

Formation continue

pour adultes et entreprises

essential

Working with
the Community

Participant's
Guide

skills

Personal Information

Please provide the information requested hereunder

Name:

Surname:

Program:

Start Date:

Training Instructor

Self-evaluation *Pre-training*:

End Date:

Training Instructor

Self-evaluation *Post-training*:

Sommaire

Essential Skills	3
Occupation:	4
Accounting and Related Clerks	4
Occupation Skills and Tasks	5
Accounting and Related Clerks	5
SELF-EVALUATION <i>pre-training</i> (Part I).....	6
Job Task Planning and Organizing.....	17
Score Card	28
My Skills Development Plan.....	29
SELF-EVALUATION <i>post-training</i> (Part II)	30
Job Task Planning and Organizing.....	41
Score Card	52
Final picture	53
Web sites.....	55

Essential Skills

According to the definition currently used, skills are considered to be a set of knowledge, know-how and self-management. With this in mind, the employee will be deemed competent if he masters the knowledge, skills and attitudes required to efficiently carry out his duties.

According to Human Resources and Skills Development Canada, essential skills are necessary skills for life, learning and work. They are the basis of learning among all other skills and allow people to evolve within their employment and adapt to changes in their work environment. These are not technical skills required by particular occupations, but rather the skills applied in all occupations: for example, repair persons may have to read and understand written work orders before doing the repairs.

Essential skills are "enabling" skills that:

1. help a person perform tasks required by their occupation and other daily activities,
2. provide a person with a foundation to learn other skills,
3. enhance people's ability to adapt to change.

People who have the essential skills at the levels required by their desired occupations will have enhanced employability. However, it is important to note that other factors should also be taken into consideration.

Occupation:

Accounting and Related Clerks

Essential skills are used in almost all occupations and are transferable from school to work, job to job and sector to sector. The work description in this tool originates mainly from the National Occupational Classification (NOC) codes.

Occupation Skills and Tasks

NOC code:

1431 Accounting and Related Clerks

Occupation description:

This unit group includes clerks who calculate, prepare and process bills, invoices, accounts payable and receivable, budgets and other routine financial records according to established procedures. They are employed throughout the private and public sectors

Essential Skills	Level *				
	1	2	3	4	5
Document Use	1	2	3	4	5
Oral communication	1	2	3	4	5
Thinking Skills					
• Job Task Planning and Organizing	1	2	3	4	5
• Decision Making	1	2	3	4	5
• Problem Solving	1	2	3	4	5
• Finding Information	1	2	3	4	5

*Complexity levels have been assigned to each skill. Some skills have five levels while others have only four. These levels indicate the degree of complexity associated with the use of a given skill in a particular task.

SELF-EVALUATION *pre-training* (Part I)

To better know your strengths concerning essential skills, please answer the following self-evaluation.

1. Read each statement and check, in the appropriate column, the answer that describes best your capacity to perform the specified task.
2. If you have answered "YES" or "SOMETIMES" to the corresponding tasks, give an example that will prove your skills in this area. *Tip: Think of your past experiences at work and in your personal life.*

Document Use



is the ability to find, understand or enter information (e.g. text, symbols, numbers) in different types of documents. Strong **document use** skills are essential in many workplaces and in everyday life. Completing a form, checking off items on a list of tasks, and plotting information on a graph are all examples of **document use**.

Complete this self-assessment to help you understand your **document use** strengths and areas for improvement.

I CAN :	YES	NO	SOMETI MES	Think of how you have used forms, charts and other kinds of documents in previous work experiences or in school.	The candidate has demonstrated its competence in this area.							
<ul style="list-style-type: none"> read labels on files. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>								Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> read the daily control log. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>								Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> scan labels on floppy disks, files and office products for a variety of data. For example, scan labels on file folders to locate dates and account numbers (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>								Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETIMES	Think of how you have used forms, charts and other kinds of documents in previous work experiences or in school.	The candidate has demonstrated its competence in this area									
<ul style="list-style-type: none"> locate data in a variety of lists, tables and schedules (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>					
<ul style="list-style-type: none"> enter data into account ledgers and logbooks. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>				Disagree <input type="checkbox"/> Agree <input type="checkbox"/>						
<ul style="list-style-type: none"> read account ledgers. These may be computerized. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>							Disagree <input type="checkbox"/> Agree <input type="checkbox"/>			
<ul style="list-style-type: none"> check forms filled in by employees for accuracy to correct errors and complete them in full by entering missing information. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>										Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETIMES	Think of how you have used forms, charts and other kinds of documents in previous work experiences or in school.	The candidate has demonstrated its competence in this area								
<ul style="list-style-type: none"> enter payroll and benefits data on a computer to record information on employees and generate cheques. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>									Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> read and interpret lists, such as accounts, lists of clients with overdue accounts and price lists. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>									Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> read and complete employee time sheets and enter data into a central computer system. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>									Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETI MES	Think of how you have used forms, charts and other kinds of documents in previous work experiences or in school.	The candidate has demonstrated its competence in this area											
<ul style="list-style-type: none"> • read forms, such as collection management forms, cheque request and issue forms, bond indemnity forms and NO-sufficient fund forms. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>							Disagree <input type="checkbox"/> Agree <input type="checkbox"/>					
<ul style="list-style-type: none"> • complete forms, such as credit approval and application forms, tax adjustment application forms and Goods and Services Tax (GST) exemption forms. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>									Disagree <input type="checkbox"/> Agree <input type="checkbox"/>			
<ul style="list-style-type: none"> • interpret financial statements for clients. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>												Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETIMES	Think of how you have used forms, charts and other kinds of documents in previous work experiences or in school.	The candidate has demonstrated its competence in this area										
<ul style="list-style-type: none"> read, interpret, classify and record information from invoices. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>							Disagree <input type="checkbox"/> Agree <input type="checkbox"/>				
<ul style="list-style-type: none"> complete or help employees complete forms relating to payroll or benefits, such as medical services plan applications and pension forms. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>											Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> review audit statements from accounting firms. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>											Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETI MES	Think of how you have used forms, charts and other kinds of documents in previous work experiences or in school.	The candidate has demonstrated its competence in this area											
complete forms such as general ledgers, tax and source deductions, remittances, workers' compensation, pension contribution reports, records of employment, annual financial reports and income tax returns. In some cases, combine data from several sources to complete such forms. (3)				<table border="1" style="width: 100%; height: 100%;"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>												Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

Oral communication



is the ability to use speech to share thoughts and information. Strong **oral communication** skills are essential to being able to present your ideas clearly in a variety of situations such as: explaining procedures to a co-worker; giving directions to a friend; or dealing with customer service to discuss a problem with your phone bill.

Complete this self-assessment to help you understand your **oral communication** strengths and areas for improvement.

I CAN :	YES	NO	SOMETI MES	Give examples of how you have communicated effectively in different situations (i.e. giving a presentation at school or responding to a customer complaint). Why is clear communication important for this type of work?	The candidate has demonstrated its competence in this area				
<ul style="list-style-type: none"> listen to simple messages on voice mail. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> talk to suppliers to obtain quotes and clarify invoice amounts. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> provide employees with information on pay, benefits and insurance coverage and answer their questions. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETI MES	Give examples of how you have communicated effectively in different situations (i.e. giving a presentation at school or responding to a customer complaint). Why is clear communication important for this type of work?	The candidate has demonstrated its competence in this area					
<ul style="list-style-type: none"> ask co-workers or supervisors for information or assistance in handling particular calculations and exchange information about the payroll with co-workers in accounting. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> interact with suppliers to enquire about products, verify prices, lodge complaints and ask for refunds. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> consult outside agencies to receive clarification of regulations or procedures, such as contacting Revenue Canada to obtain a tax ruling or to resolve a conflict. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>	
<ul style="list-style-type: none"> interact with the supervisor to receive instructions, to obtain help with paperwork, problem customers or particular accounts and to obtain approvals and signatures.(2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETI MES	Give examples of how you have communicated effectively in different situations (i.e. giving a presentation at school or responding to a customer complaint). Why is clear communication important for this type of work?	The candidate has demonstrated its competence in this area					
<ul style="list-style-type: none"> participate in staff meetings to discuss problems and new policies and to exchange opinions on current procedures (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> speak with customers to follow up on overdue accounts, arrange payments, answer customer enquiries and discuss disagreements about accounts (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> participate in group discussions at departmental meetings to solve problems and to discuss changes and new policies and regulations. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> instruct other pay and benefits clerks on procedures. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETI MES	Give examples of how you have communicated effectively in different situations (i.e. giving a presentation at school or responding to a customer complaint). Why is clear communication important for this type of work?	The candidate has demonstrated its competence in this area				
<ul style="list-style-type: none"> organize and lead discussions (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> present information to co-workers and colleagues (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> discuss ongoing work with co-workers and colleagues. For example, discuss daily schedules and activities with colleagues (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> train co-workers, employees, subcontractors and clients to use financial software. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

Thinking Skills



Job Task Planning and Organizing

refers to the extent to which workers plan and organize their own tasks. It does not refer to involvement in the planning function for the organization in which they work.

Please complete this self-assessment in order to highlight your strengths and areas for improvement relating to thinking skills.

I CAN :	YES	NO	SOMETI MES	Give examples of when you have efficiently planned your work and met deadlines. How did you deal with any scheduling conflicts that might have happened?	The candidate has demonstrated its competence in this area								
<ul style="list-style-type: none"> Some accounting and related clerks follow established procedures and directives closely. Their tasks are repetitive although the content changes to reflect the needs of different clients (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>							Disagree <input type="checkbox"/> Agree <input type="checkbox"/>		
<ul style="list-style-type: none"> Accounting and related clerks contribute to short and long-term financial planning for public and private sector organizations. They may be responsible for assigning tasks to co-workers and subcontractors. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>									Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETI MES	Give examples of when you have efficiently planned your work and met deadlines. How did you deal with any scheduling conflicts that might have happened?	The candidate has demonstrated its competence in this area										
<ul style="list-style-type: none"> Accounting and related clerks organize their tasks to deal with the day's priorities. They respond to urgently required special requests, while keeping in mind the need to complete routine tasks on schedule. Routine tasks include paying invoices by specified dates and producing month-end reports. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>											<p>Disagree <input type="checkbox"/> Agree <input type="checkbox"/></p>
<ul style="list-style-type: none"> Some administrative clerks plan their own job tasks. Those that plan their own work determine the order in which to perform their tasks but must respond to urgent requests for information and ensure that certain tasks are completed by specified times. They are interrupted frequently and must then reorganize their tasks to meet deadlines and maintain their efficiency. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>											<p>Disagree <input type="checkbox"/> Agree <input type="checkbox"/></p>

Thinking Skills



Decision Making

refers to making a choice among options. Decision making occurs during problem solving, but not all decision making is part of problem solving.

I CAN :	YES	NO	SOMETIMES	Give an example of an important decision you have made. What factors did you consider when making your decision?	The candidate has demonstrated its competence in this area				
<ul style="list-style-type: none"> decide which invoices to pay and from which accounts to pay them. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> decide on the appropriate client codes to assign to a file or document. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> decide whether to charge clients late fees. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> decide how to approach clients for payment. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETIMES	Give an example of an important decision you have made. What factors did you consider when making your decision?	The candidate has demonstrated its competence in this area					
<ul style="list-style-type: none"> determine what payment schedule to set up for clients with overdue accounts, using best judgment and following policy guidelines (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> decide on the priority of work tasks to ensure that the payroll is completed on time. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> decide what codes to apply to various payroll and benefits transactions. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> decide whether to pass a delinquent account on to a collection agency. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

Thinking Skills



Problem Solving


involves problems that require solutions. Most problems concern mechanical challenges, people or situations.

I CAN :	YES	NO	SOMETIMES	Think about a problem you have dealt with and describe how you solved the problem. Some interviewers like to ask these types of questions to get an idea of how you would handle yourself in challenging situations.	The candidate has demonstrated its competence in this area								
<ul style="list-style-type: none"> the invoices and purchase orders do not match. Check the paper trail to find the source of the error.(1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>									Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> you are having difficulty finding a particular document when only limited information is available. Track the document through the processing steps, phone other departments and conduct physical searches if necessary. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>									Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETI MES	Think about a problem you have dealt with and describe how you solved the problem. Some interviewers like to ask these types of questions to get an idea of how you would handle yourself in challenging situations.	The candidate has demonstrated its competence in this area										
<ul style="list-style-type: none"> a customer is claiming that an invoice has been received for a bill that has already been paid or they have not received a cheque owing to them. Review the customer's file to verify the claim. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>							Disagree <input type="checkbox"/> Agree <input type="checkbox"/>				
<ul style="list-style-type: none"> the pay verification does not balance. May have to check all deductions to find the reason. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>							Disagree <input type="checkbox"/> Agree <input type="checkbox"/>				
<ul style="list-style-type: none"> there are shipping and receiving problems; for example, shipments are short of the number indicated on the purchase order or shipments have been sent to the wrong department. Verify account information and contact shippers or departmental personnel to ensure that accounting information accurately reflects orders received.(2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>											Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETI MES	Think about a problem you have dealt with and describe how you solved the problem. Some interviewers like to ask these types of questions to get an idea of how you would handle yourself in challenging situations.	The candidate has demonstrated its competence in this area							
<ul style="list-style-type: none"> an employee disagrees with the amount on the pay cheque. Review records and consult managers as necessary to identify the reason for the discrepancy so that corrective actions may be taken if necessary. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>								Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> there are minor technical problems in the payroll banking system. Resolve these problems by talking directly with bank staff. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>								Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> information is missing from pay files. Contact the employee, the employee's manager or the bank to obtain the data. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>								Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETI MES	Think about a problem you have dealt with and describe how you solved the problem. Some interviewers like to ask these types of questions to get an idea of how you would handle yourself in challenging situations.	The candidate has demonstrated its competence in this area											
<ul style="list-style-type: none"> the accounts are not balanced. Find and correct the error. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>											Disagree <input type="checkbox"/> Agree <input type="checkbox"/>	
<ul style="list-style-type: none"> receive complaints from employees who believe they are entitled to more pay. Accounting and related clerks re-examine timesheets and punch cards and recalculate income and deductions for the employees concerned. If the pay has been miscalculated, adjust it. Otherwise, refer complaints to employers. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>												Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> encounter discrepancies between bank statements and journal entries when performing bank reconciliations. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>												Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

<p>Thinking Skills</p> 	<p>Finding Information involves using any of a variety of sources including text, people, computerized databases or information systems.</p>
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I CAN :	YES	NO	SOMETI MES	What kind of information would you need to find for customers, co-workers or supervisors in this job? What would be the most effective way to find the information you need?	The candidate has demonstrated its competence in this area				
<ul style="list-style-type: none"> check with suppliers or purchasers regarding the delivery of products. (1) 				<table border="1" style="width: 100%; height: 40px;"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input style="width: 30px; height: 20px;" type="checkbox"/> Agree <input style="width: 30px; height: 20px;" type="checkbox"/>
<ul style="list-style-type: none"> refer to supply catalogues for ordering information. (1) 				<table border="1" style="width: 100%; height: 40px;"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input style="width: 30px; height: 20px;" type="checkbox"/> Agree <input style="width: 30px; height: 20px;" type="checkbox"/>
<ul style="list-style-type: none"> consult payroll registers and personnel files to locate payroll and benefits data. (1) 				<table border="1" style="width: 100%; height: 40px;"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input style="width: 30px; height: 20px;" type="checkbox"/> Agree <input style="width: 30px; height: 20px;" type="checkbox"/>

I CAN :	YES	NO	SOMETI MES	What kind of information would you need to find for customers, co-workers or supervisors in this job? What would be the most effective way to find the information you need?	The candidate has demonstrated its competence in this area							
<ul style="list-style-type: none"> contact managers of other departments and individual employees to obtain information missing from pay files. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>				Disagree <input type="checkbox"/> Agree <input type="checkbox"/>				
<ul style="list-style-type: none"> search for names, addresses and telephone numbers in the telephone book or company directories. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>			
<ul style="list-style-type: none"> research financial information or obtain information about customers from manuals, financial statements, files, reports, co-workers, managers and computer systems or printouts. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>		
<ul style="list-style-type: none"> check accounts for accuracy or resolve discrepancies in financial records by consulting invoices and other documents in the files, using computer systems and archives or by seeking required information from co-workers or staff in other departments. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>								Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETI MES	What kind of information would you need to find for customers, co-workers or supervisors in this job? What would be the most effective way to find the information you need?	The candidate has demonstrated its competence in this area						
<ul style="list-style-type: none"> refer to collective agreements to interpret and explain the application of various clauses to specific situations raised by employees, drawing on a knowledge of contract language and past practice. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>							Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> search government bulletins and websites to find information about corporate and personal taxes (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>							Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

Score Card

The participant must have 80% of the boxes checked « Agree » in the same complexity rating for the practitioner to award the level.

	Use of Documents	Level 1 /3 ___%	Level 3 /6 ___%	Comments:
		Level 2 /8 ___%	LEVEL ATTRIBUTED:	
	Oral Communication	Level 1 /5 ___%	Level 3 /4 ___%	Comments:
		Level 2 /6 ___%	LEVEL ATTRIBUTED:	
	Job Task Planning and Organization	Level 1 /2 ___%	Level 3 /3 ___%	Comments:
		Level 2 /1 ___%	LEVEL ATTRIBUTED:	
	Decision Making	Level 1 /3 ___%	Level 3 /1 ___%	Comments:
		Level 2 /4 ___%	LEVEL ATTRIBUTED:	
	Problem Solving	Level 1 /2 ___%	Level 3 /3 ___%	Comments:
		Level 2 /6 ___%	LEVEL ATTRIBUTED:	
	Finding Information	Level 1 /5 ___%	Level 3 /3 ___%	Comments:
		Level 2 /1 ___%	LEVEL ATTRIBUTED:	

SELF-EVALUATION *post-training* (Part II)

To better know your strengths concerning essential skills, please answer the following self-evaluation.

1. Read each statement and check, in the appropriate column, the answer that describes best your capacity to perform the specified task.
2. If you have answered "YES" or "SOMETIMES" to the corresponding tasks, give an example that will prove your skills in this area. *Tip: Think of your past experiences at work and in your personal life.*

Document Use



is the ability to find, understand or enter information (e.g. text, symbols, numbers) in different types of documents. Strong **document use** skills are essential in many workplaces and in everyday life. Completing a form, checking off items on a list of tasks, and plotting information on a graph are all examples of **document use**.

Complete this self-assessment to help you understand your **document use** strengths and areas for improvement.

I CAN :	YES	NO	SOMETIMES	Think of how you have used forms, charts and other kinds of documents in previous work experiences or in school.	The candidate has demonstrated its competence in this area.						
<ul style="list-style-type: none"> • read labels on files. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>							Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> • read the daily control log. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>							Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> • scan labels on floppy disks, files and office products for a variety of data. For example, scan labels on file folders to locate dates and account numbers (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>							Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETIMES	Think of how you have used forms, charts and other kinds of documents in previous work experiences or in school.	The candidate has demonstrated its competence in this area									
<ul style="list-style-type: none"> locate data in a variety of lists, tables and schedules (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>					
<ul style="list-style-type: none"> enter data into account ledgers and logbooks. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>				Disagree <input type="checkbox"/> Agree <input type="checkbox"/>						
<ul style="list-style-type: none"> read account ledgers. These may be computerized. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>							Disagree <input type="checkbox"/> Agree <input type="checkbox"/>			
<ul style="list-style-type: none"> check forms filled in by employees for accuracy to correct errors and complete them in full by entering missing information. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>										Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETIMES	Think of how you have used forms, charts and other kinds of documents in previous work experiences or in school.	The candidate has demonstrated its competence in this area								
<ul style="list-style-type: none"> enter payroll and benefits data on a computer to record information on employees and generate cheques. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>									Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> read and interpret lists, such as accounts, lists of clients with overdue accounts and price lists. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>									Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> read and complete employee time sheets and enter data into a central computer system. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>									Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETI MES	Think of how you have used forms, charts and other kinds of documents in previous work experiences or in school.	The candidate has demonstrated its competence in this area										
<ul style="list-style-type: none"> read forms, such as collection management forms, cheque request and issue forms, bond indemnity forms and NO-sufficient fund forms. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>							Disagree <input type="checkbox"/> Agree <input type="checkbox"/>				
<ul style="list-style-type: none"> complete forms, such as credit approval and application forms, tax adjustment application forms and Goods and Services Tax (GST) exemption forms. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>									Disagree <input type="checkbox"/> Agree <input type="checkbox"/>		
<ul style="list-style-type: none"> interpret financial statements for clients. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>											Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETI MES	Think of how you have used forms, charts and other kinds of documents in previous work experiences or in school.	The candidate has demonstrated its competence in this area										
<ul style="list-style-type: none"> read, interpret, classify and record information from invoices. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>					
<ul style="list-style-type: none"> complete or help employees complete forms relating to payroll or benefits, such as medical services plan applications and pension forms. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>											Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> review audit statements from accounting firms. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>											Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETI MES	Think of how you have used forms, charts and other kinds of documents in previous work experiences or in school.	The candidate has demonstrated its competence in this area											
complete forms such as general ledgers, tax and source deductions, remittances, workers' compensation, pension contribution reports, records of employment, annual financial reports and income tax returns. In some cases, combine data from several sources to complete such forms. (3)				<table border="1" style="width: 100%; height: 100%;"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>												Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

Oral communication



is the ability to use speech to share thoughts and information. Strong **oral communication** skills are essential to being able to present your ideas clearly in a variety of situations such as: explaining procedures to a co-worker; giving directions to a friend; or dealing with customer service to discuss a problem with your phone bill.

Complete this self-assessment to help you understand your **oral communication** strengths and areas for improvement.

I CAN :	YES	NO	SOMETI MES	Give examples of how you have communicated effectively in different situations (i.e. giving a presentation at school or responding to a customer complaint). Why is clear communication important for this type of work?	The candidate has demonstrated its competence in this area				
<ul style="list-style-type: none"> listen to simple messages on voice mail. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> talk to suppliers to obtain quotes and clarify invoice amounts. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> provide employees with information on pay, benefits and insurance coverage and answer their questions. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETI MES	Give examples of how you have communicated effectively in different situations (i.e. giving a presentation at school or responding to a customer complaint). Why is clear communication important for this type of work?	The candidate has demonstrated its competence in this area					
<ul style="list-style-type: none"> ask co-workers or supervisors for information or assistance in handling particular calculations and exchange information about the payroll with co-workers in accounting. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> interact with suppliers to enquire about products, verify prices, lodge complaints and ask for refunds. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> consult outside agencies to receive clarification of regulations or procedures, such as contacting Revenue Canada to obtain a tax ruling or to resolve a conflict. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>	
<ul style="list-style-type: none"> interact with the supervisor to receive instructions, to obtain help with paperwork, problem customers or particular accounts and to obtain approvals and signatures.(2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETI MES	Give examples of how you have communicated effectively in different situations (i.e. giving a presentation at school or responding to a customer complaint). Why is clear communication important for this type of work?	The candidate has demonstrated its competence in this area					
<ul style="list-style-type: none"> participate in staff meetings to discuss problems and new policies and to exchange opinions on current procedures (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> speak with customers to follow up on overdue accounts, arrange payments, answer customer enquiries and discuss disagreements about accounts (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> participate in group discussions at departmental meetings to solve problems and to discuss changes and new policies and regulations. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> instruct other pay and benefits clerks on procedures. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETI MES	Give examples of how you have communicated effectively in different situations (i.e. giving a presentation at school or responding to a customer complaint). Why is clear communication important for this type of work?	The candidate has demonstrated its competence in this area					
<ul style="list-style-type: none"> organize and lead discussions (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> present information to co-workers and colleagues (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> discuss ongoing work with co-workers and colleagues. For example, discuss daily schedules and activities with colleagues (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> train co-workers, employees, subcontractors and clients to use financial software. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

Thinking Skills



Job Task Planning and Organizing

refers to the extent to which workers plan and organize their own tasks. It does not refer to involvement in the planning function for the organization in which they work.

Please complete this self-assessment in order to highlight your strengths and areas for improvement relating to thinking skills.

I CAN :	YES	NO	SOMETI MES	Give examples of when you have efficiently planned your work and met deadlines. How did you deal with any scheduling conflicts that might have happened?	The candidate has demonstrated its competence in this area					
<ul style="list-style-type: none"> Some accounting and related clerks follow established procedures and directives closely. Their tasks are repetitive although the content changes to reflect the needs of different clients (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> Accounting and related clerks contribute to short and long-term financial planning for public and private sector organizations. They may be responsible for assigning tasks to co-workers and subcontractors. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> Accounting and related clerks organize their tasks to deal with the day's priorities. They respond to urgently required special requests, while keeping in mind the need to complete routine tasks on 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETI MES	Give examples of when you have efficiently planned your work and met deadlines. How did you deal with any scheduling conflicts that might have happened?	The candidate has demonstrated its competence in this area										
schedule. Routine tasks include paying invoices by specified dates and producing month-end reports. (3)				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>											
<ul style="list-style-type: none"> Some administrative clerks plan their own job tasks. Those that plan their own work determine the order in which to perform their tasks but must respond to urgent requests for information and ensure that certain tasks are completed by specified times. They are interrupted frequently and must then reorganize their tasks to meet deadlines and maintain their efficiency. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>											Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

Thinking Skills



Decision Making

refers to making a choice among options. Decision making occurs during problem solving, but not all decision making is part of problem solving.

I CAN :	YES	NO	SOMETIMES	Give an example of an important decision you have made. What factors did you consider when making your decision?	The candidate has demonstrated its competence in this area				
<ul style="list-style-type: none"> decide which invoices to pay and from which accounts to pay them. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> decide on the appropriate client codes to assign to a file or document. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> decide whether to charge clients late fees. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> decide how to approach clients for payment. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETIMES	Give an example of an important decision you have made. What factors did you consider when making your decision?	The candidate has demonstrated its competence in this area					
<ul style="list-style-type: none"> determine what payment schedule to set up for clients with overdue accounts, using best judgment and following policy guidelines (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> decide on the priority of work tasks to ensure that the payroll is completed on time. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> decide what codes to apply to various payroll and benefits transactions. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> decide whether to pass a delinquent account on to a collection agency. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>						Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

Thinking Skills



Problem Solving


involves problems that require solutions. Most problems concern mechanical challenges, people or situations.

I CAN :	YES	NO	SOMETIMES	Think about a problem you have dealt with and describe how you solved the problem. Some interviewers like to ask these types of questions to get an idea of how you would handle yourself in challenging situations.	The candidate has demonstrated its competence in this area								
<ul style="list-style-type: none"> the invoices and purchase orders do not match. Check the paper trail to find the source of the error.(1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>									Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> you are having difficulty finding a particular document when only limited information is available. Track the document through the processing steps, phone other departments and conduct physical searches if necessary. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>									Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETI MES	Think about a problem you have dealt with and describe how you solved the problem. Some interviewers like to ask these types of questions to get an idea of how you would handle yourself in challenging situations.	The candidate has demonstrated its competence in this area										
<ul style="list-style-type: none"> a customer is claiming that an invoice has been received for a bill that has already been paid or they have not received a cheque owing to them. Review the customer's file to verify the claim. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>								Disagree <input type="checkbox"/> Agree <input type="checkbox"/>			
<ul style="list-style-type: none"> the pay verification does not balance. May have to check all deductions to find the reason. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>								Disagree <input type="checkbox"/> Agree <input type="checkbox"/>			
<ul style="list-style-type: none"> there are shipping and receiving problems; for example, shipments are short of the number indicated on the purchase order or shipments have been sent to the wrong department. Verify account information and contact shippers or departmental personnel to ensure that accounting information accurately reflects orders received.(2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>											Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETI MES	Think about a problem you have dealt with and describe how you solved the problem. Some interviewers like to ask these types of questions to get an idea of how you would handle yourself in challenging situations.	The candidate has demonstrated its competence in this area								
<ul style="list-style-type: none"> an employee disagrees with the amount on the pay cheque. Review records and consult managers as necessary to identify the reason for the discrepancy so that corrective actions may be taken if necessary. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>									Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> there are minor technical problems in the payroll banking system. Resolve these problems by talking directly with bank staff. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>									Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> information is missing from pay files. Contact the employee, the employee's manager or the bank to obtain the data. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>									Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETI MES	Think about a problem you have dealt with and describe how you solved the problem. Some interviewers like to ask these types of questions to get an idea of how you would handle yourself in challenging situations.	The candidate has demonstrated its competence in this area										
<ul style="list-style-type: none"> the accounts are not balanced. Find and correct the error. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>							Disagree <input type="checkbox"/> Agree <input type="checkbox"/>				
<ul style="list-style-type: none"> receive complaints from employees who believe they are entitled to more pay. Accounting and related clerks re-examine timesheets and punch cards and recalculate income and deductions for the employees concerned. If the pay has been miscalculated, adjust it. Otherwise, refer complaints to employers. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>											Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> encounter discrepancies between bank statements and journal entries when performing bank reconciliations. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>											Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

<p>Thinking Skills</p> 	<p>Finding Information involves using any of a variety of sources including text, people, computerized databases or information systems.</p>
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I CAN :	YES	NO	SOMETI MES	What kind of information would you need to find for customers, co-workers or supervisors in this job? What would be the most effective way to find the information you need?	The candidate has demonstrated its competence in this area				
<ul style="list-style-type: none"> check with suppliers or purchasers regarding the delivery of products. (1) 				<table border="1" style="width: 100%; height: 40px;"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input style="width: 30px; height: 20px;" type="checkbox"/> Agree <input style="width: 30px; height: 20px;" type="checkbox"/>
<ul style="list-style-type: none"> refer to supply catalogues for ordering information. (1) 				<table border="1" style="width: 100%; height: 40px;"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input style="width: 30px; height: 20px;" type="checkbox"/> Agree <input style="width: 30px; height: 20px;" type="checkbox"/>
<ul style="list-style-type: none"> consult payroll registers and personnel files to locate payroll and benefits data. (1) 				<table border="1" style="width: 100%; height: 40px;"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input style="width: 30px; height: 20px;" type="checkbox"/> Agree <input style="width: 30px; height: 20px;" type="checkbox"/>

I CAN :	YES	NO	SOMETI MES	What kind of information would you need to find for customers, co-workers or supervisors in this job? What would be the most effective way to find the information you need?	The candidate has demonstrated its competence in this area				
<ul style="list-style-type: none"> contact managers of other departments and individual employees to obtain information missing from pay files. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>				Disagree <input type="checkbox"/> Agree <input type="checkbox"/>	
<ul style="list-style-type: none"> search for names, addresses and telephone numbers in the telephone book or company directories. (1) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> research financial information or obtain information about customers from manuals, financial statements, files, reports, co-workers, managers and computer systems or printouts. (2) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>				Disagree <input type="checkbox"/> Agree <input type="checkbox"/>	
<ul style="list-style-type: none"> check accounts for accuracy or resolve discrepancies in financial records by consulting invoices and other documents in the files, using computer systems and archives or by seeking required information from co-workers or staff in other departments. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

I CAN :	YES	NO	SOMETI MES	What kind of information would you need to find for customers, co-workers or supervisors in this job? What would be the most effective way to find the information you need?	The candidate has demonstrated its competence in this area						
<ul style="list-style-type: none"> refer to collective agreements to interpret and explain the application of various clauses to specific situations raised by employees, drawing on a knowledge of contract language and past practice. (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>							Disagree <input type="checkbox"/> Agree <input type="checkbox"/>
<ul style="list-style-type: none"> search government bulletins and websites to find information about corporate and personal taxes (3) 				<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>							Disagree <input type="checkbox"/> Agree <input type="checkbox"/>

Score Card




The participant must have 80% of the boxes checked « Agree » in the same complexity rating for the practitioner to award the level.

	Use of Documents	Level 1 /3 ___%	Level 3 /6 ___%	Comments:
		Level 2 /8 ___%	LEVEL ATTRIBUTED:	
	Oral Communication	Level 1 /5 ___%	Level 3 /4 ___%	Comments:
		Level 2 /6 ___%	LEVEL ATTRIBUTED:	
	Job Task Planning and Organization	Level 1 /2 ___%	Level 3 /3 ___%	Comments:
		Level 2 /1 ___%	LEVEL ATTRIBUTED:	
	Decision Making	Level 1 /3 ___%	Level 3 /1 ___%	Comments:
		Level 2 /4 ___%	LEVEL ATTRIBUTED:	
	Problem Solving	Level 1 /2 ___%	Level 3 /3 ___%	Comments:
		Level 2 /6 ___%	LEVEL ATTRIBUTED:	
	Finding Information	Level 1 /5 ___%	Level 3 /3 ___%	Comments:
		Level 2 /1 ___%	LEVEL ATTRIBUTED:	

Final picture

Please find enclosed the final picture as well as an attestation of your skills level.

Final picture

	Documents use	1	2	3	4	5
	Orale Communication	1	2	3	4	5
	Job Task Planning and Organization	1	2	3	4	5
	Decision Making	1	2	3	4	5
	Problem Solving	1	2	3	4	5
	Finding Information	1	2	3	4	5

This represents an informal assessment of your essential skills and working habits. You should review your stage results and discuss them with your coordinator in order to identify ways to continue improve your skills.

Comments :

Coordinator Signature

Participant Signature

Date

Date

Web sites

Human Resources and Skills Development Canada (HRSDC)

http://www.hrsdc.gc.ca/eng/workplaceskills/essential_skills/general/home.shtml

Ontario Skills Passport (OSP)

<http://skills.edu.gov.on.ca/OSPWeb/jsp/login.jsp>

Human Resources and Skills Development Canada (HRSDC) – Learning Tools

http://www.rhdcc.gc.ca/fra/competence/competences_essentielles/generale/ce_apprentissage.shtml

Workplace Education Manitoba

<http://www.wem.mb.ca/>

TOWES

<http://www.towes.com>

Document Use Tip Sheet

http://www.hrsdc.gc.ca/eng/workplaceskills/essential_skills/doc_use_tip_sheet.shtml

Oral Communication - An Essential Skill in the Canadian Workplace

http://www.hrsdc.gc.ca/eng/workplaceskills/essential_skills/oral_comm_video.shtml

Centre for Canadian Language Benchmarks

http://www.language.ca/display_page.asp?page_id=207

Skillplan

<http://www.skillplan.ca/>