

ATC Program Essential Skills Package

Administrative Assistant



Instructional Methods: Classroom Lectures, Hands on Computer and Equipment Use

Course Format: Classroom: Individual and group work

Rationale:

Workplace Education Manitoba has listed nine Essential Skills needed to be successful in any workplace. All nine Essential Skills are used in different combinations, in different applications, in every occupation. They are the foundational skills you use to carry out your work tasks and are the building blocks you use to learn new ones. The importance of, and need for, employees to have appropriate levels of workplace Essential Skills is clear and strong.

What specifically are the Essential Skills needed in the workplace?

To help answer this question, the Federal Government, since 1994, has surveyed more than 3,000 Canadians in workplaces in all sectors and all types and sizes of organizations. All participants were asked what workplace Essential Skills they felt were needed in order for workers to be most effective, efficient and productive.

The result has been the identification of the following nine workplace Essential Skills:

1. [Reading](#)
2. [Writing](#)
3. [Numeracy](#)
4. [Document Use](#)
5. [Oral Communication](#)
6. [Working With Others](#)
7. [Thinking](#)
8. [Digital Technology](#)
9. [Continuous Learning](#)

To help students be successful in their training, ATC has developed a package focused specifically on these Essential Skills and how they apply to the program of **Administrative Assistant**. The purpose of this package is not to dissuade students from attending the program, but to help them become successful by informing them of the skills required. We highly encourage all students to take some time to work through the package and become informed of the program requirements.

Reading

- Read short notes from co-workers (e.g. read notes from supervisors to learn the timelines for entering information, such as registrations)
- Read short text entries on forms (e.g. read short comments on requisition forms to learn how to authorize purchases)
- Read memos and bulletins (e.g. read internal memos to learn about changes to operating procedures)
- Read a variety of instructions and procedures (e.g. read sequenced instructions to learn how to process licenses and permit applications)
- Read brochures, information releases and newsletters (e.g. read brochures to be able to refer customers to appropriate resources and newsletters to learn about changes to programs)
- Read a variety of policy and procedure manuals (e.g. read policy manuals to learn about hours of work, dress code and grievance procedures)
- May read computer manuals (e.g. read manuals to learn how to batch files and produce reports using online registration systems)
- Read journals, magazines, books and any other reference materials that are relevant to their jobs (e.g. workers employed with medical clinics may read reference materials to learn the definitions of medical terms)

Writing

- Write reminders and short notes to co-workers (e.g. write short notes to co-workers to remind them about upcoming meetings and report submission deadlines)
- Write comments in the remarks sections of forms (e.g. workers employed in the medical field write comments about presenting symptoms on patient intake forms)
- May write email and short letters (e.g. write email to suppliers to inquire about products and shipping information)
- May write detailed letters and memos (e.g. write internal memos to provide co-workers with detailed instructions on how to complete claim forms or details of new office procedures)

Numeracy

- May handle cash, credit card and debit card transactions and provide change
- May record payables and receivables against various accounts in general ledgers
- May review payables and receivables for accuracy
- May measure dimensions and weights using basic measuring tools (e.g. weigh outgoing mail using electronic scales)
- May count and sum totals (e.g. tally supplies to establish inventory counts)
- May compare operating statistics to targets (e.g. compare the number of registrants to expected registrations to determine occupancy rates)

- Estimate times to carry out job tasks using past experiences as guides (e.g. estimate the time needed to complete procedures, serve customers and process documents, such as permits and application forms)
- May estimate levels of inventory
- May calculate discounts, taxes and currency exchanges
- May monitor budgets, e.g. compare purchases of office supplies to office supply budgets and adjust spending as required
- May calculate summary averages (e.g. calculate the average number of permits processed per week and month)
- May calculate and verify invoice and receipt amounts
 - They calculate amounts for goods and services, determine discounts and surcharges, and add federal and provincial sales taxes

Document Use

- Locate data, such as names, dates, codes and dollar values, on files, labels and tags
- Locate data in lists (e.g. scan contact lists to find names, addresses and telephone numbers)
- Enter data into a variety of forms (e.g. enter data, such as names, addresses, dates, codes and account numbers, into application forms)
- Locate information in a variety of forms (e.g. use weight tables to determine shipping costs, and schedules to determine the times and locations of upcoming events)
- May interpret graphs (e.g. workers with educational institutions scan graphs to locate information about enrolments and completed registrations)
- May complete complex forms (e.g. workers with shipping firms complete free-trade certificates by entering data, such as names and addresses of producers and importers, identification numbers, classification numbers and preference criteria)

Oral Communication

- Leave and listen to messages (e.g. leave voicemail messages with customers to remind them of upcoming appointments)
- Talk to suppliers (e.g. talk to suppliers about the availability of products and their costs)
- Exchange information with co-workers (e.g. speak with co-workers about changes to how office supplies are ordered)
- May provide information to customers, registrants and patients (e.g. explain course registration processes to students applying for courses at colleges and universities)
- Participate in staff meetings to discuss problems and new policies and to exchange opinions on current procedures
- May speak with dissatisfied customers (e.g. speak with and attempt to satisfy customers who are unhappy with long wait times or billing errors)

- May provide detailed instructions and explanations (e.g. explain detailed processes about administrative tasks to new employees)

Thinking

- Encounter delays due to equipment faults (e.g. discover that they cannot access online registration systems because of equipment faults)
 - They inform supervisors and technology support staff about the glitches
 - They perform registrations manually until repairs are made and systems are operational
- May decide what purchases, such as office supplies, are required
- Encounter errors in administrative and financial records
 - They check forms and computer records and speak with co-workers from various departments
 - They locate the errors and correct the records.
- Encounter delays due to incomplete records (e.g. have difficulty finding particular documents when only limited information is available)
 - They track the document through the processing steps, phone other departments and conduct physical searches
- Encounter dissatisfied customers and co-workers (e.g. deal with registrants who are unhappy about long wait times)
 - They speak with the dissatisfied persons about their complaints, explain processes and seek acceptable solutions.
- Decide order of tasks and their priorities (e.g. decide the order in which to complete tasks by considering deadlines and priorities)
- May select suppliers (e.g. decide which suppliers to use for the purchase of supplies, such as forms and paper)
- Assess the legibility, accuracy and completeness of completed forms
 - They compare the information presented in forms to requirements to identify potential errors and information gaps.
- Evaluate expense claims and invoices
 - They compare fees and costs to industry standards and price lists to identify potentially incorrect and fraudulent charges.
- May evaluate the suitability of administrative procedures
 - They consider a number of factors including speed of service and common bottlenecks.
- May plan their own job tasks, or follow established procedures and directives closely
 - Their tasks are repetitive, although the contents change to reflect the needs of different clients
 - Those that plan their own work determine the order in which to perform their tasks, but must respond to urgent requests for information and ensure that certain tasks are completed by specified times
 - They are interrupted frequently and must then reorganize their tasks to meet deadlines and maintain their efficiency
- Locate information about processes by reading memos and procedure manuals, watching videos and speaking with coworkers
- Find out how to complete forms by reading directions and by speaking with co-workers and government agencies

Digital Technology

- May use databases to enter and retrieve data, such as registrations, sales and costs
- May use bookkeeping, billing and accounting software to record financial transactions
- Use calculators and personal digital assistant (PDA) devices to complete numeracy-related tasks, such as summing figures and calculating interest charges
- Use office equipment, such as printers, scanners, fax machines, copiers, binding machines and postage meters, to perform a variety of clerical tasks
- May operate point-of-sale equipment, such as electronic cash registers, bar scanners and touch- screens to complete tasks, such as registrations and financial transactions (e.g. use bar scanners to complete course registration processes)
- May use word processing programs to enter data into forms and write letters and memos
- May use specialized database software to complete and electronically submit claim forms, registrations and applications
- May use contact management software to schedule appointments, generate automated reminders and produce mailing lists
- May use graphics software to create slide presentations with imported images
- May use spreadsheets to track registrations, times and expenditures
- May use intranets and email applications to exchange information and documents with co-workers, customers, suppliers and government agencies
- May use browsers to access forms and guidelines on government websites
- May use browsers and search engines to locate product information from suppliers, such as costs and specifications
- May use the Internet to access training courses and seminars offered by suppliers, employers and trainers
- May use specialized Internet applications to send medical records, x-rays and referral information to insurers and medical practitioners
- May use bookkeeping, billing and accounting software to generate monthly financial statements, such as balance sheets and income and expense statements

Working with Others

Administrative clerks work independently or in small teams. They may work jointly with partners and helpers to complete tasks, such as conduct inventories, and may work as a member of a team when assisting others during busy periods. They sometimes have to cover other people's stations during breaks. You might need to pass on instructions from your boss to other coworkers.

Continuous Learning

Administrative clerks continue to learn. For example, they receive training in the use of new software as it is added to the work environment. Software is constantly changing in this industry and they must be prepared to be lifelong learners. They may also take training offered by their employers in areas such as time management and specific job skill upgrading.

Essential Skills Package Self-Test for Administrative Assistant Program

You will need basic math skills in order to work with Microsoft Excel and Accounting. For example, Administrative Assistants have to be able to create invoices and check them. You will need to be able to proofread financial documents. We will be working on advanced formulas in Excel as we progress in the course.

See if you can answer these questions.

1. $\frac{1}{2} =$ _____ %
2. $.75 =$ _____ %
3. Do you know the Order of Operations? What is it?

BEDMAS

B = Brackets or Parenthesis

E _____

D _____

M _____

A _____

S _____

4. Which columns are correct? Circle the ones with the correct answers.

256	444	890	243
32	45	888	333
1	25	102	11

289 **514** **1889** **587**

5. You buy office chairs for your company. You purchase 5 of them at \$99.99 each. The tax is 15%. What is the total cost of the purchase?

6. Identify these mathematical operators:

a. + Plus Sign

b. - _____

c. \geq _____

d. < _____

7. If you got 15/20 on a test. What did you get out of 100? _____

8. If you start work at 8 am and you get one hour for lunch and you finish at 4 pm. How many hours did you work?

If you are paid \$10.50 per hour, how much did you make in one day?

You will need basic reading and writing skills to succeed as an Administrative Assistant. You will work with many different types of documents and have to communicate with a range of people. A large and critical part of the job is creating and proofreading documents to be professional and mail-able. ***This means that they have absolutely no errors.*** It would be a good idea to start reading if you don't already. Try to read as many books and articles as you can. It will help to improve your skills tremendously.

“The more that you read, the more things you will know. The more that you learn, the more places you'll go.” - Dr. Seuss

9. Are these the same or different? Write S if they are the same and D if they are different. Careful proofreading is a very important skill for any secretary.

S	Y.M.C.A	Y.M.C.A
	George Elliott, Jr.	George Elliott, Sr.
	Hubert VanderMallie	Hubert Vander Mallie
	Louis Riel Foundation	Luis Riel Foundation
	Baxter and Smith Co. Ltd.	Baxter & Smith Co. Ltd.
	B23987	B23897
	Emilie Jergenson	Emily Jergenson
	Skye E. Randall	Skye E. Randall
	XIBY87UK9	XIBY87UY9

10. Read the following MEMO and answer the comprehension questions.

MEMO

TO: All Staff
FROM: Joseph Smith, Manager
DATE: March 15, 2013
RE: **PAYROLL DEDUCTIONS**

Effective immediately you will have a new deduction on your paycheques. The new Dental Plan has come into effect and every employee will be charged \$15 per month for this new benefit. You will see your first deduction on your March 31, 2013 paycheque.

If you have any questions please call the Payroll Department at extension 321.

- a. Who will receive this memo?
- b. What is the main idea of this memo?
- c. How much would be deducted from each employee in total for 2013 for this new plan? Show your work.
- d. Who is the manager?

11. Circle every error in this paragraph.

Most employers require applicants to submit a resume. With out 1 you may not get considered four the job A well writte resume will show employers how your skills, experiences and quealifications match the skills necessary to preform a job. A well prepared resume shows employers you you are serious about finding a job and should get them interested in caling you for a job interviews. Its up to you to have a good resume.

12. Use 10 adjectives to describe yourself.

For example: Keen, Persuasive, Supportive.....

13. You need to write an email to your teacher Mr. Brown, because there was a substitute in class on Friday and they marked you absent by mistake. Compose a brief, concise and polite email to your teacher to explain what happened and what you would like them to do.

To:

Date:

Subject:

Answer Key to Example Questions:

1. 50%
2. 75%
3. Brackets
Exponents
Division
Multiplicaton
Addition
Subtraction
- 4.

256	444	890	243
32	45	888	333
1	25	102	11
289	514	1889	587

5. \$574.94
6. – Minus Sign
>= Greater Than or Equal to
< Less Than
7. 75/100
8. 7 hours, \$73.50
- 9.

S	Y.M.C.A	Y.M.C.A
D	George Elliott, Jr.	George Elliott, Sr.
D	Hubert VanderMallie	Hubert Vander Mallie
D	Louis Riel Foundation	Luis Riel Foundation
D	Baxter and Smith Co. Ltd.	Baxter & Smith Co. Ltd.
D	B23987	B23897
D	Emilie Jergenson	Emily Jergenson
S	Skye E. Randall	Skye E. Randall
D	XIBY87UK9	XIBY87UY9

10.
 - a. All the staff
 - b. Deduction for dental plan
 - c. \$15 x 9 months = \$135
 - d. Joseph Smith
- 11.

Most employers require applicants to submit a resume. Without 1 you may not get considered for the job. A well written resume will show employers how your skills, experiences and qualifications match the skills necessary to perform a job. A well prepared resume shows employers you are serious about finding a job and should get them interested in calling you for a job interviews. Its up to you to have a good resume.

12. These answers will vary depending on the applicant

13.

To: Mr. Brown
Date: February 1, 2014
Subject: My Attendance for Friday

On Friday when you were away we had a substitute. He made an error and marked me absent when I was actually there. You can confirm this with my parents or the other classmates if you need to.

I would like you to please change the attendance records. My attendance is important to me. Thank you.

References

Workplace Education http://www.wem.mb.ca/the_9_essential_skills.aspx