Idaho CTE

Administrative Services (2014)

Use Standard Office Software Applications 1.0

1.1 Demonstrate Proficiency in Word Processing 1.1

- 1.1.1 Use a template to create a business document. 1.1.1
- 1.1.2 Create tables, charts, and graphs to depict information. 1.1.2
- 1.1.32 Demonstrate appropriate formatting and design to create business documents (i.e., letters, emails, memos, reports, and proposals). 1.1.3
- 1.1.4 Demonstrate competency in keyboarding and 10-key. 1.1.4
- 1.1.5 Draft, edit, and revise written work. 1.1.5
- 1.1.6 Create various desktop publications (e.g., newsletters, certificates, brochures, and flyers). 1.1.6
- 1.1.7 Use data to create mail merging with other software applications. 1.1.7

1.2 Demonstrate Proficiency in Spreadsheet Applications 1.2

- 1.2.1 Generate formulas and use functions to solve a problem. 1.2.1
- 1.2.2 Use formatting and editing to create a spreadsheet. 1.2.2
- 1.2.3 Create tables, charts, and graphs to depict information. 1.2.3
- 1.2.4 Demonstrate sorting and filtering data. 1.2.4
- 1.2.5 Export data to other software applications. 1.2.5
- 1.2.6 Import data to create spreadsheets. 1.2.6
- 1.2.7 Implement security measures for spreadsheet protection. 1.2.7

1.3 Demonstrate Proficiency in Database Applications 1.3

- 1.3.1 Use data to create tables. 1.3.1
- 1.3.2 Create forms to collect and enter data. 1.3.2
- 1.3.3 Formulate reports utilizing data queries to convey meaningful information. 1.3.3
- 1.3.4 Use filters to answer inquiries and create final reports. 1.3.4
- 1.3.5 Edit and revise collected data. 1.3.5

1.4 Demonstrate Proficiency in Presentation Software 1.4

- 1.4.1 Use a template to create a presentation. 1.4.1
- 1.4.2 Demonstrate appropriate formatting and design of business presentations. 1.4.2

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1.4.3 Edit and revise presentation content consistent with professional standards. 1.4.3

1.4.4 Customize presentations (e.g., animations, transitions, hidden slides, sound files). 1.4.4

1.4.5 Capture and insert graphics, audio, and video appropriate to the presentation. 1.4.5

1.4.6 Manage presentations (e.g., use rehearsed timings, screen navigation tools, pen, highlighter). 1.4.6

1.5 Demonstrate Proficiency in Technology Media 1.5

1.5.1 Evaluate Internet research sites for credibility and reliability. 1.5.1

1.5.2 Manage an electronic file storage system. 1.5.2

1.5.3 Recognize the potential risks associated with information management. 1.5.3

1.5.4 Identify and apply information security practices (e.g., password security, login, logout). 1.5.4

1.5.5 Practice safe, legal, and responsible use of technology in the workplace. 1.5.5

1.5.6 Demonstrate effective and appropriate use of social media. 1.5.6

Understand Accounting Functions 2.0

2.1 Perform Accounting Procedures 2.1

2.1.1 Balance cash and receipts. 2.1.1

2.1.2 Balance bank statements with checkbook. 2.1.2

2.1.3 Maintain accounting records (e.g., AP, AR, payroll, cost, tax). 2.1.3

2.1.4 Process invoices for payment. 2.1.4

2.1.5 Prepare bank deposits. 2.1.5

2.1.6 Prepare purchase requisitions. 2.1.6

2.1.7 Complete travel vouchers. 2.1.7

2.1.8 Document and process receipt of payment. 2.1.8

2.1.9 Explain the nature of accounts payable and accounts receivable. 2.1.9

2.1.10 Manage budget allocation. 2.1.10

Understand Legal and Ethical Issues that Impact Business 3.0

3.1 Understand Legal Issues in Business 3.1

3.1.1 Describe various fraudulent business activities. 3.1.1

3.1.2 Explain legal issues associated with information management. 3.1.2

3.1.3 Describe methods used to protect copyrights, intellectual property, and corporate property. 3.1.3

3.1.4 Research local, state, and federal regulations impacting business operations. 3.1.4

3.1.5 Discuss the importance of maintaining records for software licenses. 3.1.5

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3.1.6 Describe employee rights in the workplace. 3.1.6

3.2 Understand Ethics in Business 3.2

3.2.1 Explain ethical characteristics and traits. 3.2.1

3.2.2 Discuss business ethics in the office environment. 3.2.2

3.2.3 Describe the importance of workplace confidentiality. 3.2.3

3.2.4 Discuss and examine ethical usage of media content. 3.2.4

Understand the Importance of Positive Customer Relations 4.0

4.1 Foster Positive Relationships with Customers 4.1

4.1.1 Recognize the importance of and demonstrate how to properly acknowledge customers/clients. 4.1.1

4.1.2 Identify and address needs of customers/clients. 4.1.2

4.1.3 Provide helpful, courteous, and knowledgeable service. 4.1.3

4.1.4 Identify appropriate channels of communication with customers/clients (e.g., phone call, face- to-face, email, Web, social media, technology). 4.1.4

4.1.5 Identify techniques to seek and use customer/client feedback to improve company services. 4.1.5

4.1.6 Recognize the relationship between customer/client satisfaction and company success. 4.1.6

4.2 Resolve Conflicts with/for Customers 4.2

4.2.1 Identify conflict resolution skills to enhance productivity and improve workplace relationships. 4.2.1

4.2.2 Implement conflict resolution strategies and problem-solving skills. 4.2.2

4.2.3 Explain the role of documentation as a component in conflict resolution. 4.2.3

Understand Business Communication 5.0

5.1 Demonstrate Written and Oral Communication 5.1

5.1.1 Prepare correspondence (e.g., memo, business letter, electronic mail). 5.1.1

5.1.2 Proofread for all content, format, and keying errors 5.1.2

5.1.3 Transcribe notes from written, verbal, and/or recorded formats. 5.1.3

5.1.4 Prepare agendas and compile materials for meetings. 5.1.4

5.1.5 Communicate with liaisons outside the company. 5.1.5

Understand Business and Office Operations 6.0

6.1 Manage Office Functions for a Business 6.1

6.1.1 Demonstrate management of office projects and meeting deadlines. 6.1.1

6.1.2 Explain purchasing, shipping, and receiving procedures. 6.1.2

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6.1.3 Make travel arrangements for business purposes. 6.1.3

6.1.4 Plan and organize a meeting. 6.1.4

- 6.1.5 Describe the function of facilities management. 6.1.5
- 6.1.6 Plan organization/department activities. 6.1.6
- 6.1.7 Create and maintain electronic office calendars, tasks, appointments, resources. 6.1.7

6.2 Understand Mail/Shipping Processes 6.2

- 6.2.1 Process incoming and outgoing mail. 6.2.1
- 6.2.2 Identify special mail services through USPS (e.g., certified, registered, return receipt). 6.2.2
- 6.2.3 Identify mail/shipping couriers (e.g., FEDEX, UPS, DHL). 6.2.3

6.3 Understand Telephone Techniques and Etiquette 6.3

- 6.3.1 Identify techniques for answering, screening, and placing calls. 6.3.1
- 6.3.2 Identify techniques for placing callers on hold, transferring calls, and taking/leaving messages. 6.3.2
- 6.3.3 Locate telephone numbers and contact information. 6.3.3

6.4 Understand File/Records Management 6.4

- 6.4.1 Identify types of filing supplies, procedures, and systems. 6.4.1
- 6.4.2 File office information manually and electronically. 6.4.2
- 6.4.3 Retrieve information from files. 6.4.3
- 6.4.4 List the phases of a record life cycle. 6.4.4

6.5 Understand How Businesses are Organized 6.5

- 6.5.1 Describe the differences between the various types of business ownership. 6.5.1
- 6.5.2 Describe the hierarchy of a business organization and the roles of key officers. 6.5.2
- 6.5.3 Compare and contrast various types of management styles. 6.5.3

6.6 Understand Proper Use of Office Tools and Equipment 6.6

- 6.6.1 Identify when to use facsimile versus scanned documents. 6.6.1
- 6.6.2 Discuss copy machine usage and maintenance. 6.6.2
- 6.6.3 Operate 10-Key calculator 6.6.3
- 6.6.4 Set up and use audio visual equipment. 6.6.4
- 6.6.5 Explain the use of multi-line phones and conference calls. 6.6.5
- 6.6.6 Describe web-based and video conferencing. 6.6.6
- 6.6.7 Discuss technology device trends as applied to business environments. 6.6.7

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Investigate Careers in Administrative Services 6.7

6.7.1 Research various careers related to administrative services and office management. 6.7.1

6.7.2 Compare personal traits, likes, and dislikes with characteristics typical in administrative services careers. 6.7.2

6.7.3 Explain the role and responsibilities of administrative assistants. 6.7.3