

# Instructional Framework

Business Operations and Assistant Services  
52.0400.00



## Domain 1: Technology Applications

### 45-50% Instructional Time

#### STANDARD 1.0 APPLY WORD PROCESSING SOFTWARE TO PRODUCE DOCUMENTS

1.1 Create and manage documents	<ul style="list-style-type: none"><li>• Creating documents<ul style="list-style-type: none"><li>◦ Creating a new document</li><li>◦ Open existing documents</li><li>◦ Opening from a template</li></ul></li><li>• Creating folders/sub folders</li><li>• Save vs. Save As</li></ul>
1.2 Format text, paragraphs, and sections	<ul style="list-style-type: none"><li>• Formatting marks</li><li>• Toolbars, ribbons, tabs</li><li>• Text selection</li><li>• Format text</li></ul>
1.3 Create tables and lists	<ul style="list-style-type: none"><li>• Creating tables<ul style="list-style-type: none"><li>◦ Adding /removing rows and columns</li><li>◦ Formatting</li></ul></li><li>• Create lists<ul style="list-style-type: none"><li>◦ Bullets</li><li>◦ Numbering</li><li>◦ Promoting/demoting within a list</li></ul></li></ul>
1.4 Create and manage references (e.g., footnotes, endnotes, bibliography, citation, table of contents, figure and table captions)	<ul style="list-style-type: none"><li>• Footnotes</li><li>• Endnotes</li><li>• Bibliography</li><li>• Citation</li><li>• Table of contents</li><li>• Figure</li><li>• Table captions</li></ul>
1.5 Insert and format graphic elements	<ul style="list-style-type: none"><li>• Inserting images from different locations</li><li>• Formatting images/graphics</li><li>• Toolbars associated with graphics</li></ul>

#### STANDARD 2.0 COMPOSE DOCUMENTS FOR PRESENTATION

2.1 Create and manage presentations	<ul style="list-style-type: none"> <li>• Creating presentations <ul style="list-style-type: none"> <li>◦ Creating a new presentation</li> <li>◦ Open existing presentations</li> <li>◦ Opening from a template</li> <li>◦ Themes/layouts</li> </ul> </li> <li>• Creating new slides</li> <li>• Creating folders/sub folders</li> <li>• Save vs. Save As</li> </ul>
2.2 Insert and format text, shapes, and images	<ul style="list-style-type: none"> <li>• Placeholder</li> <li>• Toolbars, ribbons, tabs</li> <li>• Text selection</li> <li>• Format text</li> <li>• Inserting images from different locations</li> <li>• Formatting images/graphics</li> <li>• Toolbars associated with graphics</li> </ul>
2.3 Insert tables, charts, graphics, and media	<ul style="list-style-type: none"> <li>• Creating tables <ul style="list-style-type: none"> <li>◦ Adding /removing rows and columns</li> <li>◦ Formatting</li> </ul> </li> <li>• Creating charts and graphics</li> <li>• Creating/inserting media</li> </ul>
2.4 Apply transitions, animations, and timing	<ul style="list-style-type: none"> <li>• Explore options for: <ul style="list-style-type: none"> <li>◦ Transitions</li> <li>◦ Animations</li> <li>◦ Timing</li> </ul> </li> <li>• Professional purpose and intention of each</li> </ul>
2.5 Manage multiple presentations	<ul style="list-style-type: none"> <li>• Merging multiple presentations</li> </ul>
2.6 Use on-line presentation technologies in addition to PPT and slides, i.e., Prezi, Adobe Slate	<ul style="list-style-type: none"> <li>• Google Slides</li> </ul>
<b>STANDARD 3.0 USE SPREADSHEET SOFTWARE TO PRODUCE DOCUMENTS</b>	
3.1 Create and manage worksheets and workbooks (e.g., print area, print scaling)	<ul style="list-style-type: none"> <li>• Creating workbooks <ul style="list-style-type: none"> <li>◦ Creating a new workbook</li> <li>◦ Open existing workbook</li> <li>◦ Opening from a template</li> </ul> </li> <li>• Creating new worksheets</li> <li>• Print formatting and scaling</li> <li>• Creating folders/sub folders</li> <li>• Save vs. Save As</li> </ul>
3.2 Manage data cells and ranges	<ul style="list-style-type: none"> <li>• Formatting cells</li> </ul>

	<ul style="list-style-type: none"> <li>• Workbook navigation</li> </ul>
3.3 Create tables	<ul style="list-style-type: none"> <li>• Creating tables within a workbook</li> <li>• Creating and managing pivot tables</li> </ul>
3.4 Perform operations with formulas and functions	<ul style="list-style-type: none"> <li>• Basic formulas (+, -, *, /)</li> <li>• Basic functions (SUM, AVG, MIN, MAX, COUNT)</li> <li>• Cell references including: <ul style="list-style-type: none"> <li>◦ Absolute vs. relative</li> </ul> </li> <li>• AutoFill</li> </ul>
3.5 Create charts and objects	<ul style="list-style-type: none"> <li>• Creating charts <ul style="list-style-type: none"> <li>◦ Understanding the data</li> </ul> </li> <li>• Creating objects</li> </ul>
<b>STANDARD 4.0 APPLY COMMUNICATION, COLLABORATION, AND EMAIL SKILLS</b>	
4.1 Configure email client	<ul style="list-style-type: none"> <li>• Account information</li> <li>• Managing settings</li> </ul>
4.2 Create, format, organize, and manage messages	<ul style="list-style-type: none"> <li>• Composing messages</li> <li>• Recipients <ul style="list-style-type: none"> <li>◦ Reply, Reply All, Forward</li> <li>◦ Cc, Bcc</li> </ul> </li> <li>• Formatting messages</li> <li>• E-mail etiquette</li> <li>• Creating folders</li> <li>• Managing Settings</li> </ul>
4.3 Create and manage calendars, meetings, notes, and tasks	<ul style="list-style-type: none"> <li>• Calendar set-up</li> <li>• Creating appointments and meetings</li> <li>• Managing multiple calendars</li> </ul>
4.4 Create and manage contacts and groups	<ul style="list-style-type: none"> <li>• Create and manage contacts and groups</li> </ul>
<b>STANDARD 5.0 USE DATABASE SOFTWARE TO PRODUCE DOCUMENTS</b>	
5.1 Maintain and edit a database	<ul style="list-style-type: none"> <li>• Adding fields</li> <li>• Maintaining records</li> </ul>
5.2 Identify queries	<ul style="list-style-type: none"> <li>• Identify queries to view specific records</li> </ul>
5.3 Create forms	<ul style="list-style-type: none"> <li>• Creating new forms to enter data</li> </ul>
5.4 Create reports	<ul style="list-style-type: none"> <li>• Creating functional reports from the database</li> <li>• Formatting reports</li> </ul>
5.5 Determine tables and fields	<ul style="list-style-type: none"> <li>• Differentiating between tables and fields</li> </ul>
<b>STANDARD 12.0 DEMONSTRATE PROFICIENCY NAVIGATING THE INTERNET</b>	

12.1 Characterize Universal Resource Locators (URLs) and associated protocols (e.g., .com, .org, .edu, .gov, .net, .mil)	<ul style="list-style-type: none"> <li>Identify and differentiate common usage of top level domains</li> </ul>
12.2 Demonstrate proficiency in using search engines and applying operators and filters	<ul style="list-style-type: none"> <li>Applying operators to filter search results <ul style="list-style-type: none"> <li>“ ”</li> <li>and</li> <li>or</li> <li>not</li> <li>wild cards like *, etc.</li> </ul> </li> </ul>
12.3 Compare and contrast various methods of online storage and transfer of files	<ul style="list-style-type: none"> <li>Identify and differentiate between different cloud storage applications</li> </ul>

<b>Domain 2: Operations Support</b> <b>45-50% Instructional Time</b>	
<b>STANDARD 6.0 DEMONSTRATE AN UNDERSTANDING OF THE FUNCTIONS AND RESPONSIBILITIES OF A BUSINESS ASSISTANT</b>	
6.1 Explore career opportunities for a business assistant (e.g., virtual assistant, receptionist, office manager, clerk, administrative assistant)	<ul style="list-style-type: none"> <li>Differentiate between the job functions/descriptions associated with various business assistant positions</li> </ul>
6.2 Demonstrate proficiency in keyboard functions and keyboarding skills (minimum 40 wpm)	<ul style="list-style-type: none"> <li>Typing a minimum of 40 words per minute</li> <li>Posture, motion and ergonomics <ul style="list-style-type: none"> <li>Body placement</li> <li>Equipment</li> </ul> </li> <li>Identification and purpose of keyboard functions</li> </ul>
6.3 Compare and contrast the functions of management (i.e., planning, organizing, staffing, directing, and controlling) and their relationship	<ul style="list-style-type: none"> <li>5 Functions of Management and the roles of each</li> </ul>
6.4 Practice project management skills	<ul style="list-style-type: none"> <li>Basic project management breakdown <ul style="list-style-type: none"> <li>Set goal</li> <li>Plan</li> <li>Do</li> <li>Review/Reflect</li> </ul> </li> </ul>
6.5 Explain the purpose of notarization and medallion/signature guarantee	<ul style="list-style-type: none"> <li>Define notarization and explain the purpose</li> </ul>
6.6 Prepare a physical mailing (e.g., labels, handwritten, postcards)	<ul style="list-style-type: none"> <li>Address documents for mailing <ul style="list-style-type: none"> <li>Envelope/mailer formatting</li> </ul> </li> <li>Perform mail merge</li> </ul>
<b>STANDARD 7.0 ESTABLISH AND FOLLOW PROCEDURES TO MANAGE RECORDS</b>	
7.1 Create a filing system to preserve and retrieve records	<ul style="list-style-type: none"> <li>Filing by</li> </ul>

	<ul style="list-style-type: none"> <li>○ Subject</li> <li>○ Geographic</li> <li>○ Chronological</li> <li>○ Numerical</li> <li>○ Name</li> </ul>
7.2 File, archive, and destroy materials according to regulatory policy to manage records	<ul style="list-style-type: none"> <li>● Determine retention schedule for keeping files and when to archive them</li> <li>● Identify types of file that should be destroyed and how to dispose of them</li> </ul>
7.3 Choose document priorities to interpret file hierarchy	<ul style="list-style-type: none"> <li>● Create folders and subfolders</li> </ul>
7.4 Use computer skills to manage electronic files	<ul style="list-style-type: none"> <li>● Create folders and subfolders</li> <li>● Drag and Drop</li> <li>● Cut/Copy and Paste</li> </ul>
<b>STANDARD 8.0 PLAN AND PARTICIPATE IN FACE-TO-FACE AND VIRTUAL MEETINGS</b>	
8.1 Prepare and assemble materials and documentation for meetings	<ul style="list-style-type: none"> <li>● Creating documents <ul style="list-style-type: none"> <li>○ Agenda</li> <li>○ Attendance Sheets</li> <li>○ Supporting materials</li> </ul> </li> </ul>
8.2 Prepare meeting facilities and equipment (e.g., reserve space, ensure technology is functioning)	<ul style="list-style-type: none"> <li>● Booking facilities and equipment</li> <li>● Arranging for technology requirements</li> <li>● Preparing the meeting rooms for presentations and activities</li> <li>● Technology permissions for meeting participants</li> <li>● Explore various online meeting platforms and their technological specifications</li> </ul>
8.3 Take notes and prepare meeting minutes and related documentation	<ul style="list-style-type: none"> <li>● Take notes</li> <li>● Prepare meeting minutes</li> <li>● And prepare related documentation</li> </ul>
<b>STANDARD 9.0 PREPARE TRAVEL ARRANGEMENTS</b>	
9.1 Select suitable lodging and transportation to arrange travel according to company policy	<ul style="list-style-type: none"> <li>● Compare a variety of company policies</li> <li>● Analyze various booking resources</li> <li>● Compare amenities for intended purpose of travel</li> </ul>
9.2 Plan travel and meeting itinerary	<ul style="list-style-type: none"> <li>● International travel requirements</li> <li>● Appropriate scheduling of travel events</li> <li>● Develop an itinerary including dates, times and activities</li> </ul>
9.3 Prepare travel claims post-travel for reimbursement to traveler	<ul style="list-style-type: none"> <li>● Prepare post-travel claims that include receipts for lodging, transportation, meals and misc. expenses</li> </ul>
9.4 Apply knowledge of domestic/international time zones and currency exchange	<ul style="list-style-type: none"> <li>● Identify resources for currency exchange rates</li> </ul>

rates	<ul style="list-style-type: none"> <li>• Compare domestic and international time zones</li> </ul>
<b>STANDARD 10.0 DEMONSTRATE TELEPHONE SKILLS TO COMMUNICATE EFFECTIVELY</b>	
10.1 Record and deliver accurate messages to appropriate parties	<ul style="list-style-type: none"> <li>• Messaging components including: <ul style="list-style-type: none"> <li>○ Date and time of call</li> <li>○ Name of caller</li> <li>○ Company they are calling from</li> <li>○ Phone number of caller including area code</li> <li>○ Detailed message</li> <li>○ Who took the message</li> </ul> </li> <li>• Delivery guidelines based on company policies/culture</li> </ul>
10.2 Use professional telephone etiquette and screening techniques when placing and receiving calls	<ul style="list-style-type: none"> <li>• Receiving calls <ul style="list-style-type: none"> <li>○ Answer timely</li> <li>○ Identify yourself</li> <li>○ Assist - screen, transfer, conclude</li> </ul> </li> <li>• Screening calls <ul style="list-style-type: none"> <li>○ Determine who is calling and purpose of calls</li> </ul> </li> <li>• Placing calls <ul style="list-style-type: none"> <li>○ Identify yourself</li> <li>○ State your purpose</li> <li>○ Know your info before placing call</li> </ul> </li> <li>• Etiquette</li> </ul>
<b>STANDARD 13.0 DEMONSTRATE KNOWLEDGE OF THE NEED FOR ETHICAL BEHAVIOR IN THE WORKPLACE</b>	
13.1 Explain concepts of conflict of interest and intellectual property	<ul style="list-style-type: none"> <li>• Explain conflict of interest</li> <li>• Explain intellectual property</li> </ul>
13.2 Evaluate reasons for keeping employer and customer information confidential and/or privileged	<ul style="list-style-type: none"> <li>• Legal ramifications of exposing confidential/privileged information</li> <li>• Effects on company culture, reputation, and customers</li> </ul>
13.3 Explore ethical issues arising from copyright infringements (e.g., downloading and sharing applications without license(s), copyright laws, regulatory control)	<ul style="list-style-type: none"> <li>• Explore ethical issues arising from copyright infringements</li> </ul>
13.4 Identify and describe use and misuse of company resources (e.g., using office for personal use, stealing office supplies, etc.)	<ul style="list-style-type: none"> <li>• Identify and describe use and misuse of company resources <ul style="list-style-type: none"> <li>○ Time</li> <li>○ Mileage</li> <li>○ Resources</li> <li>○ Equipment</li> <li>○ Social Media</li> <li>○ Finance</li> </ul> </li> </ul>

## Domain 3: Financial Procedures

### 10-15% Instructional Time

#### STANDARD 11.0 MAINTAIN RECORDS AND REPORTS TO MANAGE CASH AND BANKING PROCEDURES

11.1 Perform transactions to manage petty cash and banking procedures	<ul style="list-style-type: none"><li>• Following petty cash and banking procedures as outlined in company policies</li><li>• Petty cash procedures may include:<ul style="list-style-type: none"><li>○ Establishing funds</li><li>○ Making payments</li><li>○ Keeping records</li><li>○ Replenishing funds</li></ul></li></ul>
11.2 Maintain accurate balance sheets/ledgers	<ul style="list-style-type: none"><li>• Identify the difference between balance sheets and ledgers.</li><li>• Ledgers will include:<ul style="list-style-type: none"><li>○ Revenue</li><li>○ Expenses</li><li>○ Debits</li><li>○ Credits</li></ul></li><li>• Balance sheets will include:<ul style="list-style-type: none"><li>○ Assets</li><li>○ Liabilities</li><li>○ Owners Equity</li></ul></li></ul>
11.3 Organize and tally receipts and proof work to prepare bank deposits	<ul style="list-style-type: none"><li>• Complete a deposit slip</li><li>• Appropriate endorsements</li><li>• Accurately tally and reconcile receipts for a bank deposit</li></ul>
11.4 Identify various forms of business payment options (e.g., credit card, pcard, checks, electronic transfers)	<ul style="list-style-type: none"><li>• Identify various forms of business payment options</li></ul>