Office Specialist III – Preparation

6742 36 weeks

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Acknowledgments

The components of this instructional framework were developed by the following curriculum development panelists:

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Suggested Grade Level: 11 or 12

Students complete the Office Specialist sequence identified locally or progress in the sequence until prepared to transfer into other business courses. Students develop skills in areas including
keyboarding, word processing, office procedures, and records management. If a fourth year is needed, the teacher should use simulated activities in the following areas: word processing, spreadsheets, databases, telecommunications, graphic design, and records management.

The tasks contained in the Office Specialist III framework will correlate with many of the FBLA competitive events. Refer to the FBLA website for details or to the task-by-task FBLA correlation.

**NOTE:** The class size shall be limited to an average of 15 students per instructor per class period with no class being more than 18.

**Task Essentials Table**

- Tasks/competencies designated by plus icons (⊕) in the left-hand column(s) are essential
- Tasks/competencies designated by empty-circle icons (〇) are optional
- Tasks/competencies designated by minus icons (⊖) are omitted
- Tasks marked with an asterisk (*) are sensitive.

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**Managing Records**

| 51 | ✅ | File documents by subject headings. |
| 52 | ✅ | File documents chronologically. |

**Keeping Financial Records**

| 53 | ✅ | Maintain a checkbook. |
| 54 | ✅ | Reconcile a bank statement. |
| 55 | ✅ | Figure payroll deductions. |
| 56 | ✅ | Compute gross and net wages. |

**Duplicating Documents**

| 57 |  | Prepare two-sided copies. |
| 58 |  | Collate multiple-page documents. |

**Using Telecommunications**

| 59 | ✅ | Demonstrate the ability to use electronic communications (e.g., email, fax). |
| 60 | ✅ | Access information on the Internet. |
| 61 |  | Identify emerging trends in telecommunications. |

**Enhancing Mathematics Skills**

| 62 | ✅ | Solve business-math problems, using a variety of electronic methods. |
| 63 | ✅ | Compute interest, commissions, and discounts. |

**Preparing for Industry Certification**

| 64 |  | Describe the processes and requirements for obtaining industry certifications related to the Office Specialist III–Preparation course. |
| 65 |  | Identify testing skills/strategies for a certification examination. |
Demonstrate the ability to successfully complete selected practice examinations (e.g., practice questions similar to those on certification exams).

Successfully complete an industry certification examination representative of skills learned in this course (e.g., MOS, IC3, NOCTI, Workplace Readiness Skills for the Commonwealth).

Preparing for Employment

Refine job interview skills.

Update a portfolio containing representative samples of student work.

Identify the steps in resigning from a position.

Adhere to a compliance training manual and other company policies.

Legend: 🔹Essential 🔺Non-essential 🔺Omitted

Processing Information and Data

Task Number 39

Compose research-related documents.

Definition

Composition should include conducting research, if required, and keying and formatting the documents according to the type of document (i.e., academic research paper, magazine article) and style choice (i.e., MLA, APA).

FBLA Competitive Events and Activities Areas

American Enterprise Project

Business Financial Plan

Business Skills and Knowledge

Community Service Project
Partnership with Business Project

Task Number 40

Produce complex business documents (e.g., invitations, newsletters, research-related documents).

Definition

Production should include using industry-standard software and acceptable formats in preparing mailable business documents. Examples of documents include

- formal reports
- multipage letters
- letters or reports with integrated tables, graphs, or graphics
- flyers and brochures
- newsletters
- announcements
- invitations
- programs.

FBLA Competitive Events and Activities Areas

Business Calculations

Business Skills and Knowledge

Computer Applications

Database Design & Applications

Introduction to Financial Math

Spreadsheet Applications

Word Processing

Microsoft Imagine Academy Resources

Creating and Managing Documents


[5.147] Publisher 2010 Secondary School: Lesson 5—Project 1

[5.148] Publisher 2010 Secondary School: Lesson 6—Project 1


NBEA Achievement Standards for Information Technology

Apply a variety of input technologies to maximize productivity.

Compose documents using a variety of input technologies.

Prepare projects that include a variety of media (e.g., images, text, video, and audio).

Use productivity software to create documents, research topics and take notes, categorize data, and perform calculations to improve academic achievement across the curriculum.

Task Number 41

Produce form letters by merging files.

Definition

Producing form letters includes

- using the merge feature
- preparing form and data files
- merging the form and data files to create form letters (merging of a primary file, or main document, with a secondary file, or data source, should be completed according to the steps specified within the word processing software).

FBLA Competitive Events and Activities Areas

Business Calculations

Business Skills and Knowledge
Computer Applications

Database Design & Applications

Introduction to Financial Math

Spreadsheet Applications

Word Processing

Microsoft Imagine Academy Resources

Reviewing and Finalizing Documents

Word Lesson Plan: Mail Merge and Reviewing Documents

Mail Merge (project)

NBEA Achievement Standards for Information Technology

Apply a variety of input technologies to maximize productivity.

Compose documents using a variety of input technologies.

Use advanced features of productivity software.

Use productivity software to create documents, research topics and take notes, categorize data, and perform calculations to improve academic achievement across the curriculum.

Task Number 42

Perform calculations on business forms.

Definition

Performance should include

- using electronic methods to perform calculations
- preparing spreadsheets with formulas to perform required calculations.
FBLA Competitive Events and Activities Areas

Business Calculations

Business Skills and Knowledge

Computer Applications

Database Design & Applications

Introduction to Financial Math

Spreadsheet Applications

Word Processing

Microsoft Imagine Academy Resources

[2.020] Microsoft Digital Literacy: Productivity Programs—Lesson 4
Introduction to Spreadsheet Programs
Working with Worksheet Data
Excel Lesson Plan: Understanding Microsoft Office Excel 2010
[5.064] Excel 2010 Secondary Schools: Lesson 1—Project 1
Purchasing a Car (project)
[5.297] Excel 2010 Higher Education: Lesson 5—Project 1
Tracking Your Grades (project)

NBEA Achievement Standards for Information Technology

Use productivity software to create documents, research topics and take notes, categorize data, and perform calculations to improve academic achievement across the curriculum.

Task Number 43

Compose a business letter.

Definition

Composition should include
• using grammar and punctuation
• following a style guide/s
• following a business letter format
• writing and editing mailable business letters for various situations (e.g. to request information, to respond to a request).

FBLA Competitive Events and Activities Areas

Business Communication

Business Skills and Knowledge

Computer Applications

Database Design & Applications

Introduction to Business Communication

Spreadsheet Applications

Word Processing

NBEA Achievement Standards for Information Technology

Compose documents using a variety of input technologies.

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Task Number 44

Transcribe correspondence.

Definition

Transcribing correspondence should include

• following steps for setting up dictation or voice recognition equipment
• accessing recorded information
• using established document standards (i.e., grammar, punctuation, spelling)
• producing a mailable document.

FBLA Competitive Events and Activities Areas

Business Calculations
NBEA Achievement Standards for Information Technology

Use productivity software to create documents, research topics and take notes, categorize data, and perform calculations to improve academic achievement across the curriculum.

Use the collaborative features of productivity software to accomplish organizational tasks.

Task Number 45

Create a database.

Definition

Creation of a database requires an understanding of databases' uses and structural elements (i.e., fields, tables, records) and should include

- planning the structure
- creating fields and tables
- entering data to create records.

FBLA Competitive Events and Activities Areas

Business Skills and Knowledge

Computer Applications

Database Design & Applications
Spreadsheet Applications

Word Processing

Microsoft Imagine Academy Resources

[2.022] Microsoft Digital Literacy: Productivity Programs—Lesson 6
Introduction to Database Programs

Creating and Editing a Database

Access Lesson Plan: Create Database Tables Using Access

Summer Jobs (project)

NBEA Achievement Standards for Communication

Integrate functions of word processing, databases, spreadsheets, and presentation applications to various workplace scenarios.

NBEA Achievement Standards for Information Technology

Identify productivity software appropriate for specific tasks.

Use productivity software to create documents, research topics and take notes, categorize data, and perform calculations to improve academic achievement across the curriculum.

Task Number 46

Create a worksheet.

Definition

Creation of a worksheet requires an understanding of worksheets' uses and structural elements (i.e., cells, rows, columns) and includes

- setting properties for cells, rows, and columns (e.g., data type, font, height, width)
- entering the data
- creating charts to display the data
- using basic formulas and functions (e.g., sum, average, min, max, count).
FBLA Competitive Events and Activities Areas

Business Skills and Knowledge

Computer Applications

Database Design & Applications

Spreadsheet Applications

Word Processing

Microsoft Imagine Academy Resources

[2.020] Microsoft Digital Literacy: Productivity Programs—Lesson 4
Introduction to Spreadsheet Programs
[3.008] Excel 2010: Beginner Skills—E-Learning Module 1
Creating and Editing Worksheets
Excel Lesson Plan: Understanding Microsoft Office Excel 2010
[5.064] Excel 2010 Secondary Schools: Lesson 1—Project 1
Purchasing a Car (project)

NBEA Achievement Standards for Communication

Integrate functions of word processing, databases, spreadsheets, and presentation applications to various workplace scenarios.

NBEA Achievement Standards for Information Technology

Identify productivity software appropriate for specific tasks.

Use productivity software to create documents, research topics and take notes, categorize data, and perform calculations to improve academic achievement across the curriculum.

Task Number 47

Scan documents and images.

Definition
Scanning should include

- using scanner equipment to electronically copy text or images
- using scanner software to save the scanned text or images to a file
- using the scan option on a printer.

FBLA Competitive Events and Activities Areas

Business Skills and Knowledge

Introduction to Business Procedures

Introduction to Information Technology

NBEA Achievement Standards for Communication

Enhance documents through the use of advanced layout, design, and graphics production software and scanning hardware.

NBEA Achievement Standards for Information Technology

Identify productivity software appropriate for specific tasks.

Use the collaborative features of productivity software to accomplish organizational tasks.

Task Number 48

Create a presentation.

Definition

Creation of a presentation requires an understanding of presentation uses and structural elements (i.e. slides, outlines, layouts, designs) and should include

- identifying the components of an effective presentation
- organizing the information in a logical sequence
- developing a central idea
- verifying accuracy of the data
- selecting the theme and layout for the slides
- creating and formatting the text
- illustrating with graphics
• delivering the presentation according to effective communication rules
• participating in peer review.

FBLA Competitive Events and Activities Areas

Banking and Financial Systems

Business Skills and Knowledge

Entrepreneurship
The topic for this event changes from year to year. The annual topic may or may not correlate with this particular course. Please refer to the current Virginia FBLA State Handbook.

Global Business
The topic for this event changes from year to year. The annual topic may or may not correlate with this particular course. Please refer to the current Virginia FBLA State Handbook.

LifeSmarts

Management Decision Making
The topic for this event changes from year to year. The annual topic may or may not correlate with this particular course. Please refer to the current Virginia FBLA State Handbook.

Management Information Systems
The topic for this event changes from year to year. The annual topic may or may not correlate with this particular course. Please refer to the current Virginia FBLA State Handbook.

Marketing
The topic for this event changes from year to year. The annual topic may or may not correlate with this particular course. Please refer to the current Virginia FBLA State Handbook.

Network Design

Virtual Business Management Challenge

Performing Administrative Support Activities

Task Number 49

Maintain an appointment calendar.
Definition

Maintenance of an appointment calendar includes

- scheduling appointments
- entering information about appointments (i.e., date and time, participants) into a calendar
- using electronic calendar system software to maintain appointment schedules.

FBLA Competitive Events and Activities Areas

Business Skills and Knowledge

Introduction to Business Procedures

Microsoft Imagine Academy Resources

Planning with the Calendar, Tasks, Notes, and Journal Features

NBEA Achievement Standards for Communication

Discuss and identify ways to keep business data secure from theft and destruction.

Discuss the importance of the use of phone and digital devices as customer service tools.

NBEA Achievement Standards for Information Technology

Use productivity software to create documents, research topics and take notes, categorize data, and perform calculations to improve academic achievement across the curriculum.

Task Number 50

Greet visitors.

Definition

Greeting visitors includes politely

- speaking to guests as they arrive in a welcoming tone and manner
- asking whether the guests need assistance
• asking for the guest's name and whom they are visiting
• providing directions for guests
• asking guests, when appropriate, whether they would like refreshments.

**FBLA Competitive Events and Activities Areas**

**Business Skills and Knowledge**

**Introduction to Business Procedures**

**Introduction to Information Technology**

**NBEA Achievement Standards for Communication**

Communicate in a clear, complete, concise, correct, and courteous manner on personal and professional levels.

Discuss the importance of extending courtesy when dealing with customers.

Discuss the importance of listening skills in customer/client relations.

Discuss the importance of listening to subordinates and peers.

Discuss the importance of taking responsibility for all spoken and written communication and actions taken.

Discuss the role that courtesy and gratitude to colleagues play in a business.

Employ appropriate strategies for communicating with dissatisfied customers in face-to-face discussions, through digital means, and in writing.

Incorporate appropriate leadership and supervision techniques, customer service strategies, and personal ethics standards to communicate effectively with various business constituencies.

Project a positive first impression over the phone.

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**Managing Records**
Task Number 51

File documents by subject headings.

Definition

Filing includes

- indexing, coding, and sorting documents
- demonstrating proper use of ARMA International rules to file by subject
- maintaining an electronic filing system
- using a database to organize records by subject area.

Indexing, coding, sorting, and filing documents may involve using simulations or actual documents, including electronic databases, to demonstrate use of ARMA International rules to file by subject.

FBLA Competitive Events and Activities Areas

Business Skills and Knowledge

Introduction to Business Procedures

Introduction to Information Technology

Microsoft Imagine Academy Resources

[2.009] Microsoft Digital Literacy: Computer Basics—Lesson 4
[3.121] Windows 7 Essentials I—E-Learning Module 2
[5.022] Intro Windows 7: Lesson 2—Project 1

NBEA Achievement Standards for Information Technology

Sort, prioritize, and retrieve data from databases.

Task Number 52
File documents chronologically.

Definition

Filing includes

- indexing, coding, and sorting documents
- demonstrating proper use of ARMA International rules to file chronologically
- maintaining an electronic filing system
- using a database to organize records chronologically.

Indexing, coding, sorting, and filing documents may involve using simulations or actual documents, including electronic databases, to demonstrate use of ARMA International rules to file chronologically.

FBLA Competitive Events and Activities Areas

Business Skills and Knowledge

Introduction to Business Procedures

Introduction to Information Technology

Microsoft Imagine Academy Resources

[2.009] Microsoft Digital Literacy: Computer Basics—Lesson 4
Computer Operating Systems
Office Lesson Plan: Managing Files
[5.022] Intro Windows 7: Lesson 2—Project 1
File Management (project)

NBEA Achievement Standards for Information Technology

Sort, prioritize, and retrieve data from databases.

Keeping Financial Records
Task Number 53

Maintain a checkbook.

Definition

Maintaining a checkbook should include

- demonstrating manual and electronic methods of processing checkbook transactions (e.g., writing checks, endorsing checks, cashing checks, depositing checks and cash, transferring funds)
- tracking account balance and transaction activity manually, online, or with a software program (e.g., worksheet).

FBLA Competitive Events and Activities Areas

Accounting I
Accounting II
Business Calculations
Business Skills and Knowledge
Introduction to Financial Math
Personal Finance

NBEA Achievement Standards for Personal Finance

Describe the steps involved in opening and using a checking account.

Task Number 54

Reconcile a bank statement.

Definition

Reconciling a bank statement should include matching checking account records with the bank statement using forms provided by a bank. If personal records and the bank statement do not reconcile, procedures should be followed to locate and correct the error.
Task Number 55

Figure payroll deductions.

Definition

Figuring payroll deductions should include

- determining the difference between gross pay and net pay
- reviewing withholding taxes and other deductions
- using manual and electronic withholding tables to locate correct deductions
- calculating total deductions, using manual and electronic methods.

FBLA Competitive Events and Activities Areas

Accounting I

Accounting II

Business Calculations

Business Skills and Knowledge

Introduction to Financial Math

Personal Finance

NBEA Achievement Standards for Personal Finance

Describe and use the steps involved in the bank reconciliation process.
NBEA Achievement Standards for Computation

Calculate payroll withholdings, Social Security and Medicare deductions, other deductions, and net earnings.

NBEA Achievement Standards for Personal Finance

Calculate personal tax liabilities for various types of taxes (e.g., property, income, sales, FICA, and Medicare).

Task Number 56

Compute gross and net wages.

Definition

Computation of gross wages and net wages should follow instructor's guidelines. Computation should include hourly pay, overtime pay, time and a half, weekend, holiday, commission, graduated commission, and piece rate.

FBLA Competitive Events and Activities Areas

Accounting I

Accounting II

Business Calculations

Business Skills and Knowledge

Introduction to Financial Math

Personal Finance

NBEA Achievement Standards for Computation
Calculate gross earnings (e.g., salary, hourly rate, commission, per diem, tips, or production).

NBEA Achievement Standards for Personal Finance

Calculate net pay.

Differentiate between gross and net income.

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Duplicating Documents

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Task Number 57

Prepare two-sided copies.

Definition

Preparation should include using the duplex feature on a copier to prepare two-sided copies. If the duplex feature is not available, the student should demonstrate the two-step process to run the front and back of copies.

FBLA Competitive Events and Activities Areas

Business Skills and Knowledge

Introduction to Business Procedures

Introduction to Information Technology

NBEA Achievement Standards for Information Technology

Apply a variety of input technologies to maximize productivity.

Select appropriate input technology to optimize performance.

Use various input technologies to enter and manipulate information appropriately.
Task Number 58

Collate multiple-page documents.

Definition

Collating documents includes

- using the collating feature on the copier to compile the designated number of copies
- demonstrating the use of blank paper to copy and collate documents that contain integrated one-sided and two-sided documents
- using a manual sorter
- demonstrating efficient orders of stacks for manually collating pages.

FBLA Competitive Events and Activities Areas

Business Skills and Knowledge

Introduction to Business Procedures

Introduction to Information Technology

NBEA Achievement Standards for Information Technology

Select appropriate input technology to optimize performance.

Use various input technologies to enter and manipulate information appropriately.

Using Telecommunications

Task Number 59
Demonstrate the ability to use electronic communications (e.g., email, fax).

Definition

Demonstration should include following procedures for

- sending and receiving email, including using netiquette and adding attachments
- preparing fax cover sheets
- using a fax machine and other devices, such as a computer, to fax and transmit text and images.

FBLA Competitive Events and Activities Areas

Business Communication

Business Skills and Knowledge

Introduction to Business Communication

Microsoft Imagine Academy Resources

[2.014] Microsoft Digital Literacy: Internet and the World Wide Web—Lesson 3
[2.038] Creating an Internet Email Account—Lesson 1
What is an Internet Email Account?

NBEA Achievement Standards for Communication

Discuss rules of safe and appropriate conduct when using the Internet and email.

Use Bluetooth technology.

Use WiFi technology securely.

Use asynchronous (different time, different place) and synchronous (same time, different place) collaboration tools, such as discussion boards, portals, blogs, and wikis to facilitate group work.

Use digital messaging technologies.

Use email to receive and send basic messages.
NBEA Achievement Standards for Information Technology

Explore translation and digital language input tools and resources for effective global communication.

Task Number 60

Access information on the Internet.

Definition

Accessing the Internet should include

- using URLs and search engines to locate information
- following logical search procedures
- checking sources of information for reliability and credibility
- downloading information
- following copyright laws and ethical standards in the use of downloaded information.

FBLA Competitive Events and Activities Areas

American Enterprise Project

Business Financial Plan

Business Plan

Business Skills and Knowledge

Community Service Project

Partnership with Business Project

Microsoft Imagine Academy Resources

[2.044] Finding and Evaluating Resources on the Web—Lesson 1
NBEA Achievement Standards for Communication

Incorporate the use of the Internet to complete complex projects requiring the use of competitive intelligence techniques (research on competition, markets, and customer attitudes).

Use CD-ROMs, DVDs, videos, and the Internet for knowledge acquisition.

NBEA Achievement Standards for Information Technology

Analyze the effectiveness of online information resources to support collaborative tasks, research, publications, communications, and increased productivity.

Explore translation and digital language input tools and resources for effective global communication.

Use a wide variety of information technology resources to retrieve information.

Task Number 61

Identify emerging trends in telecommunications.

Definition

Identification of emerging trends may include:

- cloud computing
- connected home monitoring and control
- autonomous vehicles
- factory automation
- augmented and virtual reality
- global e-commerce standards
- online research and development
- collaborative commerce
- blockchain technology.

FBLA Competitive Events and Activities Areas
Business Communication

Business Skills and Knowledge

Introduction to Business Communication

Introduction to Business Procedures

Microsoft Imagine Academy Resources

Other Methods of Communicating on the Internet
[2.048] Using Social Networking to Connect with the World—Lesson 1
Introduction to Social Networking
[2.049] Using Social Networking to Connect with the World—Lesson 2
Exploring Blogs
[2.067] Using Social Networking to Connect with the World—Lesson 3
Exploring Instant Messaging

NBEA Achievement Standards for Communication

Incorporate the use of the Internet to complete complex projects requiring the use of competitive intelligence techniques (research on competition, markets, and customer attitudes).

Use Bluetooth technology.

Use asynchronous (different time, different place) and synchronous (same time, different place) collaboration tools, such as discussion boards, portals, blogs, and wikis to facilitate group work.

NBEA Achievement Standards for Information Technology

Assess the impact of information technology in a global society.

Explore translation and digital language input tools and resources for effective global communication.

Enhancing Mathematics Skills
Task Number 62

Solve business-math problems, using a variety of electronic methods.

Definition

Solving problems should include using a calculator or computer to perform the following mathematical functions:

- Addition, subtraction, multiplication, division
- Percentages
- Averages
- Constant factors

FBLA Competitive Events and Activities Areas

Accounting I

Accounting II

Business Calculations

Business Skills and Knowledge

Computer Applications

Database Design & Applications

Introduction to Financial Math

Spreadsheet Applications

Microsoft Imagine Academy Resources

[2.020] Microsoft Digital Literacy: Productivity Programs—Lesson 4
Introduction to Spreadsheet Programs

Working with Worksheet Data

Excel Lesson Plan: Working with Formulas and Functions

NBEA Achievement Standards for Computation

Select and use appropriate tools when solving problems (e.g., paper and pencil, manipulatives, hand-held calculators, Web calculators, computer numerical keypads, spreadsheets, personal desktop assistants, and cell phones.

Task Number 63

Compute interest, commissions, and discounts.

Definition

Computation should include

- using the simple interest formula (interest = principle x rate x time)
- using multiplication for percentages in calculating commissions
- using subtraction for a price reduction and multiplication for a percentage discount.

FBLA Competitive Events and Activities Areas

Accounting I

Accounting II

Business Calculations

Business Skills and Knowledge

Computer Applications

Database Design & Applications

Introduction to Financial Math

Spreadsheet Applications

Word Processing

NBEA Achievement Standards for Computation
Calculate bank discount and proceeds on a discounted note.

Calculate compound interest and the resulting compound amount at the maturity date for savings and investments.

Calculate gross earnings (e.g., salary, hourly rate, commission, per diem, tips, or production).

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**Preparing for Industry Certification**

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**Task Number 64**

**Describe the processes and requirements for obtaining industry certifications related to the Office Specialist III–Preparation course.**

**Definition**

The description should include a list of industry certifications related to the Office Specialist III–Preparation course and the process/requirements for obtaining the certifications from

- official websites of the testing organization/vendor
- materials from publishers that have developed practice materials and tests based on information from the testing organization/vendor
- information from certified instructors or industry-certified professionals
- information in the "Course Description" section of this document.

**FBLA Competitive Events and Activities Areas**

**Business Skills and Knowledge**

**Electronic Career Portfolio**

**Job Interview**
Task Number 65

Identify testing skills/strategies for a certification examination.

Definition

The identification of testing skills and strategies should be undertaken by

- conducting an Internet research project
- reviewing materials from exam and practice-exam publishers
- interviewing certified instructors and/or industry-certified professionals.

FBLA Competitive Events and Activities Areas

Business Skills and Knowledge

Electronic Career Portfolio

Job Interview

Task Number 66

Demonstrate the ability to successfully complete selected practice examinations (e.g., practice questions similar to those on certification exams).

Definition

The demonstration should include successfully completing practice examinations for selected certifications related to the course obtained from vendor sites and/or materials from publishers. The level of performance on a practice examination serves as a gauge of the applicant's readiness for formal industry testing.

FBLA Competitive Events and Activities Areas

Business Skills and Knowledge
Task Number 67

Successfully complete an industry certification examination representative of skills learned in this course (e.g., MOS, IC3, NOCTI, Workplace Readiness Skills for the Commonwealth).

Definition

The successful completion of an industry certification examination will be achieved when the student applicant earns an examination score deemed "passing" by the testing organization. Qualifying examinations are those currently approved at the state level as representative of Office Specialist III–Preparation skills.

Students should be encouraged to attain industry certification as evidence of their office specialist skill level and general employability.

FBLA Competitive Events and Activities Areas

Business Skills and Knowledge

Preparing for Employment

Task Number 68

Refine job interview skills.

Definition

Refining job interview skills should be done by giving students the opportunity to practice before an actual interview. Students should play a variety of roles to illustrate behaviors both desirable (e.g., maintaining eye contact, asking informed questions) and undesirable (e.g., speaking too softly, failing to answer questions completely) during an interview.

In addition, students should
• exhibit promptness
• have a copy of his or her résumé for reference to dates and places
• display a professional appearance
• distinguish between legal and illegal interview questions
• thank the interviewer for the opportunity to discuss the job.

FBLA Competitive Events and Activities Areas

Business Skills and Knowledge

D. J. Howard/Walker/Shell/Campbell/VBEA Scholarship/S.L.T. Award of Excellence

Electronic Career Portfolio

Future Business Leader

L. Marguerite Crumley, Frank Manning Peele, Foundation's Sarah Lowe Thompson Scholarships

NBEA Achievement Standards for Career Development

Demonstrate appropriate interviewing techniques through participation in mock or actual interviews.

Explain the importance of appropriate interview follow-up techniques.

Identify steps to prepare for an interview.

List tasks to be completed following the interview.

Task Number 69

Update a portfolio containing representative samples of student work.

Definition

Updating a portfolio involves writing and gathering materials that may include

• an introduction, listing the contents of the portfolio and summarizing the student's experience
• a career development package, including résumé, letters of recommendation, college or employment application
• work samples, demonstrating the student's skills
• a description of a research topic in the telecommunications field
• documentation of the student's practical or work experience.

FBLA Competitive Events and Activities Areas

Business Skills and Knowledge

D. J. Howard/Walker/Shell/Campbell/VBEA Scholarship/S.L.T. Award of Excellence

Electronic Career Portfolio

Future Business Leader

Job Interview

L. Marguerite Crumley, Frank Manning Peele, Foundation's Sarah Lowe Thompson Scholarships

NBEA Achievement Standards for Career Development

Develop a career portfolio of items including resumes, sample cover letters, letters of recommendation, examples of work and technical skills, awards, and documentation of extracurricular activities and community service activities.

Present the career portfolio.

Use evolving technologies to enhance the career portfolio.

Task Number 70

Identify the steps in resigning from a position.

Definition

Identification should include

• an oral or written resignation from the job
• a provision of ample time to find a replacement--usually two weeks
• an offer to train the replacement in adherence to company procedures.
NBEA Achievement Standards for Communication

Discuss appropriate spoken and written actions when leaving a job under various circumstances (e.g., resignation and termination).

Task Number 71

Adhere to a compliance training manual and other company policies.

Definition

Adherence to a compliance training manual should include

- reading the manual
- following the code of ethics
- maintaining confidentiality (e.g., knowing what to say and not to say on the job and outside of the office).
### SOL Correlation by Task

<table>
<thead>
<tr>
<th>Task</th>
<th>English:</th>
<th>History and Social Science:</th>
<th>Mathematics:</th>
</tr>
</thead>
<tbody>
<tr>
<td>39 Compose research-related documents.</td>
<td>11.8, 12.8</td>
<td>GOVT.1, VUS.1</td>
<td>COM.1, COM.12</td>
</tr>
<tr>
<td>40 Produce complex business documents (e.g., invitations,</td>
<td>11.6, 11.7, 12.6,</td>
<td>COM.12</td>
<td></td>
</tr>
<tr>
<td>newsletters, research-related documents).</td>
<td>12.7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>41 Produce form letters by merging files.</td>
<td>11.6, 11.7, 12.6,</td>
<td>COM.7</td>
<td></td>
</tr>
<tr>
<td>42 Perform calculations on business forms.</td>
<td>12.7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>43 Compose a business letter.</td>
<td>11.6, 11.7, 12.6,</td>
<td>COM.7</td>
<td></td>
</tr>
<tr>
<td>44 Transcribe correspondence.</td>
<td>12.7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>45 Create a database.</td>
<td>11.1, 11.6, 12.1,</td>
<td>COM.1, COM.7, COM.10, COM.11</td>
<td></td>
</tr>
<tr>
<td>46 Create a worksheet.</td>
<td>12.6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>47 Scan documents and images.</td>
<td>11.1, 11.6, 11.7,</td>
<td>COM.7, COM.10, COM.12, COM.14</td>
<td></td>
</tr>
<tr>
<td>48 Create a presentation.</td>
<td>12.1, 12.6, 12.7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>49 Maintain an appointment calendar.</td>
<td>11.1, 11.6, 12.1,</td>
<td>COM.1, COM.7, COM.10, COM.12, COM.14</td>
<td></td>
</tr>
<tr>
<td>50 Greet visitors.</td>
<td>12.1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>51 File documents by subject headings.</td>
<td>11.5, 12.5</td>
<td>COM.9</td>
<td></td>
</tr>
<tr>
<td>52 File documents chronologically.</td>
<td>11.5, 12.5</td>
<td>COM.9</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Task Description</td>
<td>English:</td>
<td>Mathematics:</td>
</tr>
<tr>
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<td>---------------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>53</td>
<td>Maintain a checkbook.</td>
<td>11.5, 12.5</td>
<td>COM.7</td>
</tr>
<tr>
<td>54</td>
<td>Reconcile a bank statement.</td>
<td>11.5, 12.5</td>
<td></td>
</tr>
<tr>
<td>55</td>
<td>Figure payroll deductions.</td>
<td>11.5, 12.5</td>
<td></td>
</tr>
<tr>
<td>56</td>
<td>Compute gross and net wages.</td>
<td>11.5, 12.5</td>
<td>COM.1</td>
</tr>
<tr>
<td>57</td>
<td>Prepare two-sided copies.</td>
<td>11.5, 12.5</td>
<td></td>
</tr>
<tr>
<td>58</td>
<td>Collate multiple-page documents.</td>
<td>11.5, 12.5</td>
<td></td>
</tr>
<tr>
<td>59</td>
<td>Demonstrate the ability to use electronic communications (e.g., email, fax).</td>
<td>11.5, 11.6, 12.5, 12.6</td>
<td>GOVT.16, VUS.13</td>
</tr>
<tr>
<td>60</td>
<td>Access information on the Internet.</td>
<td>11.5, 12.5</td>
<td>GOVT.1, VUS.13, VUS.14</td>
</tr>
<tr>
<td>61</td>
<td>Identify emerging trends in telecommunications.</td>
<td>11.2, 11.5, 11.8, 12.2, 12.5, 12.8</td>
<td>GOVT.1, GOVT.16, VUS.1, VUS.13, VUS.14</td>
</tr>
<tr>
<td>62</td>
<td>Solve business-math problems, using a variety of electronic methods.</td>
<td></td>
<td>COM.1, COM.7</td>
</tr>
<tr>
<td>63</td>
<td>Compute interest, commissions, and discounts.</td>
<td>11.5, 12.5</td>
<td>A.4</td>
</tr>
<tr>
<td>64</td>
<td>Describe the processes and requirements for obtaining industry certifications related to the Office Specialist III–Preparation course.</td>
<td>11.5, 11.6, 11.8, 12.5, 12.6, 12.8</td>
<td></td>
</tr>
<tr>
<td>65</td>
<td>Identify testing skills/strategies for a certification examination.</td>
<td>11.1, 11.5, 12.1, 12.5</td>
<td></td>
</tr>
<tr>
<td>66</td>
<td>Demonstrate the ability to successfully complete selected practice examinations (e.g., practice questions similar to those on certification exams).</td>
<td>11.5, 12.5</td>
<td></td>
</tr>
<tr>
<td>67</td>
<td>Successfully complete an industry certification examination representative of skills learned in this course (e.g., MOS, IC3, NOCTI, Workplace Readiness Skills for the Commonwealth).</td>
<td>11.5, 12.5</td>
<td></td>
</tr>
<tr>
<td>68</td>
<td>Refine job interview skills.</td>
<td>11.1, 11.5, 12.1, 12.5</td>
<td>GOVT.16</td>
</tr>
<tr>
<td>69</td>
<td>Update a portfolio containing representative samples of student work.</td>
<td>11.1, 11.5, 11.6, 11.7, 11.8, 12.1, 12.5, 12.6, 12.7</td>
<td></td>
</tr>
</tbody>
</table>
Teacher Resources

Instructional Scenarios

Planning a Fundraising Event

Duty/Concept Area(s): Processing Information and Data

Scenario

Celia is a member of the Student Leadership Team at her school. One of the projects that the Leadership Team is working on is to raise funds for a beautification project that will convert the area behind the school library into a garden with benches and tables so students can use the space to sit and read or meet and do group work assigned to them. The principal has asked Celia to present a marketing plan for the project, including potential donors they hope to reach.

Big Question

What are the information and data tools necessary to market a fundraising event and raise money for the beautification project?

Focused Questions

1. In what format should Celia organize and present the information to the principal?
2. How can Celia organize all of the information (i.e., names, mailing addresses, contact information) about potential donors to prepare for the fundraiser?
3. What are the most effective and creative ways to market this event to reach as many donors as possible?
4. What is the most effective way to organize and keep track of donations and ongoing fundraising balance?

Project-Based Assessment

Teacher assessment consists of flyers, brochures, merge features, PowerPoint/worksheet/database organization skills.

Your New Job as an Administrative Assistant

Duty/Concept Area(s): Performing Administrative Support Activities
Scenario

Michael is a new administrative assistant at Trenatron Inc. Michael’s cubicle is at the entrance to the offices. He manages the calendar of appointments and takes phone calls for the three managers whose offices are located on his side of the building. He is also often the first person that clients see or speak with. Sometimes, he will get requests by phone and email just as someone is walking through the door, and it can be challenging to keep track of all the details and maintain his composure in front of clients.

Big Question
What systems can Michael put in place in order to efficiently manage the responsibilities of his new job?

Focused Questions

1. What is the most effective way to maintain an appointment calendar and schedule appointments?
2. What are the benefits of using an online scheduling system rather than a paper scheduling system?
3. What kinds of information should you ask when taking a message?
4. What is the best tone of voice to use when greeting and speaking with the public?
5. What is the proper way to answer the phone?
6. How should Michael determine which task to do first if he has several that he needs to do?

Project-Based Assessment

Teachers can assess the accuracy of messages, role-play to assess tone of voice on the phone and in person, and assess use of an online calendar/scheduling system.

Resources

Online scheduling options on Internet, YouTube videos of effective phone/conversation etiquette

Database for students

Duty/Concept Area(s): Managing Records

Scenario

Tiffany works as an office manager at a local high school. One of the teachers has requested help in switching from paper to digital records for her students, particularly in creating a computer-based record of student GPAs. The teacher has not provided any further information on how to organize the information and has simply given Tiffany a sheet of paper with data on it.

<table>
<thead>
<tr>
<th>NAME</th>
<th>STUDENT NO.</th>
<th>GRADE LEVEL</th>
<th>GPA</th>
</tr>
</thead>
</table>

40
George Johnson  12345  10  2.6  
Sally Mae Walker  23456  11  3.5  
Louis Jackson  67890  9  3.0  
Amanda Willis  01234  9  3.2  
Terrence Jones  34567  10  3.8  
Cynthia Parker  45678  11  2.8  
Karen Alexander  56789  11  2.1  
Michael Reed  78901  11  3.0  
Alicia Rogers  89012  10  2.0  
Shawn Baker  90123  12  3.3  
Todd James  04567  12  3.7  
Janet Brown  08901  12  2.5  

**Big Question**

How should Tiffany go about setting up a database from printed data?

**Focused Questions**

1. What are the possible ways that Tiffany can organize the information she has been given?
2. What is the best program or software for Tiffany to use to create a database?
3. What functions and commands can Tiffany use or include in the database to help the teacher sort the information in other ways?

**Project-Based Assessment**

Students will be evaluated based on design and data input.

**Entrepreneurship Infusion Units**

Entrepreneurship Infusion Units may be used to help students achieve additional, focused competencies and enhance the validated tasks/competencies related to identifying and starting a new business venture. Because the unit is a complement to certain designated courses and is not mandatory, all tasks/competencies are marked “optional.”
Appendix: Credentials, Course Sequences, and Career Cluster Information

Industry Credentials: Only apply to 36-week courses

- A*S*K Concepts of Entrepreneurship and Management Assessment
- A*S*K Concepts of Finance Assessment
- A*S*K Fundamental Business Concepts Assessment
- Administrative Assisting Assessment
- Administrative Services Assessment
- Banking and Related Services Assessment
- Business Financial Management Assessment
- College and Work Readiness Assessment (CWRA+)
- Financial and Investment Planning Assessment
- General Management Assessment
- Human Resources Management Assessment
- IC3 Digital Literacy Certification Examination
- Microsoft 365 Fundamentals Examination
- Microsoft Certified Azure Fundamentals Examination
- Microsoft Dynamics 365 Fundamentals Examination
- Microsoft Office Specialist (MOS) Examinations
- National Career Readiness Certificate Assessment
- W!SE Financial Literacy Certification Test
- Workplace Readiness Skills for the Commonwealth Examination

Concentration sequences: A combination of this course and those below, equivalent to two 36-week courses, is a concentration sequence. Students wishing to complete a specialization may take additional courses based on their career pathways. A program completer is a student who has met the requirements for a CTE concentration sequence and all other requirements for high school graduation or an approved alternative education program.

- Accounting (6320/36 weeks)
- Accounting, Advanced (6321/36 weeks)
- Business Law (6131/36 weeks)
- Business Law (6132/18 weeks)
- Business Management (6135/36 weeks)
- Business Management (6136/18 weeks)
- Computer Information Systems (6612/36 weeks)
- Computer Information Systems (6614/18 weeks)
- Computer Information Systems, Advanced (6613/36 weeks)
- Database Design and Management (Oracle) (6660/36 weeks)
- Design, Multimedia, and Web Technologies (6630/36 weeks)
- Design, Multimedia, and Web Technologies (6632/18 weeks)
- Design, Multimedia, and Web Technologies, Advanced (6631/36 weeks)
- Design, Multimedia, and Web Technologies, Advanced (6633/18 weeks)
- Digital Applications (6611/36 weeks)
- Digital Applications (6617/18 weeks)
• Information Technology Fundamentals (6670/36 weeks)
• International Baccalaureate Information Technology in a Global Society (IB6613/36 weeks)
• Java Programming (Oracle) (6661/36 weeks)
• Legal Administration (6735/36 weeks)
• Legal Administration (6736/18 weeks)
• Medical Administration (6730/36 weeks)
• Medical Administration (6731/18 weeks)
• Office Administration (6621/36 weeks)
• Office Administration (6622/18 weeks)
• Principles of Business and Marketing (6115/36 weeks)
• Principles of Business and Marketing (6116/18 weeks)

Career Cluster: Arts, Audio/Video Technology and Communications

<table>
<thead>
<tr>
<th>Pathway</th>
<th>Occupations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Printing Technology</td>
<td>Job Printer&lt;br&gt;Production, Planning, Expediting Clerk</td>
</tr>
</tbody>
</table>

Career Cluster: Business Management and Administration

<table>
<thead>
<tr>
<th>Pathway</th>
<th>Occupations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Support</td>
<td>Administrative Assistant&lt;br&gt;Computer Operator&lt;br&gt;Customer Service Representative&lt;br&gt;Information Assistant&lt;br&gt;Receptionist&lt;br&gt;Records Processing Assistant</td>
</tr>
</tbody>
</table>