

## OALCF Task Cover Sheet

**Task Title: Using a Business Document**

<b>Learner Name:</b>	
<b>Date Started:</b>	<b>Date Completed:</b>
<b>Successful Completion:</b> Yes ___ No ___	
<b>Goal Path:</b> Employment <input checked="" type="checkbox"/> Apprenticeship ___ Secondary School ___ Post Secondary ___ Independence ___	
<b>Task Description:</b> Review a Credit Application to see if all necessary information has been given and decide if a follow up call to the customer is necessary. The learner will also review this information with the practitioner to explain their decision	
<b>Competency:</b> A: Find and Use Information B: Communicate Ideas and Information	<b>Task Group(s):</b> A2: Interpret documents B1: Interact with others
<b>Level Indicators:</b> A2.3: Interpret somewhat complex documents to connect, evaluate and integrate information B1.2: Initiate and maintain interactions with one or more persons to discuss, explain or exchange information and opinions	
<b>Performance Descriptors:</b> see chart on last page	
<b>Materials Required:</b> <ul style="list-style-type: none"><li>• This task set can be changed by using any appropriate business document to make it pertinent to the particular employment goal of the learner</li><li>• Pencil/pen</li><li>• Learner Task and Document</li></ul>	

**Task Title: Using a Business Document****Learner Information and Instructions:**

You are being trained as a credit clerk in Warren's Department Store. A credit clerk's job is to review credit card application forms such as this one and decide if it is ready for processing, or if more information is required.

1. Read the form carefully. The information should be complete and make sense. After you have read the form, decide if you have to call the applicant for more information. You may take notes as you review the form.
2. Explain your decision orally to your supervisor (instructor) providing examples as necessary. You may refer to your notes.

## Warren's Department Store Credit Application

Check one: I want an individual account  A joint account:

(Note: You may apply for either whether you are single, married, or separated)

### ABOUT YOU:

Name (first, middle, last): Janice B. Utley

### REFERENCES

Social Insurance Number: 051-99-5478

Date of Birth 3/4/67

Address: 231 Finch Ave. Barrie  
Street City  
Ontario L4M 3G3  
Province Postal code

Length of time at address: 5 years

Own  Rent  Relative's  Other  Store or Company Name: Sigsons

Number of dependents: 1

Driver's licence number D 345178345

### ABOUT YOUR BANKING AND CREDIT

Bank name/Branch Whitney Bank

Checking account number 20034-90653

Bank name/Branch Orillia Dominion

Savings account number 452-666874

VISA account number 456-874-665403

Major Card account number \_\_\_\_\_

Other \_\_\_\_\_

Account number: C445577

Employer: Whitney Bank

Position: Teller

Length of time 4 years

Work phone: \_\_\_\_\_

### ABOUT YOUR (check one)

Co-applicant  Authorized user

Name: \_\_\_\_\_

Social Insurance number \_\_\_\_\_

Address: \_\_\_\_\_

Driver's licence number: \_\_\_\_\_

Street City

Province Postal Code

Relation to applicant: \_\_\_\_\_

Home Phone: \_\_\_\_\_

Work phone: \_\_\_\_\_

Employer: \_\_\_\_\_

Length of time: \_\_\_\_\_

Signature (s)

Janice B. Utley

01/12/02

Applicant

Date

Other signature (where needed)

Date

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Answer Key:

Missing information includes:

- Joint account is checked off, but there is no information for the other person
- Missing work phone number

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<b>Performance Descriptors</b>		<b>Needs Work</b>	<b>Completes task with support from practitioner</b>	<b>Completes task independently</b>
A2.3	<ul style="list-style-type: none"><li>performs complex searches using multiple search criteria</li></ul>			
	<ul style="list-style-type: none"><li>manages unfamiliar elements (e.g. vocabulary, context, topic) to complete tasks</li></ul>			
	<ul style="list-style-type: none"><li>integrates several pieces of information from documents</li></ul>			
	<ul style="list-style-type: none"><li>uses layout to locate information</li></ul>			
	<ul style="list-style-type: none"><li>makes inferences and draws conclusions from information displays</li></ul>			
B1.2	<ul style="list-style-type: none"><li>shows an awareness of factors that affect interactions, such as differences in opinions and ideas, and social, linguistic and cultural differences</li></ul>			

**This task:** was successfully completed \_\_\_ needs to be tried again \_\_\_

<b>Learner Comments</b>

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**Instructor (print)**

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**Learner Signature**