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ABSTRACT
                 This guide, prepared for the Delaware State Board of
Education and the State Department of Public Instruction, is intended
to assist individuals developing curricula to prepare students for
entry-level positions in various banking and financial occupations.
It is divided into three sections, each of which consists of a
cross-referenced listing of job duties and occupational tasks.
Section 1 is devoted to basic employability skills. Section 2 covers
the job duties and tasks required in administrative support
occupations (including executive secretaries). The third section
covers the duties and tasks required of entry-level workers in
occupations related to information services and systems (computer
operator, computer programmer, and data entry operator). (MN)

STATE TECHNICAL COMMITTEE REPORT

OCCUPATIONAL TASK ANALYSES

FOR
THE DEVELOPMENT OF BUSINESS
EDUCATION MODEL CURRICULA

WITH EMPHASIS ON BANKING AND FINANCIAL OCCUPATIONS

OCTOBER, 1987

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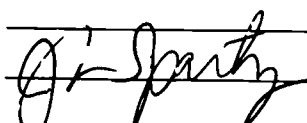**Vocational Education Division**
Dover, Delaware

In cooperation with
The State Council on Vocational Education

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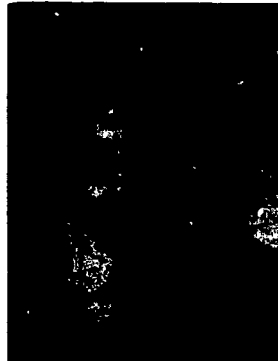
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INTRODUCTION

The demand for skilled office workers has never been brighter. Every recent prediction of future opportunities, particularly those of the banking institutions, includes statistics showing an increased need for workers in the "information era." The economic development of a State is dependent on how effectively its resources are used to provide a work force geared to meet the needs of business and industry. State and Local Education Agencies will continue to respond to this mandate through vocational education in preparing students for entry level positions as office workers. The Governor's Task Force Report on Vocational Education and the Carl Perkins Federal Vocational Education Act recognize the importance and encourage the utilization of business and industry representatives to assist educators in developing and improving vocational curricula.

To address t'.is need, the Director of Vocational Education and State Supervisor of Business and Office Education, in consultation with the Business Industry Education Alliance (BIE) and Advisory Council on Career and Vocational Education, organized a State Technical Committee for Business and Office Education. The purpose of this Committee is to advise the State Board of Education and the State Department of Public Instruction on the development of a model curriculum which addresses financial and banking occupational training needs within the vocational area of Business and Office Occupations.

The *Occupational Task Analyses for Basic Employability Skills, Administrative Support Occupations and Information Services and Systems* are inventories of skills identified by the State Technical Committee for Business and Office Occupations and is designed to be used by local districts in developing model curricula to address labor market needs in Delaware. The task force members representing the banking industry emphasized the need for keyboarding, oral and written communication and math computation skills as essential for entry level positions i.e., Data Entry, Receptionist, and Accounting Clerk.

These entry level employees may be promoted to word processing and secretarial positions after demonstrating occupational competencies while participating in on-the-job experiences.

Technical assistance to local school districts for utilizing this material is available through the Vocational Division, State Department of Public Instruction.

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BUSINESS & OFFICE OCCUPATIONS

BASIC EMPLOYABILITY SKILLS

BASIC EMPLOYABILITY SKILLS

-----------DUTIES-----------   ----------------------------OCCUPATIONAL TASK ANALYSES----------------------------

The employee will be able to:

A. Examine Own Employment Capabilities

A-1. Match interest and aptitudes for job area
A-2. Verify abilities
A-3. Identify immediate work goal

A-4 Match own availability and flexibility to job opening
A-5. Develop career plan

B. Identify Employment Opportunities

B-1. Identify requirements for job
B-2. Investigate occupational opportunities
B-3. Identify resources for finding employment

B-4. Determine hiring practices and opportunities from employers
B-5. Identify job trends

C. Apply Employment Seeking Skills

C-1. Locate job openings
C-2. Prepare a resume and cover letter
C-3. Complete application form
C-4. Prepare for job interview
C-5. Participate in interview
C-6. Complete required tests

C-7. Write follow-up letter
C-8. Evaluate job offer
C-9. Write acceptance letter
C-10. Evaluate job rejection
C-11. Write response to job rejection if appropriate

D. Demonstrate Appropriate Work Behavior

D-1. Follow rules and regulations
D-2. Complete assignments in accurate and timely manner
D-3. Control emotions

D-4. Assume responsibility for own decisions and actions
D-5. Exhibit pride and loyalty
D-6. Recognize the importance of confidentiality
D-7 Be trustworthy in all business dealings

E. Comply With Safety and Health Rules of Company

E-1. Learn safety rules and regulations of company
E-2. Utilize equipment correctly
E-3. Use appropriate action during emergencies
E-4. Maintain clean and orderly work area

F. Maintain Business-Like Image

F-1. Participate in company orientation
F-2. Demonstrate knowledge of company products and services
F-3. Exhibit positive behavior

F-4. Support and promote employer's image and purpose
F-5. Dress appropriately for the company's image
F-6. Be prepared to demonstrate procedures and assist others.

G. Maintain Working Relationships With Others

G-1. Work productively with others
G-2. Show empathy, respect, and support of others
G-3. Recognize, analyze and solve or refer problems

H. Communicate Effectively In English

H-1. Read and comprehend written information
H-2. Speak effectively with others

H-6. Use telephone etiquette
H-7. Understand and follow written and oral directions

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BASIC EMPLOYABILITY SKILLS

-----------------DUTIES--------------   -----------------------------OCCUPATIONAL TASK ANALYSES-------------------------------

The employee will be able to:

H-3. Use job-related terminology when appropriate	H-8. Locate information needed to complete a task
H-4. Listen attentively	H-9. Prepare written communication demonstrating correct grammar and sentence structure and clarity
H-5. Write legibly	

I. Adapt to Change

I-1. Recognize need to change and be flexible	I-3. Participate in continuing education
I-2. Demonstrate willingness to learn	I-4. View change as a positive work challenge

J. Understand How A Business Works

J-1. Recognize the role of business in the free enterprise system
J-2. Identify general responsibilities of employees
J-3. Identify general responsibilities of management/ employers

K. Perform Math Skills

K-1. Apply math for problem solving	K-7. Add and subtract fractions
K-2. Add whole numbers	K-8. Convert fractions to decimals
K-3. Subtract whole numbers	K-9. Be familiar with metric measurement
K-4. Multiply whole numbers	K-10. Convert decimals to fractions
K-5. Divide whole numbers	K-11. Convert weeks/days to hours
K-6. Add and subtract decimals	K-12. Complete a time card
	K-13. Convert hourly wage to salary
	K-14. Process a W-2 form
	K-15. Process a W-4 form

*Basic Employability Skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

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BUSINESS & OFFICE OCCUPATIONS

ADMINISTRATIVE SUPPORT OCCUPATIONS

****

- EXECUTIVE SECRETARY

ADMINISTRATIVE SUPPORT OCCUPATIONS

- ## Executive Secretary

--------------DUTIES--------------   ------------------------------OCCUPATIONAL TASK ANALYSES-------------------------------

The employee will be able to:

A. Manage Time And Resources

A-1. Establish individual goals, and objectives (E,R,A)
A-2. Establish work-related goals and objectives (E,R,A)
A-3. Plan and prioritize daily activities and work schedules (E,R,A)
A-4. Coordinate work schedule with other personnel (R,A)
A-5. Gather data and materials required to complete tasks (E,R,A)
A-6. Coordinate use of resources (R,A)
A-7. Adjust individual plans in response to changing conditions in work load or resource availability (R,A)
A-8. Coordinate schedules of internal/external personnel (R,A)

A-9. Maintain schedules (E,R,A)
A-10. Inform participants of established schedules (dates, rooms, times, etc.) (E,R,A)
A-11. Establish follow-up procedures for overall operations (E,R,A)
A-12. Plan for future projects (E,R,A)
A-13. Identify long and short-term deadlines (E,R,A)
A-14. Identify need for additional resources (R,A)
A-15. Coordinate travel arrangements (E,R,A)
A-16. Revise schedules of internal/external personnel due to unexpected changes (R,A)
A-17. Meet established deadlines (E,R,A)
A-18. Provide direction for assigned personnel (A)

B. Present A Positive Image

B-1. Greet the public (E,R,A)
B-2. Provide information requested by the public (E,R,A)
B-3. Interact positively with co-workers (E,R,A)

B-4. Assist with orientation of new employees (R,A)
B-5. Contribute to team effort (E,R,A)
B-6. Represent the organization in various capacities (E,R,A)
B-7. Produce high quality work (E,R,A)

C. Manage Information

C-1. Organize paper/traditional filing system (E,R,A)
C-2. Organize electronic filing system (R,A)
C-3. Maintain filing systems (E,R,A)
C-4. Retrieve information from various filing systems (E,R,A)
C-5. Maintain personnel records (R,A)
C-6. Maintain financial records (R,A)
C-7. Maintain DATA records (E,R,A)
C-8. Prepare information for internal/external distribution (E,R,A)

C-9 Disseminate information through the proper channels (R,A)
C-10. Use information to create reports, correspondence, recommendations, minutes, etc. (R,A)
C-11. Research information from internal/external sources (R,A)
C-12. Control distribution of information (Confidentiality) (E,R,A)

LEVEL OF TASKS
E = Entry
R = Retention
A = Advancement

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ADMINISTRATIVE SUPPORT OCCUPATIONS

- **Executive Secretary**

----------------DUTIES----------------   ------------------------------OCCUPATIONAL   TASK   ANALYSES------------------------------

The employee will be able to:

D. Communicate With Others

D-1. Follow instructions and directions to complete tasks (E,R,A)

D-2. Give verbal directions and instructions clearly (E,R,A)

D-3. Give written directions and instructions clearly (E,R,A)

D-4. Obtain information to clarify your interpretation of the task (E,R,A)

D-5. Seek directions when unsure of task (E,R,A)

D-6. Interpret body language (E,R,A)

D-7. Utilize non-verbal actions (R,A)

D-8. Practice effective/courteous telephone technique (E,R,A)

D-9. Screen phone calls (E,R,A)

D-10. Compose written documents (R,A)

D-11. Interpret written and oral communications (E,R,A)

E. Make Decisions

E-1. Evaluate information (E,R,A)

E-2. Weigh alternatives (E,R,A)

E-3. Operate within limits of responsibility (E,R,A)

E-4. Accept responsibility and risk for decisions made (E,R,A)

E-5. Provide justification for decisions made (E,R,A)

E-6. Carry out decisions made (E,R,A)

E-7. Inform others of decisions made (E,R,A)

E-8. Evaluate outcome of decisions made (E,R,A)

F. Adapt To New Technology

F-1. Keep up-to-date with new technology (R,A)

F-2. Use available manuals for self-instruction (E,R,A)

F 3. Adapt/apply basic knowledge to specific job situations (E,R,A)

F-4. Define and document operational procedures (E,R,A)

F-5. Identify potential problems and ways to correct, avoid them (R,A)

F-6. Utilize help lines (E,R,A)

G. Improve Work Efficiency

G-1. Meet and strive to exceed established standards (E,R,A)

G-2. Identify new methods for accomplishing tasks (R,A)

G-3. Streamline procedures (R,A)

G-4. Proofread written materials (E,R,A)

G-5. Recognize and correct mistakes (E,R,A)

G-6. Incorporate corrections and feedback into future work performance (E,R,A)

G-7. Achieve a balance between quality and quantity of work produced (E,R,A)

G-8. Assess aptitudes and compatibility for working with new technology (R,A)

LEVEL OF TASKS
  E = Entry
  R = Retention
  A = Advancement

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ADMINISTRATIVE SUPPORT OCCUPATIONS

- Executive Secretary

------------------DUTIES----------------   ----------------------------OCCUPATIONAL   TASK   ANALYSES----------------------------------

The employee will be able to:

H. Operate And Maintain Office Equipment

H-1. Maintain equipment inventory (E,R,A)
H-2. Interpret operating manuals (E,R,A)
H-3. Instruct co-workers in proper use of equipment (E,R,A)
H-4. Inventory supplies for equipment (E,R,A)
H-5. Monitor usage of supplies (E,R,A)

H-6. Order supplies (E,R,A)
H-7. Review storage capacity (E,R,A)
H-8. Perform basic maintenance tasks (E,R,A)
H-9. Secure service maintenance (R,A)
H-10. Document service response time (E,R,A)
H-11. Generate feedback on performance of equipment (E,R,A)

I. Perform Word Processing Functions

I-1. Apply basic word processing concepts to various systems (E,R,A)
I-2. Interpret operating manuals (E,R,A)
I-3. Utilize help lines (E,R,A)
I-4. Use word processing terminology (E,R,A)
I-5. Organize electronic filing system (R,A)
I-6. Define and document operational procedures (R,A)
I-7. Review storage capacity (E,R,A)
I-8. Maintain daily job log (E,R,A)
I-9. Maximize program functions based on identified/ potential user needs (E,R,A)
I-10. Format documents (E,R,A)

I-11. Compose, store, edit, revise documents (E,R,A)
I-12. Transcribe and dictation (E,R,A)
I-13. Use reference materials (dictionary, thesaurus, spelling, word books, etc.) (E,R,A)
I-14. Proofread documents (E,R,A)
I-15. Create and maintain back-up systems (E,R,A)
I-16. Retrieve information from electronic files (E,R,A)
I-17. Instruct back-up operator (R,A)
I-18. Inventory supplies (E,R,A)
I-19. Update electronic data files (E,R,A)
I-20. Perform basic maintenance tasks (E,R,A)

LEVEL OF TASKS
E = Entry
R = Retention
A = Advancement

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BUSINESS & OFFICE OCCUPATIONS

INFORMATION SERVICES AND SYSTEMS

****

- COMPUTER OPERATOR
- COMPUTER PROGRAMMER
- DATA ENTRY OPERATOR

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ADMINISTRATIVE SUPPORT OCCUPATIONS

- Computer Operator
- Computer Programmer (Trainee)

----------------DUTIES--------------   ----------------------------OCCUPATIONAL TASK ANALYSES-------------------------------

The employee will be able to:

A. Write And Maintain Programs

A-1.	Determine the program's purpose (E,R,A)	A-9. Compile program (E,R,A)
A-2.	Determine the program flow (E,R,A)	A-10. Test and de-bug program (E,R,A)
A-3.	Spec-out a program for others (R,A)	A-11. Prepare program documentation (E,R,A)
A-4.	Determine the source of data (R,A)	A-12. Implement the program (R,A)
A-5.	Determine appropriate language (R,A)	A-13. Write procedures for software (E,R,A)
A-6.	Determine the best hardware (R,A)	A-14. Get user approval (A)
A-7.	Design output format (R,A)	A-15. Update the code (E,R,A)
A-8.	Code the program (E,R,A)	A-16. Keep abreast of new technology (E,R,A)

B. Operate The Equipment

B-1.	Power up/power down peripherals (E)	B-13. Test equipment (R,A)
B-2.	Load input/output devices (E)	B-14. Start up/shut down system (R,A)
B-3.	Load software (E)	B-15. Sign onto system (E)
B-4.	Operate auxiliary equipment (E)	B-16. Access the system (E)
B-5.	Monitor peripheral equipment operation (E,R)	B-17. Use keyboard to interact with the system (E)
B-6.	File and pull tapes/disks (R)	B-18. Write data entry format programs (R)
B-7.	Set up special forms (R)	B-19. Satisfy hardware requests (E,R)
B-8.	Break down output (E)	B-20. Determine nature of problem (R,A)
B-9.	Deliver output (E)	B-21. Fix recoverable problems (R,A)
B-10.	Ensure adequate inventory (E)	B-22 Request help as needed (R,A)
B-11.	Order supplies (R,A)	B-23. Maintain security of hardware/software (E,R,A)
B-12.	Clean equipment (E)	B-24. Participate in training (E,R,A)
		B-25. Monitor environmental equipment (E,R,A)

C. Monitor System Resources

C-1	Monitor on-line resources (R,A)	C-5. Keep log of system performance (R,A)
C-2.	Monitor software messages (E,R,A)	C-6. Run diagnostics (R, A)
C-3.	Respond to hardware messages (E,R,A)	C-7. Recommend replacement for old equipment (R,A)
C-4.	Respond to software messages (E,R,A)	

LEVEL OF TASKS
   E = Entry
   R = Retention
   A = Advancement

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ADMINISTRATIVE SUPPORT OCCUPATIONS

- Computer Operator
- Computer Programmer (Trainee)

---------------DUTIES-------------   ----------------------------OCCUPATIONAL TASK ANALYSES----------------------------

The employee will be able to:

D. Keep Track Of Various Jobs

D-1.	Monitor system console for hardware request (R,A)	D-6.	Ensure programs run correctly (R,A)
D-2.	Monitor system console for job flow (R,A)	D-7.	Check printed output (E,R,A)
D-3.	Use monitoring programs (R,A)	D-8.	Maintain written logs (E,R,A)
D-4.	Prioritize work flow (R,A)	D-9.	Monitor performance of others (A)
D-5.	Schedule and monitor production jobs (R,A)	D-10.	Keep track of deleted material (A)

E. Satisfy User Requests

E-1.	Resolve on-line problems (R,A)	E-6.	Present solutions to user's problems (R,A)
E-2.	Remain on customer schedule (E,R,A)	E-7.	Respond in timely fashion to request (R,A)
E-3.	Schedule special requests (R,A)	E-8.	Train users in software use (A)
E-4.	Start jobs (E,R)	E-9.	Write user guides (A)
E-5.	Define user problems (R,A)	E-10.	Explain terminology (R A)
		E-11.	Deliver data (E,R,A)

F. Manage Data

F-1.	Enter data accurately (E,R,A)	F-5.	Convert data to different formats (A)
F-2.	Verify data (R,A)	F-6.	Move data to storage (E,R,A)
F-3.	Use programs to manipulate data (E,R,A)	F-7.	Secure data (E,R,A)
F-4.	Back-up data (R,A)	F-8.	Update media library (R,A)
		F-9.	Maintain confidentiality of data (E,R,A)

G. Communicate With Others

G-1.	Communicate ideas verbally (E,R,A)	G-7.	Report activities to management (R,A)
G-2.	Listen to identify user needs (E,R,A)	G-8.	Provide assistance for problem-solving (R,A)
G-3.	Report problems (E,R,A)	G-9.	Complete forms (E,R,A)
G-4.	Write reports (R,A)	G-10.	Write documentation (R,A)
G-5.	Give positive feedback (E,R,A)	G-11.	Make presentations (A)
G-6.	Keep co-workers informed of daily status (E,R,A)		

LEVEL OF TASKS
  E = Entry
  R = Retention
  A = Advancement

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ADMINISTRATIVE SUPPORT OCCUPATIONS

- Computer Operator
- Computer Programmer (Trainee)

----------------DUTIES-------------   -----------------------------OCCUPATIONAL TASK ANALYSES------------------------------

The employee will be able to:

H. Train Co-Workers

H-1.	Explain job description (R,A)	
H-2.	Explain job related terminology (R,A)	
H-3.	Identify sources of documentation (R,A)	
H-4.	Explain hardware features (R,A)	
H-5.	Explain software features (R,A)	
H-6.	Explain special keyboard functions (R,A)	
H-7.	Explain production schedule (R,A)	
H-8.	Explain new jobs (R,A)	

H-9.	Explain job execution requirements (R,A)
H-10.	Explain how to set up special forms (R,A)
H-11.	Explain operating procedures (R,A)
H-12.	Explain how to recognize problems (R,A)
H-13.	Share tricks of the trade (R,A)
H-14.	Familiarize new employees with recovery procedures (R,A)
H-15.	Familiarize new employees with emergency procedures (R,A)

I. Maintain Procedures

I-1.	Follow verbal instructions (E,R,A)
I-2.	Read and interpret manuals (E,R,A)
I-3.	Identify need for manuals (E,R,A)
I-4.	Update manuals and procedures (R,A)

I-5.	Recommend changes (E,R,A)
I-6.	Maintain personal notes (E,R,A)
I-7.	Follow documentation (E,R,A)
I-8.	Enforce procedures (A)

LEVEL OF TASKS
- E = Entry
- R = Retention
- A = Advancement

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ADMINISTRATIVE SUPPORT OCCUPATIONS

- Data Entry Operator

-----------------DUTIES--------------   ------------------------------OCCUPATIONAL TASK ANALYSES------------------------------

The employee will be able to:

A. Perform Data Control Functions

A-1. Schedule jobs (A)	A-6. Copy data (E,R,A)
A-2. Prepare job instructions for key operator (A)	A-7. Prepare keyed job documents for supervisor (E,R,A)
A-3. Prepare documents and batch tickets for data entry (E,R,A)	A-8. Recover data (E,R,A)
A-4. Code data (E,R,A)	A-9. Perform emergency shutdown procedures (R,A)
A-5. Maintain integrity and confidentiality of data (E,R,A)	A-10. Monitor disk usage (R,A)
	A-11. Prepare backup files (E,R,A)

B. Enter and Verify Data

B-1. Organize work station (E,R,A)	B-5. Analyze data (A)
B-2. Enter data from source documents (with or without program control) (E,R,A)	B-6. Verify data (A)
B-3. Add new records (E,R,A)	B-7. Search tapes, disks, or diskette for information (R,A)
B-4. Modify records (E,R,A)	B-8. Transmit data (R,A)
	B-9. Terminate operation (E,R,A)

C. Operate Office Equipment

C-1. Operate electronic calculators (E,R,A)
C-2. Operate typewriters (E,R,A)
C-3. Operate ten-key adding machine (E,R,A)

D. Operate Data Entry Equipment

D-1. Operate on-line CRT terminals (E,R,A)	D-5. Operate verifiers (E,R,A)
D-2. Operate key to floppy disk equipment (E,R,A)	D-6. Perform operator maintenance on verifiers (R,A)
D-3. Operate key to hard disk equipment (E,R,A)	
D-4. Operate key to magnetic tape equipment (E,R,A)	D-7. Prepare printouts using a printer (E,R,A)

E. Perform Clerical And Maintenance Duties

E-1. Receive telephone calls (E,R,A)	E-8. Store data entry supplies (E,R,A)
E-2. Place telephone calls (E,R,A)	E-9. Inventory data entry supplies (E,R,A)
E-3. File program cards (E,R,A)	E-10. Identify data entry equipment malfunction (R,A)
E-4. Organize file of job instructions (E,R,A)	

LEVEL OF TASKS
  E = Entry
  R = Retention
  A = Advancement

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ADMINISTRATIVE SUPPORT OCCUPATIONS

- Data Entry Operator

---------------DUTIES------------- -----------------------------OCCUPATIONAL TASK ANALYSES-----------------------------

The employee will be able to:

E-5. Prepare worker production log (E,R,A) E-6. File reusable tapes, disks or diskettes (E,R,A) E-7. Assist with on-the-job training (A)	E-11. Remove and repunches jammed cards (keypunch) (E,R,A) E-12. Inspect disks or diskettes for damage (E,R,A) E-13. Restore disk data files (R,A)

F. Manage Data

F-1. Enter data accurately (E,R,A) F-2. Verify data (E,R,A) F-3. Use programs to manipulate data (R,A) F-4. Back-up data (R,A)	F-5. Convert data to different formats (A) F-6. Move data to storage (E,R,A) F-7. Secure data (E,R,A) F-8. Update media library (R,A) F-9. Maintain confidentiality of data (E,R,A)

G. Communicate With Others

G-1. Communicate ideas orally (E,R,A) G-2. Listen to identify user needs (A) G-3. Report problems (E,R,A) G-4. Write reports (A) G-5. Give positive feedback (R,A)	G-6. Keep co-workers informed of daily status (A) G-7. Report activities to management (R,A) G-8. Provide assistance for problem-solving (R,A) G-9. Complete forms (E,R,A) G-10. Write documentation (A) G-11. Make presentations (A)

H. Train Co-Workers

H-1. Explain job description (A) H-2. Explain terminology (A) H-3. Identify sources of documentation (A) H-4. Explain hardware features (A) H-5. Explain software features (A)	H-6. Explain special keyboard functions (A) H-7. Explain new jobs (A) H-8. Explain how to set up special forms (A) H-9. Explain operating procedures (A) H-10. Share tricks of the trade (A) H-11. Familiarize new employees with emergency procedures (E,R,A)

I. Maintain Procedures

I-1. Follow verbal instructions (R,A) I-2. Read and interpret manuals (R,A) I-3. Identify need for manuals (A) I-4. Update manuals and procedures (A)	I-5. Recommend changes (A) I-6. Maintain personal notes (A) I-7. Follow documentation (E,R,A) I-8. Enforce procedures (R,A)

LEVEL OF TASKS
  E = Entry
  R = Retention
  A = Advancement

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