

Career Institute Young Adult Program

Office Skills



Project Purpose: To acquire the skills to operate an office and the equipment in an office and learn to type a professional business letter.

Goals

- Write a Memorandum
- Create Business Correspondence
- Transcription of Telephone Message
- Preparation of Fax Cover Sheet
- Preparation of Business Envelope
- Office Filing
- Operation of a Copy Machine
- Preparation of an Employment Timesheet

Check off list

- Complete the pre and post assessment form before and after the completion of the project.
- Check off the Office Benchmarks as you demonstrate your knowledge to your Career Mentor
- Submit a copy of a sample memo
- Submit a copy of the fax cover sheet
- Complete the telephone messages form
- Fill out a copy of an employment timesheet
- Complete the Action Plan
- Type the Business Letter
- Complete the Stipend Request

Assessment Project Goals	Pre	Post
Do you know how to operate a copy machine?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Can you identify how to fix paper jams?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you know how to send a fax?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you know the proper format for a professional business letter?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you know how to set up a filing system?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you know the proper format for completing a timesheet and when to submit it for payment?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you know the three steps to greeting a guest in the office?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you know the proper format for a professional memo?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Knowing how an office works is very important. Many of you will have jobs in an office where you will be required to do many tasks related to making an office run smoothly. Knowing these skills will help you as you look for a summer job. You may find that you enjoy these tasks and this environment. Following is a check off sheet for the skills you will need to know and the documents you will need to submit.

Copy machine	How to load the paper How to fix paper jams How to change the toner How to change paper sizes
How to send a fax	Prepare a fax cover sheet How to troubleshoot machine problems
How to properly answer the telephone	How to take a message
How to make appointments	Review an appointment calendar for multiple staff members System for making appointments
Prepare a memorandum	Attached is a sample memorandum
Prepare a business letter	Attached is a sample business letter
Prepare a business envelope	Address should match the letter
Learn how a filing system	File 10 items Demonstrate skills and explain to a staff member
Learn how to properly introduce someone	Meet the guest Shake their hand Introduce them to all others in the room and others you encounter along your path with them. Demonstrate skills and explain to a staff member
Learn how to greet guests	Greet the person Ask if you can help them Deliver them to the person they are there to see, or offer them a comfortable seat until the staff member can join them. Show a staff member these skills

Classroom Training - Office Benchmarks

Demonstrate your knowledge of the following by showing your Career Mentor how to do the skills shown below.

Computer Skills

- Keyboarding Information (_____ words per minute)
- Parts of the Computer
- Microsoft Windows
- Microsoft Office Suite (Especially Word, Excel, and Outlook)
- Data Entry
- Researching Information (Internet)

Office Machines and Electronic Equipment

- Telephone
- Fax
- Copier
- Paper Shredder
- Postage Machine
- 10 Key

Responsibilities

- Telephoning
- Copying Correspondence (Copy Machine)
- Faxing (FAX Machine)
- Preparing and Processing Outgoing Mail (USPS, UPS, Fed-Ex, Airborne)
- Processing and Distributing Incoming Mail
- Filing Correspondence (Electronically and Manually)
- Composing and Formatting Routine Correspondence
- Scheduling Appointments (Outlook and Appointment Book)
- Performing Receptionist Duties-Greeting and Assisting Callers
- Ordering, Storing, and Inventorying Office Supplies
- Transcribing (From Notes or Machine)
- Performing Errands
- Coordinating Meetings
- Preparing Bank Deposits

Professional Skills and Characteristics

- Able to Perform In a Fast-Paced Environment
- Confidentiality
- Dependability
- Detail Oriented
- Establishing Priorities
- Organization of Work
- Excellent Spelling Skills
- Good Communication Skills (Oral & Written)
- Has Initiative, and can Multi-Task
- Needs To Be A Team Player
- People Skills
- Phone Skills
- Customer Service
- Professional Appearance
- Professional Attitude

Sample Memo

Career Institute

Memo

To: Sally Smith
From: Jenny Jones
CC: Kelly Clary
Date: 10/20/2008
Re: Timesheet are due

Please sent your timesheet

Time sheets are due this Thursday. Please email your timesheet in by Thursday at 11:30 a.m.

Thank you for your promptness in completing this task.

Sample Fax Cover Sheet

Facsimile transmittal sheet

To:	Martha Miser	From:	Jenny Jones
Company:	Western Group	Date:	10/20/2008
Fax number:	702-732-1489	Total no. of pages including cover:	3
Phone number:	702-732-0123	Regarding:	Verification

URGENT FOR REVIEW PLEASE COMMENT PLEASE REPLY PLEASE RECYCLE

Comments:

Dear Martha,

We are writing to confirm our reservation for holiday planning. Please refer to the attached application.

Please fax information to 909-481-3947.

Thanks for your assistance!

Jenny

11660 Church, Suite 468, Rancho Cucamonga, Ca 91730

Telephone Messages

Message 1

Staff Member: _____

Date: _____ Time: _____ a.m. p.m.

From: _____ Phone Number: _____

<input type="checkbox"/>	Called	<input type="checkbox"/>	Came in to see you	<input type="checkbox"/>	Will call again
<input type="checkbox"/>	Please Call	<input type="checkbox"/>	Returned your call	<input type="checkbox"/>	Wants to see you

Message:

Message 2

Staff Member: _____

Date: _____ Time: _____ a.m. p.m.

From: _____ Phone Number: _____

<input type="checkbox"/>	Called	<input type="checkbox"/>	Came in to see you	<input type="checkbox"/>	Will call again
<input type="checkbox"/>	Please Call	<input type="checkbox"/>	Returned your call	<input type="checkbox"/>	Wants to see you

Message:

Message 3

Staff Member: _____

Date: _____ Time: _____ a.m. p.m.

From: _____ Phone Number: _____

<input type="checkbox"/>	Called	<input type="checkbox"/>	Came in to see you	<input type="checkbox"/>	Will call again
<input type="checkbox"/>	Please Call	<input type="checkbox"/>	Returned your call	<input type="checkbox"/>	Wants to see you

Message:

Action Plan

Project: _____

State three things that you have learned while completing this project, and explain how you will apply them into your daily life.

Knowledge/ Skills Learned	How Will You Apply It?
1.	
2.	
3.	

Sample Business Letter

Begin your letter by typing today's date on the top left-hand side of the page. Type your return address, then the address to where the letter is being sent. Go down 2 spaces and type the person's name or department. Go down 2 spaces, indent 5 spaces, and begin typing your letter.

June 3, 2006

Go down 2 spaces

Your Name
Your Address
City, State, Zip Code

Go down 2 spaces

Career Institute

_____, Career Mentor
10722 Arrow Route Suite #808
Rancho Cucamonga, CA 91730
(909) 481-1070

Go down 2 spaces

Dear Career Mentor:

Go down 2 spaces

Here is a sample of a basic letter that is required for this project. While completing this project, I was able to gain valuable skills to run an office. I now have an email account and can communicate with my family, friends, and the Career Institute Staff. I also learned more information about my typing skills, filing and can operate office machines. When I first enrolled into the youth program, I did not have these skills; I could not type, and did not know how to create a fax cover sheet or memorandum.

Go down 2 spaces

After completing this project, I have learned plenty of information such as how to type up a basic letter, format that letter with the tool bar, and improve my typing speed. I realized typing is like riding a bike. Once you learn you never forget. Now I am able to work with a computer, navigate the tool bar, and create a basic Microsoft Word document. While learning these office skills I have increased my ability to look for employment, and confidence in working in an office.

Go down 2 spaces

All in all, I am more confident in on feel ready to look for a job in a busy reality office, where I can use my skills to earn more money! I now have more knowledge about taking messages and greeting guest. I also, now have more freedom in communicating with email and enjoy using the computer.

Go down 2 spaces

Sincerely,

Go down 4 spaces

Julie Smith

Career Institute Stipend Request

Name: _____ Date: _____

Address: _____

Home Number: _____ Cell Phone: _____

Email address: _____

Are you currently working?

Yes Where? _____

Address: _____

Supervisor: _____ Phone Number: _____

Please attach a current pay stub

No

Are you attending school?

Yes Where? _____

Counselor's Name: _____

Please attach copy of your most recent Class Schedule, Report Card or Diploma / GED

No

Project Completed: _____

Total _____

Participant Signature

Career Mentor Signature