COMMUNITY LITERACY OF ONTARIO

Literacy Link Eastern Ontario

KL&S
Kingston Literacy & Skills

Clerical and Office Administration Curriculum

Learner Modules

COMMUNITY LITERACY OF ONTARIO
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EMPLOYMENT ONTARIO

Ontario

Canada

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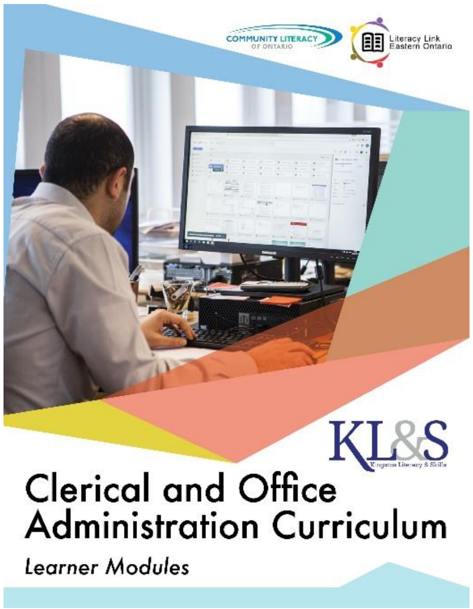
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Introduction

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:

- **Clerical and Office Administration** (Kingston Literacy & Skills)
- **Food Counter Attendants & Kitchen Helpers** (Connections Adult Learning)
- **Health Care Preparation** (Brant Skills Centre)
- **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.

Health Care
Preparation Curriculum
Learner Workbook
Retail Curriculum
Clerical and Office
Administration Curriculum
Practitioner Modules
Health Care
Preparation Curriculum
Instructor Manual
Food Counter Attendant
& Kitchen Helper Curriculum
Clerical and Office
Administration Curriculum
Learner Modules

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 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 as 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

Learner Modules

Module 1: About the Clerical & Office Administration 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. This Guide is available on the website of Community Literacy of Ontario.

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. This curriculum will help you improve your reading, writing, math and digital technology skills while learning more about working in a clerical position. 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. For instance, if you are working as a file clerk, you will need to learn about proper filing systems, whereas if you are working as a receptionist, you might need to use a scheduling system through Excel. This course aims to give an overview of skills required for a variety of clerical 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 and have a good attention to detail, then it might be a good career choice for you.

Are my skills strong enough to take this course?

Your instructor will assess if your skill level is strong enough to take this course. Before starting this curriculum, it is recommended that you have at least basic computer skills. If you can turn on a computer, preform basic internet searches and know the basics of programs such as MS Word or Google Docs, you should be fine. Throughout this curriculum you will also improve your computer, reading, writing and math skills.

Learner Rights and Responsibilities

1. You will go to all of your classes and contact the instructor when you are unable to attend.
2. 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.
3. You will maintain a calm and mature learning environment at all times.
4. You will be respectful to all staff, students and volunteers, as they will be to you.
5. You will respect the privacy of all staff, students and volunteers.
6. You will have your privacy respected as well.
7. You will complete your work in a timely fashion.
8. You will receive feedback in a timely fashion.
9. 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.
10. You will respect the equipment and classroom space.

Add your own rights and responsibilities:

Learner: Date:

Instructor: Date:

Measuring Progress

Milestones:

Throughout the course, the instructor will ask you to do various tasks called “Milestones”. These are small, set activities that are used to show your progress.

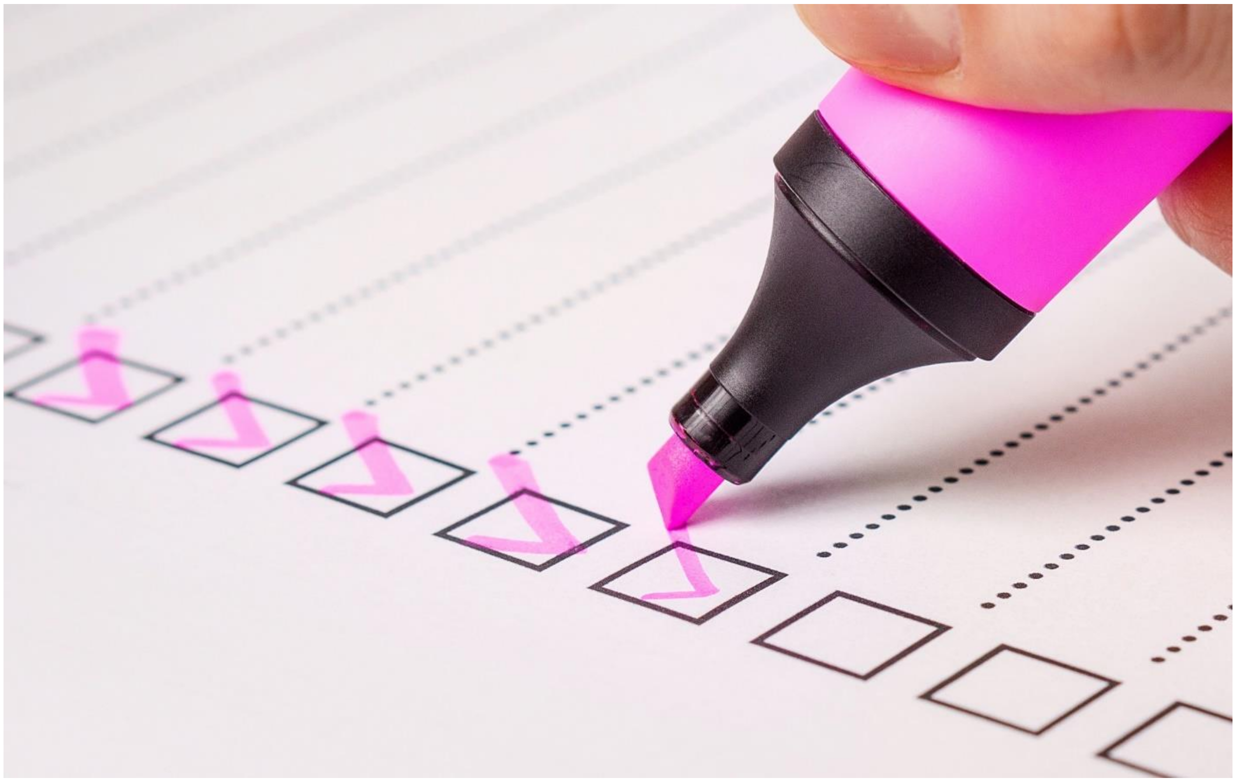
Culminating Task:

At the end of the course, you may be asked to write a Culminating Task which reflects the skills you have been learning. This is not an exam!

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.

COMMUNITY LITERACY OF ONTARIO

Literacy Link Eastern Ontario

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Clerical & Office Administration
Learner Modules

Module 2: Essential Skills

Section A: Difficult Vocabulary

Assistant
Productive
Responsible
Transferable
Technology
Essential
Decisions
Irresponsible

Definitions:

- Assistant – something or someone that gives support or aid
- Productive – something that gets tasks done
- Responsible – someone who takes charge of a task
- Transferable – something that can be used in one place or another
- Technology – modern equipment
- Essential – something that is important or necessary
- Decisions – choices one must make
- Irresponsible – someone who is not responsible

Section A: Activity 1

Match the synonyms (words with the same meanings)

A. Assistant
B. Technology
C. Responsible
D. Irresponsible
E. Decisions
F. Essential
G. Productive
H. Transferable

1. Not responsible
2. Choices
3. Helper
4. Important
5. Helpful/Useful
6. Changeable/Can be moved
7. In charge
8. Equipment

Section A: Activity 2

Use the vocabulary above to complete the following sentences.

1. I hope to work as an Administrative _______________________.
2. We could all be a little more _______________________ at work.
3. __________________ has changed a lot in the past 10 years.
4. __________________ skills are ______________________ skills that we use every day.
5. Some ____________________ are hard to make.
6. Your employer expects you to be a __________________ person.
7. People who are __________________ have trouble keeping a job.

Section A: Activity 3

In the rest of the module, you will find each of the vocabulary words listed at least twice. Take a moment to scan through and highlight the words as you see them.

Language Note:

Commas in lists: **Commas are used after each item in a list, except before AND. This is because AND is already used to separate thoughts and ideas.**

Example: **In an office you have to make decisions, use math and more!**

Section B: Essential Skills

The Essential Skills are a skill base which you need for work and life. In other words, they are the transferable skills which you use every day. For instance, if you drive a car, shop for groceries or work in an office, you have to make decisions, read, use math and more. All of these are Essential Skills.

The government defines 9 Essential Skills. Watch this video and list the skills below: https://www.canada.ca/en/employment-social-development/programs/essential-skills/video.html

Section B: Activity 1

List the 9 Essential Skills:

1____________________ 2______________________ 3 _____________________

4____________________ 5______________________ 6______________________

7____________________ 8______________________ 9______________________

Section B: Activity 2

How would you define each Essential Skill in one sentence? Use the video for support.

1. Reading

____

2. Writing

____

3. Computer Use/Digital Skills

____

4. Working with Others

____

5. Thinking Skills ☐

____

6. Numeracy ☐

____

7. Continuous Learning ☐

____

8. Oral Communication ☐

____

9. Document Use ☐

____

Check your answers either with your instructor or on the Essential Skills website at https://www.canada.ca/en/employment-social-development/programs/essential-skills/definitions.html before moving on.

Section C: Building Your Essential Skills

Essential Skills aren't just for work; they are also used in our lives every day. Many skills which we use at home are transferable to work. For instance, which essential skills did you use to get to class this morning? Think about your morning. Did you wake up by an alarm on your phone (digital technology and numeracy/time management)? Did you have to get your children to school or organize a ride with your neighbour? Did you take the bus and have to figure out the bus map, or use a mapping app on your phone? Did you stop and purchase a coffee on the way?

Section C: Activity 1

List at least three essential skills you've used already this morning with a brief example of how below.

Section C: Activity 2

Are you comfortable with all the essential skills or are there some that you struggle with? Most people struggle with at least one. Look at the list of Essential Skills shared in an earlier activity. In the boxes provided in *Section B / Activity 2*, order them from 1 to 9, with 1 being your strongest skill and 9 being your weakest.

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

Which skills do you see as your weakest? Why?

Section C: Activity 3

If you don't know which skills you struggle with, take the online "Self-assessments" for each of the nine Essential Skills. Scroll down to find this assessment at: https://www.canada.ca/en/employment-social-development/programs/essential-skills/tools.html. Answer the questions honestly.

Notes:

Section C: Activity 4

Check out the Essential Skills ***"****Tip sheets and practice and learning exercises*" located mid-way down the following web page: https://www.canada.ca/en/employment-social-development/programs/essential-skills/tools.html

Select your weakest skill and list three suggested ways to improve it.

Skill: ____________________________

Ways to improve:

1.

2.

3.

Section D: Essential Skills at Work

The Government of Canada uses the Essential Skills to identify not only the skills that different jobs require, but also how difficult those skills are. For instance, both an administrative assistant and a receptionist use digital technology. However, the work an administrative assistant does is more difficult and needs a level 3 in digital technology while a receptionist only needs a level 1 or 2. Comparing this to a completely different career, a scientist may require a level 4 or 5 in digital technology.

Levels:

- Level 1 is considered beginner
- Level 2 is functional
- Level 3 is difficult or complex
- Levels 4 and 5 are professionally or academically high.

Most activities require you to have between levels 1 and 3. However, if you were looking for work in something specialized, like app development, your digital technology skills may need to be at a level 4 or 5.

Section D: Activity 1

Follow https://www.jobbank.gc.ca/essentialskillsprofilelist/A and select "Administrative Clerks". Below list two common employment activities you would do in this role. In the box to the left, note the Essential Skill level as indicated on the website. If there are a range of skill levels, either use the average or a "/" such as skill level 2/3.

1. Reading ☐

(For example, you could select "Read policies and procedures; read brochures")

____

____

2. Writing ☐

____

____

3. Computer Use and Digital Technology ☐

____

____

4. Working with Others ☐

____

____

5. Decision Making/Thinking ☐

____

____

6. Numeracy ☐

____

____

7. Continuous Learning ☐

____

____

8. Oral Communication ☐

____

____

9. Document Use ☐

____

____

Section D: Activity 2

Read about Theo’s first day at **Money Financial** where he is working as a receptionist in the office. In each section, list which Essential Skills Theo needs to improve in order to be a productive and responsible employee.

- Theo was 20 minutes late for work. He took the 7:45 local bus instead of the 7:43 express.

- Theo had trouble finding his new security pass when he entered the building, and security had to call his supervisor before he could start.

- Theo was supposed to answer the phone all morning. He did, but struggled to transfer the calls through the building.

- In the afternoon, Theo was supposed to learn the filing system, but he struggled to keep up with the training.

- At the end of the day, Theo’s supervisor gave him a bunch of forms to fill out to get a new security pass. Theo had trouble responding to the forms. They seemed very complicated to him.

Section D: Activity 3

If you were Theo’s supervisor, how could you help him be more productive and responsible in his job? What suggestions would you give him? Explore the Essential Skills website for ideas and support.

Section D: Activity 4

Think about a job you’ve had where someone acted irresponsibly or made bad decisions at work.

- What was the job?
- How did your co-worker act irresponsibly?
- Which Essential Skills was this co-worker lacking?
- Did the manager help the employee build their skills?

COMMUNITY LITERACY OF ONTARIO

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Clerical & Office Administration

Learner Modules

Module 3: Computers and Technology

Section A: Difficult Vocabulary

Compatible
Function
Organize
Proceed
Available
Flexible
Comfortable
Complex

Definitions

- Compatible – when things work well together
- Organize – to coordinate activities or arrange a space
- Available – able to use or obtain
- Comfortable – feeling relaxed or confident
- Function – to have a specific job
- Proceed – to begin or move forward
- Complex – difficult or intricate
- Flexible – to be ready and able to change

Section A: Activity 1

Match the synonyms

A. Compatible	1. Adaptable
B. Organize	2. Open/Obtainable
C. Available	3. Intricate
D. Comfortable	4. Advance
E. Function	5. Job/Purpose
F. Complex	6. Well suited
G. Flexible	7. Confident
H. Proceed	8. Arrange

Section A: Activity 2

Use the vocabulary above to complete the following sentences.

- A good manager always keeps their employees ___________ and on task.
- Not all apps are ________________ with Apple and Android devices.
- A good manager is ______________ with their employees' schedules.
- A computer program usually has several different __________ it can perform.
- Some computer programs are ________________ and difficult to use.
- Some computers do not ____________ the way they should.
- If the work is too hard, it might be difficult to ________________ to the next task.
- Managers should always be ______________ to speak with their employees.

Section A: Activity 3

In the rest of the module, you will find each of the vocabulary words listed at least twice. Take a moment to scan through and highlight the words as you see them.

Language Note

"Organize" is a *VERB (action word). If you add a "d" to the end, it can be used as a PAST TENSE VERB or it can become an ADJECTIVE (a descriptive word).*

She organizes the party. (Verb) She is very organized. (Adjective)

She organized the party. (Past tense verb)

Section B: Computers and Creating Documents

This section is adapted from the Clerical Curriculum Developed by Literacy Link Eastern Ontario. Used with permission.

Technology is an important part of office work today. Clerical staff will work on computers throughout the day. Various jobs will require you to do different computer-based tasks. Some of the things you may be required to do are:

- Create and edit documents
- Create and input data into a spreadsheet
- Fill in forms
- Download or upload forms
- Manage files
- Communicate by email
- Maintain a database
- Maintain electronic calendars
- Create or fill in surveys or polls
- Research information online
- Create flyers, posters or notices for work
- Send text messages or reminders
- Be flexible in learning new programs and systems

Most offices use MS Office Suite, but some use Apple brand computers. These days, some offices are moving toward using web-based options like Office 365 or Google Docs. These low cost options allow you to use word processing, spreadsheets, email and PowerPoint documents which are similar to, and compatible with, MS Office programs. This means that someone with MS Word can open a document create in Google Docs. Though this can seem overwhelming or too complex when you first start working with computers, remember that most of these programs are very similar. Once you are comfortable in one, you should be able to figure out another.

Section B: Activity 1

Being comfortable on computers starts with typing, just as being comfortable with writing by hand starts with grasping a pen. How comfortable are you with typing?

I can….	Yes/No	Details
Find the home row quickly and easily.		
Find the question mark and period.		
Use the number pad.		
Make capital letters.		
Make special symbols, like $ & #.		
Underline, bold and italicize words.		
Type 25 words per minute without looking at the keyboard		

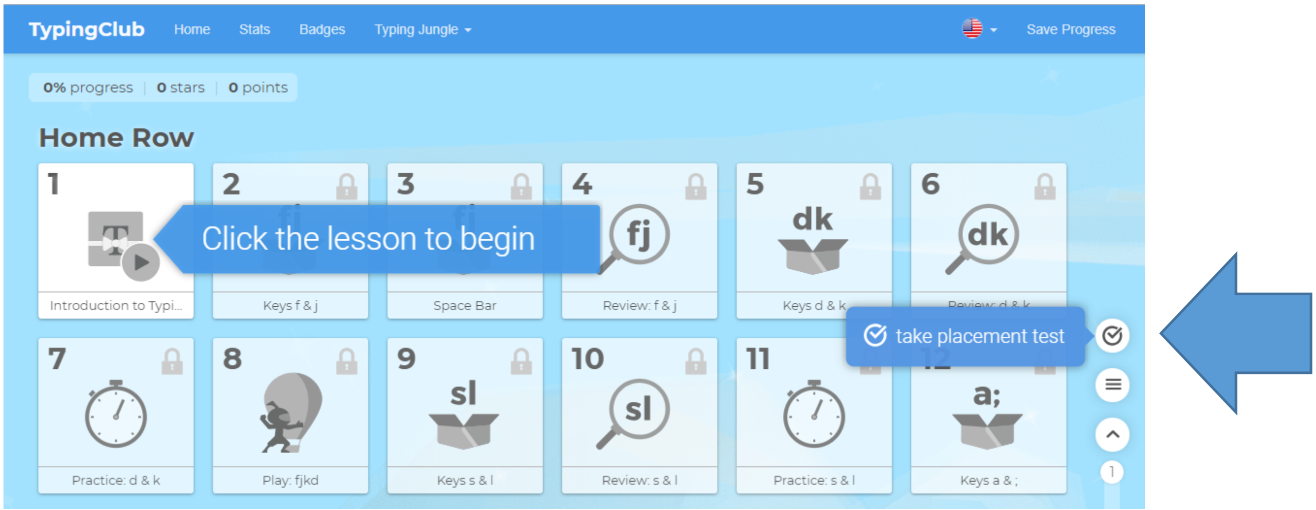
No matter what your age or current comfort level, you can learn to type. As a bonus, people who struggle with spelling will find that it improves as they practice typing! Also, keep in mind there are a variety of keyboards available, including some with larger and brighter keys, some that are used for braille, rounded ones, mouse imbedded ones and more. There are even keyboards that are set up for one-handed typists! If you are finding it difficult to type, you should look into a keyboard that is more compatible with your needs.

Section B: Activity 2

Take a typing test at: www.typingclub.com

*This program can be set up for one-handed typing, if needed.

Did you score less than 40 WPS (words per minute)? Then you need more practice. Starting today, you should practice typing for at least 15 minutes per class, using the Typing Club website. Start with the “placement test”, which can be found on the right hand side of the Typing Club website.


TypingClub
Home
Stats
Badges
Typing Jungle
Save Progress
0% progress | 0 stars | 0 points
Home Row
1
2
3
4
5
6
Click the lesson to begin
fj
dk
dk
Introduction to Typi...
Keys f & j
Space Bar
Review: f & j
Keys d & k
Review: d & k
take placement test
7
8
9
10
11
12
sl
sl
a;
Practice: d & k
Play: fjkd
Keys s & l
Review: s & l
Practice: s & l
Keys a & ;
1

Don’t forget to save your Typing Club progress in the following chart:

Date of placement test:		**Speed at placement test:**
Date	**Lesson #**	**Speed**

Section B: Activity 3

How is your general knowledge of computers? Rate your knowledge of computers as:

Strong

- I can use any kind of computer confidently
- I can learn new programs quickly and easily
- I can troubleshoot computer problems easily
- People often come to me for help with their computer

Okay

- I can use familiar computers easily
- I can use familiar programs like Word
- I struggle to learn new programs, but I try to keep up with new technology
- I don't like using a computer that I am not comfortable on

Functional

- I can do some things on the computer, like check my email or play a game
- I don't know how to use many different programs
- I struggle to learn new programs or to use different types of computers
- I can't keep up with changing technology

Needs Improvement

- I avoid computers as much as possible
- I struggle to use new technology, like smart phones
- I don't really understand how the internet works
- I find computers frustrating to use

If you answered “Functional” or “Needs Improvement” to the self-assessment above, then it’s time for some upgrading. Having strong computer skills can make you more flexible at work and at home. If you are already enrolled in a computer upgrading course through your literacy provider, ask if you can skip this section.

Section B: Activity 4

When was the first time you remember using a computer? What were you doing?

Have you ever been frustrated on a computer? Explain what happened.

Section C: Building Your Skills

Section C: Activity 1

Sit down with your instructor and decide which skills you need to brush up on. Write them in the column below and get started.

GCF Learn Free is an extremely helpful website with videos to help learners build their digital skills: https://edu.gcfglobal.org/en/subjects/tech/

Digital skills I need to build	**Date Completed**	**Notes**
For example… Computer Basics		

Section C: Activity 2

Watching a video will give you a good idea how to proceed with a computer program, but the best way to learn is through actual practice. Using MS Word, or a similar program, recreate the two notices.

If you need additional support in how to use Word, check out the Word tutorial via GCF Learn Free at: https://edu.gcfglobal.org/en/word/

Notice 1: Office BBQ

Calling all Employees! It's time for our

bi-annual Employee Appreciation BBQ!

Don't forget to bring your gloves for our office versus warehouse tug-of-war. The grand prize this year is a Friday pizza party.

We'll see you on August 1st, 2019 at 3:00 p.m. at Rotary Park.

RSVP to Sheila at sheilasfamjam@gmail.com and let her know if you are bringing:

Salad Dessert BBQ Veggie Side Drinks Other

Web links should format like this automatically

Use your TAB key to space this list

Notice 2: Notice to All Staff

Notice to All Staff

Date: October 22nd, 20XX

Due to staff request, we will not be offering a flexible lunch. You will be able to take either 30, 60 or 90 minutes provided you adjust your end of day time accordingly. To ensure we have enough staff coverage at all time, lunch schedules are subject to approval of your supervisor. Also, please note your lunch hours cannot be adjusted more than once per month.

Sincerely,
Human Resources

Staff Member	Supervisor	Length of Lunch	Start Time

Section D: Tablets, Smart Phones and other Touch Screens

You may be required to use a tablet, smartphone or a computer with a touch screen. These can be simple and easy ways of navigating a computer. Touch screen computers became popular a few years ago. Some offices will use a touch screen attached to a desktop or a laptop for guests to sign in. Other times, you will see them in a store or at a museum for people to look up information. Though the size of the touch screen computers tend to make them a little more secure, they are often being replaced by tablets.

Smartphone and Tablets

The smartphone first came out in 2007 and was really a hybrid of a computer and a phone. Since the first “iPhone” smartphone appeared, dozens of different ones have come on the market. The two main types of smartphones are “iPhones” by Apple and “Androids” by Samsung, HP, LG, Google and several other companies. iPhones and Androids generally have the same types of functions, but operate in different ways. iPhones are known to have strong security functions and Androids tend to be faster.

A smartphone might be used if you move from one office to another or if you are checking in with other employees. Sometimes it is used to set up reminder calls when clients book appointments. You can make calls, send emails, have your calendar on hand, as well as review and transfer documents on them. It’s a great way to keep organized and to stay ahead of the game.

Tablets are very similar to smartphones, but have a much bigger screen and aren’t used for phone calls. They have more memory and are able to run more complex programs. With a tablet, you can also use a detached keyboard if you are more comfortable with them.

App stands for application and is basically a program on your cellphone or tablet that has a focused function. Your office might have different Apps that you are required to use at work. Calendar apps to track your workload and organize your tasks are very popular.

Section D: Activity 1

Search these three popular apps that you might use if you were working for a busy company. If you have a smartphone available check “Google Store” or “iTunes”.

App	Price	3 Functions or Features	Other notes
Dropbox		1. 2. 3.	
LogMeIn		1. 2. 3.	
Wunderlist		1. 2. 3.	

Section D: Activity 2

Imagine your manager asked you to recommend an app to help her link with her Personal Assistant. They work between offices and are often on the road with meetings. They need something to help keep them informed of what’s going on in both spaces. Use the internet, or one of the app stores to research which app might be best for them. Write a short, but appropriate email recommending an app for them.

To:
From:
Subject:

Section E: Essential Skills Addressed – Digital Skills and Continuous Learning

Section E: Activity 1

Review the Essential Skills profile for Administrative Clerks at https://www.jobbank.gc.ca/essentialskillsresults/5. Click on “Digital technology” for Administrative Clerks. Which level of digital communications do you need for most clerical work?

Section E: Activity 2

Using the same link to the Essential Skills profiles as above, for Administrative Clerks, find two important Digital Technology and Continuous Learning skills. (Note: Continuous Learning is found under “Additional Information” on this list.)

Clerical & Office Administration

Learner Modules

Module 4: Communication Skills - Phone

Section A: Difficult Vocabulary

Tactics
Outcome
Organization
Etiquette
Complain/Complaint
Solution
Interaction
Barrier

Section A: Activity 1

Match the synonyms

A. Tactics
B. Outcome
C. Organization
D. Etiquette
E. Complaint
F. Solution
G. Interaction
H. Barrier

1. Dealings
2. Group or company
3. Objection/Problem
4. Result
5. Answer/Result
6. Strategy
7. Manners
8. Obstacle/Problem

Section A: Activity 2

Use the vocabulary above to complete the following sentences.

1. My grandmother always said it was important to follow ________________________.
2. I try not to let _______________ stop me from reaching my goals.
3. The chef listened to the customer's _________________________.
4. I always have positive ___________________ at the bank.
5. My boss says whenever I start a task, I need to think about the ____________________.
6. I want to work for a reasonable and caring ________________________________.
7. When you see a problem, instead of whining think of the ________________________.
8. Learning different _________ for dealing with tough clients can make your job go more smoothly.

Section A: Activity 3

In the rest of the module, you will find each of the vocabulary words listed at least twice. Take a moment-to scan through and highlight the words as you see them.

Grammar Note:

The way we speak over the phone can set the tone for the conversation. Remember to not be overly casual and to use clear and proper grammar.
Common terms to avoid are: “I seen” instead of “I saw” or “I’ve seen”, and “I’m gonna” instead of “I’m going to”.

Section B: Answering the Phone

In a clerical position, you will communicate with co-workers, clients or customers over the phone. It is important to always be clear, informative, efficient and polite. These are called soft skills. Soft skills are basically the people skills which make communications pleasant. Speaking on the phone takes strong communication skills. When answering the phone at work, you should always keep in mind:

1. Identification

Whether in person or on the phone, when you are at work, you represent your organization. When answering the phone, it is best to identify your company and then yourself, followed by a polite greeting.

Example: Good Morning, Kevin’s Cleaning Services. Leonard speaking. How may I help you?

Helpful
Tips

2. **Listening**
   a. It is important to listen carefully to the message being shared.
   b. Information from the caller should be confirmed before you respond or transfer the call.
   c. If you are having difficulty understanding a caller because of phone troubles, try the following tactics:
      - Tell the caller you cannot hear them
      - Ask the caller to speak more slowly
      - If the caller seems to have bad cell reception, let them know
      - If possible, step into a space that has less background noise
   d. If you are having difficulty understanding a caller because of language issues, such as a heavy accent or limited spoken English skills, try the following tactics:
      - Tell the caller you are having a little trouble understanding them over the phone
      - Ask them to speak slowly and clearly
      - Repeat the information to ensure it is correct
      - Take your time and don't get frustrated

3. **Pay attention**
   a. Though you may have heard the same question, comment or complaint hundreds of times before, you need to listen carefully to each speaker before responding. Nothing is more frustrating than reaching out for help or support only to feel like you are being ignored.

4. **Show empathy**
   a. You aren't always able to help the people that you are speaking with. They may not be able to get the service exactly as they wanted it, when they wanted it.
   b. Take the time to connect with callers through acknowledging the issue and, when possible, offering solutions.
   c. If a caller has a complaint, it is your job to listen and respond appropriately.

5. **Be tactful**
   a. Be sensitive to the person you are dealing with and respond appropriately.

6. **Respect confidentiality**
   a. When you are getting or confirming information over the phone, be aware of your surroundings and the people around you.
   b. You need to be aware of the privacy policies in your organization.

7. **Be patient**
   a. In this fast-paced world, we are always on the go. Take an extra moment to listen to your caller and give them enough time to respond.

Section B: Activity 1

Read the following interactions and note which soft skill is missing from the interaction.

1. **At the Hair Salon:**

- Reception: Hello, We-Do-All-Dos, Miranda Speaking. How may I help you?
- *Caller: Hi, I'd like to book an appointment for tomorrow at 2:00 p.m. with Hoda for a quick trim. I have an important meeting and I want to look fresh.*
- Reception: I'm sorry, but Hoda already has an appointment at that time.
- *Caller: I need my hair done and that's my only break.*
- Reception: I can book you at another time tomorrow. She's available at 1:00 p.m.
- *Caller: I work, and 2:00 p.m. is my only break.*
- Reception: I can book you in today?
- *Caller: I need an appointment tomorrow.*
- Reception: Well, I'm sorry.
- *Caller: Ok. Fine. Good bye.*

Consider:

A. Which soft skills rule(s) of phone etiquette did the receptionist break?

B. What outcome do you think this phone call had on the caller or the business?

C. Using a brightly coloured pen, edit the conversation above to make a positive solution for the caller and the business.

Read the following interactions and note which soft skill is missing.

2. **At an Accounting Firm:**

- Clerk: Hello?
- *Caller: Is this Numbers, Numbers, Numbers?*
- Clerk: Yup. What do you need?
- *Caller: Do you help with tax problems?*
- Clerk: Yes, we do.
- *Caller: Umm, I have some problems with my taxes and need to book an appointment with someone.*
- Clerk: Sure. Can you meet Saied tomorrow at 9:30 a.m.?
- *Caller: Okay, should I bring anything?*
- Clerk: Yeah, all your tax documents and some ID. We'll see you tomorrow at 9:30 a.m.
- *Caller: Alright, ummm, thanks.*

Consider:

A. Which soft skills rule(s) of phone etiquette did the clerk break?

B. What outcome do you think this phone call had on the caller or the business?

C. Using a brightly coloured pen, edit the conversation above to make a positive outcome for the caller and the business.

3. Now that you've seen a few examples, think about a negative interaction you've had over the phone with a clerk or receptionist. What happened? What soft skills did the receptionist lack?

4. Reviewing the soft skills discussed, think about your own telephone manners. In which area could you improve?

Section B: Activity 2

How would you rate your memory on a scale of 1 to 10 (1 being terrible and 10 being excellent)?

If you struggle to remember details and information, keep a pad of paper beside you and take good notes. Don't forget to listen carefully and ask for clarification when necessary.

Section B: Activity 3

How well do you listen and remember?

With a partner or the instructor, role play the following phone conversations. Remember the soft skills you've learned.

Scenario A: Call Center/Clerical	**Scenario A: Caller**
Location: At the Head Office of "Dippy's Donuts". **Suggested Outcome:** Client is calm and plans to return to Dippy's Another time **Barrier:** The client's phone keeps cutting out/bad reception.	You are calling Dippy's Donuts Head Office to complain about customer service in Kingston. You are annoyed at how rude the cashiers were and how bad the food was.

Scenario B: Receptionist Location: At a school **Suggested Outcomes:** Book an appointment with the parent and student to see the principal as soon as possible. **Barrier:** The principal is away at a conference for a week.	**Scenario B: Caller** Your son's report card was very bad. You talked to the teacher and he didn't give you any reasons or suggestions on how your son can improve. You are worried and upset. You want to speak with the principal immediately.
Scenario C: Receptionist Location: At a doctor's office **Suggested Outcome:** The client comes to the walk-in clinic at your office that evening. **Barrier**: The client's doctor is unable to see them for two weeks.	**Scenario C: Caller** You feel sick. You have had a cold for two weeks and it isn't going away. You think you might need antibiotics. You want to see your doctor right away.
Scenario D: Receptionist Location: At a law clinic **Suggest outcome:** The client books an appointment with the support staff or paralegal as soon as possible. **Barrier:** The lawyers are in trial for at least four weeks.	**Scenario D: Caller** You are in trouble with your apartment. You don't know how to handle it. You need to talk to someone because your landlord is threatening you and you don't know your rights. You really want to speak with a lawyer.

Section C: Essential Skills Addressed – Decision Making and Communication

Section C: Activity 1

Review the Essential Skills profile for Administrative Clerks at https://www.jobbank.gc.ca/essentialskillsresults/5. Which level of decision making and communications are required for clerical/office positions?

Section C: Activity 2

Using the same link to the Essential Skills profiles as above, for Administrative Clerks, find two important Thinking and Communication Skills that are needed for the activities in this section.

Thinking:

Communication:

COMMUNITY LITERACY
OF ONTARIO

Literacy Link
Eastern Ontario

KL&S
Kingston Literacy & Skills

Clerical & Office Administration

Learner Modules

Module 5: Communication Skills – In Person

Section A: Difficult Vocabulary

Productive
Distracted
Appropriate
Impression
Positive
Humour
Confident
Private

Definitions

1. Appropriate – To be suitable for a situation. For example: Her dress is appropriate for work.
2. Productive – To work hard and be useful. For example: Katie had a productive day at work. She completed all her tasks.
3. Positive – To be upbeat and confident. For example: He always has a positive attitude at work. He is a popular employee.
4. Distracted – To be unfocused. For example: It's easy to be distracted at school if the teacher isn't interesting.
5. Impression – A feeling or idea about something. For example: I have the impression that she didn't like the food. She wrinkled her nose.
6. Humour – Funniness, as in jokes or gags. For example: A little humour can brighten up your day.
7. Confident – Positive and strong. For example: I feel positive about my report. I worked hard on it.
8. Private – something is personal or confidential. For example: The company will always keep your information private.

Section A: Activity 1

Synonym Match

1. Distracted	a. Gags or Jokes
2. Impression	b. Confidential
3. Humour	c. Uplifting
4. Confident	d. Unfocused
5. Private	e. A sense or idea
6. Appropriate	f. Helpful or useful
7. Productive	g. Certain
8. Positive	h. Suitable

Section A: Activity 2

Use the vocabulary above to complete the following sentences.

1. I enjoy a little __________________ in the workplace. Jokes make me laugh.
2. My co-worker is very _________________. He is always smiling.
3. Sometimes I get _________________________. It can be hard to focus.
4. We worked so hard today. It was a very _______________ shift.
5. Whenever he talks about his family, I get the _________________ that he is a good Dad.
6. We are careful to speak quietly when something is _________________.
7. One of my co-workers never tells _______________ jokes in the office. He's always offending someone.
8. I am ________________ that you will get promoted. You always work harder than anyone else.

Section A: Activity 3

In the rest of the module, you will find each of the vocabulary words listed at least twice. Take a moment to scan through and highlight the words as you see them.

Language Note:

Humor	or	Humour?	Neighbor	or	Neighbour?	Labor	or	Labour?
Flavor	or	Flavour?	Savor	or	Savour?	Favor	or	Favour?

Both of the above spellings are correct. "OR" endings are the American Version, while "OUR" endings are Canadian or British versions. All are acceptable, although some offices and companies prefer employees to use the traditional Canadian spelling.

Section B: Socializing at Work

Wherever you work, you may interact with co-workers and the public. Keeping these interactions both positive and productive is key to being successful at work.

You have to work with the people in your office every day, maybe for years or decades. It is likely that you will develop friendships. Having friends at work can be great. It can make the day go by a little better and can give you someone to brainstorm ideas with. However, although this is common and natural, it is best to keep a clear dividing line between your friendships and your professional interactions. Keep in mind, you don't want your work friendships to get in the way of your job. Remember, you are co-workers first and friends second.

Section B: Activity 1

Scenarios

Read the following scenarios and decide how you would deal with the situation:

1. Your work friend invites you out for a drink after work. You've been working really hard and could use a little break. Do you:
    a. Say no, because you never mix personal and professional.
    b. Say yes, but just go for one drink or dinner.
    c. Say yes, and have a night out venting about the office.
    d. Suggest going for lunch the next day instead.

Explain your response:

2. You go shopping on your lunch hour with some work friends. You are a little longer than you should be, and it looks like you are going to be 15 minutes late getting back to work. Your friends seem unconcerned. Do you:
    a. Leave without your friends, so you can be on time.
    b. Let your boss know when you get back to work that you were late and that you will make up the time.
    c. Keep shopping and hope no one notices when you get back.
    d. Call your boss and turn in your tardy co-workers.

Explain your response:

3. During a meeting, your friend suggests a policy that you strongly disagree with. You know it's something they think is important, but you believe it would not be a good change for the company. How do you respond when your boss asks your opinion?

    a. Back your friend up because it's important to them.
    b. Choose not to give an opinion and talk to your friend privately about it.
    c. Give your opinion on the topic because that is your job.

Explain your response:

4. A co-worker's mother recently died. Do you:

    a. Call the friend at home to express your condolences.
    b. Send a text or message on social media.
    c. Send a card around the office and take a collection towards flowers.
    d. Sit with the family at the hospital.

Explain your response:

Section B: Activity 2

Can you think of a time when you had a positive friendship at work? How did it impact your work? Explain.

Section C: Greeting Customers and Clients

Putting on a good face

Customer and client interactions are important parts of any business. When you are meeting with clients, whether just to welcome them to the office or to sit down and go over a document together, you need to put your best face forward.

The old saying, you never get a second chance to make a good first impression holds true today. First impressions are important and they set the tone for your relationship with a client or co-worker.

Section C: Activity 1

Do you make a good first impression?

Do you:	Always	Sometimes	Never
Greet people when they first arrive?			
Look people in the eye when you are talking to them?			
Shake hands?			
Try to make a connection with them?			
Maintain confidence and poise?			

Section C: Activity 2

Read the following scenarios and decide what the person could have done better.

Scenario I

Arnold works at a busy hair salon. He is supposed to greet customers, answer the phone and book appointments, but they are so busy today he's also helping out on the floor. When Sandra came in for her appointment, all of the hair dressers were busy and Arnold was sweeping the floor. Arnold saw Sandra, but kept sweeping because he knew no one could take her for at least 10 minutes.

This was Sandra's first time at the salon. How do you think she felt, and what do you think Arnold could have done differently?

Scenario II

Marie arrived at her interview with Inn-Insurance 10 minutes late. Traffic was bad and she stopped for a coffee on the way. When she got to the office, she was a little out of breath because she had to park several blocks away. She forgot the name of the woman she was supposed to see.

What kind of a first impression do you think Marie made on her interviewers?

Scenario III

Graeme was working in a busy office. He was on an important phone call with a client when his new manager arrived for her first day of work. When she got to Graeme's desk he shook his head at her and made an awkward gesture. His new manager was a bit confused and left to meet the next person.

What could Graeme have done differently to have balanced the needs of his client and his new manager?

Scenario IV

Have you ever made a BAD first impression on someone? What happened? Were you able to "fix it" later?

First Impressions and the Handshake

More than just body language, a handshake is very important in business relationships. There are studies that show how important a handshake can be. One study even drew a connection between a "good firm handshake" and whether someone would make a good employee or not.

A good handshake has a firm grip without being too strong. You want a handshake to be a sincere connection between you and the person you meet.

A good handshake might last about 5 seconds and may have one or two "shakes".

A bad handshake is too strong or too light. It's too long or too short.

No one is exempt from having a bad handshake; even famous politicians, business leaders, actors and sports professionals have an awkward one now and then.

In 2017 "The Handshake" became a very popular topic in news and entertainment media as various high powered officials from around the world demonstrated how not to shake hands. They weren't the first! "Bone Crusher" handshakes became a mainstay of political interactions, with world leaders almost arm wrestling each other to show strength through their shake.

Section C: Activity 3

Are you interested in improving your handshake? Google “Top 10 Bad Business Handshakes” and select the video by “BusinessGovAU” (or other video of your choice).

- Are you guilty of any of these awkward handshake styles? Y/N _________________

- Write about a time when you had a “bad handshake” with someone, either during a job interview, at work or perhaps meeting a family friend for the first time.
  ____
  ____
  ____
  ____

- Next Google “How to Give a Proper Handshake”. Find a video under 10 minutes long that gives hints for handshakes and first impressions. Take notes on information given in the video.
  ____
  ____
  ____
  ____

Section C: Activity 4

1. After all you have read and watched, how would you describe a good handshake in one sentence?

2. If you feel comfortable, ask some people around the classroom/learning centre to shake your hand. Practice the techniques you learned above.

Humour in the Workplace

Humour can be a positive way to break up the day. When appropriate, it builds morale and creates a positive, team building atmosphere. However, when done incorrectly it creates bitterness and can distract from work.

Studies even show that humour makes people seem strong and confident in the workplace. Employers see it as a positive quality in employees, and well-placed humour can help you build positive relationships with your coworkers and employers. However, a misplaced joke or a crass sense of humour has just the opposite effect.

1. An office joke should focus on an event, not a person or group of people. It should never single a person out in a negative way.

2. It should never focus on religion, race, sexual orientation, gender or other personal factors that could be seen as offensive. Most workplaces have strict policies against this type of bullying behaviour.

3. The idea should be to “laugh with” not “laugh at” people in the office. A good joke is one that everyone finds funny.

4. Watch the sarcasm. It can be seen as belittling or mean-spirited.

5. Never put down your co-workers, boss, company or the products you are selling.

Section C: Activity 5

Appropriate or Inappropriate?

Think of a time when you heard an inappropriate joke in the office/school/work.

How did you react?

What was done about the joke?

Section D: Keeping Focused at Work

Section D: Activity 1

How easily do you focus in the workplace? Take the quiz:

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 you answered "always" to three or more of these questions, you 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. Here are some tips to helping you concentrate at work:

**Remember each office has its own culture and what is appropriate for one might not work in another.*

Strategies for Staying Focused and Organized at Work

Get Organized

- Write a task list and keep it in sight. This will help keep you on track through the day.

- Use your calendar to keep track of meetings, appointments and your to-do list. You can do this on a paper-based calendar if you like or, if you prefer, you can use a calendar in your phone or on your email.

- Keep your space neat and tidy so you don't get distracted.

Be Prepared

- Set specific times for breaks and, if it's appropriate, keep healthy snacks and water close by, so you can stay at your desk if you get hungry.

Limit Distractors

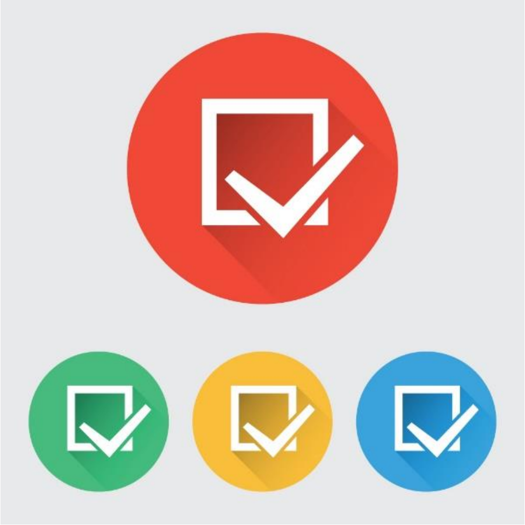
- Put your phone in a drawer, or change your notification settings so you are only notified with specific information.

- Did you know that most phones allow you to add exceptions to your do not disturb settings? For instance, you could add an exception for your child's school.

- Let co-workers who are close by know when you really need to focus on something.

- If it's appropriate at your office, try putting on headphones and listening to music without lyrics. This can help to drown out background noises.

- If possible, don't let your email run in the background all the time. Check your email at specific points through the day, so you aren't constantly being distracted by every note that pops up.



Section D: Activity 2

Do you think you are a good multitasker?

Pull out your phone and set it to “timer”. Then grab a piece of paper and a pencil, and time yourself writing the following sentences.

- *I like to read a good book in the winter.*
- *1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20.*

Do it again, but this time write a word from the top line, and then underneath it, write two numbers from the bottom line. It should look the same as above when you are done. Don’t forget to time yourself!

TIME 1 ______

TIME 2 ______

Which was faster? Why do you think?

Build Your Attention Span

If you have trouble focusing on a task for more than a few minutes, try the 10/15/20 method. Set the timer on your phone or watch to 10 minutes. Work solidly on your task until then, and don’t let anything distract you. After 10 minutes, take a short break and then try again. Once 10 minutes is easy for you, change the setting to 15 minutes.

Section E: Essential Skills Addressed – Oral Communication and Working with Others

Section E: Activity 1

Review the Essential Skills profile for Administrative Clerks at https://www.jobbank.gc.ca/essentialskillsresults/5. Which level of Working with Others and Oral Communication is required for clerical/office positions?

Section E: Activity 2

On the Essential Skills Profiles, find one important Working with Others and Communication skill that is needed for the activities in this section.

- Working with others:
- Communication:

Community Literacy of Ontario
Literacy Link Eastern Ontario

KL&S
Kingston Literacy & Skills

Clerical & Office Administration
Learner Modules
Module 6: Email

Section A: Difficult Vocabulary

Miscommunication
Personalize
Unprofessional
Punctuation
Explanation
Emoji
Information
Necessary

Definitions:

- Miscommunication – A lack of understanding
  - There was a **miscommunication** at work and I missed my shift.
- Unprofessional – Not Proper/Amateur
  - My boss said wearing jeans and flip flops to work is **unprofessional.**
- Explanation – To give reason for something
  - I gave a long **explanation** about why I was so late for work.
- Information – News or knowledge
  - You need more **information** before deciding which car to buy.
- Punctuation – marks used to clarify meaning in sentences (.,!:?)
  - A proper sentence needs clear **punctuation**.
- Emoji – small pictures embedded into emails or texts, such as a happy face.
  - I like texting with **emojis** ☺ .
- Necessary – important
  - Working out is **necessary** for staying in shape.

]

Section A: Activity 1

Match the synonyms

A. Miscommunication
B. Unprofessional
C. Explanation
D. Information
E. Personalize
F. Punctuation
G. Emoji
H. Necessary

1. Improper
2. Punctuation expressing emotion ☺ ☹
3. Made individual
4. Unclear message
5. Facts or news
6. Required/important
7. Reason
8. . , !, ‘ “

Section A: Activity 2

Use the vocabulary above to complete the following sentences.

1. My daughter always emails me with ___________________.
2. It’s important to get the right _______________ before making a decision.
3. Proper __________________ helps make your letter look professional.
4. Strong writing skills are ___________________ at work.
5. It’s __________________ to use emojis at work.
6. My boss asked me for an ___________________ after I sent the wrong file.
7. I use pictures to _________________ my work space.
8. I lost my job because of a ____________________. I missed my shift.

Section A: Activity 3

In the rest of the module, you will find each of the vocabulary words listed at least twice. Take a moment to scan through and highlight the words as you see them.

Grammar Note:

“UN” and “MIS” are negative prefixes. They mean “not” or “bad”. When you put them in front of a root word it changes the meaning.

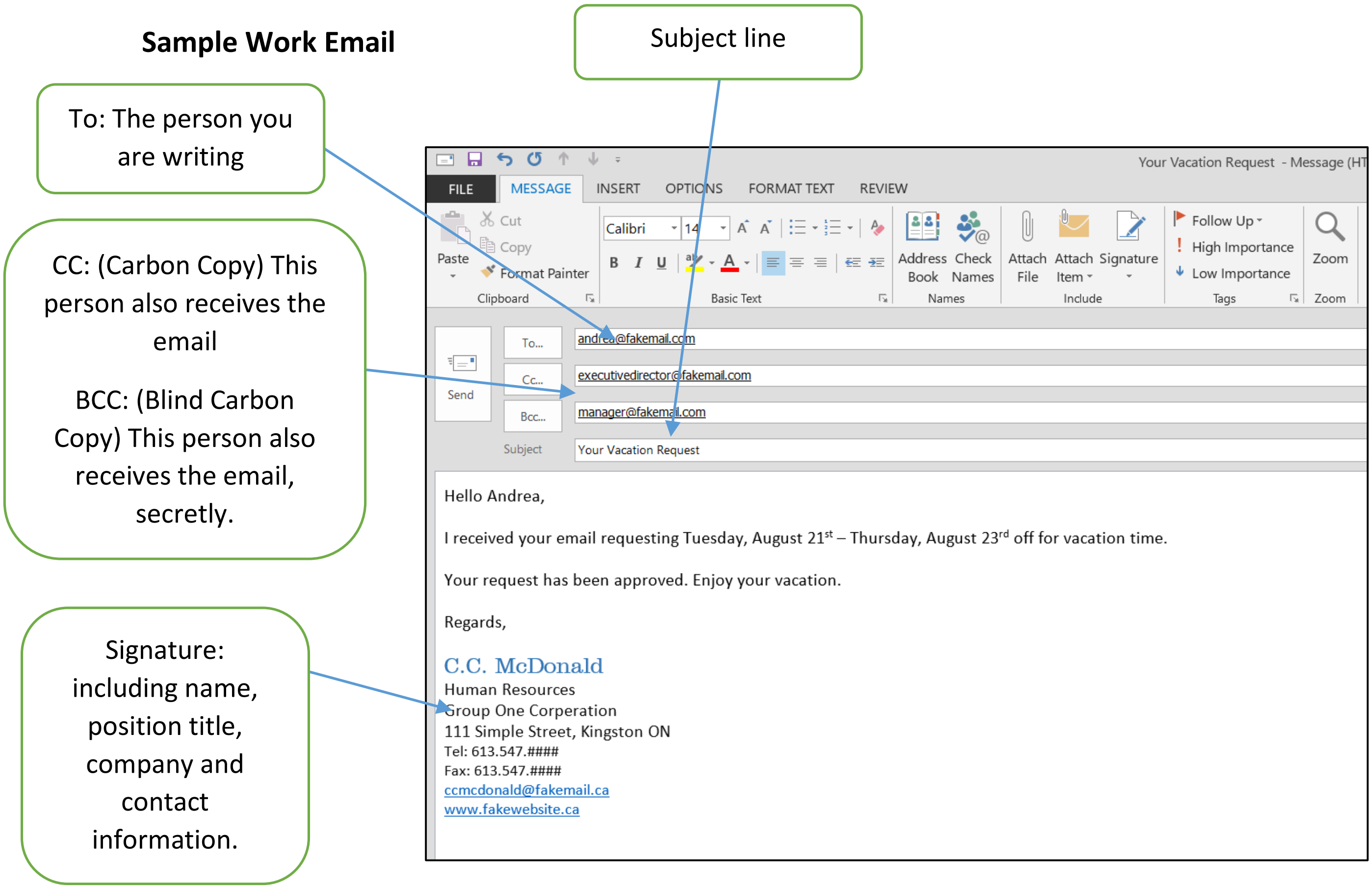
Information + MIS = misinformation
Professional + UN = unprofessional
Communication + MIS = miscommunication
Popular + UN = unpopular

“DIS” and “IN” have similar meanings.

Formal + IN = informal
Like + DIS = dislike
Attentive + IN = inattentive
Believe + DIS = disbelieve

Section B: Tips for Effective Email Communication

Sample Work Email



Subject line

To: The person you are writing

CC: (Carbon Copy) This person also receives the email

BCC: (Blind Carbon Copy) This person also receives the email, secretly.

Signature: including name, position title, company and contact information.

Your Vacation Request - Message (HT
FILE
MESSAGE
INSERT
OPTIONS
FORMAT TEXT
REVIEW
Paste
Cut
Copy
Format Painter
Clipboard
Calibri
14
B
I
U
Basic Text
Address Book
Check Names
Names
Attach File
Attach Item
Signature
Include
Follow Up
High Importance
Low Importance
Tags
Zoom
Zoom
Send

To... andrea@fakemail.com

Cc... executivedirector@fakemail.com

Bcc... manager@fakemail.com

Subject Your Vacation Request

Hello Andrea,

I received your email requesting Tuesday, August 21st – Thursday, August 23rd off for vacation time.

Your request has been approved. Enjoy your vacation.

Regards,

C.C. McDonald
Human Resources
Group One Corperation
111 Simple Street, Kingston ON
Tel: 613.547.####
Fax: 613.547.####
ccmcdonald@fakemail.ca
www.fakewebsite.ca

A lot of workplace communication is being done through email these days. It's very convenient and almost instant. Because of the format, it can feel informal, but there are rules of etiquette and privacy around workplace emails that should be followed.

Structure:

- Grammar, spelling and punctuation are important in email communication. Major errors can lead to miscommunication and minor errors can make you seem unprofessional. All email programs have grammar and spell checkers imbedded in them. After you've written your email, take a minute to review it. Does it make sense?
- Use proper sentence and paragraph formatting. An email may seem informal, but it is a professional document.
- Don't use ALL CAPS or BRIGHT RED LETTERS. This is the email equivalent of yelling.

- Generally avoid using emoticons ☺ ☹ & TOO! Much##* punctuation! in your emails. Stick with clear and simple messages using only standard punctuation.

- Choose a simple font and colour and stick with it. Choose a simple colour like black or blue. Some fonts can be hard to read, while others take away from the importance of your message.
    - Like this- Too small to read easily.
    - Like this - This font distracts from the message.
    - Like this - This font is too condensed. It is difficult to read.
    - Like this - Silly or ornamental fonts are unprofessional.

- Always use the subject line. People are busy, and stating a clear and concise email subject can help them prioritize their work. Also, did you know that if you continuously send emails without a subject line they might get flagged as SPAM? This means they will be put in the “junk” box and might get deleted before they are read.

- Respond to emails quickly. This lets the sender know you received it.

Privacy and Content

Though it might seem like it, email is not a private form of communication. Once you send information in an email, you lose control over it. It is very easy for information to be misplaced or shared these days. Here are some hints to keep content private and professional.

Emails about clients

- Privacy is important, so don’t put a client’s full name in the subject line of an email. Each company will have their own rules about this. You might be allowed to put a first name only, initials or a client/case number. If your company doesn’t have a rule around this, then choose the method you would like others to use when sending you emails.

- When emailing information about a client, keep it “need to know” only. Remember you are sharing personal information about a client.

- If you are emailing outside of your own agency or office, make sure to get the client’s permission to share their information.

Internal/Co-worker Emails

- Keep your emails short and to the point. People are busy and, if there is too much information, they might miss important information.

- Only use group emails when necessary. For instance, if you are sending a note about organizing parking spaces, then a group email is appropriate.
    - If you are replying to a group email, don't hit "Reply all" unless it is important for everyone to see your response. For instance, if someone emails that they found a key chain in the parking lot, don't respond "**It's not mine.**" Emails like this are annoying and take up valuable work time.

- A good rule of thumb is to never write anything in an email that you wouldn't want to be made public. The reality is, once you hit "Send" you lose control of that email. You trust that the person on the other end will keep it private, but you never know.

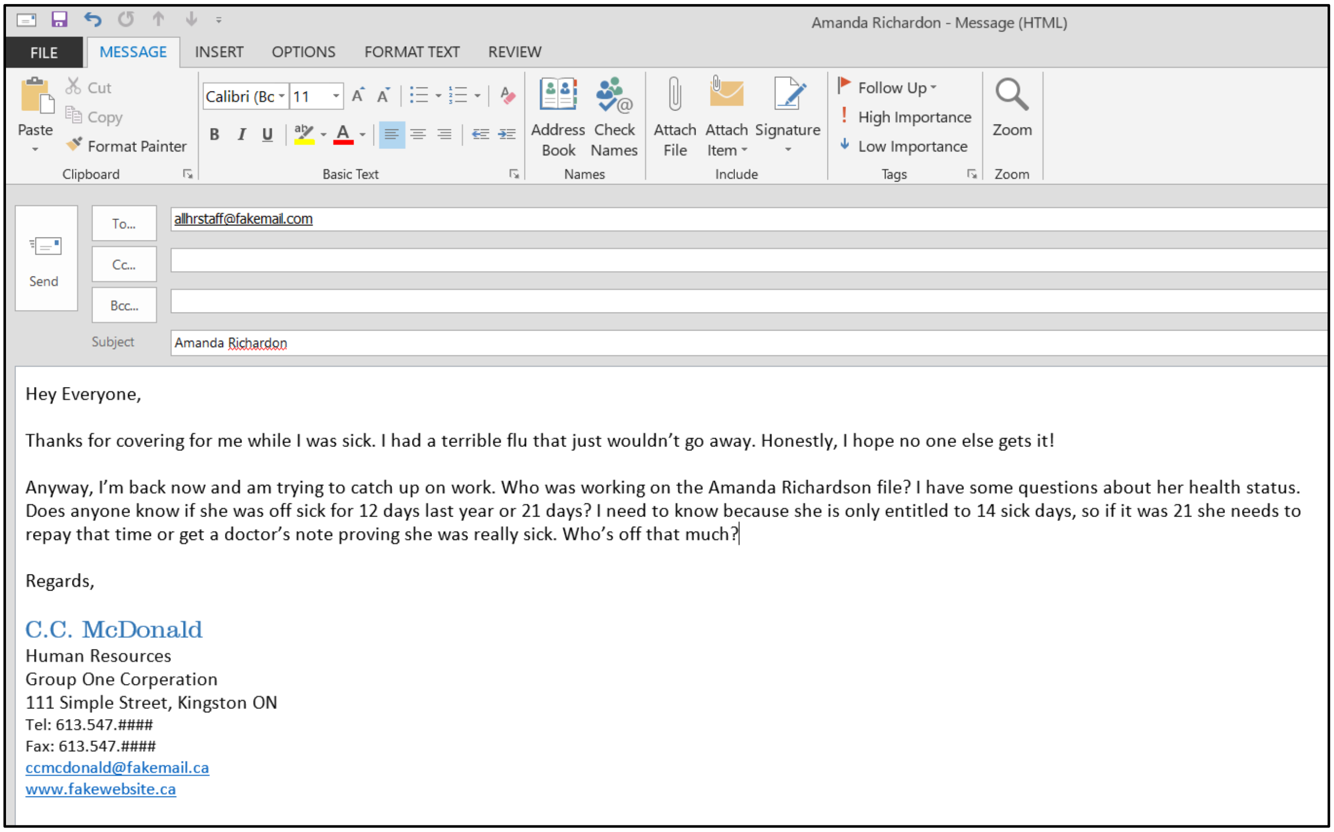
- There are generally multiple copies of emails once they are sent. For instance, if you send an email to your co-worker, Allison, even if she doesn't forward it to anyone, there is a copy in your "Sent" folder and a copy in her "Inbox". Even if you delete it, there is still a copy in your "Trash" folder and sometimes on a backup.

- Know your corporate culture. Some companies encourage employees to be friendly with each other. In those cases, adding a few emojis or a picture to your internal email is welcome. Other companies prefer to keep all email interactions professional. Check to see if there are company guidelines on interoffice communications.

- Finally, never gossip over email or share unnecessary personal information.

Section B: Activity 1

Read the email below and answer the questions.


Amanda Richardon - Message (HTML)
FILE
MESSAGE
INSERT
OPTIONS
FORMAT TEXT
REVIEW
Paste
Cut
Copy
Format Painter
Clipboard
Calibri (Bc
11
Basic Text
Address Book
Check Names
Names
Attach File
Attach Item
Signature
Include
Follow Up
High Importance
Low Importance
Tags
Zoom
Zoom
Send
To...
Cc...
Bcc...
Subject

To: allhrstaff@fakemail.com

Subject: Amanda Richardon

Hey Everyone,

Thanks for covering for me while I was sick. I had a terrible flu that just wouldn't go away. Honestly, I hope no one else gets it!

Anyway, I'm back now and am trying to catch up on work. Who was working on the Amanda Richardson file? I have some questions about her health status. Does anyone know if she was off sick for 12 days last year or 21 days? I need to know because she is only entitled to 14 sick days, so if it was 21 she needs to repay that time or get a doctor's note proving she was really sick. Who's off that much?

Regards,

C.C. McDonald
Human Resources
Group One Corperation
111 Simple Street, Kingston ON
Tel: 613.547.####
Fax: 613.547.####
ccmcdonald@fakemail.ca
www.fakewebsite.ca

1. Who is the email to?

____

2. What is C.C. McDonald's job title?

____

3. This email has several inappropriate things in it. Can you name three?

____

____

____

4. Rewrite this email so it contains the important information, but is appropriate for work.

Section B: Activity 2

Email your instructor a quick note about why you missed class last week. Make sure to thank your teacher for understanding and set up a date to start classes again.

If you don't have an email address (or prefer to not email your teacher) use the space below.

To:
CC:
From:
Subject:

Section C: Personal Email and Finding a Job

If you are looking for a job, you are likely using your personal email address to send resumes. Most jobs these days require that you look at the profile online and then either apply online or send a resume through your personal email.

Your personal email says a lot about you. Employers notice. When looking for jobs, your email address should be professional. Think about it as the suit you wear to an interview.

Tips to Try:

- Use your name: Rosa.Squire@..........com
- Use a few numbers or special characters to personalize it: Rosa.Squire21@gmail.com
- Use initials or version of your name like Rosa.e.Squire, RE_Squire, SquireR
- Add your city or province like Ontario_Rosa@........com
- Use a well-known email server such as Gmail, Outlook, Yahoo and Live to avoid having your email flagged as "spam"

Things to Avoid:

- Cutesy nicknames like Rosysquirrel@.........com. These may be fun and easy to remember for your friends, but they are unprofessional for work.
- Anything sexualized or that you might use for a dating sight HottyBody@........com.
- Anything which mentions drugs, alcohol or partying like Beers420@.......com.
- Too many numbers or characters at the end of your name, such as rosa.squire21_3!45@.......com. This can be hard to remember, and annoying to type in. Consider having to give this over the phone. Is it quick and easy, or does it require explanations and corrections?
- Health status or other personalized words which may give an employer reasons to ignore your application survivor@.......com.
- Political references.

Final tips on job search and email addresses:

- If your email address is on your resume, check it regularly.
- Keep a digital version of your resume handy, so you can quickly email it out if needed.

Section C: Activity 1

Are these email addresses appropriate for work or a job search? Give a reason why or why not.

Email Address	Appropriate/Inappropriate	Why/Why Not
happylover@.......com		
Singh_f.t!22.4-5@......com		
SinghF.12@......com		
bubblegumgirl@......com		
Amelia.j.Watson2@.......com		
NDP_supporter@......com		
Tories_for_the_win@.......com		
Your email address:		

Section D: Essential Skills Addressed – Writing, Communications and Digital Technology

Section D: Activity 1

Review the Essential Skills profile for Administrative Clerks at https://www.jobbank.gc.ca/essentialskillsresults/5. Which level of writing is required for clerical roles?

Section D: Activity 2

Under the above Essential Skills profile, find one important skill for Digital Technology, Communication and Writing that **you are already strong in.**

- Digital Technology:
- Communication:
- Writing:

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Clerical & Office Administration
Learner Modules
Module 7: Numeracy at Work

Section A: Math Self-Assessment

Section A: Activity 1

Think about your own math skills.

Can you:

☐ Add	☐ Subtract
☐ Understand decimals	☐ Do fractions
☐ Multiply	☐ Divide
☐ Read a traditional (analog) clock	☐ Read a bus schedule
☐ Make change	☐ Balance a cash drawer/till
☐ Tell time	☐ Estimate costs
☐ Use a spreadsheet to track purchases	☐ Read charts and understand data

If you struggle with basic math skills, now is the time to improve. It will help you feel more confident in your daily life. If you are taking this program through a literacy centre, ask your instructor about getting extra math support or joining a math class.

If you are working on your own, consider upgrading your skills online through GCF Learn Free's Global online classroom: https://edu.gcfglobal.org/en/subjects/reading-and-math/.

GCFGlobal™
Creating Opportunities for a Better Life

Section A: Activity 2

Think about the types of math you regularly use. What math skill would you use to figure out each of the following? List addition, subtraction, multiplication, division, percentage or fractions below.

1. _____ What percentage of your week do you go to the gym?
2. _____ How much money do you have left in your bank account after paying bills?
3. _____ How many people in total ride the city bus each week?
4. _____ How much flour do you need if you double a recipe?
5. _____ How much tax will you have to pay on a gym membership?
6. _____ How much money will each person get, if 6 of you bought a winning lottery ticket together?

Section B: Math at Work and in Life

Section B: Activity 1

Math skills, such as adding, subtracting, multiplying and dividing, are the building blocks for how we use numbers (also called numeracy). Think about ways in which you have used math this week? List them below.

1. Reading a cellphone bill
2. Checking the temperature
3.
4.
5.
6.
7.
8.
9.
10.

Today, many people think that, because we have a calculator at our finger tips, we don't need to learn basic math skills. But the truth is that having basic math skills helps us in so many ways. For instance:

- People make mistakes. People program your computers, cell phones and calculators and mistakes can happen. Having strong estimating/guessing skills help you know if a mistake is made.
- Technology fails. Batteries run out. Computers wear out. Cellphones get dropped. Mental math stays!
- Understanding math can also help you with your problem solving and reasoning skills.
- Improving your mental math can stimulate your brain and help keep your brain healthy. Think about it as jogging for your brain.
- Knowing the basics helps you understand time, money and measurements.

Section C: Numeracy in the Clerical Field

According to the Ministry of Training, Colleges and Universities, we tend to use math daily in four different ways:

1. Data – Reading charts and graphs
2. Money – Costs, comparisons and calculations
3. Time – Scheduling, reading clocks
4. Measurements – Finding height, weight, volume and more

Not all jobs use these types of math or use math in the same ways. For instance, a carpenter, an engineer and a grocer would use measurement-based math, while a cashier, an accountant and a bank teller would use more money math.

Section C: Activity 1

Go to the Essential Skills profile for Administrative Clerks at https://www.jobbank.gc.ca/essentialskillsresults/5. Click on “Numeracy”.

List two ways that money, measurement and data are used in a clerical position. Remember to add the Essential Skill levels. (They are noted in brackets after each task.)

Money

1.
2.

Measurement

1.
2.

Data

1.
2.

In clerical jobs, you will use math in different ways. In the following activities, assume that you are working for the local gym. You are working as clerical support. You handle scheduling, new registrations, phone and email inquiries.

Section C: Activity 2

You are 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 – 8 AM*	*Amount of Seniors Swimming 4 – 6 PM*
Monday	87	52
Tuesday	77	56
Wednesday	45	61
Thursday	56	65
Friday	36	46
Saturday	91	62
Sunday	66	36

Using the information above, answer the questions below.

1. Why do you need to change the swim schedule?
2. How many people in total swam in the mornings?
3. How many people in total swam in the afternoons?
4. How many people in total swam throughout the week?
5. Which day and time had the least amount of seniors?
6. Which day and time had the highest amount of seniors?
7. The next week was a holiday and the pool was closed for two days. Only half the total amount of seniors swam. How many people swam that week?
8. Which day and time would you add an extra hour of swimming and why?
9. Enter the times from the calendar in the schedule on the following page. Remember that, in order to add the extra hour per week, you will have to decide which program to shift.

Section C: Activity 3

A. Seniors swim – M, T, W, Th, F, S, Su 7:00 – 8:00 AM and 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 and Tot Swim – M, T, W, Th, F 9:00 –11:00 AM and S, Su 9:00 – 11:30 AM
E. Lessons – M, T, W, Th, F 11:00 AM – 4:00 PM S, Su 11:30 AM – 4:00 PM
F. Swim Yoga– M, T, W, Th, F, S, Su 5:00 – 7:00 AM

Time	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
5:00 AM							
6:00 AM							
7:00 AM							
8:00 AM							
9:00 AM							
10:00 AM							
11:00 AM							
12:00 PM							
1:00 PM							
2:00 PM							
3:00 PM							
4:00 PM							
5:00 PM	Adult Free Swim	Private Lessons	Adult Free Swim	Children’s lessons	Party Rentals	Party Rentals	Party Rentals
6:00 PM							
7:00 PM							
8:00 PM							

Section C: Activity 4

Using the chart above, answer the following questions:

1. How many hours per week are available for party rentals?
2. How many hours per week are available for private lessons?
3. If each private lesson takes 30 minutes, how many private lessons can be given per week?
4. If you are closed Monday for a holiday, how much swim yoga will you lose that week?

Section C: Activity 5

Using the internet, find the closest YMCA to your school. Complete the following three questions.

1. **Address and contact information**

Number ______________________ Street __________________________
City _______________________ Province ________________________
Postal Code _________________ Phone ________________________
Website ____

2. **Cost of a monthly and yearly membership for:**

	Monthly	*Yearly*
Adult:		
Child:		
Senior:		
Student:		
Family:		

3. **Using the information above, answer the following questions.**

   a. You sell six new memberships today. Three are adult memberships, two are family memberships and one is a senior membership. How much money in total will that be?

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

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

   d. If a family pays for a yearly pass instead of a monthly pass, how much money will they save?

   e. If a student pays for a yearly pass instead of a monthly pass, how much money will they save?

Section D: Essential Skills Addressed – Numeracy and Problem Solving

Section D: Activity 1

Review the Essential Skills profile for Administrative Clerks at https://www.jobbank.gc.ca/essentialskillsresults/5. Which level of math skills is required for clerical roles?

Section D: Activity 2

Under the above Essential Skills profile for Administrative Clerks, find one important skill for Thinking/Problem Solving and Numeracy that **you are already strong in.**

- Problem Solving:
- Numeracy:

Clerical & Office Administration

Learner Modules

Module 8: Document Use

Section A: Difficult Vocabulary

Troubleshooting
Specific
Properly
Product
Document
Jargon
Communicate
Research

Definitions

1. Troubleshoot: To solve problems
2. Properly: To do something correctly
3. Document: Form or a text with a specific purpose
4. Communicate: To share information
5. Specific: Something that is clearly defined
6. Product: The result of something
7. Jargon: Language or vocabulary specific to a job or field of study
8. Research: Investigate or review information

Section A: Activity 1

Match the synonyms

A. Troubleshoot
B. Properly
C. Document
D. Communicate
E. Specific
F. Product
G. Jargon
H. Research

1. Form
2. Vocabulary
3. Correctly
4. Definite
5. Review
6. The result of
7. Find solutions
8. Share information

Section A: Activity 2

Use the vocabulary above to complete the following sentences.

1. The company ____________________ well with its employees.
2. The ________________ from my lawyer has too much ____________ to understand.
3. You need to do a lot of _________________ before buying a new _______________.
4. You should always know the ____________ thing you want to buy.
5. If you do your research ______________ you will get the right product.
6. Any good manual has a ______________ section to help you find answers to common problems.

Section A: Activity 3

In the rest of the module, you will find each of the vocabulary words listed at least twice. Take a moment to scan through and highlight the words as you see them.

Grammar Note:

Some words can be used as either nouns (things) or verbs (actions)

Example: I need the document. (Document is a NOUN or a thing)

Document everything you see. (Document is a VERB or an action)

Example: The produce in the store looks very fresh. (NOUN)

I will produce the documents! (VERB)

Section B: Finding and Using Information

In clerical work, you will use documents mainly to find or communicate (share) information. This means you are either reading documents, or creating and filling them in.

For instance, if your printer breaks at work and you need to order a new one. You will need to do the following things:

- Research printer options to make sure it fits the needs of your office.
- Compare brands and prices by reading flyers, websites and product reviews.
- Decided which one you want.
- Order it from a website or office supply store.
- Fill in the documents and forms needed to order the printer. For instance, you might need to fill in a shipping form, a payment form and a warranty.
- Check the order when it arrives.
- Read the instruction manual while setting it up.

In each of these steps, you will find or communicate information using a form. Finding information requires that you read, skim or scan through a document until you see the specific information you are looking for. Communicating information requires that you give information by filling in a form, either on paper or on the computer.

Section B: Activity 1

Read the steps below on buying and ordering a new printer. Are you finding or communicating information?

Step	*Finding Information (reading)*	*Communicating Information (writing)*
1. Requesting a new printer at work		
2. Researching new printers		
3. Making a spreadsheet comparing utilities and prices		
4. Ordering the printer		
5. Signing for the new printer when it arrives		
6. Reading the manual		
7. Troubleshooting		
8. Emailing staff to let them know the new printer is up and running		

Finding information means reading and using different strategies to get the job done efficiently.

- **First, know why you are reading**
    - Are you looking for specific information or are you looking for basic understanding?
    - Do you need to read the whole document, or are you looking for a specific section or piece of information?

- **Know what you are reading**
    - Preview the document – look at titles, skim the pictures and the layout.
    - Do you have the background information needed to understand the document?

- **Check your understanding while you are reading**
    - Pause as you go through to check facts and figures.
    - If you don’t understand something, reread the text.
    - Do you understand the vocabulary being used? Are there too many technical or “jargon” words being used, making it hard to understand?
    - Are you able to explain what you’ve read in your own words?
    - Are you able to apply what you’ve learned?

- **Use reading techniques to improve comprehension**
    - Look up new vocabulary.
    - Use context to help you understand new information.

Sample Printer Review

Printer XX-1User GG_Computer_Guy

The XX-1 was hard to install. The manual didn’t have a good troubleshooting section. There was too much jargon! Also, it was a long wait to talk to an operator when I needed help. The IT guy was actually super helpful once I got through. Once the printer was set up, it worked well. It’s good on ink and prints quickly. Mine hasn’t jammed yet.

Because you are looking for a new printer, you read the review carefully so that you can really understand what he is saying. You see that the printer runs really well and is good on ink. You also learn that the setup process was a problem.

Finding information can also mean skimming or scanning a document. **Skimming** is when you quickly look over a document to get the general idea. **Scanning** something quickly is looking over a document for a specific word or phrase. So if you are setting up the printer, you may scan the table of contents for "Connecting WiFi" when you are trying to connect it to the internet.

Hint for skimming and scanning information – use a table to help you understand the document and find information.

Section B: Activity 2

Table of Contents
Pamela's 4 in 1 Printer, Scanner, Photocopier and Fax Machine

Topic	**Section**	
1 – Warranty	1.2 – Refunds	Pages 2-9
	1.3 – Policies	
2 – Safety & Legal	2.1 – Liability	Pages 10-14
	2.2 – Copyright	
3 – Setup	3.1 – Parts	Pages 15-23
	3.2 – Plugs & Cords	
	3.3 – Troubleshooting	
4 – Networking	4.1 – WiFi	Pages 24-31
	4.2 – Networking with computers	
	4.3 – Remote Connection	
5 – Faxing	5.1 – Sending	Pages 31-32
	5.2 – Receiving	
6 – Scanning	6.1 – Colour/Black and White	Pages 33-35
	6.2 – Sending	
7 – Printing	7.1 – Colour/Black and White	Pages 36-42
	7.2 – Connecting	
	7.3 – Private Printing	
	7.4 – Paper/Page Setup	
	7.5 – Documents	
8 – Troubleshooting	8.1 – FAQ	Pages 43-49
9 – Contact	9.1 – Distributers	Pages 50-53
	9.2 – Manufacturer	

Answer the following questions by skimming and scanning the table of contents for “*Pamela’s 4 in 1 Printer, Scanner, Photocopier and Fax Machine*”.

1. What is the table of contents for?
2. What is the name of the company?
3. In which section would you find information on returning the printer?
4. In which section would you find help with connecting to your office network?
5. Where would you look if you were offline?
6. Where would you find contact information?

Section C: Sharing Information

We also use forms to communicate information. In a clerical job, you will be filling in or creating forms. Forms can be filled in by hand or online. Either way, they need to be filled in properly. It is important to keep documents neat and tidy. A messy form could cause something to be delivered to the wrong area, the wrong product to be shipped or perhaps not to be shipped at all.

Section C: Activity 1

Imagine you’ve been asked to order a new printer for the office. You’ve done your research and you go over to the store to look at it in person. Please fill in the following order form to order it.

This form was adapted from the Clerical Curriculum created by Literacy Link Eastern Ontario. Used with permission.

- Go to www.staples.ca and find a printer which also scans, photocopies and faxes.
- Use the product information to fill in the form below. Assume you are shipping to your school or learning centre.
- Make sure to add a note that your school is on the second floor of an office building.

Ordering Information

Company	Initial	Date
Street Address	Suite/Unit #	
City	Prov.	Postal Code
Phone	E-mail	
Contact Name	Title	

Product Information

Product Name:	Product Number:
Original Cost:	Including Taxes:
Paid By (circle)	Visa Mastercard Cash Store Account Debit
Payment Information:	

Delivery

Date:

Location: Same as above ☐ Different (Below)

Company	Phone
Address	Email
Contact	

Delivery Notes

Special Information	
Signature	Date

Section C: Activity 2

Now that you’ve ordered your printer, please send an email to your boss and let her know which printer you’ve selected and why. List a few features and remember to add the price.

To:
From:
Subject:

Section D: Essential Skills Addressed – Reading and Document Use

Section D: Activity 1

Review the Essential Skills profile for Administrative Clerks at https://www.jobbank.gc.ca/essentialskillsresults/5. Which level of Document Use is required for clerical roles?

Section D: Activity 2

Under the Essential Skills profile for Administrative Clerks, find one important skill for Communication and Writing that you could improve on.

- Communication:

- Writing:

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Learner Modules

Module 9: Filing and Document Management

Section A: Difficult Vocabulary

This section is adapted from Literacy Link Eastern Ontario's Clerical Curriculum. Used with permission.

Media System Accuracy Record

Consistent Request Management Ignore

Definitions:

- Media: Methods of storing or communicating information
- System: A method of organizing
- Accuracy: Precise and correct
- Record: Evidence or documentation
- Request: Ask for
- Consistent: Regular or reliable
- Management: The people in charge
- Ignore: To not pay attention to

Section A: Activity 1

Match the synonyms

A. Media
B. System
C. Request
D. Record
E. Consistent
F. Management
G. Ignore
H. Accuracy

1. Ask for
2. Magazines, Newspapers, CDs, etc.
3. Disregard
4. Organization
5. Administration
6. Reliable
7. Precise
8. Evidence

Section A: Activity 2

Use the vocabulary above to complete the following sentences.

1. My father keeps ____________ of all his purchases.
2. A good clerk keeps _________________ files.
3. Never _____________ a small problem as it could turn into a bigger one later.
4. I called the office to _______________ a day off.
5. We store documents in different forms of ____________________.
6. _______________ is important when filing documents.
7. Different offices have different _______________ for filing.
8. If you have a problem you can't figure out, call ________________.

Section A: Activity 3

In the rest of the module you will find each of the vocabulary words listed at least twice. Take a moment to scan through and highlight the words as you see them.

Grammar Note: Commas

Use a comma before coordinator conjunctions (FOR, AND, NOR, BUT, OR, YET, SO) when connecting two simple sentences.

My boss always asks for sugar in her coffee. Today she wanted cream.
My boss always asks for sugar in her coffee, but today she wanted cream.

The officer turned on the sirens. I pulled my car over.
The officer turned on the sirens, so I pulled my car over.

Section B: File Management

This section is adapted from Literacy Link Eastern Ontario's Clerical Curriculum. Used with permission.

An important part of working in a clerical position is data management. Today, most companies keep both paper and digital copies of files, and it is important to keep these records organized and consistent.

Over the years, files have taken on a variety of forms including:

- Paper – Hard copies of files
- Electronic – Files stored using different media
    - Video and audio Recordings
    - Multimedia presentations
    - Slide presentations
- Digital Storage (files available through digital form)
    - Hard drives and USB Sticks
    - Disks
    - CDs, DVDs, Bluerays
- Cloud Storage (files stored in the 'cloud' on the internet)
- Microfilm (these records can be viewed using special machines)
    - Miniaturized records

No matter what form a record is created in, it needs to be stored to keep contents private and secure, but still accessible to authorized staff.

The three key elements in making record management effective are documentation, consistency and accuracy.

Documentation

Documentation means keeping physical evidence. It is a way of making sure all information is accounted for and real. For instance, a dental office might keep a copy of your credit card receipt to prove you paid for your last visit.

Consistency

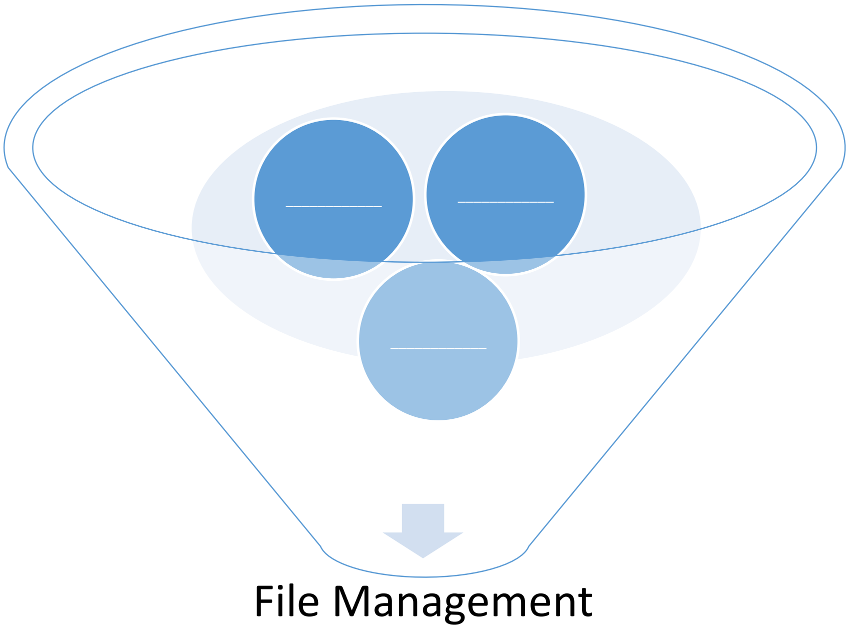
Consistency in filing means each file is treated or handled in the same manner. This is important so that one person may easily be able to find information that another person has filed. Consider that you are working at a dental office. If a client comes in, any clerk in the office should be able to find the information a person is requesting.

Accuracy

All files need to be filed properly and consistently, so information is stored and shared properly. Again, think about a dentist office. If the dentist requests a set of x-rays for Dennis Anderson, but they have been misfiled or mislabelled, it could lead to many problems, including inappropriate treatment plans being recommended, and loss of time and money.

Section B: Activity 1

Fill in the chart below with the three key aspects of proper File Management



To learn more about file management, watch the following video "*Introduction to Records Management*": http://www.wisc-online.com/objects/ViewObject.aspx?ID=ORD805

An important part of file management is alphabetizing, which means putting words or letters in alphabetic order.

Here are some samples:

Letters	A	B	C	D
Words starting with different letters	Amanda	Brandon	Carry	David
Words starting the with the same letter	Aaron	Albert	Amanda	Aziz
First and Last Names	**Am**hed, Bradley	**Ander**son, Vanessa	**Andr**ews, Milton	**Andrews,** Zachardy

Section B: Activity 2

Put the following names in alphabetical order:

First Names

Vanessa Terry Pierre Rolland Evelyn Wallid

Full Names (Remember to go by Last Name, First Name)

Vanessa Bernard Terry Roseland Pierre Beausoleil Rolland Hamel

__________________ ________________ __________________ ______________

Evelyn Maynard Wallid Maracle

__________________ ________________

Filing Rules

The Association of Records Managers and Associates (ARMA) is an international body which sets the standards for records management. The Associations has two chapters in Ontario; one in Toronto and one in Ottawa. They keep up with changes to record creation and management, and help to inform individuals who work in the field of best practices.

There are many different filing systems which businesses may use, but the ARMA alphabetic system is the most common.

ARMA indexes (files) by “units”. For instance, the name “Allan Aaron Arden” has three units: **Allan + Aaron + Arden.**

For Example:

NAME	*UNIT 1*	*UNIT 2*	*UNIT 3*
Ann’s Flowers	ANN’S	FLOWERS	
Julie’s Haircare	JULIE’S	HAIRCARE	
Ted’s Auto Parts	TED’S	AUTO	PARTS
Candles and Such	CANDLES	AND	SUCH
Victoria`s Antiques	VICTORIA`S	ANTIQUES	

In Alphabetic Order

NAME	*UNIT 1*	*UNIT 2*	*UNIT 3*
Ann’s Flowers	ANN’S	FLOWERS	
Candles and Such	CANDLES	AND	SUCH
Julie’s Haircare	JULIE’S	HAIRCARE	
Ted’s Auto Parts	TED’S	AUTO	PARTS
Victoria`s Antiques	VICTORIA`S	ANTIQUES	

Section B: Activity 3

Break each of these businesses down into units and then file alphabetically below.

NAME	*UNIT 1*	*UNIT 2*	*UNIT 3*	*UNIT 4*
Watson and Son Furniture				
Hair by Harry				
Smart Repairs				
To Fruit and Beyond				
Pierre's Papillion				

Now list the businesses in Alphabetical Order

NAME	*UNIT 1*	*UNIT 2*	*UNIT 3*	*UNIT 4*

12 Simple Rules for Proper Filing

Of course, filing can be more complicated than just putting things in alphabetic order. Luckily, to help us out, here are the 12 simple rules for proper filing, according to the Association of Records Managers and Associates**:**

Rule 1 – Personal Names

Names are arranged in the following order: *Last Name, First Name, Middle Name*. Of course, it might also be *Last Name, First Initial, Middle Initial* or some combination thereof.

Remember: *nothing before something*…when one of the units is just an initial, it comes before a name starting with that same letter. Leave out punctuation, such as periods (.), apostrophes (‘) or hyphens (-). For instance: Miles, R would be listed before Miles, Rebecca.

NAME	UNIT 1	UNIT 2	UNIT 3
Roberta J. Adams	ADAMS	ROBERTA	J
Shelley B. Andrews	ANDREWS	SHELLEY	B
Terry Andrews	ANDREWS	TERRY	
Wilma Karen Jackson	JACKSON	WILMA	KAREN
Walter Jenson	JENSON	WALTER	
William Jenson	JENSON	WILLIAM	
R Miles	MILES	R	
Rebecca Miles	MILES	REBECCA	
Ann Marie Williams	WILLIAMS	ANN	MARIE
Anna Williams	WILLIAMS	ANNA	
Don Williams	WILLIAMS	DON	

Rule 2 - Personal Names with Prefixes

Common Prefixes are Mac, Mc, De, La, Van, O’ and many more. When a name has a prefix at the beginning, such as O’Brien, simply ignore any punctuation and consider it as one unit “OBrien”.

NAME	UNIT 1	UNIT 2	UNIT 3
Ona DuMonde	DUMONDE	ONA	
Pauline DuMonde	DUMONDE	PAULINE	
Ariel L’Abelle	LABELLE	ARIEL	
Jonie A. MacDonald	MACDONALD	JONIE	A
Terry C. McDonald	MCDONALD	TERRY	C
Carl Van Eric	VANERIC	CARL	
Jane Van Eric	VANERIC	JANE	

Rule 3 - Hyphenated Personal Names

Similar to Rule 2, when someone has a hyphenated first, middle or last name, it is looked at as one unit. For instance: *Mary-Anne* is considered MaryAnne and Carleson-Graves is considered CarlesonGraves.

NAME	UNIT 1	UNIT 2	UNIT 3
Vera Andrews – Smyth	ANDREWSSMYTH	VERA	
Mary-Anne Carleson-Graves	MARYANNE	CARLESONGRAVES	
Tina DeTom-Jones	DETOMJONES	TINA	
Ginny Amanda Lee	LEE	GINNY	AMANDA
Amy Amanda-Lee	AMANDALEE	AMY	
Ann-Marie S. Shootle	SHOOTLE	ANNMARIE	S

Rule 4 - Single Letters and Abbreviations of Personal Names

When a person uses his or her initials as their name, we index them as separate units. The name J.K. Rowling would be alphabetized using **Rowling** as unit one**, J** as unit 2, and **K** as unit 3. Nicknames or abbreviations are done the same.

NAME	UNIT 1	UNIT 2	UNIT 3
A.J. Andrews	ANDREWS	A	J
Lee Bailings	BAILINGS	Lee	
Lou Chancer	CHANCER	LOU	
Wm. Daniels	DANIELS	WM	
J.K. Rowling	ROWLING	J	K
T. J. Simpson	SIMPSON	T	J
Geo. N. Victory	VICTORY	GEO	N

Rule 5 - Personal Names with Titles and Suffixes

Personal names can come with titles or professional designations. These can be *Miss, Mr., Mrs., or Ms.* Other titles could be Dr., *Prof., or Const.* Sometimes people use suffixes with their names as well. Some examples of suffixes are II, III, Jr. and Sr. Professional designations, like *CPA, MD, and PH.D*, are suffixes as well. **Prefixes and suffixes are the last indexing unit** we use to see the difference between two or more names that are the same. Prefixes and suffixes are sometimes placed in brackets (parentheses) at the end.

Professor James Knight would be listed as Knight, James, Professor.

Royal or religious titles, such as *King, Queen, Prince, Princess, Father or Sister*, are seen as suffixes.

Queen Amelia Ackerman would then be listed as Ackerman, Amelia, Queen

The exception is if titles are placed before a single given name (Queen Elizabeth) or a single last name only (Dr. Greer). Then, they are indexed **as written**.

Here are some examples of proper filing of personal names with titles and suffixes.

NAME	UNIT 1	UNIT 2	UNIT 3	UNIT 4
Queen Amelia Ackerman	ACKERMAN	AMELIA	QUEEN	
Sharon Balderson, CPA	BALDERSON	SHARON	CPA	
Father James	FATHER	JAMES		
Mrs. Amy Jenes	JENES	AMY	MRS	
Queen Elizabeth II	QUEEN	ELIZABETH	II	
Mrs. Jenny Landerman	LANDERMAN	JENNY	MRS	
Professor James Knight	KNIGHT	JAMES	PROFESSOR	
Sister May Smith	SMITH	MAY	SISTER	
Paul K Teaside III	TEASIDE	PAUL	K	III
Mr. James Wide, Jr.	WIDE	JAMES	JR	MR
Dr. Fred Walters	WALTERS	FRED	DR	

Section B: Activity 4

Filing Rules for Personal Names

1. When filing personal names, which name is the first filing unit?

   ____

2. In the following names, circle the prefix.
   a) McPherson
   b) St. Jacques
   c) Van Kleiff
   d) de la Roche

3. Number the following from one to ten to show the correct filing order. If file folders are available for you to use at your learning centre, you could label them by printing the names on labels for the folders. Then you could place them in correct filing order.

___R. T Sampson

___Captain R. T. Sampson

___Robert T. Sampson

___Dr. Robert Sampson

___Robert T. Sampson, Sr.

___Robert T. Sampson Jr.

___Robert Sampson

___Robert T. Sampson, C.P.A.

___Dr. Sampson

___Father R. T. Sampson

Rule 6 - Names of Businesses and Organizations

Businesses and organizations follow the same rules as regular names. However, if a business begins with the article *"THE",* then put it in the last unit as you would a title.

NAME	UNIT 1	UNIT 2	UNIT 3	UNIT 4
Barb's Boutique	BARBS	BOUTIQUE		
The Baron Dollar Store	BARON	DOLLAR	STORE	THE
Copiers Are Us	COPIERS	ARE	US	
Cpt. Jim's Seafood House	CPT	JIMS	SEAFOOD	HOUSE
Dr. Adam's Tree Repair	DR	ADAMS	TREE	REPAIR
St. Peter Lawn Care	STPETER	LAWN	CARE	
The Worthy Coat Factory	WORTHY	COAT	FACTORY	THE
Zing Gray Daily News	ZING	GRAY	DAILY	NEWS

Rule 7 – Business Names with Single Letters, Abbreviations, Acronyms and Other Punctuation

In businesses containing single letters, like W D Construction, each letter is a separate unit.

Acronyms, like CBC, are indexed as one unit.

Always ignore the punctuation (For example: C.B.C. should be indexed as CBC).

NAME	UNIT 1	UNIT 2	UNIT 3
A B Electronics	A	B	ELECTRONICS
Ace Repair Co.	ACE	REPAIR	CO
KKSR Broadcasting	KKSR	BROADCASTING	
L.A.N., Inc.	LAN	INC	
Regal Mfg. Corp.	REGAL	MFG	CORP

Rules 9 and 10 – Numbers and Symbols in Business and Organization Names

- All numbers, both common Arabic style (1, 2, 3, 4, 5, 6) and Roman Numerals (I, II, III, IV, V, VI…..), are considered as one unit.
- When names contain numbers, they always come before letters in filing. For example, *Limestone 21st Century Farms* comes before *Limestone Apple Farm.*
- Numbers are filed in ascending order from lowest to highest.
- When names contain digit numerals, we arrange them in ascending order, lowest to highest, with numbers coming before the Roman numerals, and both before alphabetic names.
- If a number is written as an ordinal number (1st, 2nd, 3rd, etc.), the "st, nd, rd" are ignored.
- If a number is written out (*one, two, three)*, it is treated and filed as a word in alphabetical order.
- Symbols in a name, such as &, $, #, @, +, ?, %, are written in their word form instead and filed using the rules above.

Number, Numeral and Symbol Filing Examples

SYMBOL	INDEXED AS
&	AND
¢	CENT or CENTS
$	DOLLAR or DOLLARS
#	NUMBER, POUND or POUNDS

SYMBOL	INDEXED AS
@	AT
+	PLUS
?	QUESTION
%	PERCENT

NAME	UNIT 1	UNIT 2	UNIT 3	UNIT 4
1-2-3 Easy Mart	123	EASY	MART	
1 Stop Shopping Centre	1	STOP	SHOPPING	CENTRE
4th Street Market	4	STREET	MARKET	
$ Days Motel	DOLLAR	DAYS	MOTEL	
The Dollar Smart Store	DOLLAR	SMART	STORE	THE
Just Good ¢ Store	JUST	GOOD	CENTS	STORE

Section B: Activity 5

Rules for Business Names

Break down the business names into units in the table below. Remember “nothing before something”, punctuation is ignored, and symbols are given a name.

NAME	UNIT 1	UNIT 2	UNIT 3	UNIT 4
Happy Accident Insurance				
The Elm Pub				
CKTV				
J.A. Massage				
Mechanic’s Choice				
Paul’s Pizza & Pasta				
24 – 7 Phone Service				
Internet @ Home				
B-4 You Go				
#1 Used Cars				
A + + Towing				

Test your skills by completing the alphabetic filing activity at http://www.wisc-online.com/objects/ViewObject.aspx?ID=BST205.

If this link does not work, try www.wisc-online.com and type in “*Records Management: Applying ARMA Rules to Business Filing*” and choose that file to view.

Rule 11 - Government Names

The names of government organizations have their own rules and can be complex.

- First index the jurisdiction that controls the agency
  Revenue Canada (Canada is the jurisdiction)
  Employment Ontario (Ontario is the jurisdiction)

- Second is the agency name
  Revenue Canada (Revenue is the name)
  Employment Ontario (Employment is the name)

- Finally, qualifiers, such as “Province of”, “County of” or “Department of” are omitted, unless they are necessary. For instance, both the province and capital city of “Quebec” carry the same name, so they might need to be qualified.

NAME	UNIT 1 (Jurisdiction)	UNIT 2	UNIT 3	UNIT 4	UNIT 5
Public Works, Kingston, ON	KINGSTON	PUBLIC	WORKS	KINGSTON	ONTARIO
Revenue Canada	CANADA	REVENUE	CANADA		

Rule 12 – Addresses

If a business or personal name is identical they need to be filed by address. Address elements must be considered in a particular order: City, Province (spelled as the full word, not abbreviated), Street Name, Street type/Quadrant (NE, NW, SE, SW), House or Building Number.

NAME	UNIT 1	UNIT 2	UNIT 3	UNIT 4	UNIT 5	UNIT 6
Metro 310 Barrie St. Kingston, ON	METRO	KINGSTON	ONTARIO	BARRIE	ST	310
Metro 775 Bayridge Dr Kingston, ON	METRO	KINGSTON	ONTARIO	BAYRIDGE	DR	775
Metro 460 Gardiners Rd Kingston, ON	METRO	KINGSTON	ONTARIO	GARDINERS	RD	460

Section B: Activity 6

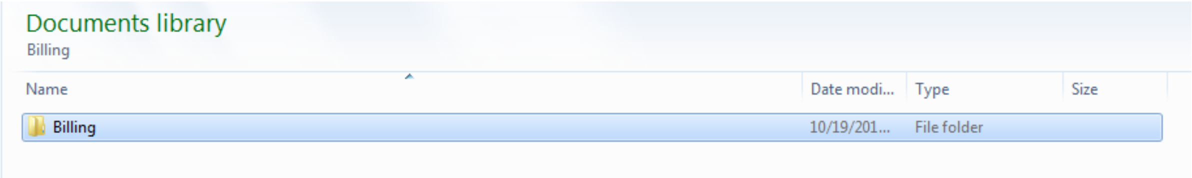
Using Google Maps, look up your five closest Tim Hortons and fill in the chart below. If you have the computer skills, recreate this chart in MS Word or Google Docs.

NAME	UNIT 1	UNIT 2	UNIT 3	UNIT 4	UNIT 5	UNIT 6	UNIT 7
Tim Hortons 460 Gardiners Road, Kingston Ontario	TIM	HORTONS	KINGSTON	ONTARIO	GARDINERS	RD	460

Digital File Management

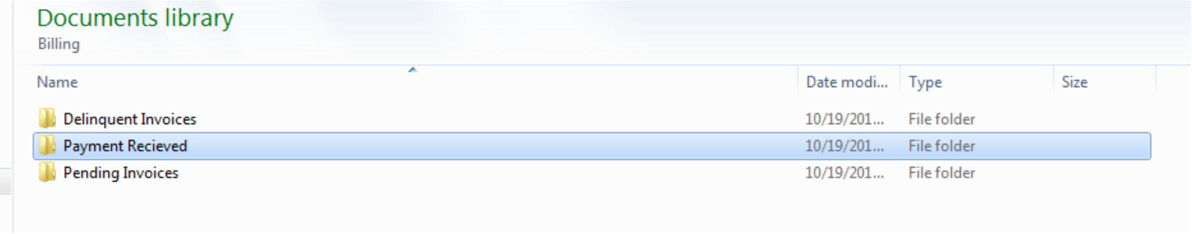
Note: When filing digitally, all the previous alphabetic rules are used; however, sometimes software programs have their own systems which might not be the same as ARMA. For instance, MS EXCEL sorts symbols using its own system and puts numbers after letters. So if you are tracking paper files in a spreadsheet, be careful!

Digital files should be kept as neat and orderly as paper files. Most offices will have a digital filing system. It might look something like this:



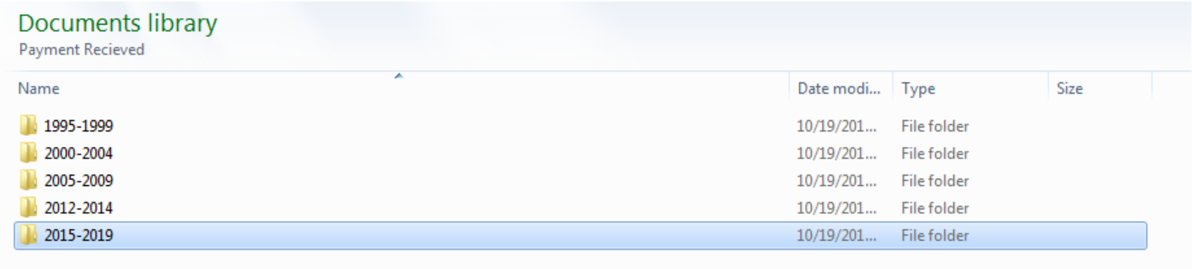
Documents library
Billing

Name	Date modi...	Type	Size
Billing	10/19/201...	File folder	



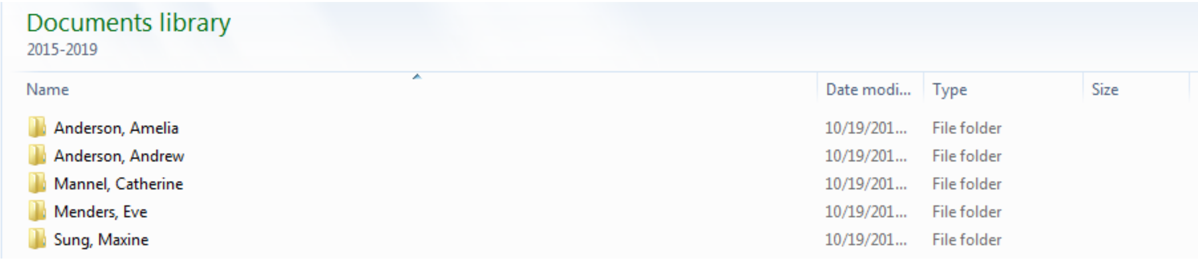
Documents library
Billing

Name	Date modi...	Type	Size
Delinquent Invoices	10/19/201...	File folder	
Payment Recieved	10/19/201...	File folder	
Pending Invoices	10/19/201...	File folder	



Documents library
Payment Recieved

Name	Date modi...	Type	Size
1995-1999	10/19/201...	File folder	
2000-2004	10/19/201...	File folder	
2005-2009	10/19/201...	File folder	
2012-2014	10/19/201...	File folder	
2015-2019	10/19/201...	File folder	



Documents library
2015-2019

Name	Date modi...	Type	Size
Anderson, Amelia	10/19/201...	File folder	
Anderson, Andrew	10/19/201...	File folder	
Mannel, Catherine	10/19/201...	File folder	
Menders, Eve	10/19/201...	File folder	
Sung, Maxine	10/19/201...	File folder	

Section C: Why Filing?

Section C: Activity 1

1. Why do we file in such a specific way?

2. What problems could occur if we don't keep our files accurate?

3. Why should each file be standard?

Section D: Essential Skills Addressed – Reading, Document Use and Digital Technology

Section D: Activity 1

Review the Essential Skills profile for Administrative Clerks at https://www.jobbank.gc.ca/essentialskillsresults/5. Which level of reading is required for clerical roles?

Section D: Activity 2

Under the Essential Skills profile for Administrative Clerks, find one important skill for Digital Technology, Communication and Writing that **you are already strong in.**

- Communication:
- Writing:
- Digital Technology: