



Task Title: Complete Employee Theft Report

OALCF Cover Sheet – Practitioner Copy

Learner Name: _____

Date Started: _____

Date Completed: _____

Successful Completion: Yes No

Goal Path: Employment Apprenticeship

Secondary School Post Secondary Independence

Task Description: In this task, the learner will read a case study about an employee theft and complete the proper form.

Main Competency/Task Group/Level Indicator:

- Find and Use Information/Read continuous text/A1.2
- Communicate Ideas and Information/Complete and create documents/B3.2a

Materials Required:

- Pen/pencil and paper and/or digital device

Task Title: CompleteEmployeeTheftReport_E_A1.2_B3.2a

Learner Information

Employees who work in retail need to be familiar with workplace reports and protocols related to reporting theft.

Read the **Case Study – Theft at Quick Market**.

Review the **Employee Theft Incident Report**.

Case Study—Theft at Quick Market

Carlos Ortez has been working at Quick Market for almost a year. He works as a part-time sales clerk in the evenings and on weekends. His main job duties are to serve customers at the counter, restock shelves with products, keep the store clean and organized, keep track of inventory, and balance the cash till at the end of the night.

Most nights he works with another man named Walter Jones, who is also a sales clerk. On weekends he works with either Sandra Shaw, who is a supervisor, or Eric Chang who is a sales clerk.

On the night of January 24, Carlos was working with Walter and the store was very busy. There were three customers waiting in line. Walter was restocking the cigarette shelves and Carlos was working the cash. At the beginning of the night, there were ten cases of cigarettes that needed to be opened and put on the shelves. When Carlos was done serving the customers, he helped Walter with the shelves. He noticed that there were only eight cases opened and put away. When Carlos checked the inventory at the end of the night, only one case was sold. This means there was a case missing.

In the past, Carlos has seen Walter steal a chocolate bar and a magazine. He didn't report these thefts to the supervisor because he thought it wasn't really a big deal. This time, the missing cigarettes are worth over \$100.

There is a store policy that states all employee thefts must be reported to the supervisor. Employees are not to confront the person who has committed the theft for their own safety. An Employee Theft Incident Form needs to be filled out and submitted to the supervisor. The supervisor will conduct the investigation and handle any outcomes related to involving the police or disciplining the employee.

Before closing the store for the night Carlos took an Incident Reporting Form home with him to complete. As he said goodbye to Walter and watched him get in his car, he noticed the missing case of cigarettes in his back seat.

Employee Theft Incident Report

Date and Time Incident Occurred: _____
Where Incident Occurred: _____

REPORTING PARTY

Who is reporting the claim? _____

Employee title: _____

INCIDENT REPORT

Who is being reported? _____

Employee title: _____

Describe the incident: _____

Signature of Employee Reporting Incident

Date

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Work Sheet

Task 1: Based on the case study, fill out the Employee Theft Report provided as Carlos.

Answer: No written response required here.

Task completed: Yes: No

Answers

Employee Theft Incident Report

Date and Time Incident Occurred: January 24

Where Incident Occurred: Quick Market

REPORTING PARTY

Who is reporting the claim? Carlos Ortez

Employee title: Sales Clerk

INCIDENT REPORT

Who is being reported? Walter Jones

Employee title: Sales Clerk

Describe the incident:

After I helped customers, I went to help Walter stack the shelves. There were ten cases of cigarettes that needed to be placed on the shelves, but I noticed that there were only eight being restocked. I checked our sales for the night and only one case was sold.

When Walter and I were leaving for the night, I saw a case of cigarettes in Walter's car.

I know I should have reported this to management when it occurred, but I did not because it was a small amount: Several weeks ago, I also observed Walter stealing a chocolate bar and a magazine.

C Ortez

January 25, 2024

Signature of Employee Reporting Incident

Date

Performance Descriptors

Levels	Performance Descriptors	Needs Work	Completes task with support from practitioner	Completes task independently
A1.2	scans text to locate information			
	locates multiple pieces of information in simple texts			
	makes low-level inferences			
	makes connections between sentences and between paragraphs in a single text			
	follows the main events of descriptive, narrative and informational text			
B3.2a	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			
	follows instructions on documents			

This task: Was successfully completed Needs to be tried again

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Learner Comments:

Instructor (print):

Learner (print):
