

Alignment Document
Administrative and Professional Support CTAG Alignment

This document contains information for one Career-Technical Articulation Number (CTAN) for the Administrative and Professional Support Career-Technical Assurance Guide (CTAG).

The CTAN is:

1. Office Procedures

Office Procedures - CTAN alignment with the Business Administrative Services Pathway in the Career Field Technical Content Standards of the Ohio Department of Education

General Course Description: This class is designed to emphasize the roles and responsibilities of an effective administrative assistant such as professionalism; effective verbal and written communications; time, stress, and anger management; office supplies and inventory; travel arrangements; meetings and conferences; ethical behavior; customer service; workplace teams, and more. Self-development and problem solving are also included in this course.

Advising Notes:

- Students must access credit within 3 years of program completion.

Semester Credit Hours: 3

All Learning Outcomes marked with an asterisk are essential and must be taught.

Alignment:

Learning Outcomes The student will be able to:	Competencies from the Administrative and Professional Support Pathway, Career Field Technical Content Standards
1. Describe the various roles and responsibilities of an effective office professional.*	1.1 <u>Employability Skills</u> : Develop career awareness and employability skills (e.g., face-to-face, online) needed for gaining and maintaining employment in diverse business settings. 1.1.2 Identify the scope of career opportunities and the requirements for education, training, certification, licensure, and experience. 1.1.4 Describe the role and function of professional organizations, industry associations and organized labor and use networking techniques to develop and maintain professional relationships. 1.1.7 Apply problem-solving and critical-thinking skills to work-related issues when making decisions and formulating solutions. 1.1.8 Identify the correlation between emotions, behavior, and appearance and manage those to establish and maintain professionalism. 1.1.9 Give and receive constructive feedback to improve work habits. 1.1.10 Adapt personal coping skills to adjust to taxing workplace demands. 1.2 <u>Leadership and Communications</u> : Process, maintain, evaluate, and disseminate information in a business Develop leadership and team building to promote collaboration. 1.2.4 Use negotiation and conflict-resolution skills to reach solutions. 1.2.7 Use problem-solving and consensus-building techniques to draw conclusions and determine next steps.

1.5 Global Environment: Evaluate how beliefs, values, attitudes, and behaviors influence organizational strategies and goals.

1.5.3 Use cultural intelligence to interact with individuals from diverse cultural settings.

1.5.4 Recognize barriers in cross-cultural relationships and implement behavioral adjustments.

1.8 Operations Management: Plan, organize, and monitor an organization or department to maximize contribution to organizational goals and objectives

1.8.3. Analyze the performance of organizational activities and reallocate resources to achieve established goals.

1.8.4. Identify alternative actions to take when goals are not met (e.g., changing goals, changing strategies, efficiencies).

3.1 Customer Relations: Apply techniques, strategies and tools to develop, maintain and grow positive internal and external customer, or client, relationships.

3.1.1 Explain the nature of positive customer or client relations and their role in keeping customers, and describe the importance of meeting and exceeding customer expectations.

3.1.2 Compare the cost to acquire customers with the cost to maintain customers, and explain how these costs impact business strategy and influence which customers to maintain.

3.1.3 Apply a customer-service mindset in a culturally appropriate manner (e.g., respond to customer inquiries; reinforce service through effective, ongoing communication).

3.1.4 Build rapport with customers and use this rapport to inform customers about company policies, consequences of noncompliance with recommendations or requirements and service or account terminations.

3.1.5 Maintain confidentiality or privacy of internal and external customers.

3.1.6 Reinforce company's image and culture to exhibit the business's brand promise.

3.1.7 Describe the scope of customer-relationship management to show its contribution to business.

4.3 Compliance: Develop compliance systems, processes and procedures used to manage compliance risk across an organization.

4.3.6 Analyze existing policies, procedures, and documents to ascertain compliance with regulatory requirements (e.g., Centers for Medicare and Medicaid Services [CMS], Health Insurance Portability and Accountability Act [HIPAA]) and self-regulatory guidelines.

4.3.7 Monitor compliance with organizational or departmental compliance policies and procedures (e.g., continuing education requirements, prevention of fraudulent practices, record falsification or alteration, patient or customer abuse, lack of follow-up).

4.3.8 Identify strategies for managing professional liability and malpractice risks (e.g., incompetent or impaired physicians, unnecessary procedures, patient or customer misconduct, service or medical errors, lack of training, poor documentation).

6.2 Information Management: Institute and evaluate information management tools, policies, procedures and strategies to achieve business unit and organizational goals.

6.2.2 Manage business records to maintain needed documentation (e.g., routing orders, tracking shipments, expense reports, healthcare data, customer data, budget data, quality data, human resources data).

6.2.3 Monitor and audit internal records.

6.2.4 Identify critical artifacts requiring preservation, establish retention guidelines, and archive information according to retention systems and procedures and regulatory requirements.

6.2.5 Select and use tools, systems, and processes to manage the preparation of documentation for teams and projects in a cost-effective manner (e.g., agendas, reports, minutes, training materials, RFPs [Requests for Proposal], process analysis charts, and diagrams).

6.2.10 Identify strategies for integrating technology into department or enterprise operations.

6.4 Knowledge Management: Apply systems, strategies, and practices to share, organize, store, analyze, and facilitate the use of a business's insights, processes, procedures, and experiences as a strategic asset.

6.4.3 Select and implement offline tools and techniques to gather, document and organize the knowledge residing with employees across the organization (e.g., relational networks, brainstorming, learning, and idea capture, peer assist, learning reviews, storytelling, collaborative physical workspace, knowledge cafés, communities of practice).

6.4.4 Select and apply online networks and tools to disseminate knowledge and effective practices (e.g., document libraries, Wikis, blogs, social networking sites or services, knowledge clusters, expert locators, collaborative virtual workspaces, interfaces).

6.7 Talent Onboarding and Development: Apply strategies, policies, and procedures to orient new hires and provide growth opportunities to engage new and existing union and non-union employees in the workplace.

6.7.2 Conduct human resources onboarding activities (e.g., employment eligibility verification [I-9 form], tax paperwork, contracts, benefit plans, policy orientation).

6.7.3 Orient talent to organizational culture, values, and norms using appropriate techniques (e.g., coaching or mentoring, cross-departmental networking, toolkits, training).

	<p>6.10 <u>Human Resources Operations</u>: Develop, implement, and evaluate the day-to-day policies, procedures, and activities that are used to ensure efficient, effective human resources management.</p> <p>6.10.2 Process human-resource compliance paperwork, and complete required reporting (e.g., workers' compensation claims, Occupational Safety and Health Administration [OSHA] documents, employment documents, fair medical leave, disability, unemployment).</p> <p>7.5 <u>Facilities Management</u>: Plan, maintain, and monitor property and equipment to facilitate ongoing business activities</p> <p>7.5.1 Identify routine activities for maintaining, disposing, retiring, and replacing business facilities and equipment.</p> <p>8.1 <u>Business Process Analysis</u>: Conduct business process analysis to identify, analyze, and solve business problems and improve process performance.</p> <p>8.1.2 Document the process activities, records or information and systems involved in business activities (e.g., developing new products, acquiring new customers, producing inventory for sale, selling goods and services, managing people).</p> <p>8.1.3 Identify process requirements and performance expectations.</p> <p>8.1.4 Identify measurements and metrics for evaluating process effectiveness and efficiency.</p> <p>8.3 <u>Project Management</u>: Plan, manage, monitor, control projects to improve workflow, minimize costs, and achieve intended project outcomes using planning and project-management tools</p> <p>8.3.4 Document, sequence, allocate, and schedule activities to facilitate on-time and on-budget completion of project by qualified resources.</p> <p>9.4 <u>Internal Controls</u>: Establish suitable internal controls to ensure the proper recording and reporting of transactions in compliance with applicable standards.</p> <p>9.4.1 Describe the impact of financial reporting and internal control regulations on control requirements (e.g., Sarbanes-Oxley Act of 2002, Dodd-Frank Wall Street Reform Act, Model Audit Rule, Government Accountability Standards).</p> <p>9.4.4 Develop and implement internal control procedures (e.g., cash controls, inventory controls, payroll controls, plant asset controls, data protection, personal information controls).</p> <p>9.4.5 Inspect and ensure the continued functioning of internal controls.</p> <p>9.5 <u>Financial Accounting</u>: Track, record, and summarize financial transactions to enable accurate reporting of financial activity to external parties</p>
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	<p>9.5.11 Perform procedures to validate accuracy of accounting data, to identify errors and to make corrections (e.g., review trial balance, reconcile cash, proof ledgers, count inventory).</p> <p>9.5.14 Identify and preserve accounting information in compliance with regulations and policies.</p>
<p>2. Develop effective verbal and written communication techniques appropriate for diverse environments.*</p>	<p>1.2 <u>Leadership and Communications</u>: Process, maintain, evaluate, and disseminate information in a business; develop leadership and team building to promote collaboration.</p> <p>1.2.3 Identify and use verbal, nonverbal, and active listening skills to communicate effectively.</p> <p>1.2.5 Communicate information (e.g., directions, ideas, vision, workplace expectations) for an intended audience and purpose.</p> <p>1.2.11 Write professional correspondence, documents, job applications and résumés.</p> <p>1.2.12 Use technical writing skills to complete forms and create reports.</p> <p>1.5 <u>Global Environment</u>: Evaluate how beliefs, values, attitudes, and behaviors influence organizational strategies and goals.</p> <p>1.5.3 Use cultural intelligence to interact with individuals from diverse cultural settings.</p> <p>1.5.4 Recognize barriers in cross-cultural relationships and implement behavioral adjustments.</p> <p>1.10 <u>Sales and Marketing</u>: Manage pricing, place, promotion, packaging, positioning, and public relations to improve quality customer service.</p> <p>1.10.2. Determine the customer/client needs and identify solutions and potential community resources.</p> <p>3.3 <u>Business Communications Management</u>: Apply strategies and procedures to plan, create, implement, and evaluate internal and external company communications.</p> <p>3.3.1 Identify organizational communication hierarchies, and select the appropriate communication strategy to use for the hierarchy.</p> <p>3.3.2 Explain how the content of written communications (e.g., email, text messages, chats) creates reputational, legal and regulatory exposure for organizations, and describe how to manage the risk individually and collectively.</p> <p>3.3.7 Develop, implement, monitor and adjust communications plan to meet the information needs of internal and external customers.</p> <p>3.3.8 Collaborate on and aggregate complex internal documents to create a common voice that is vision, mission and brand-consistent.</p>
<p>3. Demonstrate effective use of electronic communications.*</p>	<p>1.2 <u>Leadership and Communications</u>: Process, maintain, evaluate, and disseminate information in a business; develop leadership and team building to promote collaboration.</p> <p>1.2.9 Identify advantages and disadvantages involving digital and/or electronic communications (e.g., common content for</p>

	<p>large audience, control of tone, speed, cost, lack of non-verbal cues, potential for forwarding information, longevity).</p> <p>1.4 <u>Knowledge Management and Information Technology</u>: Demonstrate current and emerging strategies and technologies used to collect, analyze, record and share information in business operations.</p> <p>1.4.1 Use office equipment to communicate (e.g., phone, radio equipment, fax machine, scanner, public address systems).</p> <p>1.4.2 Select and use software applications to locate, record, analyze and present information (e.g., word processing, e-mail, spreadsheet, databases, presentation, Internet search engines).</p> <p>1.4.3 Verify compliance with security rules, regulations and codes (e.g., property, privacy, access, accuracy issues, client and patient record confidentiality) pertaining to technology specific to industry pathway.</p> <p>1.4.4 Use system hardware to support software applications.</p> <p>1.4.5 Use information technology tools to maintain, secure, and monitor business records.</p> <p>1.4.6 Use an electronic database to access and create business and technical information.</p> <p>1.4.8 Use electronic media to communicate and follow network etiquette guidelines.</p> <p>5.9 <u>Marketing Communications</u>: Apply the concepts and determine the strategies needed to communicate information about products, services, images, or ideas to achieve desired outcomes that support organizational goals and objectives.</p> <p>5.9.6 Implement word-of-mouth strategies to build brand and to promote products using word-of-mouth strategies.</p> <p>6.3 <u>Business Applications</u>: Apply tools, processes, and procedures to manage the efficient and effective use of technology to achieve organizational goals.</p> <p>6.3.3 Implement collaborative or groupware and cloud computing applications (e.g., services, application, virtual environments) to facilitate projects and business operations.</p> <p>6.3.5 Research and incorporate visual, interactive, and social media content into business communications.</p> <p>6.3.7 Maintain a multimedia website, and test and post website design changes.</p>
<p>4. Explain the importance of working efficiently and effectively, and describe tools and strategies to improve time management.*</p>	<p>1.4 <u>Knowledge Management and Information Technology</u>: Demonstrate current and emerging strategies and technologies used to collect, analyze, record and share information in business operations.</p> <p>1.4.7 Use personal information management and productivity applications to optimize assigned tasks (e.g., lists, calendars, address books).</p>
<p>5. Demonstrate an understanding of stress and anger management in the</p>	<p>1.1 <u>Employability Skills</u>: Develop career awareness and employability skills (e.g., face-to-face, online) needed for</p>

<p>workplace and understand the effects of these components on the workplace.</p>	<p>gaining and maintaining employment in diverse business settings. 1.1.10 Adapt personal coping skills to adjust to taxing workplace demands.</p>
<p>6. Maintain inventory and demonstrate correct procedures for purchasing business supplies, equipment, and services.</p>	<p>7.2 <u>Sourcing and Procurement</u>: Implement sourcing and procurement activities to obtain resources that enable achievement of organizational goals and objectives and to enhance the organization’s financial wellbeing. 7.2.4 Manage the bid or contracting process (e.g., bid specification, vendor or supplier search, bid review, selection of vendor) to achieve business goals.</p>
<p>7. Correctly schedule and manage appointments.*</p>	<p>6.2 <u>Information Management</u>: Institute and evaluate information management tools, policies, procedures and strategies to achieve business unit and organizational goals. 6.2.6 Perform scheduling functions to facilitate on-time, prompt completion of work activities (e.g., calendars, travel arrangements and itineraries, meeting arrangements and requests for audio-visual or technical support and information).</p>
<p>8. Plan meetings and events and coordinate business travel.*</p>	<p>1.4 <u>Knowledge Management and Information Technology</u>: Demonstrate current and emerging strategies and technologies used to collect, analyze, record and share information in business operations. 1.4.7 Use personal information management and productivity applications to optimize assigned tasks (e.g., lists, calendars, address books). 6.2 <u>Information Management</u>: Institute and evaluate information management tools, policies, procedures and strategies to achieve business unit and organizational goals. 6.2.6 Perform scheduling functions to facilitate on time, prompt completion of work activities (e.g., calendars, travel arrangements, and itineraries, meeting arrangements and requests for audio-visual or technical support and information).</p>
<p>9. Recognize the importance of ethical behavior in the workplace and explain the characteristics of an ethical employee.*</p>	<p>1.3 <u>Business Ethics and Law</u>: Analyze how professional, ethical, and legal behavior contributes to continuous improvement in organizational performance and regulatory compliance. 1.3.3 Use ethical character traits consistent with workplace standards (e.g., honesty, personal integrity, compassion, justice). 1.3.8 Verify compliance with computer and intellectual property laws and regulations.</p>
<p>10. Explain the importance of effective teamwork in an organization.*</p>	<p>1.2 <u>Leadership and Communications</u>: Process, maintain, evaluate, and disseminate information in a business; develop leadership and team building to promote collaboration. 1.2.4 Use negotiation and conflict-resolution skills to reach solutions. 1.2.7 Use problem-solving and consensus-building techniques to draw conclusions and determine next steps 1.2.13 Identify stakeholders and solicit their opinions.</p>

	<p>3.2 <u>Relationship Management</u>: Apply techniques and strategies to develop, maintain, and grow positive relationships with employees, peers and stakeholders.</p> <p>3.2.6 Determine the nature of office politics, and overcome problems and difficulties associated with office politics and turf wars.</p> <p>3.2.7 Identify when and how to take risks to achieve objectives.</p> <p>3.2.8 Describe the nature of organizational culture and its impact on business, and interpret and adapt to a business's culture.</p> <p>3.2.9 Establish strategic relationships with others.</p> <p>3.2.10 Share best practices with key individuals and groups within and outside the business.</p> <p>3.2.11 Manage internal and external business relationships to foster positive interactions, and strategically plan and leverage business relationships for growth.</p> <p>3.2.12 Describe ways that businesses build positive employer-employee relationships</p>
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