Idaho CTE

Administrative Services (2024)

PROFESSIONAL ORGANIZATIONS AND LEADERSHIP 1.0

1 **Student Leadership in Career Technical Student Organizations (CTSO) and Professional Associations** 1.1

1. Explore the role of professional organizations and/or associations in the administrative services industry. 1.1.1
2. Define the value, role, and opportunities provided through career technical student organizations. 1.1.2
3. Engage in career exploration and leadership development. 1.1.3

CAREER EXPLORATION 2.0

1 **Careers in Administrative Services** 2.1

1. Research careers (e.g., front desk, C-suite, assistant, office manager) related to administrative services and office management. 2.1.1
2. Identify educational requirements, available certifications, professional organizations, and compensation ranges related to an administrative services career pathway. 2.1.2
3. Describe the role and responsibilities of administrative services professionals. 2.1.3

CONTENT STANDARD 3.0: MICROSOFT OFFICE SOFTWARE APPLICATIONS 3.0

1 **Microsoft Word** 3.1

1. Create a business document (e.g., resumé) from a template. 3.1.1
2. Create a table, chart, and graph from the same data set. 3.1.2
3. Format business documents (e.g., letters, emails, memos, reports, proposals), adhering to standard business communication principles. 3.1.3
4. Enter data using a variety of input devices. 3.1.4
5. Draft, edit, and revise written work. 3.1.5
6. Create desktop publications (e.g., newsletters, certificates, brochures, and flyers). 3.1.6
7. Create mail merging through Microsoft software applications. 3.1.7
8. Manage files, backups, and file sharing, using Cloud-based services. 3.1.8

2 **Microsoft Excel** 3.2

1. Generate formulas using functions to solve a problem. 3.2.1
2. Create a spreadsheet using formatting and editing. 3.2.2
3. Create tables, charts, and graphs to depict information. 3.2.3

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4 Sort and filter spreadsheet data. 3.2.4

5 Export data to various software applications. 3.2.5

6 Import data to create spreadsheets. 3.2.6

7 Implement security measures for spreadsheet protection. 3.2.7

3 Microsoft PowerPoint 3.3

1 Create a presentation from a template and theme. 3.3.1

2 Describe formatting and design goals for business presentations. 3.3.2

3 Revise presentation content, formatting, and design, consistent with professional standards. 3.3.3

4 Customize presentations (e.g., animations, transitions, hidden slides, audio files, speaker notes). 3.3.4

5 Import graphics, audio, and video content into a presentation. 3.3.5

6 Manage presentation, using other common software tools (e.g., rehearse timings, screen navigation tools, pen, highlighter, spell checker). 3.3.6

4 Media Technologies 3.4

1 Evaluate Internet research sites for credibility and reliability. 3.4.1

2 Manage an electronic media file storage system, applying file management techniques, including through The Cloud. 3.4.2

3 Recognize the potential risks associated with information management. 3.4.3

4 Apply information security practices (e.g., password security, login, logout). 3.4.4

5 Describe safe, legal, and responsible use of technology in the workplace, including use of social media. 3.4.5

6 Describe trends in Cloud-based applications, file sharing, and the use of artificial intelligence in administrative services. 3.4.6

7 Identify security threats (e.g., phishing, fraudulent links and attachments, robocalls, spam emails, texts). 3.4.7

ACCOUNTING FUNCTIONS 4.0

1 Accounting Procedures 4.1

1 Balance cash and receipts. 4.1.1

2 Balance bank statements. 4.1.2

3 Maintain accounting records (e.g., accounts payable, accounts receivable, payroll, cost, tax, accounting or spreadsheet software). 4.1.3

4 Process invoices for payment. 4.1.4

5 Document and process receipt of payment. 4.1.5

6 Describe the nature of accounts payable and accounts receivable. 4.1.6

7 Manage budget allocations. 4.1.7

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8 Prepare bank deposits. 4.1.8

9 Prepare purchase requisitions. 4.1.9

10 Complete procedures and authorization for travel, travel vouchers, and accommodations purchases. 4.1.10

LEGAL AND ETHICAL ISSUES 5.0

1 Legal Issues Affecting Business 5.1

1 Describe fraudulent business activities. 5.1.1

2 Describe legal issues associated with misuse of information management. 5.1.2

3 Describe methods used to protect copyright, intellectual property, and corporate property. 5.1.3

4 Define the elements of a valid contract. 5.1.4

5 Describe local, state, and federal regulations impacting business operations. 5.1.5

6 Describe the importance of maintaining records for software licenses. 5.1.6

7 Describe employee rights in the workplace, including the responsibility to report violations. 5.1.7

2 Ethics Affecting Business 5.2

1 Describe the value of ethics and ethical guidelines in the workplace. 5.2.1

2 Describe the importance of workplace confidentiality. 5.2.2

3 Describe the ethical usage of media content. 5.2.3

BUSINESS COMMUNICATION 6.0

1 Written and Oral Communication 6.1

1 Prepare correspondence (e.g., memo, business letter, electronic mail). 6.1.1

2 Edit Adobe PDF documents to include electronic signatures. 6.1.2

3 Proofread content, format, grammar, and keying errors. 6.1.3

4 Transcribe notes from written, verbal, and recorded formats. 6.1.4

5 Prepare agendas, minutes, and materials for meetings. 6.1.5

6 Communicate with liaisons outside the company (e.g., professional email, etiquette). 6.1.6

7 Deliver presentations. 6.1.7

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2 Telephone and Other Communication Device Techniques and Etiquette 6.2

1. Identify techniques for professionally answering, screening, and placing calls. 6.2.1
2. Identify techniques for placing callers on hold, transferring calls, and taking/leaving messages. 6.2.2
3. Describe techniques for locating telephone numbers and contact information. 6.2.3
4. Demonstrate video conferencing etiquette. 6.2.4

3 Positive Customer Service and Customer Relations 6.3

1. Describe the importance of acknowledging customers/clients. 6.3.1
2. Identify the needs of customers/clients. 6.3.2
3. Provide helpful, courteous, and knowledgeable service. 6.3.3
4. Identify appropriate channels of communication with customers/clients (e.g., phone call, face-to-face, email, Web, social media, other technologies). 6.3.4
5. Identify techniques to seek and use customer/client feedback to improve company services. 6.3.5
6. Describe the relationship between customer/client satisfaction and company success. 6.3.6

4 Conflict Resolution 6.4

1. Identify conflict-resolution techniques to enhance productivity and improve workplace relationships. 6.4.1
2. Implement conflict-resolution strategies and problem-solving skills. 6.4.2
3. Describe the role of documentation as a component of professional conflict resolution. 6.4.3

BUSINESS AND OFFICE OPERATIONS 7.0

1 Office Functions 7.1

1. Describe the importance of time management and meeting deadlines. 7.1.1
2. Describe common purchasing, shipping, and receiving procedures. 7.1.2
3. Research options for travel and accommodations (e.g., flight, hotel) for business purposes. 7.1.3
4. Plan a meeting. 7.1.4
5. Describe the function of facilities management. 7.1.5
6. Plan organization/department activities (e.g., team building, life events). 7.1.6
7. Maintain electronic office calendars, tasks, appointments, allocating necessary resources (e.g., reserving rooms, room preparation, technology, equipment). 7.1.7
8. Describe the importance of working as a calendar delegate. 7.1.8
9. Describe office hazards and safety protocols. 7.1.9

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2 Mail/Shipping Processes 7.2

1. Process incoming and outgoing mail, including interoffice mail. 7.2.1
2. Identify special mail services (e.g., certified, registered, return receipt) available through the United States Post Office (USPS). 7.2.2
3. Identify common mail/shipping couriers (e.g., FedEx, UPS, DHL) and reasons businesses use them. 7.2.3

3 File/Records Management 7.3

1. File office information manually and electronically. 7.3.1
2. Describe ARMA filing rules. 7.3.2
3. List the life cycle phases for records. 7.3.3

4 Business Organization 7.4

1. Compare the types of business ownership (e.g., sole proprietorship, partnership, corporation). 7.4.1
2. Identify common departments (e.g., human resources, sales/marketing, customer relations, management, executive leadership, board of directors) and their business functions. 7.4.2
3. Describe the importance of chain of command, business organization models, and organizational charts. 7.4.3
4. Compare leadership styles (e.g., autocratic, democratic, laissez-faire, transformational). 7.4.4

5 Office Tools and Equipment 7.5

1. Identify when to use facsimile versus scanned documents. 7.5.1
2. Describe copy machine usage and maintenance. 7.5.2
3. Improve 10-key calculator proficiency. 7.5.3
4. Set up audio/visual equipment. 7.5.4
5. Describe the use of multi-line phones and conference calls. 7.5.5
6. Set up web-based and video conferencing. 7.5.6
7. Describe technology device trends as applied to business environments. 7.5.7