This document presents the Ohio Integrated Technical and Academic Competency (ITAC) profile for administrative office technology, which is a comprehensive listing of 58 occupational skill competencies deemed essential for Ohio graduates of programs in office technology. The document begins with an introduction to the ITAC system, a list of professionals involved in the identification of competencies for administrative office technology, and an overview of the administrative office technology field today and its likely development in the future. The overview is followed by sections for each of seven competency areas identified. Each section consists of lists of the occupational skill competencies accompanied by key indicators for assessing mastery of the specialty and foundation skills constituting each individual competency. The competency areas are office operations; leadership and management; finance and accounting; economics; communications; technology applications; and professional and career development. The competencies reflect the job opportunities and skills required for employment in the field as identified through extensive research and input from industry, labor, professional organizations, and other stakeholders in the administrative office technology field. Critical academic, employability, and information technology skills have been integrated throughout the list to support the technical skills presented. The competencies are organized so that they can be clustered or grouped in a modular approach and used as the basis for curriculum development in Ohio's secondary, adult, and postsecondary programs. (MN)
**Administrative Office Technology**

**Acknowledgements**

**Overview**

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Introduction to the Specialization ITAC

Revised 2001

The Ohio Integrated Technical and Academic Competency (ITAC) profiles are developed under the auspices of the Ohio Department of Education and the Ohio State Board of Education. They provide a broad-based educational response to Ohio’s need for a skilled workforce. Each Specialization ITAC represents a profile of the professional or occupational competencies deemed essential for a graduate to perform proficiently when he or she graduates from the specialization workforce development programs in Business and Marketing, Industrial and Engineering Systems, Health Occupations, or Family and Consumer Sciences. The Specialization ITAC profile, in conjunction with the competencies identified in the Foundation and Clusters ITACs, provide a career pathway that can lead to employment or further education.

Process and Intent

The integrated competency lists are the result of all encompassing research and review of existing competency profile lists and includes input from industry, labor, professional organizations, professional and industrial representation, and national standards for a specific industry/profession. Representatives from a broad cross-section of Ohio professional organizations, businesses/professions, industry, and labor played a critical role in identifying current and future knowledge and skills for the industry, and defining the vision and scope of the profession/industry. The instructional methods and teaching strategies are the responsibility of the local school system and/or instructor.

Curriculum Applications Using the ITAC Competency Profiles

Each profile includes a comprehensive listing of occupational skill competencies that reflect the job opportunities and skills that are required to work in a specific profession/career pathway. Critical academic, employability and information technology skills have been integrated throughout the list to support the technical skills. These competency profiles will be used as the basis for curriculum development in Ohio’s secondary, adult, and post-secondary programs. The specialization competency profiles are organized so that they can be clustered or grouped in a modular approach. Individual curriculum specialists can use the competencies profiles to develop instructional programs based on local needs as determined in conjunction with their local advisory committees. i.e., the specialization cluster academy approach. Final assessments will be designed to accompany each profile list and to accommodate student evaluation by modules.
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2001 Revision

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Overview

Administrative Office Technology

When you phone or walk into any business or industry, you are likely to be greeted by an Administrative Office Technologist. Administrative Office Technologists are employed in virtually every business/industry. Job titles vary within this field, including Secretary, Administrative Assistant, Office Clerk, Legal Secretary, Medical Secretary, and Receptionist, as well as many others.

In the Ohio Job Outlook to 2008, Administrative Office Technology occupations are grouped among those projected to gain the most employment and/or growing the fastest. Clerical Administrative Support occupations had an annual employment of 914,110 in 1998 with projected employment in 2008 of 984,160. This reflects an increase of 70,050 or 7.7 percent. Total annual openings are projected to be 25,745 per year. Within this area, General Office Clerks are ranked as fifth among occupations in Ohio with the most annual job openings for 1998-2008 while receptionists and information clerks ranked 18th; and secretaries, (except legal and medical) ranked 21st.

The field of Administrative Office Technology is ever changing. As the information technology era progresses, the responsibilities of the administrative office technologist have expanded greatly. Those employed in this field experience a broader ability to make decisions and direct tasks. Technology is utilized to conduct research, communicate with clients and among co-workers, plan and deliver meetings, and coordinate schedules. Advanced computer application skills are essential along with the ability to do initial troubleshooting of technology. This field also calls for flexibility; excellent interpersonal skills; project coordination; and the ability to work well with all levels of internal management and staff, as well as outside clients and vendors.

Administrative Office Technologists are a vital part of today's business economy. They serve as an essential link between the business and the clients it serves. Opportunities for the administrative office technologist are limited only to the employee's ambitions. The expansion of opportunities is reflected in research conducted by OfficeTeam, a division of Robert Half International Company. In a survey of 150 executives with the nation's 1,000 largest companies:

- Fifty-six percent of executives believe that administrative assistance will impact the selection and implementation of new technologies.
- The areas in which administrative assistants will assume more responsibility at the entry-level capacity by 2005 include Internet research, desktop publishing, help desk or training and assistance, and web page development.
- Sixty-five percent of executives say that administrative assistants will be relied upon for project management expertise by 2005.
- Sixty-five percent of executives expect the title for administrative assistants will include the word "coordinator" by the year 2005.

The field of Administrative Office Technology is one of excitement and change. Those employed in this field will be required to continually update/upgrade their skills. In return they will receive a more challenging, self-directed work environment from which many rewards will be gained.
02.00.00.0 Administrative Office Technology

02.01.00.0 Office Operations

02.01.01.0 Analyze trends and issues in business and management

Key Indicators - Foundation:
02.01.01.01 Identify types of business enterprises and trends affecting them
02.01.01.02 Analyze influences on trends and issues in business and management
02.01.01.03 Analyze historical, social, and political factors affecting trends and issues in business and management

02.01.02.0 Apply analytical skills in business operations

Key Indicators - Specialty:
02.01.02.01 Determine the results from implementing solutions

Key Indicators - Foundation:
02.01.02.02 Determine whether information is sufficient, insufficient, or extraneous when solving business problems
02.01.02.03 Interpret data needed to solve problems and make decisions
02.01.02.04 Apply information from tables, charts, and graphs to problem-solving and decision-making
02.01.02.05 Interpret workflow and organizational charts
02.01.02.06 Apply logic skills to business decisions
02.01.02.07 Calculate estimates based on given data
02.01.02.08 Use algebraic equations to solve unknowns

02.01.03.0 Perform scheduling functions

Key Indicators - Specialty:
02.01.03.01 Create an electronic calendar
02.01.03.02 Maintain electronic calendar
02.01.03.03 Identify need for managing schedules across projects
02.01.03.04 Identify software sources of electronic calendars

Key Indicators - Foundation:
02.01.03.05 Maintain appointment calendars
02.01.03.06 Maintain schedules
02.01.03.07 Manage scheduling conflicts
02.01.03.08 Create calendar/schedules of activities (itineraries)
02.01.03.09 Identify the need for management across projects

02.01.04.0 Conduct meeting and other group function

Key Indicators - Specialty:
02.01.04.01 Use an electronic calendar to schedule meeting
02.01.04.02 Make arrangement for technology needs for meeting (e.g., computers, Internet connection)
02.01.04.03 Maintain record of meeting proceedings
02.01.04.04 Make travel arrangements for participants and speakers

Key Indicators - Foundation:
02.01.04.05 Plan meetings
02.01.04.06 Apply parliamentary procedure during meetings
02.01.04.07 Schedule meetings
02.01.04.08 Prepare agendas
02.01.04.09 Make necessary meeting room arrangements
02.01.04.10 Make arrangements for participants' special needs (e.g., dietary, hearing, handicap access, foreign language interpreter)
02.01.04.11 Facilitate meetings
02.01.04.12 Participate in group discussions and meetings
02.01.04.13 Communicate roles and responsibilities of committee members and officers

02.01.05.0 Coordinate travel

Key Indicators-Specialty:
02.01.05.01 Identify traveler's preferences
02.01.05.02 Research travel resources
02.01.05.03 Utilize information from travel agents
02.01.05.04 Use Internet travel information
02.01.05.05 Arrange for transportation and lodging
02.01.05.06 Finalize arrangements
02.01.05.07 Prepare itineraries
02.01.05.08 Prepare expense reports
02.01.05.09 Identify international travel concerns (e.g., health, customs, restrictions, driving, passport, visa, and time changes)
02.01.05.10 Calculate exchange rates

02.01.06.0 Maintain a records management system

Key Indicators-Specialty:
02.01.06.01 Select filing method (i.e., alphabetical, chronological, numerical, geographical, subject)
02.01.06.02 Sort documents and integrated media according to selected filing method
02.01.06.03 Store documents and integrated media according to selected filing method
02.01.06.04 Apply cross-referencing and logging systems for files
02.01.06.05 Determine storage media to be used (e.g., paperbase, database, micrographics, image technologies)
02.01.06.06 Create new files
02.01.06.07 Update files
02.01.06.08 Maintain a tickler file
02.01.06.09 Assist in determining and updating retention schedule
02.01.06.10 Secure files for legality and confidentiality
02.01.06.11 Maintain master list of file categories and their locations
02.01.06.12 Comply with the laws regulating privacy and legal issues for sharing information
02.01.06.13 Develop a system for maintaining necessary company records
02.01.06.14 Maintain secured and protected filing systems
02.01.06.15 Store materials within appropriate filing systems
02.01.06.16 Retrieve requested materials from established filing systems
02.01.06.17 Purge filing systems in accordance with company policy

02.01.07.0 Maintain supplies and equipment

Key Indicators-Specialty:
02.01.07.01 Assess equipment/software malfunctions
02.01.07.02 Determine sources for repair
02.01.07.03 Request repairs on equipment
02.01.07.04 Write bid requirements for equipment and supply orders
02.01.07.05 Obtain bids from multiple sources
02.01.07.06 Order new supplies and equipment
02.01.07.07 Determine the risks of payment (e.g., credit cards, cash, check, debit cards)
02.01.07.08 Identify the flow for ordering and paying for supplies/equipment on-line
02.01.07.09 Adhere to supply budget
02.01.07.10 Update equipment/software enhancements
02.01.07.11 Maintain equipment/supplies inventory and maintenance records
02.01.07.12 Receive/verify delivered supplies and equipment
02.01.07.13 Store/secure supplies and equipment
02.01.07.14 Distribute supplies and equipment

**Key Indicators-Foundation:**
02.01.07.15 Select inventory control system (periodic, perpetual, dollar, LIFO, FIFO)
02.01.07.16 Manage inventory manually and electronically
02.01.07.17 Maintain inventory control records system
02.01.07.18 Identify reasons for inventory shrinkage
02.01.07.19 Prepare inventory records report

**02.01.08.0 Perform shipping functions**

**Key Indicators-Foundation:**
02.01.08.01 Identify various classes of shipments
02.01.08.02 Sort/distribute shipments
02.01.08.03 Identify requirements for shipments
02.01.08.04 Select shipment method appropriate for shipping needs (electronic options and manual methods)

**02.01.09.0 Perform mail functions**

**Key Indicators-Specialty:**
02.01.09.01 Process outgoing mail (e.g., manual and computer postage)
02.01.09.02 Maintain mail and distribution lists
02.01.09.03 Identify various classes of mail
02.01.09.04 Sort/distribute mail
02.01.09.05 Identify delivery requirements
02.01.09.06 Select delivery method appropriate for mailing needs

**02.01.10.0 Receive visitors**

**Key Indicators-Specialty:**
02.01.10.01 Greet visitors according to company policy and security
02.01.10.02 Initiate contact with visitors by offering assistance
02.01.10.03 Direct/assist visitors to appropriate person/location
02.01.10.04 Maintain visitors' log
02.01.10.05 Screen visitors
02.01.10.06 Maintain reception area

**02.01.11.0 Maintain safe working environment**

**Key Indicators-Specialty:**
02.01.11.01 Follow government regulations pertaining to safety
02.01.11.02 Follow company health, safety, and security procedures
02.01.11.03 Identify the ergonomic concerns
02.01.11.04 Modify work environment to continuously meet health, security, and safety standards
02.01.11.05 Identify the benefits of health, wellness, and safety programs

**02.02.00.0 Leadership and Management**

**02.02.01.0 Identify key elements of business ownership**

**Key Indicators-Specialty:**
02.02.01.01 Identify characteristics of not-for-profit and non-profit businesses

**Key Indicators-Foundation:**
02.02.01.02 Identify parts of a business plan
02.02.01.03 Identify relationship between the business plan and the business organization
02.02.01.04 Identify types of business ownership and the characteristics of each
02.02.01.05 Identify advantages and disadvantages of various types of business ownership

**02.02.02.0 Analyze business-management practices**

**Key Indicators-Foundation:**
02.02.02.01 Identify functions of management
02.02.02.02 Identify areas of management (i.e., human resources, financial, facility, inventory, information systems, logistics, marketing, accounting) and their relationship to business functions
02.02.02.03 Analyze management levels and the role of each in an organization

**02.02.03.0 Build customer service**

**Key Indicators-Foundation:**
02.02.03.01 Identify organization's products and services (including own strengths as a sales agent)
02.02.03.02 Identify customers (internal and external)
02.02.03.03 Recognize the importance of all customers to the business
02.02.03.04 Determine customer's individual needs
02.02.03.05 Interact with customers in a professional manner (i.e., prompt, friendly, courteous, helpful)
02.02.03.06 Follow through on commitments made to customers
02.02.03.07 Communicate business policies to customers
02.02.03.08 Handle customer complaints in accordance with customer service policy
02.02.03.09 Facilitate customer service through the maintenance of key information systems
02.02.03.10 Maintain customer database

**02.02.04.0 Build customer and coworker relations**

**Key Indicators-Foundation:**
02.02.04.01 Provide needed information to customers and coworkers in a considerate, timely, respectful manner
02.02.04.02 Project a professional business image (i.e., appearance, voice, grammar, word usage, enunciation, nonverbal communication)
02.02.04.03 Demonstrate business professionalism through the use of appropriate manners in accordance with established protocols and company policies

**02.02.05.0 Evaluate issues related to leadership and managerial ethics**

**Key Indicators-Specialty:**
02.02.05.01 Apply conflict resolution techniques

**Key Indicators-Foundation:**
02.02.05.02 Investigate the nature of leadership and managerial ethics
02.02.05.03 Research the history of leadership and management theory
02.02.05.04 Analyze current issues in leadership and management ethics
02.02.05.05 Determine the impact that various employment and social laws may have on leading and managing business

**02.02.06.0 Analyze ethical business behavior**

**Key Indicators-Foundation:**
02.02.06.01 Analyze current trends in computer and business ethics
02.02.06.02 Identify various types of ethical and unethical business practices
02.02.06.03 Interpret codes of ethics for given businesses
02.02.06.04 Identify potential consequences of unethical business practices

**02.02.07.0 Demonstrate employee ethics**

**Key Indicators-Specialty:**
02.02.07.01 Exhibit professional behavior with regard to office politics and gossip
02.02.07.02 Respect coworkers
02.02.07.03 Ensure confidentiality in handling sensitive issues

**Key Indicators-Foundation:**
02.02.07.04 Analyze current issues in employee ethics
02.02.07.05 Identify types of ethical employee behaviors
02.02.07.06 Identify ethics established by business
02.02.07.07 Identify unethical behaviors
02.02.07.08 Identify potential consequences of unethical behaviors

### 02.03.00.0 Finance and Accounting

#### 02.03.01.0 Perform basic accounting functions

**Key Indicators-Specialty:**
02.03.01.01 Complete employee withholding forms, exemption forms, and other financial forms
02.03.01.02 Prepare payables/receivables
02.03.01.03 Prepare budgets
02.03.01.04 Prepare financial reports
02.03.01.05 Identify differences in accounting for proprietorship, partnership, and corporation

**Key Indicators-Foundation:**
02.03.01.06 Identify the purposes of basic accounting functions
02.03.01.07 Apply generally accepted accounting principles (GAAP) and procedures
02.03.01.08 Employ computer accounting applications
02.03.01.09 Calculate payrolls (manually and using automation)
02.03.01.10 Prepare balance sheets and profit/loss statements
02.03.01.11 Interpret inventory control system data

#### 02.03.02.0 Analyze financial data

**Key Indicators-Foundation:**
02.03.02.01 Analyze financial reports using both electronically and manually reported data
02.03.02.02 Evaluate cost-profit relationships
02.03.02.03 Predict financial outcomes relative to business decisions and financial data

#### 02.03.03.0 Analyze credit issues

**Key Indicators-Specialty:**
02.03.03.01 Calculate percentage rates (i.e., yearly, term, 90 days)
02.03.03.02 Calculate finance charges
02.03.03.03 Determine appropriate credit method for different situations
02.03.03.04 Determine credit-worthiness of a client

**Key Indicators-Foundation:**
02.03.03.05 Analyze differences in uses of credit cards, debit cards, installment loans, term loans, and commercial loans
02.03.03.06 Identify factors involved in issuing credit
02.03.03.07 Identify the components of credit reports

#### 02.03.04.0 Develop a financial plan

**Key Indicators-Specialty:**
02.03.04.01 Develop a proposal for a financial plan
02.03.04.02 Gather input on a proposed financial plan
02.03.04.03 Revise a proposed financial plan
02.03.04.04 Recommend a financial plan

**Key Indicators-Foundation:**
02.03.04.05 Identify components of a financial plan
02.03.04.06 Compare various sources of capital and types of loans
02.03.04.07 Compare methods of financing given business and personal endeavors
02.03.04.08 Set long-term financial goals and objectives (business and personal)

02.03.05.0 Perform banking functions

**Key Indicators-Specialty:**
- 02.03.05.01 Maintain petty cash fund
- 02.03.05.02 Identify steps in handling returned checks, credit-card deposits, and overpayments

**Key Indicators-Foundation:**
- 02.03.05.03 Maintain a checkbook including reconciliation
- 02.03.05.04 Complete bank deposit/withdraw records
- 02.03.05.05 Inspect currency for counterfeit bills, check authenticity, credit-card fraud, and smart-card fraud, check-card fraud, and electronic currency fraud
- 02.03.05.06 Calculate the cost of accepting credit cards

02.04.00.0 Economics

02.04.01.0 Apply business economic concepts

**Key Indicators-Foundation:**
- 02.04.01.01 Identify economic resources
- 02.04.01.02 Analyze the function of money
- 02.04.01.03 Identify the difference between economics and economic activity
- 02.04.01.04 Identify the relationship between business, society, and government
- 02.04.01.05 Apply the concept of economic goods and services to given business situations
- 02.04.01.06 Apply the concept of utility to given business situations
- 02.04.01.07 Apply the concept of supply and demand to given business situations
- 02.04.01.08 Apply the concept of competition to given business situations
- 02.04.01.09 Apply the concept of price to given business situations
- 02.04.01.10 Apply the concept of opportunity cost to given business situations
- 02.04.01.11 Identify types of economic systems
- 02.04.01.12 Identify factors that influence management decisions

02.04.02.0 Analyze economic indicators and trends

**Key Indicators-Specialty:**
- 02.04.02.01 Identify business cycles
- 02.04.02.02 Investigate the nature of current and past economic problems
- 02.04.02.03 Identify leading indicators
- 02.04.02.04 Identify lagging indicators
- 02.04.02.05 Project economic outcomes based on indicators and trends

02.04.03.0 Analyze international business

**Key Indicators-Specialty:**
- 02.04.03.01 Identify forms of international business activities
- 02.04.03.02 Identify barriers to international business activities
- 02.04.03.03 Identify efforts being made to develop a global economy
- 02.04.03.04 Identify the steps in the formation of international businesses
- 02.04.03.05 Identify legal responsibilities of international business
- 02.04.03.06 Identify joint venture options in international business
- 02.04.03.07 Identify the risks/rewards of international business
- 02.04.03.08 Identify the impact of exchange rates on international transactions
- 02.04.03.09 Examine the influence of political, social, and cultural factors on international business
02.04.04.0 Communicate with international and culturally diverse audiences

Key Indicators-Specialty:
02.04.04.01 Evaluate foreign audience demographics
02.04.04.02 Identify the impact of customs and cultural differences that affect business communications
02.04.04.03 Identify strategies needed for communicating with international and culturally diverse audiences
02.04.04.04 Gather information needed for international business communication
02.04.04.05 Refine verbal and nonverbal communication skills to fit international audience

Key Indicators-Foundation:
02.04.04.06 Gather information needed for effective business communication
02.04.04.07 Clarify instructions
02.04.04.08 Ensure the quality of completed documents by proofreading, editing, and making corrections
02.04.04.09 Apply listening skills
02.04.04.10 Use communication reference tools in daily work (e.g., dictionary, style manual, word division guide, spell-check, grammar check, Thesaurus)
02.04.04.11 Collaborate with individuals to solve business-related problems
02.04.04.12 Assist others with learning new tasks
02.04.04.13 Refine verbal and non-verbal communications

02.04.05.0 Analyze business law

Key Indicators-Specialty:
02.04.05.01 Analyze the relationship between ethics and business law

Key Indicators-Foundation:
02.04.05.02 Identify the impact civil and criminal laws may have on specific business elements and practices
02.04.05.03 Identify the impact business laws and jurisdictions may have on specific business elements or operations
02.04.05.04 Demonstrate knowledge of contract law

02.04.06.0 Follow intellectual property rights and copyright laws

Key Indicators-Specialty:
02.04.06.01 Explain the purpose of intellectual property rights and copyrights (i.e., patents, copyrights, licenses, trademarks, rights of originator)
02.04.06.02 Define proprietary
02.04.06.03 Explain legal ownership of proprietary material
02.04.06.04 Explain legal issues of stock image/text usage
02.04.06.05 Explain reproduction licensing

Key Indicators-Specialty:
02.05.01.0 Apply communication skills
02.05.01.01 Follow written and oral instructions
02.05.01.02 Clarify instructions
02.05.01.03 Apply basic rules for grammar and word usage
02.05.01.04 Apply basic rules for the construction of effective sentences and paragraphs
02.05.01.05 Ensure word accuracy (e.g., spelling, definitions)
02.05.01.06 Apply basic rules governing punctuation, capitalization, abbreviations, word division, and numbers
02.05.01.07 Ensure the quality of completed documents by proofreading, editing, and making corrections
02.05.01.08 Refine verbal and nonverbal communication skills (e.g., language, voice tone, discussion methods, pre-planned conversation outcome, attitude, body language, sensitivity, empathy)
02.05.01.09 Apply listening skills
02.05.01.10 Use communication reference tools in daily work (e.g., dictionary, style manual, word division guide, spell-check, grammar check, Thesaurus)
02.05.01.11 Collaborate with individuals to solve business-related problems
02.05.01.12 Assist others with learning new tasks
02.05.01.13 Refine verbal and non-verbal communications

02.05.02.0 Compose documents

Key Indicators-Specialty:
02.05.02.01 Identify audience
02.05.02.02 Evaluate demographic variables
02.05.02.03 Research topical area
02.05.02.04 Collect data
02.05.02.05 Organize data
02.05.02.06 Draft documents in accordance with all relevant rules and guidelines for effective communications
02.05.02.07 Edit draft documents
02.05.02.08 Generate final, error-free documents

02.05.03.0 Create technical documents

Key Indicators-Specialty:
02.05.03.01 Evaluate technical writing requirements
02.05.03.02 Conduct technical research
02.05.03.03 Design technical documentation
02.05.03.04 Write technical reports

02.05.04.0 Deliver business presentation

Key Indicators-Specialty:
02.05.04.01 Evaluate audience and demographic variables
02.05.04.02 Research information
02.05.04.03 Compose presentation
02.05.04.04 Prepare presentation materials and audiovisuals
02.05.04.05 Present presentation

Key Indicators-Foundation:
02.05.04.06 Identify types of presentations for business use
02.05.04.07 Outline presentations
02.05.04.08 Enhance presentation delivery using technology
02.05.04.09 Project a professional image

02.05.05.0 Communicate using telecommunication tools

Key Indicators-Specialty:
02.05.05.01 Maintain telephone lists
02.05.05.02 Transmit facsimile using FAX machine or computer
02.05.05.03 Determine most efficient method for data transmission
02.05.05.04 Access information and services using electronic communication systems (e.g., electronic bulletin boards, information services, electronic library retrieval services, worldwide networks, electronic banking, computer conferencing, web pages)
02.05.05.05 Comply with regulations and agency standards related to telecommunications
02.05.05.06 Select appropriate method of communicating

Key Indicators-Foundation:
02.05.05.07 Apply company policies regarding use of telecommunications tools (telephones, voice mail, e-mail, instant messaging, cell phones, pagers, video conferencing, teleconferencing systems)
02.05.05.08 Operate telecommunications equipment in accordance with company policy
02.05.05.09 Communicate via multiple systems (e.g., telephones, voice mail, e-mail, and instant messaging, cell phones, pagers, video-conferencing, teleconferencing systems)
02.05.05.10 Maintain up-to-date status concerning new and emerging communication technologies
02.05.05.11 Record complete and accurate messages when using telephone, voice mail, or pagers
02.05.05.12 Transmit complete and accurate messages when using telephone, voice mail, or pagers
02.05.05.13 Follow established telephone etiquette

**02.05.06.0 Use business e-mail procedures**

**Key Indicators-Specialty:**
02.05.06.01 Apply standard grammar, spelling, and punctuation in e-mail messages
02.05.06.02 Use professional standards when using electronic equipment
02.05.06.03 Maintain distribution lists
02.05.06.04 Use e-mail etiquette
02.05.06.05 Use appropriate distribution of e-mail including forwarding of e-mail messages
02.05.06.06 Reply to e-mail (to all, to sender, to others)
02.05.06.07 Use e-mail attachments
02.05.06.08 Utilize virus detection
02.05.06.09 Inform co-workers of e-mail virus according to company policy
02.05.06.10 Use e-mail tools

**02.05.07.0 Conduct business research**

**Key Indicators-Specialty:**
02.05.07.01 Identify business problems that require research
02.05.07.02 Investigate issues associated with business problems
02.05.07.03 Collect primary data (electronically and manually)
02.05.07.04 Collect secondary data (electronically and manually)
02.05.07.05 Use electronic research techniques
02.05.07.06 Analyze data
02.05.07.07 Evaluate alternative solutions
02.05.07.08 Determine the most appropriate solution
02.05.07.09 Report findings

**02.06.00.0 Technology Applications**

**02.06.01.0 Analyze the role of technology in business**

**Key Indicators-Specialty:**
02.06.01.01 Describe impact of computer technology on the workplace

**Key Indicators-Foundation:**
02.06.01.02 Explain the benefits and drawbacks of technological advancements
02.06.01.03 Research future trends in technology
02.06.01.04 Identify the impact of technology on business

**02.06.02.0 Demonstrate computer knowledge**

**Key Indicators-Specialty:**
02.06.02.01 Use basic computer terminology
02.06.02.02 Identify basic components of the computer
02.06.02.03 Demonstrate basic computer usage (boot-up to shut down)
02.06.02.04 Identify advantages/disadvantages of operating in a network environment
02.06.02.05 Operate computers in a network or in a stand-alone environment
02.06.02.06 Manage files and disks (e.g., hard drives, floppy disks, zip disks)
02.06.02.07 Ensure that computers are virus-free using computer virus detector program
02.06.02.08 Demonstrate ethical behavior in computer use
02.06.02.09 Assess computer software needs
02.06.02.10 Assess computer hardware needs
02.06.02.11 Access information using CD ROM hardware
02.06.02.12 Install/configure software programs
02.06.02.13 Create or select icons using icon program manager
02.06.02.14 Use on-line services for business purposes

02.06.03.0 Create word-processing documents for business applications

**Key Indicators-Specialty:**

02.06.03.01 Integrate word-processing files with other application software (e.g., database, spreadsheet, graphics, and desktop publishing files)
02.06.03.02 Perform special word-processing functions (e.g., borders, shading, columns, tables)
02.06.03.03 Edit documents using software features
02.06.03.04 Apply relevant rules and guidelines for effective communication
02.06.03.05 Save/store documents
02.06.03.06 Retrieve documents
02.06.03.07 Print documents
02.06.03.08 Send document electronically
02.06.03.09 Make additions to specialized dictionaries and style sheets
02.06.03.10 Annotate reports

**Key Indicators-Foundation:**

02.06.03.11 Follow written/oral instructions and specifications for preparing word-processing files
02.06.03.12 Compose documents in accordance with established company format and style

02.06.04.0 Perform computer business graphics functions

**Key Indicators-Specialty:**

02.06.04.01 Merge graphics files with word-processing, database, desktop publishing, spreadsheet files, electronic communications, or websites
02.06.04.02 Save/store graphics
02.06.04.03 Retrieve graphics
02.06.04.04 Use graphics according to legal and ethical standards
02.06.04.05 Create graphic designs
02.06.04.06 Edit graphic designs
02.06.04.07 Print graphics

02.06.05.0 Perform desktop publishing functions for business applications

**Key Indicators-Specialty:**

02.06.05.01 Design publications
02.06.05.02 Comply with copyright laws
02.06.05.03 Select method of binding or distribution (printed or electronic)
02.06.05.04 Merge word-processing, graphics, database, and spreadsheet files
02.06.05.05 Save/store documents
02.06.05.06 Retrieve documents
02.06.05.07 Print documents

**Key Indicators-Foundation:**

02.06.05.08 Create a document using desktop publishing functions
02.06.05.09 Import data
02.06.05.10 Scan images
02.06.05.11 Produce a publication

02.06.06.0 Create spreadsheets for business applications

**Key Indicators-Specialty:**

02.06.06.01 Create/format spreadsheets
02.06.06.02 Create/enter formulas in spreadsheets
02.06.06.03 Copy/move spreadsheet cells and ranges
02.06.06.04 Enter data on spreadsheets
02.06.06.05 Apply data sort, data query, data fill, and data distribution functions
02.06.06.06 Export spreadsheet files to word-processing, graphics, desktop publishing, and database files
02.06.06.07 Proofread/edit/correct completed spreadsheets
02.06.06.08 Save/store spreadsheets
02.06.06.09 Retrieve spreadsheets
02.06.06.10 Print spreadsheets
02.06.06.11 Link spreadsheet files
02.06.06.12 Interpret data from spreadsheets
02.06.06.13 Analyze data from spreadsheets
02.06.06.14 Prepare reports based on spreadsheet data

Key Indicators-Foundation:
02.06.06.15 Gather information needed to create usable spreadsheet files according to company needs
02.06.06.16 Follow written and oral instructions and specifications for preparing spreadsheets
02.06.06.17 Perform special spreadsheet functions (i.e., products, summations, percentages)

02.06.07.0 Create databases for business applications

Key Indicators-Specialty:
02.06.07.01 Create/format databases
02.06.07.02 Enter elements/data into databases
02.06.07.03 Design report formats
02.06.07.04 Apply database management system (DBMS) command menu
02.06.07.05 Export database files to word-processing and desktop publishing files
02.06.07.06 Save/store databases
02.06.07.07 Print reports
02.06.07.08 Manipulate data using field templates and picture formats
02.06.07.09 Copy files and file structures
02.06.07.10 Perform multiple sorts and indexes on records
02.06.07.11 Manipulate database records (e.g., append, modify, and delete)
02.06.07.12 Modify database structure
02.06.07.13 Delete files
02.06.07.14 Determine whether two or more databases can be used together
02.06.07.15 Merge or append two or more databases
02.06.07.16 Update multiple databases using query, sort, and index techniques

Key Indicators-Foundation:
02.06.07.17 Gather information needed to create usable database files according to company needs
02.06.07.18 Follow written and oral instructions and specification for preparing databases
02.06.07.19 Perform special database functions (e.g., merge, sort, purge, query, report)

02.06.08.0 Demonstrate Internet/Intranet procedures

Key Indicators-Specialty:
02.06.08.01 Demonstrate basic knowledge of the Internet
02.06.08.02 Describe the hardware components used on the Internet/Intranet
02.06.08.03 Access the Internet/Intranet
02.06.08.04 Use various software on the Internet/Intranet
02.06.08.05 Use browsers/search engines on the Internet
02.06.08.06 Describe the features of plug-ins
02.06.08.07 Demonstrate downloading of files
02.06.08.08 Filter information from the web for validity and usefulness
02.06.08.09 Follow the legal and ethical requirements when using Internet resources
02.06.08.10 Abide by company procedures when using the Internet

02.06.09.0 Develop a web page

Key Indicators-Specialty:
02.06.09.01 Compare/contrast the features and functions of software editors available for designing web pages
02.06.09.02 Compare/contrast the advantages of running inhouse server vs. using a server provider
02.06.09.03 Differentiate between a client and a server
02.06.09.04 Create a web page using commercial software
02.06.09.05 Maintain a web page

02.06.10.0 Reproduce documents

Key Indicators-Specialty:
02.06.10.01 Reproduce documents
02.06.10.02 Bind documents
02.06.10.03 Distribute documents
02.06.10.04 Select reprographic supplies (e.g., paper, ink, staples)

Key Indicators-Foundation:
02.06.10.05 Determine best reprographic method
02.06.10.06 Maintain reprographic equipment
02.06.10.07 Troubleshoot equipment problems

02.07.00.0 Professional and Career Development

02.07.01.0 Demonstrate behaviors appropriate to business

Key Indicators-Specialty:
02.07.01.01 Exhibit appropriate appearance/manners/attitudes
02.07.01.02 Exhibit good work habits (e.g., punctuality, dependability, flexibility, initiative)
02.07.01.03 Manage stress
02.07.01.04 Demonstrate personal skills (e.g., empathy, pride, loyalty, and self-confidence)

02.07.02.0 Achieve goals (personal and organizational)

Key Indicators-Specialty:
02.07.02.01 Identify organizational goals
02.07.02.02 Develop personal goals related to goals set by employer
02.07.02.03 Set standards for each goal
02.07.02.04 Monitor progress toward accomplishing goals
02.07.02.05 Evaluate accomplished goals
02.07.02.06 Document accomplished goals
02.07.02.07 Participate in a continuous quality improvement program (e.g., ISO 2000, Baldrige, Steven Covey, Disney)

02.07.03.0 Demonstrate teamwork

Key Indicators-Specialty:
02.07.03.01 Define teamwork
02.07.03.02 Identify situations needed for using teams
02.07.03.03 Define team structures (e.g., cross functional, quality improvement, task force, quality circles)
02.07.03.04 Identify team-building concepts
02.07.03.05 Use teamwork to solve problems
02.07.03.06 Monitor team activities

02.07.04.0 Manage projects and assignments

**Key Indicators-Specialty:**
02.07.04.01 Assess quality/productivity needs
02.07.04.02 Identify tasks
02.07.04.03 Prioritize tasks
02.07.04.04 Determine resources needed to fulfill projects/assignments
02.07.04.05 Develop a plan for efficient use of workspace
02.07.04.06 Prepare feasibility studies
02.07.04.07 Follow project-planning procedures
02.07.04.08 Develop project plans
02.07.04.09 Solve work flow/operations problems using problem-solving, decision-making, and critical-thinking skills
02.07.04.10 Use time management techniques
02.07.04.11 Use appropriate work procedures and technology (project management software)
02.07.04.12 Prepare productivity and project completion reports

02.07.05.0 Explore careers within the field of Administrative Office Technology

**Key Indicators-Foundation:**
02.07.05.01 Analyze trends and issues in business affecting potential careers
02.07.05.02 Demonstrate knowledge of careers within the business field
02.07.05.03 Explore specific Administrative Office Technology career interests
02.07.05.04 Research projected growth and availability of various careers

02.07.06.0 Develop career choices

**Key Indicators-Specialty:**
02.07.06.01 Define career options in area of training
02.07.06.02 Identify personal interests and skills
02.07.06.03 Explain how one's personal ideas impact career choice
02.07.06.04 Explain transferable skills as they apply to a variety of career options
02.07.06.05 Examine nontraditional career choices
02.07.06.06 Examine entrepreneurial career choices
02.07.06.07 Identify emerging occupations within Administrative Office Technologies
02.07.06.08 Develop a career plan with timelines

02.07.07.0 Develop a personal financial plan

**Key Indicators-Specialty:**
02.07.07.01 Identify short-term and long-term goals
02.07.07.02 Project personal financial requirements for short-term and long-term goals
02.07.07.03 Identify personal assets and liabilities
02.07.07.04 Evaluate impact of taxes on personal income
02.07.07.05 Complete/file federal and state income tax documents
02.07.07.06 Write a personal financial plan
02.07.07.07 Identify investment strategies needed for future expenses (i.e., insurance, 401K, IRA)

02.07.08.0 Seek employment in the business field

**Key Indicators-Specialty:**
| 02.07.08.01 Identify resources to find job openings |
| 02.07.08.02 Complete job application accurately and legibly including phone numbers, references, and accurate |
| 02.07.08.03 Secure permission for job and personal references |
| 02.07.08.04 Apply for a job |
| 02.07.08.05 Participate in a job interview |
| 02.07.08.06 Follow-up interview with appropriate responses (i.e., thank you letters, additional information, phone calls) |

**Key Indicators-Foundation:**

| 02.07.08.07 Prepare documentation needed for obtaining a position (e.g., resume, portfolio, cover letter) |
| 02.07.08.08 Update documents needed for business employment |
| 02.07.08.09 Compile documents in a professional manner |
| 02.07.08.10 Identify employment opportunities |
| 02.07.08.11 Dress appropriately for job interview |

### 02.07.09.0 Plan for professional development

**Key Indicators-Foundation:**

| 02.07.09.01 Identify the role of professional organizations in the professional development process |
| 02.07.09.02 Reading professional publications to keep professionally current |
| 02.07.09.03 Determine the benefits to business of employees' belonging to professional organizations |

### 02.07.10.0 Manage professional career

**Key Indicators-Specialty:**

| 02.07.10.01 Participate in selected meetings, workshops, conferences, and formal education and/or training programs |
| 02.07.10.02 Implement changes in behavior in response to constructive criticism provided on career plan |
| 02.07.10.03 Seek mentor at work |
| 02.07.10.04 Participate in professional development activities |
| 02.07.10.05 Identify meetings, workshops, and conferences related to career growth plans |
| 02.07.10.06 Identify ongoing formal education and/or training opportunities related to career growth plans |
| 02.07.10.07 Participate in evaluation |
| 02.07.10.08 Participate in professional and civic organizations |
| 02.07.10.09 Maintain own professional library (books and periodicals) |

**Key Indicators-Foundation:**

| 02.07.10.10 Set personal goals |
| 02.07.10.11 Develop skills and characteristics desired by business employers |
| 02.07.10.12 Identify possible advancement patterns in business careers including cross-training |
| 02.07.10.13 Monitor progress toward personal goals |
| 02.07.10.14 Plan for career growth, (i.e., locally, nationally, and internationally) |

### 02.07.11.0 Examine personnel management concepts

**Key Indicators-Foundation:**

| 02.07.11.01 Identify effective skills and strategies for working with organizations and groups of people |
| 02.07.11.02 Identify the kinds of rewards, incentives, and motivators people seek at work |
| 02.07.11.03 Identify the roles of formal and informal groups within organizations |

### 02.07.12.0 Analyze personnel policies and procedures
**Key Indicators-Foundation:**
02.07.12.01 Identify company rules and regulations
02.07.12.02 Identify professional development guidelines within an organization
02.07.12.03 Identify appropriate training plan for an organization
02.07.12.04 Evaluate training effectiveness for employees
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