

Course Outline
 Monterey Peninsula Unified School District

- I. COURSE TITLE: Advanced Office/Financial Occupations COOP
- II. CBEDS TITLE: GENERAL OFFICE OCCUPATIONS
- III. CBEDS NUMBER: 4613
- IV. JOB TITLES:

Job Titles- Office

| | |
|------------------|-----------|
| Secretary | 201362074 |
| File Clerk | 206362010 |
| Data Entry Clerk | 208382101 |
| W. P. | 303362010 |
| Typist | 203582066 |
| Receptionist | 237367038 |
| Office helper | 239567010 |

Job Titles- Financial

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|---------------------------|-----------|
| Auditor, Information Sys. | 160162030 |
| Auditor, Data Processing | 160162030 |
| Bank-Credit Card | |
| Collection Clerk | 241357010 |
| Credit Card Clerk | 210382038 |
| Cashier I | 211362010 |
| Cashier II | 211462010 |
| Cashier-checker | 211462014 |
| Check cashier | 211462026 |

Job Titles- Hospitality

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| Cashier, Front Office | 211362010 |
| Hotel clerk | 238367038 |
| Record Clerk | 203582066 |
| Reservation clerk | 238367038 |
| Travel clerk | 238367030 |

- V. COURSE DESCRIPTION: This course is a cooperative effort between education and local business to provide paid on-the-job training. The on-the-job training and related instruction will be provided to meet the competencies performed by personnel employed in various types of office and financial institutions.
- VI. HOURS: 525 Hours (Open Entry/Open Exit)
- VII. PREREQUISITES: Advanced Office - 1 year typing and one additional business skill or currently enrolled ; Financial – None
- VIII. DATE: Revision Date: 1 February, 1999

IX. COURSE OUTLINE:

a. CONTENT AREA SKILLS:

- i. EXPECTED STUDENT OUTCOMES
- ii. HOURS OF INSTRUCTION

COURSE OUTLINE

| CONTENT AREA SKILLS | EXPECTED STUDENT OUTCOME | HOURS | | |
|----------------------------------|--|----------------|------------------|----------------|
| | | CL = Classroom | CC = Comm. Class | CP = Co-op Ed. |
| Instruction will include: | Students will be able to: | CL | CC | CP |
| I. Office Core | 1. Orientation | 15 | | |
| | <ul style="list-style-type: none"> a) Discuss the function and mode of operation of ROP/COOP b) Knowledge of school rules and regulations c) Discuss and learn all safety rules d) Discuss teacher/student responsibilities e) Read and discuss course outline | | | |
| | 2. Basic Office Skills Review | 35 | | 35 |
| | <ul style="list-style-type: none"> a) Demonstrate typing skills b) Demonstrate filing skills c) Demonstrate ten key/printing calculator d) Knowledge of basic math | | | |
| | 3. Communications | 20 | | 20 |
| II. Financial Occupations | <ul style="list-style-type: none"> a) Demonstrate good reading skills b) Demonstrate proper technique in telephone usage c) Demonstrate good use of vocabulary and spelling d) Demonstrate good listening skills e) Demonstrate good communications skills with co-workers | | | |
| | 4. Employment Skills/Human Relations | 25 | | 25 |
| | <ul style="list-style-type: none"> a) Demonstrate good grooming b) Knowledge of filling out an application c) Prepare and type a resume d) Demonstrate good interview techniques e) Interpret deductions on pay check f) Understand difference between gross pay and net pay g) Read a want ad and write a letter of application h) Exhibit the ability to get along with others to develop and maintain positive interpersonal relationships i) Exhibit work habits and attitudes that contribute to satisfactory job performance j) Read and interpret labor and wage laws | | | |
| | 1. Teller Duties | 80 | | 80 |
| | <ul style="list-style-type: none"> a) Prepare opening and closing of teller window b) Demonstrate counting and wrapping bills and coins | | | |

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|--------------------------------|--|----|--|-----|
| | <ul style="list-style-type: none"> c) Exhibit how to read negotiable paper d) Recognize counterfeit and mutilated money e) Knowledge of running proof tapes and make out necessary report f) Demonstrate ability to work walk-up and drive-up window g) Knowledge of cash and sell <p>2. Banking Duties</p> <ul style="list-style-type: none"> a) Demonstrate ability to prepare customer statements b) Demonstrate ability to reconcile bank statements c) Exhibit ability to admit customers to safe deposit boxes d) Ability to read print-out data e) Demonstrate ability to open new account f) Assist in updating accounts receivable ledgers g) Ability to balance out the daily cash recap sheet h) Ability to balance out the daily loan recap sheet i) Ability to verify credit <p>3. Career Opportunities</p> <ul style="list-style-type: none"> a) Basic Knowledge of: <ul style="list-style-type: none"> ➤ Proof machine operator ➤ Computer branch clerk ➤ Statement clerk ➤ Collection and exchange teller ➤ Note teller ➤ Chief teller ➤ Bank specialist ➤ Operations clerk ➤ Loan clerk ➤ New accounts clerk ➤ Mortgage processing clerk ➤ Customer service representative ➤ Bank reconciliation clerk | 40 | | 110 |
| | | 10 | | 10 |
| III. Office Occupations | <p>1. Typing skills</p> <ul style="list-style-type: none"> a. Ability to compose a letter b. Ability to do letter-envelop writing c. Ability to type reports d. Ability to do statistical typing e. Ability to type memos f. Demonstrate ability to use reference materials g. Demonstrate proper word division, punctuation, centering and tabulation <p>2. Proof Reading</p> <ul style="list-style-type: none"> a. Knowledge of proper methods and techniques of correcting errors b. Knowledge of proper methods and techniques of proof-reading c. Demonstrate typing accuracy <p>3. Filing</p> <ul style="list-style-type: none"> a) Knowledge of how to retrieve | 30 | | 30 |
| | | 15 | | 20 |
| | | 20 | | 35 |

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| | information | | | |
| | b) Demonstrate ability to file material | | | |
| | c) Knowledge of filing equipment | | | |
| | d) Knowledge of retention and purging files | | | |
| | 4. Mail | | | 35 |
| | a) Ability to handle the following function | | | |
| | ➤ Incoming mail | | | |
| | ➤ Opening and sorting | | | |
| | ➤ Sorting outgoing mail and packages | 20 | | 25 |
| | 5. Banking Procedures | | | |
| | a) Knowledge of endorsing a check | | | |
| | b) Ability to fill out a deposit slip | | | |
| | c) Ability to reconcile a bank statement | 20 | | 40 |
| | 6. Basic Record Keeping | | | |
| | a) Ability to process payments | | | |
| | b) Ability to figure discounts | | | |
| | c) Demonstrate ability to record in cash receipts journal | | | |
| | d) Ability to set priorities | | | |
| | e) Ability to audit petty cash book | | | |
| | f) Ability to prove petty cash fund | | | |
| | 7. Career Opportunities | | | |
| | a) The student will be aware of career opportunities in the | | | |
| | ➤ medical offices | | | |
| | ➤ hospitals and convalescent homes | | | |
| | ➤ legal offices | | | |
| | ➤ courts | | | |
| | ➤ insurance offices | | | |
| | ➤ real estate offices | | | |
| | ➤ banks | | | |
| | ➤ civil service | | | |
| | ➤ law enforcement agency | | | |
| | ➤ automobile dealers | | | |
| | ➤ school offices | | | |

IX. COURSE OUTLINE:

- b. CAREER PERFORMANCE STANDARDS
 - i. EXPECTED STUDENT OUTCOMES
 - ii. HOURS OF INSTRUCTION

COURSE OUTLINE

| Instruction will include: | Student will be able to: | |
|--|---|---|
| <p>1. Personal Skills</p> <ul style="list-style-type: none"> ▪ Classroom policies & procedures ▪ Ethics <ul style="list-style-type: none"> ➢ Work ➢ Business ▪ Sexual harassment laws ▪ Personal skills, including positive attitude, self-confidence, honesty, perseverance & self-discipline ▪ Professional appearance ▪ Time management ▪ Lifelong learning | <p>1. Understand how personal skill development, including positive attitude, honesty, self-confidence, time management, & other positive traits affect employability.</p> <ul style="list-style-type: none"> ▪ Demonstrate and understand classroom policies & procedures ▪ Define work and business ethics & demonstrate the importance of ethical standards & social responsibilities in the business environment. ▪ Discuss the laws applicable to sexual harassment & discuss tactics for handling harassment situations. ▪ Demonstrate personal skills in class and/or business environment: <ul style="list-style-type: none"> ➢ Positive attitude ➢ Self-confidence ➢ Honesty ➢ Perseverance ➢ Self-discipline ▪ Demonstrate and model personal hygiene and acceptable professional attire ▪ Prioritize tasks and meet deadlines ▪ Explain the importance of lifelong learning | <p>Integrated in content area skills</p> |
| <p>2. Interpersonal Skills</p> <ul style="list-style-type: none"> ▪ Group dynamics ▪ Conflict resolution and negotiations ▪ Team Work ▪ Etiquette across gender and cultural groups | <p>2. Understand principles of effective interpersonal skills, including group dynamics, conflict resolution, and negotiation.</p> <ul style="list-style-type: none"> ▪ Identify and explain the key concepts of group dynamics ▪ Discuss and demonstrate the dynamics of conflict resolution and negotiation, and their importance within the business environment ▪ Demonstrate effective teamwork, share responsibilities, accept supervision and assume leadership roles ▪ Demonstrate cooperative working relationships and proper etiquette across gender and cultural groups | <p>Integrated in content area skills</p> |
| <p>CAREER PERFORMANCE STANDARDS</p> | <p>EXPECTED STUDENT OUTCOMES</p> | <p>HOURS</p> |
| <p>Instruction will include:</p> | <p>Students will be able to:</p> | |
| <p>3. Thinking and Problem-Solving Skills</p> <ul style="list-style-type: none"> ▪ Critical and creative thinking skills ▪ Logical reasoning and problem-solving skills ▪ Numerical estimation, measurement, and calculation ▪ Identify, locate, and organize needed information and propose, evaluate, and | <p>3. Understand the importance of critical thinking and problem-solving skill in the workplace.</p> <ul style="list-style-type: none"> ▪ Apply critical and creative thinking skills in a work environment and implement a plan of improvement as needed ▪ Demonstrate logical reasoning and problem solving skills in a work environment ▪ Apply numerical estimation, measurement and calculation skills to business applications including | <p>Integrated in content area skills</p> |

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| select alternative solutions | the following: <ul style="list-style-type: none"> ➤ Whole number math ➤ Decimals & fractions ➤ Counting & monetary functions ➤ Use of tables & graphs <ul style="list-style-type: none"> ▪ Recognize problem situations; identify, locate and organize needed information, and propose, evaluate and select from alternate solutions | |
| 4. Communication Skills <ul style="list-style-type: none"> ▪ Written communication ▪ Verbal and Nonverbal communication ▪ Active and effective listening ▪ Proper etiquette in business communications ▪ Writing and editing skills ▪ Use of reference material and handbooks ▪ Oral presentations | 4. Understand principles of effective communication. <ul style="list-style-type: none"> ▪ Read and implement written instructions, technical manuals, written communication, and reference books ▪ Present a positive image of verbal and nonverbal communication through use of appropriate methods ▪ Demonstrate active and effective listening skills through verbal, nonverbal and written feedback ▪ Demonstrate proper etiquette in business communications, including an awareness of and a requisite for international communications (languages, customs, and time zones) ▪ Demonstrate the following writing and editing skills: <ul style="list-style-type: none"> ➤ Use correct grammar, punctuation, capitalization, vocabulary and spelling ➤ Write, proofread and edit ➤ Select and use appropriate forms of communication ▪ Exhibit a proficiency in the use of reference materials such as dictionary, thesaurus, telephone directory, almanac, zip code directory, and office handbooks | Integrated in content areas skills |
| CAREER PERFORMANCE STANDARDS | EXPECTED STUDENT OUTCOMES | HOURS |
| Instruction will include: | Students will be able to: | |
| 5. Occupational Safety <ul style="list-style-type: none"> ▪ Good safety practice | 5. Understand occupational safety issues, including avoidance of physical hazards <ul style="list-style-type: none"> ▪ Model and implement good safety practices including: <ul style="list-style-type: none"> ➤ Avoidance and reporting of physical hazards in the work environment ➤ Safe operation of equipment ➤ Proper handling of hazardous materials | Integrated in content area skills |
| 6. Employment Literacy <ul style="list-style-type: none"> ▪ Expand awareness of career opportunities | 6. Understand career paths and strategies for obtaining employment | Integrated in content area skills |

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| <ul style="list-style-type: none"> ▪ Set employment goals and objectives ▪ Aptitudes, personal characteristics and interests ▪ Develop portfolio ▪ Develop interviewing techniques | <ul style="list-style-type: none"> ▪ Explore career opportunities and develop a career plan ▪ Identify steps for setting goals and writing personal goals and objectives ▪ Examine aptitudes related to career options; relate personal characteristics and interest to educational and occupational opportunities ▪ Develop a portfolio to include the following: <ul style="list-style-type: none"> ➢ Letter of Introduction ➢ Cover letter ➢ Resume ➢ Thank you letter ➢ Job application ➢ Licenses, Certificates and Awards ➢ Transcripts ➢ Letters on Recommendation ➢ Work Samples | |
| <p>7. Technology Literacy</p> <ul style="list-style-type: none"> ▪ Apply Industry specific technology ▪ Use Industry specific software ▪ Demonstrate Keyboarding ▪ Accessing information ▪ Lifelong enhancement of technology skills | <p>7. Understand and adapt to changing technology.</p> <ul style="list-style-type: none"> ▪ Identify and demonstrate use of appropriate technology ▪ Identify and use industry specific software ▪ Demonstrate proficiency in alphanumeric keyboarding ▪ Input and retrieve information ▪ Understand the importance of lifelong learning in adapting to changing technology | <p>Integrated in content area skills</p> |

X ADDITIONAL RECOMMENDED/OPTIONAL ITEMS:

- a. **ARTICULATION:** An articulation with Monterey Peninsula College is currently being established
- b. **VOCATIONAL CREDIT:** Variable 10 high school credits per 180 hour semester qualifies graduation requirements.
- c. **ACADEMIC CREDITS:** None
- d. **INSTRUCTIONAL STRATEGIES:** Instructional methodologies include individualized, self-paced computer exercises with reading, writing and project assignments and all project materials, lectures and audio/visual presentations, guest speakers, field trips, equipment, process demonstrations and one-on-one student-instructor interaction.
- e. **INSTRUCTIONAL MATERIALS:**
 - 1. DDC Publisher’s workbooks for Windows, Microsoft Office and the internet
 - 2. Reference library for career research
 - 3. Audio visual, computer software and equipment
- f. **CERTIFICATES:** Certificate of Completion