

**Checklist**  
**Describing training functions for advance approval of vocational credit transfer for**  
**Clerical worker, specializing in Administration**

Name of trainee:

Address:

Name of school/college in Denmark:

Name of company:

Address:

Telephone:

**PLEASE FILL IN PRIOR TO EMPLOYMENT**

Period of employment:      from: \_\_\_\_\_ to: \_\_\_\_\_

In the work practice period, the trainee must be trained within the vocational areas described on the following pages.

The company confirms that training will take place in accordance with the specifications given.

\_\_\_\_\_  
Date and signature

Please send the checklist to OPU-Sekretariatet, Bindslevs Plads 1, DK-8600 Silkeborg, [piu@piu.dk](mailto:piu@piu.dk)

**PLEASE FILL IN UPON COMPLETION OF THE EMPLOYMENT**

Upon completion of the trainee's employment period, the trainee must present the checklist once more to the company for final confirmation.

It is hereby confirmed that the training has been provided in accordance with the specifications.

\_\_\_\_\_  
Date and company signature

\_\_\_\_\_  
Signature of trainee

Please hand over the checklist to the trainee.

# Checklist for Clerical Worker, Specializing in Administration

## Introduction

When the trainee starts working for you he or she must receive a brief introduction to the company:

- Company policies and aims
- Company organisation
- Staff policies
- Information about products, suppliers, customers, sales conditions and customer service policy
- Information about the economy in the company – factors that contribute to the costs and benefits in the trainee's working functions.

The introduction enables the trainee to act in accordance with company practice.

The introduction is compulsory and you hereby confirm that the trainee has received or will receive the introduction.

Date:

Signature and company stamp:

Please find an overview of the possible work functions below. The three main fields of the education are: Communication and Service, Administration and Accounting.

The required training goals in the boxes below are based on a 12 month placement. Should the trainee stay for a shorter period of time, the number of training goals can be adjusted accordingly.

The compulsory work functions are marked in grey.

## Communication and service

*The 2 already ticked functions are compulsory. Please tick 3 more functions in this box.*

1	Planning and carrying out administrative tasks related to meetings, conferences, calendars etc.	x
2	Administrative tasks relating to communication (e.g. reception, telephone, mail)	x
3	Taking notes and writing minutes	
4	In-house information tasks (e.g. maintenance of the company's information systems, mails etc.)	
5	Customer service and sale	
6	Presentation programme	
7	Administrative tasks related to advertising and marketing (e.g. customer events, information meetings)	
8	Maintenance of the company's homepage, e-trade	

## Administrative tasks

*The 3 already ticked functions are compulsory. Please tick 4 more functions in this box.*

<b>9</b>	Planning and prioritizing own work schedule	<b>x</b>
<b>10</b>	Everyday administrative tasks (e.g. registration, filing) using relevant information technology	<b>x</b>
<b>11</b>	Everyday registration functions	<b>x</b>
<b>12</b>	Electronic bookkeeping-system	
<b>13</b>	Advanced retrieving of and reporting on data from database	
<b>14</b>	Update customer- and product information	
<b>15</b>	Administrative tasks relating to written procedures, laws, contractual and legal matters	
<b>16</b>	Planning and carrying out administrative tasks in relation to meetings or conferences	
<b>17</b>	Administrative tasks as secretary to board of directors, management or staff member	
<b>18</b>	Functions related to sale; making offers, invoicing, calculation	
<b>19</b>	Functions in connection with purchasing, e.g. placing orders, confirmation handling	
<b>20</b>	Everyday tasks in connection with the use and maintenance of office technology	
<b>21</b>	Functions connected to the introduction of new working methods and processes	
<b>22</b>	Administrative tasks relating to project management	

## Accounting and financial management functions

*The already ticked function is compulsory. Please tick 1 more function in this box.*

<b>23</b>	Handling of payments	<b>x</b>
<b>24</b>	Closing of annual accounts	
<b>25</b>	Settling of accounts with public authorities, including VAT, tax, duties and excise tax	
<b>26</b>	Salaries' account	
<b>27</b>	Preparation of interim reports, financial reports and statistics	
<b>28</b>	Preparing key figures	
<b>29</b>	Financial forecasting and monitoring	
<b>30</b>	Cash balance and cash accounts	