

This month, your Employer Evaluation will be your Educational Training Plan. This is SPECIFIC TO YOU, so you will need to get it from your Work-Based Learning Coordinator.

The Educational Training Plan will look similar to the format below. Your mentor should mark how well you’re doing in each category with a check mark. Then YOU and YOUR MENTOR and YOUR PARENT should sign and date the form. Return it to your WBL Coordinator by the monthly due date.

	1	2	3
Task 11 - Troubleshoot problems involving office equipment, such as computer hardware and software.		✓	

List any potential health/safety conditions related to this specific work assignment (Indicate NONE if no such conditions have been identified):

Special requirements expected of the student:

Student Signature: \_\_\_\_\_ Date: 10/26/15

Supervisor Signature: \_\_\_\_\_ Date: 10-27-15

Parent Signature: \_\_\_\_\_ Date: 10-27-15

### Educational Training Plan

Job Title: Office Assistant

Career Pathway: Entrepreneurship

Student Name: \_\_\_\_\_ School: West Hall High School

Type of Work-based Learning Placement: YAP

Employing Company Name: Sean Childers State Farm

Employing Company Address: 4977 Lanier Islands Parkway

Student Job Supervisor: Sean Childers - Phone: 678-541-2979 Cell: n/a

Student Job Mentor: Sean Childers - Phone: 678-541-2979 Cell: n/a

Occupational Goal: Insurance

Completed Coursework Related to Placement: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Enter the date that the student reaches the following level of competency:

1 = Very little or no skill; Needs close supervision to perform this task.

2 = Moderately competent; Some knowledge, but requires some supervision to perform this task.

3 = Proficient; Can perform this task with little or no supervision.

Student competency on all tasks should start at level 1 or 2 and be documented as 3 by the end of the experience.

PLEASE CHECK BOX			
	1	2	3
Task 1 - Answer telephones, direct calls and take messages.			✓
Task 2 - Communicate with customers, employees, and other individuals to answer questions, disseminate or explain information, take claim information and address complaints.			✓
Task 3 - Compile, copy, sort, and file records of office activities, business transactions, and other activities.			✓
Task 4 - Complete and mail bills, contracts, policies, invoices, or checks.			✓
Task 5 - Deliver messages and run errands.			✓
Task 6 - Inventory and order materials, supplies, and services.		✓	
Task 7 - Open, sort and route incoming mail, answer correspondence, and prepare outgoing mail.			✓
Task 8 - Operate office machines, such as photocopiers and scanners, facsimile machines, voice mail systems and personal computers.			✓
Task 9 - Complete work schedules, manage calendars and arrange appointments.		✓	
Task 10 - Take customer information for insurance quotes. Demonstrate knowledge of industry to ask all of the right questions.			✓

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