



Task Title: Write a Work Order/Invoice

OALCF Cover Sheet – Practitioner Copy

Learner Name: _____

Date Started (m/d/yyyy): _____

Date Completed (m/d/yyyy): _____

Successful Completion: Yes No

Goal Path: Employment Apprenticeship
Secondary School Post Secondary Independence

Task Description: Using role play the learner will complete the work order/invoice, using the information provided (by the practitioner in the role of customer).

Competency: A: Find and Use Information
B: Communicate Ideas and Information
C: Understand and Use Numbers
E: Manage Learning

Task Groups: A2: Interpret documents
B1: Interact with others
B3: Complete and create documents
C1: Manage money

Level Indicators:

- A2.2: Interpret simple documents to locate and connect information
- B1.1: Participate in brief interactions to exchange information with one other person
- B3.2: Use layout to determine where to make entries in simple documents

Task Title: Writing a Work Order_E_A2.2_B1.1_B3.2a_C1.2_E.1

- C1.2: Make low-level inferences to calculate costs and expenses that may include rates such as taxes and discounts

Performance Descriptors: See chart on last page

Materials Required:

- Practitioner and Learner instructions
- Sample work order/invoice
- Sample price list
- Pencil
- Skill-building activities include: multiplication of decimals, calculating percentages, addition of multiple digit numbers; understanding the parts of an invoice/work order; extracting necessary information from a customer to complete a work order (i.e. telephone messages)

Practitioner Instructions:

1. Make sure the learner understands the information and instructions for this task.
2. Go over the performance descriptors section with your learner to ensure that the learner understands what skills, knowledge or behaviours are being assessed by this task.
3. Discuss with the learner and decide what would be a reasonable length of time for the completion of this task. Record this on the assessment form.
4. When the learner has completed the task, provide a way for the learner to self-reflect on the experience. Complete the assessment form with the learner, enter the date completed, and note whether it was successful or needs to be tried again.
5. Make any adjustments to size of font or amount of text on a page that you feel is appropriate for this level and this learner.

Practitioner Information:

In this role-play situation, you, the practitioner, are a customer who comes into the learner's place of business to ask for a repair. This is the information you will need.

- You have a mirror that is broken, and the glass needs to be replaced.
- You need this as quickly as possible.
- You want to know how much will it cost.

Task Title: Writing a Work Order_E_A2.2_B1.1_B3.2a_C1.2_E.1

Give the following information when and if prompted:

- Your name is Philippa Madison
- Your address is 56 Willowdale Road, Tottenham, Ontario, L0G 1W0
- Your phone number is 936-3355 (area code 905). You have an answering machine at home.
- The size of the mirror frame is 20 inches by 28 inches.
- You plan to pay with Visa

Help Allowed:

- The student may ask questions to clarify information.
- The student may ask for the spelling of proper names.
- The student may take notes while you are talking and use them to calculate costs and write up the invoice.

Adaptation:

Conduct the initial contact with the student over the telephone. Make up a different scenario, with different materials/ products, and an appropriate invoice /bill form.

Learner Information and Tasks

Working with bills and invoices is one of the tasks you will face when you reach your goal of getting a job in the sales and service industry. This task will give you an opportunity to use several skills together and to see how they are used for preparing a bill for a customer.

In this activity, you will play the part of a clerk in the customer service department of the Bradford Glass Company. Your instructor will be a customer coming to Bradford Glass to get some help. Your job is to prepare a work order / invoice for the job. Here is a list of things that will help you as you work through this demonstration.

1. Ask questions of the customer to get the information you need.
2. You may ask your customer for the spelling of any proper names that you are not sure of.
3. You may take rough notes during or after the conversation with your customer.
4. You will need to be familiar with the company price list in order to answer questions the customer will ask.
5. Use the form provided to write up the work order/invoice.
6. When you have completed writing up the invoice, go over the invoice with your customer so that they understand the charges.

BRADFORD GLASS LTD. Box 1233 Bradford, Ontario, L9Z 2B7 (905) 775- 0000					WORK ORDER / INVOICE Number: 0217			
Customer Order #		Telephone			Fax		Date	
Name:								
Address:								
Postal Code								
Sold By	Cash	Charge Card	Cheque	Debit	C.O.D.	On Acct	Mdse ret	Paid out
Quantity		Description				Price		Amount
Special instructions All claims and returned goods must be accompanied by a paid bill						Subtotal		
						HST		
						TOTAL		
Received by:						Thank You		

BRADFORD GLASS LTD. Box 1233 Bradford, Ontario, L9Z 2B7

Price List – Window and Mirror Repairs

Labour costs: \$28.00/Hour

Parts	Size	Cost of Materials	Time Required (hours)
Glass sheets	8”X10”	\$4.60	1
	10”X14”	\$5.80	1
	18”X 24”	\$8.75	1.5
	24”x36”	\$15.95	2
	4’X8”	\$35.00	2
	8’x12’	\$45.00	3
Mirror sheets	8”X10”	\$6.80	1
	10”X14”	\$10.20	1
	18”X 24”	\$28.00	1.5
	24”x36”	\$48.00	2
	4’X8”	\$60.00	2
Wire and findings		\$5.60	

Learner's self reflection:

I listened carefully to what my customer wanted. Yes No

I took notes during the conversation. Yes No

I asked for all the details I needed. Yes No

I was able to answer any questions the customer asked. Yes No

I could re-read my notes after the conversation. Yes No

I was able to make up an invoice with all the relevant details. Yes No

The invoice was clear and neatly written. Yes No

Other comments:

Answer Key

*there may be some variation, depending on the questions that the learner asked

BRADFORD GLASS LTD. Box 1233 Bradford, Ontario, L9Z 2B7 (905) 775- 0000					WORK ORDER / INVOICE Number: 0217			
Customer Order #	Telephone 905-936-3355			Fax	Date (today's date)			
Name: Philippa Madison								
Address: 56 Willowdale Road, Tottenham, ON								
Postal Code LOG 1W0								
Sold By	Cash	Charge Card (Visa)	Cheque	Debit	C.O.D.	On Acct	Mdse ret	Paid out
Quantity	Description				Price	Amount		
1	Mirror Sheet – 24”x 36”				48.00	48.00		
2	Labour – cut to 20”x28” and install				28.00	56.00		
Special instructions Needs done ASAP Messages can be left on answering machine						Subtotal	104.00	
All claims and returned goods must be accompanied by a paid bill						HST	13.52	
						TOTAL	117.52	
Received by:							Thank You	

Performance Descriptors

Levels	Performance Descriptors	Needs Work	Completes task with support from practitioner	Completes task independently
A2.2	Extracts information from tables and forms			
	Uses layout to locate information			
	Makes connections between parts of documents			
	Makes low-level inferences			
B1.1	Chooses appropriate language in exchanges with clearly defined purposes			
	Participates in short, simple exchanges			
	Gives short, straightforward instructions or directions			
B3.2	Uses layout to determine where to make entries			
	Begins to make some inferences to decide what information is needed, where and how to enter the information			
	Makes entries using a limited range of vocabulary			
	Follows instructions on documents			
C1.2	Calculates using numbers expressed as whole numbers, fractions, decimals, percentages and integers			

Task Title: Writing a Work Order_E_A2.2_B1.1_B3.2a_C1.2_E.1

Levels	Performance Descriptors	Needs Work	Completes task with support from practitioner	Completes task independently
C1.2	Calculates percentages			
	Interprets and applies rates			
	Chooses and performs required operation(s); may make inferences to identify required operation(s)			
	Selects appropriate steps to reach solutions			
	Represents costs and rates using monetary symbols, decimals and percentages			
	Interprets, represents and converts amounts using whole numbers, decimals, percentages, ratios and simple, common fractions (e.g. $\frac{1}{2}$, $\frac{1}{4}$)			
	Uses strategies to check accuracy (e.g. estimating, using a calculator, repeating a calculation, using the reverse operation)			
E.1	Begins to monitor own learning			

Task Title: WritingaWorkOrder_E_A2.2_B1.1_B3.2a_C1.2_E.1

This task:

Was successfully completed

Needs to be tried again

Learner Comments:

Instructor (print):
