Samson used 16 hours of vacation time, and earned \$192.00
4. Samson worked a total of 67 hours this week, including his vacation time.
5. Samson's total pay for the week of May 5 is \$1,482.00

WEEKLY EMPLOYEE TIMESHEET 							
Employee: Samson Cowell		Week: 05 May 2025					
DATE	LOG IN	LOG OUT	REGULAR HOURS	OVERTIME	ON LEAVE	VACATION	TOTAL HOURS
05 May 2025	8:00 AM	5:00 PM	8	0	0	0	8
06 May 2025	8:00 AM	5:00 PM	8	0	0	0	8
07 May 2025	8:00 AM	5:00 PM	8	0	0	0	8
08 May 2025	8:00 AM	7:00 PM	8	2	0	0	10
09 May 2025	Vacation	Vacation	0	0	0	8	8
10 May 2025	Vacation	Vacation	0	0	0	8	8
11 May 2025	8:00 AM	6:00 PM	8	1	0	0	9
12 May 2025	8:00 AM	5:00 PM	8	0	0	0	8
TOTAL HOURS			48	3	0	16	67
RATE PER HOUR			\$25.00	\$30.00	\$25.00	\$25.00	
TOTAL PAY			\$1,200.00	\$90.00	\$0.00	\$192.00	\$1,482.00

MILESTONE 42

LEARNING ACTIVITY 7.7b |

Using MS Excel, the learner is asked to use the data provided to create a spreadsheet to track an employee's hours. Using formulas, the learner is asked to build a timesheet for the employee. A template was provided.

EMPLOYEE	HIRO NAKAMURA		PAY PERIOD:		Week of May 5, 2025	
DATE	TIME IN	TIME OUT	REGULAR HOURS	OVERTIME HOURS	VACATION	TOTAL HOURS
May 5, 2025	8:00	5:00	8			8
May 6, 2025	8:00	3:00	6		2	8
May 7, 2025	7:00	5:00	8	1		9
May 8, 2025	8:00	7:00	8	2		10
May 9, 2025	8:00	5:00	8			8
May 10, 2025						
May 11, 2025						
TOTAL HOURS			38	3	2	43
RATE PER HOUR			\$ 27.00	\$ 32.00	\$ 27.00	
TOTAL PAY			\$ 1,026.00	\$ 96.00	\$ 54.00	\$ 1,176.00

LEARNING ACTIVITY 7.8a |



MILESTONE 37/38

Without using a calculator, learners need to work out how much change is needed to provide the following customers:

- Serah needs to pay for her appointment with Dr. Bhanot (dentist). The amount owed is \$76.83. She gives you a \$100 bill. How much does she get back?

\$100 - \$76.83 = \$23.17 *change would be rounded to \$23.15 since Canada does not use pennies

- Chantal just got her hair done and her total comes to \$56.50. She wants to tip her hairdresser \$10 and gives the receptionist three \$20 bills and two \$5 bills. How much change do you give Chantal?

\$70.00 - (\$56.50 + \$10) = \$3.50

- Jack had a physio appointment today and owes \$147.25. He pays with two \$100 bills. How much do you give him back?

\$200 - \$147.25 = \$52.75

LEARNING ACTIVITY 7.8b |



Roleplaying activity. Learners are to partner up and take turns being an office worker and customer using one of the following scenarios:

- A customer is paying for a new internet router.
- A customer has come in to complain that the chemicals they bought are not working to clear up their pool and they would like a refund.
- A client has come in to schedule an emergency appointment with the dentist. There is a booking fee of \$35 for emergency appointments.

Regardless of the scenario, the Point-of-Sale system is not working, learners need to count change manually. As the instructor, monitor their customer service/communication skills while they are working on their numeracy skills. Customer Service skills are always important, and This is also a great opportunity to reflect on the communication skills we learned earlier! Make sure you are friendly and polite during the interaction. Customer services skills are ALWAYS important!

SELF-ASSESSMENT

Learners will complete the self-assessment on their own and review their responses with you. If progress is tracking well, move ahead to the next module.



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**Clerical & Office Administration
Practitioner Guide
MODULE 8 – DOCUMENT USE**

MODULE 8: OALCF – SUGGESTED MILESTONES

COMPETENCY	MILESTONE	DESCRIPTION
B3.2	29	Entries into a somewhat complex form
B2.2	21, 22 or 23	Write an email to request information

LEARNING ACTIVITY 8.1a |



Using the outlined vocabulary words, learners must complete the paragraph by filling in the blanks.

To troubleshoot effectively, one must properly document each step taken and communicate findings clearly, especially when dealing with a specific product. Avoiding unnecessary jargon ensures that all stakeholders understand the issue and the research conducted to resolve it

LEARNING ACTIVITY 8.1b |



Answers will vary.

LEARNING ACTIVITY 8.2a |



The steps to ordering a new work printer have been provided, but they are all mixed up. Using problem-solving skills, learners need to identify which order the steps go in, and then check if the step is a **FINDING** or **COMMUNICATING** information task.

STEPS		FINDING INFORMATION <i>(reading)</i>	COMMUNICATING INFORMATION <i>(writing)</i>
1	Request a new printer for work		X
2	Research printers	X	
3	Make a spreadsheet to compare printers and costs	X	X
4	Ordering the printer		X
5	Sign for the new printer when it arrives		X
6	Read the manual	X	
7	Troubleshoot	X	
8	Email staff to let them know the new printer is up and running		X

LEARNING ACTIVITY 8.2b |

Learners have been given a review on a printer. They must read it over and decide if this printer is acceptable for what they are looking for. Answers may vary.



LEARNING ACTIVITY 8.3 |

Learners have been provided with a Table of Contents for "HP 4-in-1 Printer, Scanner, Photocopier & Fax Machine." They need to skim the content outlined in the table of contents, and then answer the questions provided.

Answers:

1. A printer
2. HP
3. Section 1 – Warranty
4. Section 4 – Networking
5. Section 8 – Troubleshooting
6. Section 9 - Contact

LEARNING ACTIVITY 8.4 |



Learner has been tasked with ordering a new printer for the office. Using the internet, they need to find a printer that scans and photocopies. Once selected, the learner needs to use the information about the printer to complete the order form provided. The information about the workplace can be made up, or you can provide them with the address of the centre.

Answers may vary.

***Ensure learners are filling in the correct fields with the appropriate information.**

LEARNING ACTIVITY 8.5 |



Now that learners have found the appropriate printer, they need to communicate with their boss to let them know about which printer they selected and why (i.e. cost, features, etc.) An email template has been provided. Responses should be written in full sentences and use professional tone and appropriate grammar. Answers will vary.

SELF-ASSESSMENT

Learners will complete the self-assessment on their own and review their responses with you. If progress is tracking well, move ahead to the next module.

ADDITIONAL ACTIVITY

Filling in forms neatly can be difficult if you don't have clear printing or writing skills. This would be a good time to take a time to look at the handwriting skills of the learners. Do they need more practice to make it more legible?

Here is a resource geared towards improving handwriting skills for adults:

<https://www.nala.ie/wp-content/uploads/2019/08/Better-handwriting-for-adults.pdf>



**Clerical & Office Administration
Practitioner Guide
MODULE 9 – FILING AND DOCUMENT
MANAGEMENT**

MODULE 9: OALCF – SUGGESTED MILESTONES

COMPETENCY	MILESTONE	DESCRIPTION
A2.1	9	Enroll in a course

LEARNING ACTIVITY 9.1a |



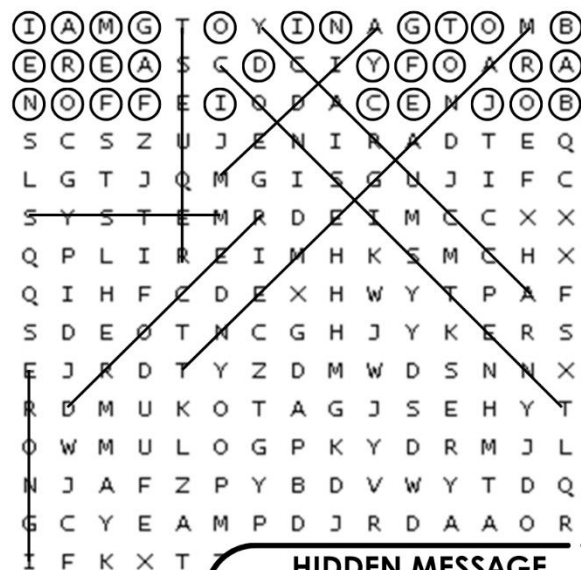
Using an online dictionary or app, learners have been asked to look up the definitions of the following words and write their meaning down in the chart provided. Responses may vary slightly. Ensure learners are finding the definitions appropriate for this module: Document Management

Media	The means of communication, like radio and television, newspapers, magazines, and the internet, that reach or influence people widely.
System	A set of things working together as parts of a mechanism or an interconnecting network
Accuracy	The quality or state of being correct or precise
Record	A thing constituting a piece of evidence about the past, especially an account kept in writing or some other permanent form
Consistent	Acting or done in the same way over time, especially to be fair or accurate
Request	An act of asking politely or formally for something.
Management	The process of dealing with or controlling things or people
Ignore	To refuse to take notice or acknowledge; disregard intentionally.

LEARNING ACTIVITY 9.1b |



Learners must find the vocabulary words in the word search puzzle. Once all the words have been found, the un-used letters (starting from the top left) will create a hidden message.



HIDDEN MESSAGE
I AM GOING TO BE READY
FOR AN OFFICE JOB!

LEARNING ACTIVITY 9.2 |

Learners have been asked to file names alphabetically.

Answer:

DUNCAN	LOGAN	STOSH	VERONICA	WALLACE
ECHOLLS, LOGAN	FENNEL, WALLACE	KANE, DUNCAN	MARS, VERONICA	PIZNARSKI, STOSH

LEARNING ACTIVITY 9.3 |

Using the chart provided, learners are asked to file names into units.

Answer:

NAME	UNIT 1	UNIT 2	UNIT 3	UNIT 4	UNIT 5
Canadian Imperial Bank of Canada	CANADIAN	IMPERIAL	BANK	OF	CANADA
National Bank of Canada	NATIONAL	BANK	OF	CANADA	
Royal Bank of Canada	ROYAL	BANK	OF	CANADA	
Laurentian Bank of Canada	LAURENTIAN	BANK	OF	CANADA	
Scotiabank	SCOTIABANK				
Bank of Montreal	BANK	OF	MONTREAL		

NAME	UNIT 1	UNIT 2	UNIT 3	UNIT 4	UNIT 5
Bank of Montreal	BANK	OF	MONTREAL		
Canadian Imperial Bank of Canada	CANADIAN	IMPERIAL	BANK	OF	CANADA
Laurentian Bank of Canada	LAURENTIAN	BANK	OF	CANADA	
National Bank of Canada	NATIONAL	BANK	OF	CANADA	
Royal Bank of Canada	ROYAL	BANK	OF	CANADA	
Scotiabank	SCOTIABANK				

LEARNING ACTIVITY 9.4 |

1. Last name
2. In the following names, circle the prefix:

1. McPherson
2. St. Jacques
3. Van Kleiff
4. de la Roche

3. 2 R. T Sampson
- 3 Captain R. T. Sampson
- 7 Robert T. Sampson
- 6 Dr. Robert Sampson
- 10 Robert T. Sampson, Sr.
- 9 Robert T. Sampson Jr.
- 5 Robert Sampson
- 8 Robert T. Sampson, C.P.A.
- 1 Dr. Sampson
- 4 Father R. T. Sampson

LEARNING ACTIVITY 9.5 |

Using the filing rules for business names, learners need to file each name into units into the chart provided.

Answer:

NAME	UNIT 1	UNIT 2	UNIT 3	UNIT 4
Happy Accident Insurance	HAPPY	ACCIDENT	INSURANCE	
The Elm Pub	ELM	PUB	THE	
CKTV	CKTV			
J.A. Massage Parlour	J	A	MASSAGE	PARLOUR
Mechanic's Choice	MECHANICS	CHOICE		
Pablo's Pizza & Pasta	PABLOS	PIZZA	AND	PASTA
24-7 Phone Services	247	PHONE	SERVICES	
Internet @ Home	INTERNET	AT	HOME	
B-4 You Go	B4	YOU	GO	
#1 Used Cars	NUMBER1	USED	CARDS	
A++ Towing	APLUSPLUS	TOWING		

LEARNING ACTIVITY 9.5b |

Learners have been directed to access a link to watch a video and complete the tasks.

<https://www.wisc-online.com/learn/career-clusters/business-management-and-administration/bsf1418/records-management-applying-arma-rules-to-bus>

If the above link does not work:

- www.wisc-online.com
- Type in “**Records Management: Applying ARMA Rules to Business Filing**” and choose that file to view

LEARNING ACTIVITY 9.6 |

Using Google, look up the five closest Tim Hortons to you. Using the addresses, create a chart similar to the example below and file each Tim Horton's location. You can use MS Word or Google Docs.

Answers may vary depending on location. Filing should be consistent with the example provided.

NAME	UNIT 1	UNIT 2	UNIT 3	UNIT 4	UNIT 5	UNIT 6
Tim Hortons 460 Gardiners Rd Kingston, ON	TIM	HORTONS	KINGSTON	ONTARIO	RD	460

LEARNING ACTIVITY 9.7 |

Reflecting on file management, learners have been asked to answer the following questions. Answers will vary, but this is a general guideline.

1. Files are organized in a specific way so that they are easy to find.
2. If files aren't accurate, information will be missing and harder to find.
3. Using a standard filing system makes it easier to locate information. If all employees use the same system, then there is no confusion about where anything is. All employees working with files should have a common understanding of filing practices.

SELF-ASSESSMENT

Learners will complete the self-assessment on their own and review their responses with you. At this point, the learner will have completed all 9 modules for this training.



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Clerical & Office Administration Practitioner Guide NEXT STEPS

WHAT'S NEXT?

Upon completion of this training, learners feel ready and confident for their next step, whether that is a referral to an Employment Ontario service provider, or to enroll in a college program. If the learner does not require anything more from LBS, administer the appropriate culminating task to match their goal path.

For any learners who may want to advance their skillset to incorporate accounting, Good Learning Anywhere offers an online Accounting program.

TO REGISTER:

Go to www.goodlearninganywhere.com



1. Click on **"Register for a Course"**
2. In the search bar, type **"Accounting"**
3. **Accounting 1** will show up as a search result; click **"Select Class"** on the right
4. Click **"Continue"**
5. On the *Student Registration* page, click the **"I am a New or Previously Exited Learner"**

Student Registration

☒ I am an Active current Learner with Good Learning Anywhere and know my Learner Portal username and password (if not, contact your mentor or call 1-866-550-0697 press 1)
☐ I am a New or Previously Exited Learner

* Username
 * Password

Sign In

Forgot your Username & Password? Please contact Good Learning Anywhere toll free at 1-866-550-0697

6. Once you click “**I am a New or Previously Exited Learner,**” you will be prompted to fill out personal information
7. The following pages are what you will be asked; make sure you fill out all of the information to the best of your ability, especially sections marked with a
8. When you have created your account and are ready to start your course, you will go to www.goodlearninganywhere.com and click “Log In” in the top right corner; you will be prompted to follow the steps to log in.



☒ I am a New or Previously Exited Learner

* Username

* Password

* First Name

Preferred Name

* Last Name

* Program

* Mailing Address

PO Box/Route No

* City

* State/Province

* Zip/Postcode

* Birth Date

Social Insurance Number

Required: Please enter 9 digit SIN

* What country were you born in?

* Immigrated to Canada?

* Status In Canada

* Email Address

Alternate Email

* Home Phone

Cell Phone

Preferred Communication

* Marital Status

* Number of Dependents

Example: Children

* I identify as

Audit and Review ☐ Yes ☐ No ☒ Not Selected

I am an LBS practitioner reviewing course for a learner

Groups

Groups

If you are taking this course with a group, please select which group you are signing up with.

About You

☐ ---

GLA would like to get to know you better! What is your learning style? Read the list below and select the responses that best describe you. This information is helpful in planning your online learning activities.

- * Check all boxes that apply:
- ☐ I am good at remembering faces
 - ☐ I do things better when someone shows me how
 - ☐ I like to doodle or draw
 - ☐ I repeat things out loud to help me remember
 - ☐ I am good at remembering names
 - ☐ I know the words to a lot of songs
 - ☐ I enjoy working with my hands
 - ☐ I find it hard to sit still
 - ☐ I use my fingers to count

* How many hours would you like to commit to your learning per week?

☐ ---

Please write a message below to introduce yourself. In your message, please tell us how much experience you have using a computer, one challenge you feel you might face in online learning, and one thing you are looking forward to in your courses. This message will help us get to know you a little better! Enjoy your classes!

* About Me:

* What will you be using to do your online course(s)?

- ☐ Computer
- ☐ Laptop
- ☐ Tablet
- ☐ Cell Phone
- ☐ Other

Check all that apply.

* How did you hear about us?

Learning Details

* Are you participating in a Literacy and Basic Skills program?

* Who referred you to GLA?

* Were you referred by Employment Ontario Self Service?

* Where will you be taking your classes?

If attending at Contact North, which location?

* What is your goal path?

* What is your highest level of Education Completed?

* Education Country

This is the country where you completed your highest level of education.

* What is your Short term Goal? (within a year)

* What is your Long term Goal? (In the next 5 years)

Education

* How long have you been out of school?

Examples: high school, college, university, trade school, elementary

* Has your education been interrupted by events in your life?

* Where did you go to school?

* How long have you been out of training?

Examples: Literacy and Basic Skills, Second Career, GED Prep

Next Steps

Employment

* Source of Income

* Are you a Registered Apprentice?

* Employment Status

* Employment Experience

* If unemployed, how long have you been out of work?

* Has your employment been affected by COVID-19? ☐ Yes ☐ No ☒ Not Selected

This refers to a loss of employment, or reduction in hours and/or pay due to negative impacts of COVID-19.

Voluntary Self Identification Questions

Aboriginal Group

Newcomer

Visible Minority

Person with Disability

Deaf

Francophone

Language

* Language Spoken at Home

* Preferred Language of Service

* Language Spoken at Last Workplace

Information and Consent Agreements

* ☐ I believe the information I have entered is true, complete and correct.

* Consent to Share Information

With your agreement and consent, information can be shared with other people who are also supporting you with your learning. This could be a teacher, an instructor, a Contact North representative, a caseworker etc. If so, please provide their full name and email address below.

Name

Who would you like to share your information with?

Email Address

Please enter their email address here.

* ☐ I agree to the Notice of Collection & Consent

This is the Learner Consent Agreement.

Submit