Passaic County Technical Institute

Clerical Skills Level I

School of Business

Submitted by:
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Maria Matano

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CLERICAL SKILLS I

I. RATIONALE

Clerical Skills I covers a variety of clerical skills and methods used in entry-level positions in an office environment. The course study includes the following computer applications: word processing, spreadsheets, and PowerPoint presentations. In addition the course provides study in the following areas: filing, reprographics, business math, banking and personal finance, telephone techniques, and safety.

COURSE DESCRIPTION

Clerical Skills I is a course intended to introduce students to office concepts so that they will be able to fulfill their multiple roles as citizens, consumers, workers, managers and business owners and manage their own financial futures. The primary purpose of the course is to help students develop the ability to make informed business and financial decisions in a global society. This course is intended to present a basic understanding of clerical skills and to connect clerical skills to a working environment and to relate successfully to the world around them.

II. COURSE OBJECTIVES/OUTLINE

NJCSS - STANDARD 9:1 21ST CENTURY LIFE AND CAREER SKILLS.
All students will demonstrate the creative, critical thinking, collaboration and problem-solving skills needed to function successfully as both global citizens and workers in diverse ethnic and organizational cultures.

NJCSS - STANDARD 9:2 PERSONAL FINANCIAL LITERACY
All students will develop skills and strategies and promote personal and financial responsibility related to financial planning, savings, investment, and charitable giving in the global economy.

NJCSS - STANDARD 9:3 CAREER AWARENESS, EXPLORATION AND PREPARATION
All students will apply knowledge about and engage in the process of career awareness, exploration, and preparation in order to navigate the globally competitive work environment of the information age.

NJCSS - STANDARD 6:3 ACTIVE CITIZENSHIP IN THE 21ST CENTURY
All students will acquire the skills needed to be active, informed citizens who value diversity and promote cultural understanding by working collaboratively to address challenges that are inherent in living in an interconnected world.
A. Fundamentals of Computers (NJCSS Standard 8.1 Educational Technology)
The student will be able to:
1. Identify computer components and the history of computers.
2. Identify the role of computer components in various types of software applications.
3. Understand the need to protect documents from viruses through the use of special programs such as firewall and virus protection software.

B. The fundamentals of Word Processing (NJCSS Standard 8.1 Educational Technology)
The student will be able to:
1. Touch type alpha and numeric keyboard at a proficiency of 25 WPM.
2. Identify and format the key components of a business letter.
3. Identify and format the key components of a personal business letter.
4. Identify and format the key components of a memorandum.
5. Insert and create tables.
6. Enhance documents with the use of clip art and other drawing tools.
7. Apply proofreader’s notations to correct documents.
8. Set up and use the tab stop function to format data into columns.
10. Use ribbon functions to bold, italicize, underline, and modify font size and style.
11. Insert bullets and numbers to enhance the visual appeal of a document.

C. The fundamentals of Excel (NJCSS Standard 8.1 Educational Technology)
The student will be able to:
1. Apply cell formatting.
2. Apply number formats.
3. Use the font ribbon to change font size and style.
4. Use font ribbon to bold, italicize and underline.
5. Use the format dialog box to number, align, select fonts, and borders.
6. Insert, resize and crop graphics.
7. Use basic formulas to add, subtract, multiply and divide.

D. The fundamentals of PowerPoint (NJCSS Standard 8.1 Educational Technology)
The student will be able to:
1. Create a basic PowerPoint presentation.
2. Enhance slides using Word Art and Clip Art.
3. Enhance presentations using transitions and sound effects.

The student will be able to:
1. Answer the telephone using a professional business attitude and direct calls as required.
2. Record and relay accurate telephone messages.
3. File documents both manually and electronically using the filing rules.
4. Greet and answer preliminary questions for office visitors.
5. Operate fax machines, copiers, printers and other office equipment.
6. Utilize safety and health procedures which are essential for the office environment.
7. Identify the importance of electronic mail in the workplace.

F. The fundamentals of Personal Finance (NJCCS Standard 9:2 Personal Financial Literacy)

The student will be able to:

1. Demonstrate basic business math skills.
2. Open and maintain a checking and savings account.
3. Understand how to read a paycheck and various payroll deductions.
4. Prepare and maintain a time sheet to track hours worked.
5. Identify the importance of protecting information to prevent identity theft.

G. The fundamentals of Building a Professional Image (NJCSS Standard 9.1.1.2 Ethical Behavior)

The student will be able to:

1. Complete a job application.
2. Develop a basic resume and cover letter.
3. Develop interviewing skills by using mock interviews.
4. Identify appropriate dress and personal hygiene for the office environment.

III. SCOPE AND SEQUENCE

Computer and business concepts will be introduced by the teacher and reinforced throughout the course with practical examples and demonstrations. Students will then have the opportunity to demonstrate learned activity independently and on a student-to-student level to reinforce learning. Each session will introduce vocabulary terms and concepts. Daily lessons should be summarized to close the activity and reinforced the following lesson through recap activities or a “What’s In It For Me” activity relevant to the topic. Students will then have an opportunity to explain and discuss the vocabulary as it relates to the learned activity. Every concept will be reinforced through hands-on activity.

Fundamentals of Computers

- Identify the parts of the computer.
- Summarize the history of the computer.
- Identify usage for various types of software applications.
- Understand firewalls and the importance of virus protection software.
Introduction to Fundamentals of Word Processing

- Introduce the home row, keyboard features and navigational tools.
- Touch type alpha and numeric keyboard at the proficiency of 25 WPM.
- Identify and format components of a business letter.
- Identify and format components of a personal business letter.
- Identify and format the components of a memo.
- Insert, create and edit tables.
- Enhance documents with clip art and design tools.
- Introduce proofreader notations to edit student work.
- Set up and use the tab stop function to format data into columns.
- Format and print business envelopes and labels.
- Format text using the ribbon features to bold, italicize, underline, and select font style and size.
- Insert bullets and numbers.

Fundamentals of Excel

- Identify parts of the Excel screen.
- Create and navigate through a worksheet.
- Enter data into cells.
- Apply cell format.
- Apply number format to cell data.
- Use font ribbon to change font size and style.
- Use font ribbon to bold, italicize and underline.
- Use the format dialog box to number, align, select fonts, borders, and colors.
- Insert, resize, and crop graphics.
- Use formulas to add, subtract, multiply and divide.

Fundamentals of PowerPoint

- Identify parts of the PowerPoint screen.
- Create and save a basic presentation.
- Format slides using style and Introduce basic operation of fax, printer and copier.
- Introduce ergonomics and office safety concepts.
- Enhance slide using word art and clip art.
- Change slide layout.
- Navigate through a presentation.
- Change slide view.

Fundamentals of Office Procedures

- Define the rules of proper telephone etiquette.
- Use role playing to answer the telephone.
- Record and relay telephone messages.
- Identify the parts of electronic mail.
• Create and respond to business electronic mail.
• Introduce basic filing rules.
• Demonstrate proper procedures and etiquette for greeting office visitors.

Fundamentals of Personal Finance
• Introduce basic business math skills; for example sales tax, markups, discounts, etc.
• Identify parts of a check.
• Demonstrate how to write a check.
• Demonstrate how to maintain the check register.
• Demonstrate how to fill out a deposit and withdrawal slip.
• Identify parts of a pay check.
• Identify various types of payroll deductions.
• Prepare a time sheet and calculate total hours worked.
• Verify that paycheck reflects correct hours worked.
• Introduce ways to protect personal financial information.

Fundamentals of Building a Professional Image
• Complete a job application.
• Develop a basic business resume using word template.
• Identify how to prepare for an interview.
• Use mock interviews to reinforce and prepare for a job interview.
• Identify appropriate dress for an interview and office environment.
• Discuss the importance of personal hygiene.
• Initiate a dress-for-success day to simulate a job interview.

IV. TEXTBOOK AND INSTRUCTIONAL MATERIALS

Textbooks


Other Resources

Banking: Dollars and Sense (Program on server)
Paradigm Signature Series – Microsoft Word, Excel, PowerPoint
www.practicalmoneyskills.com
www.themint.org
www.usmint.gov
www.jumpstart.org

V. INSTRUCTIONAL STRATEGIES:
• Teacher presentation and discussion
• Student group activities and cooperative learning
• Independent application of economic principles
• Use of interactive computer-based web site to reinforce textbook

VI. EVALUATION
• Class participation
• Attendance
• Completed class work, assessments and projects demonstrating knowledge
• Theory, tests and quizzes
• Homework
• Project

VI. SCOPE AND SEQUENCE CHART

KEY I=Introduced D=Developed in Depth R=Reinforced

SKILLS TO BE LEARNED – Clerical Skills I

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<tr>
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<th>Level I</th>
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Enhance documents with clip art and design tools.
Introduce proofreader notations to edit student work.
Set up and use the tab stop function to format data into columns.
Format and print business envelopes and labels.
Format text using the ribbon features to bold, italicize, underline, and select font style and size.
Insert bullets and numbers.
Identify parts of the Excel screen.
Create and navigate through a worksheet.
Enter data into cells.
Apply cell format.
Apply number format to cell data.
Use font ribbon to change font size and style.
Use font ribbon to bold, italicize and underline.
Use the format dialog box to number, align, select fonts, borders, and colors.
Insert, resize, and crop graphics.
Use formulas to add, subtract, multiply and divide.
Identify parts of the PowerPoint screen.
Create and save a basic presentation.
Format slides using style and Introduce basic operation of fax, printer and copier.
Introduce ergonomics and office safety concepts.
Enhance slide using word art and clip art.
Change slide layout.
Navigate through a presentation.
Change slide view.
Define the rules of proper telephone etiquette.
Use role playing to answer the telephone.
Record and relay telephone messages.
Identify the parts of electronic mail.
Create and respond to business electronic mail.
Introduce basic filing rules.
Demonstrate proper procedures and etiquette for greeting office visitors.
Introduce basic business math skills; for example sales tax, markups, discounts, etc. Identify parts of a pay check.
Identify various types of payroll deductions.
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PROFICIENCIES

1. Identify computer components and the history of computers (8:1)
2. Identify the role of computer components in various types of software applications. (8:1)
3. Understand the need to protect documents from viruses through the use of special programs such as firewall and virus protection software. (8:1)
4. Touch type alpha and numeric keyboard at a proficiency of 25 WPM. (8:1)
5. Identify and format the key components of a business letter. (8:1)
6. Identify and format the key components of a memorandum. (8:1)
7. Insert and create tables. (8:1)
8. Enhance documents with the use of clip art and other drawing tools. (8:1)
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10. Set up and use the tab stop function to format data into columns. (8:1)
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21. Create a basic PowerPoint Presentation(8:1)
22. Enhance slides using Word Art and Clip Art(8:1)
23. Enhance presentation using transitions and sound effects(8:1)
24. Answer the telephone using a professional business attitude and direct calls as required.(9.1)
25. Record and relay accurate telephone messages (9.1)
26. File documents both manually and electronically using the filing rules (9.1)
27. Greet and answer preliminary questions for office visitors(9.1)
28. Operate fax machines, copiers, printers and other office equipment. (9.1)
29. Utilize safety and health procedures which are essential for the office environment. (9.1.8)
30. Open and maintain a checking and savings account. (9.2)
31. Understand how to read a paycheck and various payroll deductions. (9.2)
32. Prepare and maintain a time sheet to track hours worked. (9.2)
33. Identify the importance of protecting information to prevent identity theft. (9.2)
34. Demonstrate basic business math skills. (9.2)
35. Complete a job application. (9.1.1.2)
36. Develop a basic resume and cover letter. (9.1.1.2)
37. Develop interviewing skills by using mock interview. (9.1.1.2)
38. Identify appropriate dress and personal hygiene for the office environment (9.1.1.2)