

U.S. Department of Labor Employment and Training Administration Office of Apprenticeship Training, Employer and Labor Services (OATELS) Washington, D.C. 20210	Distribution: A-541 Headquarters A-544 All Field Tech A-547 SD+RD+SAC+; Lab.Com	Subject: New Apprenticeable Occupation Office Manager/Administrative Services Code: 200
Symbols: DNIP/FK		Action: Immediate

PURPOSE: To inform Office of Apprenticeship Training, Employer and Labor Services (OATELS), Bureau of Apprenticeship and Training (BAT) Staff of a new apprenticeable occupation:

Office Manager/Administrative Services
O*NET CODE: 11-3011.00
RAIS CODE: 1033
Training Term: 2 year (4000 hours)
Type of Training: Time - based

BACKGROUND: This occupation was submitted by George Brennan, ATR New Jersey on behalf of Computer Productivity, New Jersey and based on industries input was revised by Salvatore D'Amore, ATR New Jersey.

The occupation Office Manager/Administrative Services is responsible for a variety of administrative and clerical duties that are necessary to run and maintain organizations efficiently.

A suggested work process schedule and outline of related instruction are attached for your information.

Attachment

NOTE: This Bulletin is being sent via Electronic-Mail (E-Mail). Bureau State Directors should provide copies to their SAC partners as appropriate.

WORK PROCESS SCHEDULE
OFFICE MANAGER/ADMINISTRATIVE SERVICES

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Office Manager/Administrative Services is responsible for a variety of administrative and clerical duties that are necessary to run and maintain organizations efficiently. Managerial training for office manager/administrative services should include prioritizing units' work, assigning work to others, organizing and analyzing operations and procedures, reviewing/revising work and forms, teambuilding and supervision and managerial skills.

ON THE JOB TRAINING SCHEDULE (OJT) **Approximate Hours**

Keyboarding/Computer Applications—Supervision 400

1. Prioritize work assignments
2. Choose appropriate software and format/type letters, memos reports, tables, business forms, financial documents
3. Proofread and edit documents using automatic software features
4. Backup, retrieve/delete, files, save/name/print documents/ envelopes and lists/forms
5. Merge mailing lists/forms
6. Design and /or type newsletter, announcement and brochure
7. Import graphics/data
8. Create and/or manage databases
9. Create and/or manage spreadsheets
10. Use macros
11. Type agendas, meeting minutes, legal documents
12. Use boilerplate materials

Records Management—Supervision 400

1. Prepare file folders and labels (color coding)
2. File four basic filing methods and retrieve information
3. Prepare cross-references for filing documents
4. Use a tickler follow up file
5. Maintain contents of files
6. Follow retention/transfer/purge/destroy procedures for files
7. Apply computer conventions for filing
8. Use/prepare PC directories
9. Establish subject filing master index
10. Select filing supplies and storage equipment
11. Use pending, reading and suspense files

Office Procedures -- Management 400

1. Greet visitors professionally
2. Maintain visitor records
3. Make/take/transfer calls using correct telephone techniques
4. Take accurate messages
5. Handle people/customers professionally
6. Make/cancel appointments
7. Use a telephone directory
8. Contact appropriate associates
9. Coordinate schedule/meetings/projects/conferences
10. Take meeting minutes

11. Make meeting minutes
12. Make travel arrangements/itineraries
13. Read maps, recognize time zones
14. Make photocopies, assemble/collate/staple documents
15. Maintain photocopiers
16. Maintain office supply inventory and order office supplies using purchase orders
17. Use reference and instruction manuals
18. Use electronic dictionaries, thesauruses
19. Set priorities, manage time, arrange workstations
20. Display supervision skills
21. Complete expense reports and forms
22. Portray a good company image
23. Follow safety practices

Communication Skills

300

1. Speak and write clearly and concisely
2. Use appropriate grammar
3. Ask questions clearly
4. Use positive tone of voice
5. Follow directions (oral and written)
6. Give clear instructions
7. Demonstrate ability to present information orally
8. Exhibit good listening skills
9. Demonstrate ability to use shorthand/speedwriting/note taking

Computational Skills (if applicable)

300

1. Perform mathematical computations (interest, percentage, discounts and averages)
2. Use accounting software
3. Demonstrate 10 key calculation skills by touch
4. Post from journals to ledgers
5. Use steps to locate errors in accounting
6. Demonstrate ability to make monetary change
7. Prepare payrolls data
8. Handle accounts receivable/accounts payable/cash receipts
9. Prepare bank deposit, reconcile bank statements
10. Compute petty cash totals
11. Prepare invoices

Mail Processing Managerial Instruction to include

100

1. Use a postage machine
2. Process incoming/outgoing/interoffice mail
3. Maintain mail registers
4. Process faxes
5. Prepare E-mail messages
6. Send E-mail messages
7. Use a zip code directory

<u>Interpersonal/Employability Skills -Managerial Training</u>	100
<ol style="list-style-type: none"> 1. Demonstrate punctuality/dependability/flexibility 2. Demonstrate positive attitude/ethics 3. Demonstrate teamwork skills 4. Demonstrate ability to work with all types of people in a diverse workplace 5. Demonstrate awareness of cultural diversity 6. Demonstrate critical thinking/problem solving skills 7. Demonstrate resume writing and interviewing skills 8. Follow line of authority 9. Supervise/train office workers 10. Delegate work 11. Handle multiple responsibilities 12. Demonstrate cost consciousness 	
<u>Computation Skills—Supervision</u>	300
<ol style="list-style-type: none"> 1. Use calculator or adding machines efficiently 2. Demonstrate familiarity with basic computer terminology 3. Use/create spreadsheets and databases for compilation of a source data 4. Use accounting payroll software applications 	
<u>Accounts Receivable--Supervision</u>	300
<ol style="list-style-type: none"> 1. Prepare billing invoices check for accuracy 2. Verify record, and post customer/client transactions 3. Maintain aging of accounts receivables ,i.e. 30, 60, 90, 180 days 4. Adjust/apply finance charges when necessary. Send overdue notice 5. Generate outstanding accounts receivable listing 6. Run monthly billing cycles 7. Supplement computerized processed with paper trail i.e., maintain accounts receivable filing 8. Purge uncollectible and send to collection 	
<u>Accounts Payable--Supervision</u>	300
<ol style="list-style-type: none"> 1. Verify record and post all payable into current system 2. Prepare, record and organize purchasing documents, i.e. purchase order invoices warranty information etc. 3. Maintain monthly accounts payable/disbursements listing 4. Prepare disbursement check and record payable information in appropriate check register 5. Prepare 1099 tax reports where applicable 	
<u>Banking Procedures--Supervision</u>	300
<ol style="list-style-type: none"> 1. Complete check registers manually or electronically 2. Prepare deposit slips, prove to receipt reports 3. Maintain and update checking, saving and money Market accounts 4. Reconcile various bank statements 5. Prepare outstanding check lists 	

<u>Payroll preparation--Supervision</u>	300
<ol style="list-style-type: none"> 1. Demonstrate understanding of the processes and function of time cards, payroll registers, payroll earning forms 2. Verify and record information for w-4 forms into employee data 3. Calculate employee earnings based on hourly time records or based on annual salary 4. Enter data into current payroll system 5. Complete payroll data for in hours/outsourced payroll check generation 6. Calculate process payroll taxes through bank deposits and/or EFTPS 7. Prepare monthly, quarterly, and annual state and federal payroll reports, i.e. withholding employment disability etc. 	
<u>Inventory Control--Supervision</u>	200
<ol style="list-style-type: none"> 1. Demonstrate ability to take physical and perpetual inventory 2. Compare inventories to locate shrinkage or shortage, prepare comparison report 3. Maintain inventory data base and reports 	
<u>Auditing/Reporting--Supervision</u>	300
<ol style="list-style-type: none"> 1. Demonstrate knowledge of the functioning of a business entity 2. Identify, maintain, and generate various reports used in connections with booking procedures, ie Aged Accounts Receivable, outstanding Accounts Payable, Inventory control reports and payroll reports 3. Maintain source documents to prove above reports 4. Demonstrate understanding of monthly close outs of bookkeeping records 	
TOTAL HOURS	4000

OFFICE MANAGER/ADMINISTRATIVE SERVICES
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RELATED INSTRUCTION OUTLINE

Suggested 1st Year	Approximate Hours
<u>Office Procedures: Supervision</u>	64
Office Management Secretarial Duties Time Management File Management Record Keeping Supply Inventory	
<u>Supervisory Skills</u>	64
Team Building Skills Conflict Resolution Training the Adult Learner Diversity Training Sensitivity Training	
<u>Supervision Applications</u>	16
Computer Application Creating, editing and proofreading word processing documents Returning data Creating spreadsheets, databases and documents Developing graphics and importing to text	
Suggested 2nd Year	Approximate Hours
<u>Supervision and Managerial Skills</u>	68
Interpersonal/Employability Skills Communication Skills Organization Skills Personnel procedures Management responsibility	
<u>Accounting and Financial Services--Supervision</u>	68
Theory of Accounting Cycle Payroll Banking procedures Journal and Ledgers	
<u>Office Equipment--Supervision</u>	8
Using the copier Fax Electronic Mailing Internet Communication	
Total Hours	288

Other related courses as deemed necessary by the sponsor and/or the Apprentice Coordinator.