

OFFICE MANAGEMENT

Curriculum Content Frameworks

Please note: All assessment questions will be taken from the knowledge portion of these frameworks.

Prepared by

Vicki Canter, Riverview High School
Erma Cummings, Mills High School
Cindy Dunn, Lamar High School
Dewana Gober, El Dorado High School
Marybeth Harmon, DeQueen High School
Jo Lawson, West Fork High School
Xerlotta Sanders, Central High School, Little Rock
Jimmy Stroud, Hector High School

Facilitated by

Karen Chisholm, Program Manager
Office of Assessment and Curriculum
Arkansas Department of Workforce Education

Edited by

Annette Monk, Pine Bluff Wastewater Utility
Sandra Porter, Program Manager
Jim Brock, Program Advisor
Ted Dean, Program Advisor
Ginger Fisher, Program Advisor
LaTrenda Jackson, Program Advisor
Office of Business/Marketing Technology
Arkansas Department of Workforce Education

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Curriculum Content Frameworks

OFFICE MANAGEMENT

Grade Levels: 11, 12
Course Code: 492380

Prerequisite: Computer Business Applications or
Word Processing I & II or
Computer Applications I & II

Course Description: Office Management is a two-semester course focusing on management and supervision in the office environment. The course covers basic skills such as word processing, records management, and communications as well as decision making, critical thinking, teamwork, and ethics.

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Unit 1: Technology

Hours: 45

Terminology: Animation, Cell, Column, Copier, Data, Database, Database management, Data processing, Desktop publishing, Facsimile (fax), Field, Formula, Presentation software, Query, Record, Row, Scanner, Slide, Spreadsheet, Transitions, Word processing

CAREER and TECHNICAL SKILLS		ACADEMIC and WORKPLACE SKILLS			
What the Student Should be Able to Do		What the Instruction Should Reinforce			
Knowledge	Application	Skill Group	Skill	Description	
1.1 Define terminology	1.1.1 Prepare a list of terms with definitions	Foundation	Reading	Applies/Understands technical words that pertain to technology [1.3.6]	
			Writing	Uses words appropriately [1.6.21]	
1.2 List software applications used for office technology	1.2.1 Make a hard copy of software applications used for office technology, using word processing software	Foundation	Reading	Applies/Understands technical words that pertain to software [1.3.6]	
1.3 Describe the need for word processing	1.3.1 Decide which types of data are used with word processing	Foundation	Reading	Applies/Understands technical words that pertain to word processing [1.3.6]	
	1.3.2 Key business documents (i.e., memos, letters, reports, tables)				
1.4 Describe the word processing activities performed in an office	1.4.1 Discuss in class the various word processing activities performed in an office	Foundation	Reading	Determines what information is needed [1.3.10]	
			Speaking	Organizes ideas, and communicates oral messages to listeners [1.5.7]	
1.5 Describe the need for databases	1.5.1 Discuss in class which types of data are used for database activities	Foundation	Reading	Determines what information is needed [1.3.10]	
			Speaking	Organizes ideas, and communicates oral messages to listeners [1.5.7]	
1.6 Identify the database activities performed in an office	1.6.1 Create a database structure (table); key in data	Foundation	Listening	Comprehends ideas and concepts related to database activity [1.2.1]	
	1.6.2 Generate database queries		Reading	Analyzes and applies what has been read to specific tasks [1.3.2]	
1.7 Describe the need for spreadsheets	1.7.1 Discuss in class the need for spreadsheets in an office environment	Foundation	Reading	Determines what information is needed [1.3.10]	
			Speaking	Organizes ideas, and communicates oral messages to listeners [1.5.7]	

CAREER and TECHNICAL SKILLS		ACADEMIC and WORKPLACE SKILLS			
What the Student Should be Able to Do		What the Instruction Should Reinforce			
Knowledge	Application	Skill Group	Skill	Description	
1.8 Identify the spreadsheet activities performed in an office	1.8.1 Create a spreadsheet with data and formulas	Foundation	Listening Reading	Comprehends ideas and concepts related to database activity [1.2.1] Analyzes and applies what has been read to specific tasks [1.3.2]	
1.9 Describe the need for presentation software	1.9.1 Discuss in class the need for presentation software in an office environment	Foundation	Reading Speaking	Determines what information is needed [1.3.10] Organizes ideas, and communicates oral messages to listeners [1.5.7]	
1.10 Identify the presentation activities performed in an office	1.10.1 Develop a presentation that includes multiple slides with text and graphics	Foundation	Listening Reading	Comprehends ideas and concepts related to database activity [1.2.1] Analyzes and applies what has been read to specific tasks [1.3.2]	
1.11 Describe the need for desktop publishing software	1.11.1 Discuss in class the need for desktop publishing in an office environment	Foundation	Reading Speaking	Determines what information is needed [1.3.10] Organizes ideas and communicates oral messages to listeners [1.5.7]	
1.12 Identify the desktop publishing activities performed in an office	1.12.1 Create a desktop publishing document (i.e., flyer, announcement, brochure)	Foundation	Listening Reading	Comprehends ideas and concepts related to database activity [1.2.1] Analyzes and applies what has been read to specific tasks [1.3.2]	
1.13 Demonstrate the combination of word processing, spreadsheets, data processing, desktop publishing, and presentations	1.13.1 Key documents to combine two or more of the following applications: word processing, spreadsheets, data processing, desktop publishing, and presentation software	Foundation	Science	Records data related to word processing, spreadsheets, data processing, desktop publishing, and presentations [1.4.21]	
1.14 Name uses of a 10-key calculator or computer numeric keypad	1.14.1 Apply uses of calculator or computer numeric keypad	Foundation	Reading	Identifies relevant details, facts, and specifications related to 10-key calculators or numeric keypads [1.3.16]	
1.15 Identify proper hand position using the touch system on the 10-key calculator or computer numeric keypad	1.15.1 Demonstrate the 10-key calculator or computer numeric keypad proficiency	Foundation	Arithmetic/ Mathematics	Applies addition, subtraction, and division to real-world problems [1.1.1] Uses calculator to solve mathematical problems [1.1.36]	
1.16 List various equipment used in the automated office	1.16.1 Determine appropriate office equipment relating to various office activities (i.e., scanner, fax, copier, etc.)	Foundation	Reading	Identifies relevant details, facts, and specifications related to office equipment [1.3.16]	

Unit 2: Human Relations

Hours: 10

Terminology: Emergency procedure plan, Ergonomics, Ethics, Fraud, Gossip, Home office, Insubordination, Mobile office, Occupational Safety & Health Administration (OSHA), Piracy, Self-assessment, Sexual harassment, Social behavior, Teamwork, Traditional office, Virtual office

CAREER and TECHNICAL SKILLS			ACADEMIC and WORKPLACE SKILLS		
What the Student Should be Able to Do			What the Instruction Should Reinforce		
Knowledge	Application		Skill Group	Skill	Description
2.1 Define terminology associated with human relations	2.1.1	Prepare a list of terms with definitions	Foundation	Reading Writing	Applies/ Understands technical words that pertain to human relations [1.3.6] Uses words appropriately [1.6.21]
2.2 Describe the different types of offices (i.e., mobile, traditional, home, virtual)	2.2.1	Analyze various office activities associated with the different types of offices	Foundation Thinking	Speaking Reasoning	Communicates a thought, idea, or fact in spoken form [1.5.5] Sees relationship between two or more ideas, objects, situations [4.5.5]
2.3 Identify acceptable/unacceptable office behavior	2.3.1	Compose a list of acceptable office behaviors (i.e., teamwork, attitude, communication, cooperation, loyalty, ethical behavior)	Foundation Personal Management	Writing Integrity/Honesty/Work Ethic	Communicates thoughts, ideas, or facts in written form in a clear, concise manner [1.6.6] Describes desirable worker characteristics [3.2.3]
	2.3.2	Compose a list of unacceptable social behaviors (i.e., sexual harassment, gossip, insubordination, office politics)			
	2.3.3	Analyze social behavior situations			
2.4 Identify ethical practices found in the workplace	2.4.1	Compose a list of acceptable ethical behaviors (i.e., trustworthiness, honesty, integrity)	Personal Management	Integrity/Honesty/Work Ethic	Chooses ethical course of action [3.2.1]
	2.4.2	Compose a list of unacceptable ethical behaviors (i.e., piracy, stealing, fraud)			
2.5 Identify concepts relating to teamwork (i.e., responsibilities, leadership, goal setting, purpose, communication)	2.5.1	Develop a project using teamwork concepts	Interpersonal	Teamwork	Works effectively with others to reach a common goal [2.6.6]
2.6 List factors affecting office ergonomics (i.e., lighting, climate, workstations)	2.6.1	Evaluate classroom ergonomics	Thinking	Creative Thinking	Creates new design by applying specified criteria [4.1.3]
	2.6.2	Generate plans to improve classroom ergonomics		Decision Making	Evaluates information/data to make the best decision [4.2.5]

Unit 3: Communications

Hours: 20

Terminology: Body language, Communication, Editing, E-mail, Five C's of communication (coherent, clear, concise, correct, and complete), Formal speaking, Informal speaking, Letter, Listening, Memo, Nonverbal communication, Proofreader's marks, Proofreading, Report, Scanner, Verbal communication, Voice mail

CAREER and TECHNICAL SKILLS		ACADEMIC and WORKPLACE SKILLS			
What the Student Should be Able to Do		What the Instruction Should Reinforce			
Knowledge	Application	Skill Group	Skill	Description	
3.1 Define terminology	3.1.1 Prepare a list of terms with definitions	Foundation	Reading	Applies/Understands technical words that pertain to communications [1.3.6]	
			Writing	Uses words appropriately [1.6.21]	
3.2 Describe skills essential for effective communication	3.2.1 List skills essential for effective communication (listening, reading, speaking, and writing)	Personal Management	Responsibility	Accepts responsibility for position [3.4.1]	
3.3 Describe verbal and nonverbal communications	3.3.1 List characteristics of verbal and non-verbal means of communication (i.e., clear, appropriate tone; standard language; and body language)	Foundation	Reading	Applies/Understands technical words that pertain to verbal/nonverbal communications [1.3.6]	
		Thinking	Reasoning	Uses logic to make conclusions between the two types of communication [4.5.6]	
3.4 Identify effective listening skills as a form of communication (i.e., focus attention and active listening)	3.4.1 List the techniques of effective listening	Foundation	Reading	Comprehends listening skills, and applies them to a listening situation [1.3.8]	
	3.4.2 Apply listening techniques to listening situations		Writing	Communicates a thought, idea, or fact in spoken form [1.5.5]	
			Thinking	Reasoning	Applies rules or principles to a new situation [4.5.1]
3.5 Identify barriers to effective listening (i.e., preoccupation, prejudice, and distraction)	3.5.1 Participate in role-playing activities and situations to increase awareness of barriers to effective listening	Foundation	Listening	Evaluates oral information/presentation [1.2.2]	
			Speaking	Communicates a thought, idea, or fact in spoken form [1.5.5]	
3.6 Describe formal and informal speaking skills	3.6.1 List examples of formal and informal skills (i.e., group, individual)	Foundation	Reading	Applies/Understands technical words that pertain to speaking skills [1.3.6]	
		Thinking	Reasoning	Applies rules or principles to a new situation [4.5.1]	

Unit 4: Financial Information

Hours: 45

Terminology: Automated teller machine (ATM), Bank reconciliation, Blank endorsement, Cash, Cash over, Cash short, Check, Checking account, Commission, Deduction, Deposit, Depositor, Electronic banking, Electronic funds transfer (EFT), Employee earnings record, Endorsement in full, Gross pay, Hourly wage, Net pay, Overtime pay, Payroll, Payroll register, Petty cash record, Petty cash summary report, Petty cash system, Regular pay, Replenish, Restrictive endorsement, Salary, Signature card, Special endorsement, Time card

CAREER and TECHNICAL SKILLS		ACADEMIC and WORKPLACE SKILLS			
What the Student Should be Able to Do		What the Instruction Should Reinforce			
Knowledge	Application	Skill Group	Skill	Description	
4.1 Define terminology associated with financial information	4.1.1 Prepare a list of terms with definitions	Foundation	Reading	Applies/Understands technical words that pertain to financial information [1.3.6]	
			Writing	Uses words appropriately [1.6.21]	
4.2 Explain the procedure for opening a checking account	4.2.1 Prepare a signature card	Foundation	Speaking	Communicates a thought, idea, or fact in spoken form [1.5.5]	
			Writing	Completes form accurately [1.6.7]	
4.3 Describe the types of endorsements	4.3.1 Prepare various types of endorsements (i.e., restrictive, special, blank)	Foundation	Reading	Determines what information is needed [1.3.10]	
			Speaking	Organizes ideas, and communicates oral messages to listeners [1.5.7]	
4.4 Describe various types of banking transactions	4.4.1 Prepare a deposit slip	Foundation	Arithmetic/ Mathematics	Applies computation skills to prepare a deposit slip [1.1.5]	
			Reading	Determines what information is needed [1.3.10]	
			Speaking	Organizes ideas, and communicates oral messages to listeners [1.5.7]	
4.5 Explain the process of preparing a check	4.5.1 Prepare a check	Foundation	Arithmetic/ Mathematics	Applies computation skills to prepare a check [1.1.5]	
			Speaking	Communicates a thought, idea, or fact in spoken form [1.5.5]	
			Writing	Writes appropriate entries [1.6.22]	

CAREER and TECHNICAL SKILLS What the Student Should be Able to Do		ACADEMIC and WORKPLACE SKILLS What the Instruction Should Reinforce			
Knowledge	Application	Skill Group	Skill	Description	
4.6 Demonstrate the procedure of reconciling a bank statement	4.6.1 Reconcile a bank statement	Foundation	Arithmetic/ Mathematics	Applies addition, subtraction, multiplication, and division to real-world situations [1.1.1] Applies computation skills to prepare a check [1.1.5]	
		Thinking	Problem Solving	Demonstrates logical reasoning in reaching a conclusion [4.4.2]	
4.7 Explain the steps in preparing petty cash transactions	4.7.1 Record transactions in a petty cash record	Foundation	Arithmetic/ Mathematics	Applies computation skills to prepare a petty cash record [1.1.5]	
			Speaking	Communicates a thought, idea, or fact in spoken form [1.5.5]	
			Writing	Completes form accurately [1.6.7]	
4.8 Describe the types of compensation plans	4.8.1 Analyze and apply the types of compensation plans to various situations (i.e., salary, hourly, commission, etc.)	Foundation	Arithmetic/ Mathematics	Applies computation skills to financial information [1.1.5]	
			Speaking	Organizes ideas, and communicates oral messages to listeners [1.5.7]	
4.9 Describe the importance and purpose(s) of documented time cards	4.9.1 Prepare a time card	Foundation	Arithmetic/ Mathematics	Applies computation skills to prepare a time card [1.1.5]	
			Reading	Applies/Understands technical words that pertain to financial information [1.3.6]	
			Writing	Completes form accurately [1.6.7]	
4.10 Explain the various types of voluntary and required deductions relating to payroll	4.10.1 Calculate FICA and income tax required deductions	Foundation	Arithmetic/ Mathematics	Applies computation skills to prepare FICA and income tax deductions [1.1.5]	
	4.10.2 List various types of voluntary deductions		Speaking	Communicates a thought, idea, or fact in spoken form [1.5.5]	
4.11 Describe the difference between gross pay and net pay	4.11.1 Prepare a payroll register	Foundation	Arithmetic/ Mathematics	Applies computation skills to prepare a payroll register [1.1.5]	
			Reading	Applies/Understands technical words that pertain to financial information [1.3.6]	
			Writing	Completes form accurately [1.6.7]	

CAREER and TECHNICAL SKILLS What the Student Should be Able to Do		ACADEMIC and WORKPLACE SKILLS What the Instruction Should Reinforce		
Knowledge	Application	Skill Group	Skill	Description
4.12 Describe payroll features found on an employee earnings record	4.12.1 Prepare an employee earnings record	Foundation	Arithmetic/ Mathematics	Applies computation skills to prepare a payroll register [1.1.5]
			Reading	Comprehends written information for main ideas [1.3.7]
			Writing	Completes form accurately [1.6.7]

Unit 5: Records Management

Hours: 15

Terminology: Accession log, Alphabetic filing, Archive, Chronological order, Coding, File, Filing, Geographic filing, Hard copy, Indexing, Label, Manual records management, Micrographics, Middle-digit filing, Numeric filing, Records management, Sort, Subject filing, Surname, Terminal-digit filing

CAREER and TECHNICAL SKILLS			ACADEMIC and WORKPLACE SKILLS		
What the Student Should be Able to Do			What the Instruction Should Reinforce		
Knowledge	Application		Skill Group	Skill	Description
5.1 Define terminology related to records management	5.1.1	Prepare a list of terms with definitions	Foundation	Writing	Applies/Understands technical words that pertain to records management [1.3.6]
5.2 Identify manual records management systems (i.e., alphabetic filing, numeric filing, geographic filing, subject filing, chronological filing, etc.)	5.2.1	Solve records management problems using each of the manual records management systems	Foundation	Listening	Comprehends ideas and concepts related to manual records management systems [1.2.1]
				Reading	Analyzes and applies what has been read to specific tasks [1.3.2]
5.3 Describe the advantages and disadvantages of both the manual and electronic records management systems	5.3.1	Compare and contrast the advantages and disadvantages of manual and electronic records management systems	Foundation	Reading	Identifies relevant details, facts, and specifications [1.3.16]

Unit 6: Employment Skills

Hours: 15

Terminology: Advancement opportunities, Career advancement, Credentials, Employment application form, Follow-up letter, Fringe benefits, Government employment agency, Interview, Job search, Job termination, Letter of application, Long-term goals, Networking, Performance improvement plan, Personal leave, Portfolio, Private employment agency, Résumé, Self-assessment, Short-term goals, Sick leave, Temporary employment agency

CAREER and TECHNICAL SKILLS			ACADEMIC and WORKPLACE SKILLS		
What the Student Should be Able to Do			What the Instruction Should Reinforce		
Knowledge	Application	Skill Group	Skill	Description	
6.1 Define terminology related to employment skills	6.1.1 Prepare a list of terms with definitions	Foundation	Reading	Applies/Understands technical words that pertain to employment skills [1.3.6]	
6.2 Describe the importance of self-assessment	6.2.1 Take the state-sponsored Kuder Career Portfolio self-assessment options (or similar self-assessment) to evaluate careers	Foundation Personal Management	Reading	Determines what information is needed [1.3.10]	
	6.2.2 Research the industry to determine basic facts and competitive salary information based on the results obtained from the self-assessment of career options		Career Awareness, Development, and Mobility	Analyzes own knowledge, skills, and abilities [3.1.2]	
	6.2.3 Prepare a monthly budget to determine if a preliminary career choice will meet financial needs		Integrity/Honesty/Work Ethic	Identifies personality assets [3.5.6]	
6.3 Explain the importance of setting career goals (i.e., short- and long-term goals)	6.3.1 Design short- and long-term career goals	Personal Management	Career Awareness, Development, and Mobility	Sets well-defined and realistic personal/career goals (short- and long-term goals) [3.1.11]	
6.4 Describe the different sources to learn about job openings (i.e., networking, newspaper, personal inquiry, agencies)	6.4.1 Search job vacancies, using sources such as the World Wide Web, newspaper, agencies, etc.	Foundation	Reading	Determines what information is needed [1.3.10]	
			Speaking	Organizes ideas, and communicates oral messages to listeners [1.5.7]	
6.5 Discuss the similarities and differences of various employment agencies (government, private, temporary)	6.5.1 Compare and contrast the similarities and differences of various employment agencies	Foundation	Reading	Applies/Understands technical words that pertain to employment agencies [1.3.6]	

CAREER and TECHNICAL SKILLS		ACADEMIC and WORKPLACE SKILLS			
What the Student Should be Able to Do		What the Instruction Should Reinforce			
Knowledge	Application	Skill Group	Skill	Description	
6.6 Discuss credentials, résumé, letter of application, employment application, and portfolio	6.6.1 Prepare a résumé, letter of application, employment application, and portfolio	Foundation Personal Management	Reading Self-esteem	Applies/Understands technical words that pertain to the application process [1.3.6] Creates a positive self-image by selling self in a letter of application [3.5.2] Develops self-confidence by creating a résumé that promotes personal strengths and abilities [3.5.5]	
6.7 Discuss the do's and don'ts in a job interview	6.7.1 Participate in a mock interview	Foundation	Reading	Applies/Understands technical words that pertain to job interviews [1.3.6]	
6.8 Describe the purpose and importance of a follow-up letter	6.8.1 Prepare a follow-up letter	Foundation	Reading	Applies/Understands technical words that pertain to follow up letters [1.3.6]	
6.9 Identify items covered in a job orientation (i.e., fringe benefits, personal leave, sick leave, and job termination)	6.9.1 List various fringe benefits; reasons for personal leave and sick leave; and reasons for job termination	Foundation	Listening Reading	Comprehends ideas and concepts related to job orientation [1.2.1] Analyzes and applies what has been read to specific tasks [1.3.2]	
6.10 Identify ways that employees are evaluated	6.10.1 Make a list of evaluation items that employees are evaluated on	Foundation	Listening Reading	Comprehends ideas and concepts related to job orientation [1.2.1] Analyzes and applies what has been read to specific tasks [1.3.2]	
6.11 Describe a career advancement and performance improvement plan	6.11.1 Prepare a plan of action for career advancement and performance improvement plan	Foundation	Reading	Applies/Understands technical words that pertain to a career plan [1.3.6]	

Glossary

Unit 1: Technology

1. Animation – the movement of slides and slide elements on and off the screen during an electronic slide show
2. Cell – the intersection of a row and column in a worksheet or a table
3. Column – information appearing vertically in a worksheet and identified by letters at the top of the worksheet window
4. Copier – an electronic device that produces copies directly from an original
5. Data – raw input to be processed by a computer
6. Database – a collection of related information
7. Database management – organizing, storing, and manipulating large amounts of information
8. Data processing – the collecting, organizing, and summarizing of data
9. Desktop publishing – the process of combining text and graphics, using a computer, to create attractive documents
10. Facsimile (fax) – technology that transfers images electronically using telephone lines
11. Field – a single piece of information in a data file
12. Formula – equation that calculates a new value from values currently on a worksheet
13. Presentation software – software used to create slides, stacks, audio clips, animations, and full-motion sequences
14. Query – a search method that allows complex searches of a database
15. Record – a complete set of data
16. Row – information appearing horizontally in a worksheet and identified by numbers on the left side of the worksheet window
17. Scanner – a device that allows photographs and text to be electronically imaged into computer files
18. Slide – one sheet or window in presentation software
19. Spreadsheet – grid of rows and columns containing numbers, text, and formulas
20. Transitions – the way a slide appears or disappears during an on-screen slide show
21. Word processing – the use of a computer and software to produce written documents

Unit 2: Human Relations

1. Emergency procedure plan – carefully planned steps to follow in case of trouble or danger
2. Ergonomics – the study of the effects of the work environment on the health and well-being of employees
3. Ethics – a system of moral standards or values
4. Fraud – intentional deception to cause a person or business to give up property (assets) or some lawful right
5. Gossip – usually incomplete and/or false statements about individuals or situations that may be harmful to the company or its employees
6. Home office – space within a person's home that is organized for the efficient performance of office tasks
7. Insubordination – failure to follow orders or instructions; refusal to do what is commanded
8. Mobile office – an establishment defined by its ability to accomplish business activities in a temporary environment
9. Occupational Safety and Health Administration (OSHA) – provides research, information, education, and training in the field of occupational safety and health
10. Piracy – unauthorized copying of a computer program that has been written by someone else
11. Self-assessment – a personal evaluation of one's strengths and weaknesses
12. Sexual harassment – any unwanted and offensive sexual look, comment, suggestion, or physical contact that causes discomfort in the workplace
13. Social behavior – good manners, appropriate language, appropriate dress, and general conduct outside of the office environment
14. Teamwork – cooperation among members of a group
15. Traditional office – a permanent place where the operations of the business, professional person, or organization take place
16. Virtual office – the capability to perform work activities away from a traditional office setting

Unit 3: Communications

1. Body language – the posture, body movements, gestures, and facial expressions that serve as nonverbal communication
2. Communication – the exchange of thoughts, messages, or information
3. Editing – the process of making changes to refine a document
4. E-mail – the electronic transfer of messages using computers and software
5. Five C's of communication (coherent, clear, concise, complete, and correct) – the basic concerns for efficiency and effectiveness in writing in the business world
6. Formal speaking – communication situations that people can prepare for ahead of time, such as interviews, group discussions, and speaking engagements
7. Informal speaking – the casual, unstructured situation in which most communication occurs, such as giving and receiving messages in casual or person-to-person interaction
8. Letter – a business document used to communicate with an individual or a group outside an organization
9. Listening – a mental process as well as the physical aspects of hearing
10. Memo – a streamlined business document used to communicate with an individual or a group within an organization; also called a memorandum
11. Nonverbal communication – communication that does not use words, including various movements of the total body such as facial expressions, gestures of hands and arms, and posture
12. Proofreader's marks – symbols used to highlight an error and to indicate that a correction needs to be made
13. Proofreading – checking a document carefully for errors or omissions
14. Report – a presentation of organized information that will be used by the reader for a specific purpose
15. Scanner – an input device to input text, graphics, and photos by "reading" printed documents
16. Verbal communication – communication that uses words, which can be either written or oral
17. Voice mail – a messaging system that uses computers and telephones to record, send, store, and retrieve voice messages

Unit 4: Financial Information

1. Automated Teller Machine (ATM) – an electronic machine from which cash deposits and withdrawals can be made
2. Bank reconciliation – bringing into agreement a bank statement with a party's cash account records
3. Blank endorsement – an endorsement that consists only of the endorser's signature on the back of a check
4. Cash – refers both to actual cash (coins and bills), checks, money orders, and funds in checking accounts in a banking institution
5. Cash over – relating to a petty cash system by which there is a cash discrepancy showing more money on hand than the related records indicate
6. Cash short – relating to a petty cash system by which there is a cash discrepancy showing less cash on hand than the related records indicate
7. Check – a written order to a bank to make payment against the depositor's funds in that bank
8. Checking account – a bank account from which payments can be ordered by a depositor
9. Commission – a fee paid to an employee, usually based on a percentage of the value of what the employee sells or processes
10. Deduction – an item that reduces gross pay earned by an employee
11. Deposit – the placement of cash (coins, bills, checks) into an account
12. Depositor – the individual who places cash (coins, bills, checks) into an account
13. Electronic banking – use of a computer and a telecommunications network to transfer funds from one fund to another
14. Electronic Funds Transfer (EFT) – the use of a computer and a telecommunications network to transfer funds from one party to another
15. Employee earnings record – a business form used to record details affecting payments made to an individual employee
16. Endorsement in full – an endorsement found on the back of a check indicating the new owner of a check; also known as a special endorsement
17. Gross pay – the salary paid to an employee before any deductions are withheld
18. Hourly wage – the amount of money an employee earns for each hour of work
19. Net pay – the total earnings paid to an employee after payroll taxes and other deductions are withheld
20. Overtime pay – the amount of pay an employee receives as an incentive for working over the regular work day or work week

21. Payroll – the total amount earned by all employees for a pay period
22. Payroll register – a business form used to record payroll information on all employees for a pay period
23. Petty cash record – a form used in a petty cash system to record all disbursements and receipts
24. Petty cash summary report – a form used in a petty cash system used to summarize expenditures
25. Petty cash system – a system established by a business that keeps a small amount of cash on hand for making small payments
26. Regular pay – an amount paid to an employee for performing work excluding overtime pay and commission earned
27. Replenish – relating to a petty cash system by which the cash box amount is restored to its original level of cash
28. Restrictive endorsement – an endorsement found on the back of a check restricting further transfer of a check's ownership
29. Salary – the money paid for employee services
30. Signature card – a bank document prepared by an account holder that is a key to the bank account security that documents who may sign checks on particular bank accounts
31. Special endorsement – an endorsement indicating a new owner of a check; also known as an endorsement in full
32. Time card – a card that is required of employees to record their arrival and departure times for payroll purposes

Unit 5: Records Management

1. Accession log – a list of numbers assigned in a numeric filing system
2. Alphabetic filing – filing records alphabetically according to letters and words (names, subjects, or geographic locations) that are used as captions on the guides and folders
3. Archive – storage area that is dedicated to organizing and preserving records
4. Chronological order – the filing of records according to date
5. Coding – the process of marking a symbol or other identification on the record to indicate how it is indexed
6. File – a collection of related information treated as a unit
7. Filing – the process of storing office records in an orderly manner within an organized system
8. Geographic filing – filing records according to geographic location
9. Hard copy – a paper printout
10. Indexing – the process of deciding how to identify a record to be filed
11. Label – written or keyed captions used to identify folders, guides, or file drawers in a paper filing system
12. Manual records management – a set of procedures used to organize, store, retrieve, remove, and dispose of paper records
13. Micrographics – documents reduced in size and stored on film
14. Middle-digit filing – method of numeric filing in which the middle two or three digits of each record number are used as the primary division under which each record is filed
15. Numeric filing – arranging records by numbers
16. Records management – management and control of all of a business's records (paper and paperless) from receipt or creation, through processing, storage, retrieval, and disposal
17. Sort – a preliminary step in filing that involves separating items into categories prior to the actual filing of documents into designated folders/files
18. Subject filing – records arranged by topic
19. Surname – the last name of an individual
20. Terminal-digit filing – a kind of numeric filing in which the last two or three digits of each record number serve as the primary division under which a record is filed

Unit 6: Employment Skills

1. Advancement opportunities – possibilities for promotion in rank or position
2. Career advancement – promotions or job changes that offer increased responsibility and salary increases
3. Credentials – evidence of training, education, and/or experience
4. Employment application form – standard form provided by employer to assess basic skill level and educational background of applicant
5. Follow-up letter – a letter that the interviewed applicant writes expressing interest in the job, appreciation for the time of the interviewer, and any additional qualifications not discussed in the interview; a thank you letter
6. Fringe benefits – an equivalent to a payment over and above the basic wage paid by an employer (i.e., paid holiday, pension contribution, paid holiday, health insurance, dental insurance, etc.)
7. Government employment agency – provides job-search services to citizens and employers free of charge
8. Interview – a question-and-answer session conducted by the employer to screen and eventually hire applicants
9. Job search – identification of jobs for which one is qualified and then securing such a position through a variety of resources, including friends, family contacts, professional associations, career services, and academic mentors
10. Job termination – ending of employment because of misconduct, lack of skills, or downsizing
11. Letter of application – a letter to accompany résumé that professionally introduces an applicant to decision makers and briefly explains why this applicant warrants an interview; a “cover letter”
12. Long-term goals – aims or plans for the next three to five years
13. Networking – making and maintaining connections among people or groups that a person comes in contact with
14. Performance improvement plan – a plan written by the supervisor and agreed to by the employee as a measure for performance improvement; used in termination proceedings if improvement goals are not met
15. Personal leave – a temporary absence from work ranging from one day to several weeks, depending upon company policies and procedures
16. Portfolio – samples of assignments and/or professional work, achievements/awards, letters of recommendation, and other professional-quality items that would support the statements made in a résumé and demonstrate competencies in an interview
17. Private employment agency – provides job-search services to individuals and employers for a fee, usually a percentage of the first year’s salary
18. Résumé – organized listing of personal contact information, work experience, education information, school activities/professional organizations, and references

19. Self-assessment – a personal evaluation of one's strengths and weaknesses
20. Short-term goals – aims or plans for one year or less
21. Sick leave – leave of absence from duty granted because of illness; absence with pay for time lost due to a bona fide nonwork-related illness or injury, pregnancy, or medical appointment as defined in the employer's personnel policies
22. Temporary employment agency – provides workers to fill temporary jobs that last for periods from one day to months