

Task Title: Starting a Bank Account

# 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:** Learners will complete a form based on finances and   
 their future plans.

**Competency:** B: Communicate Ideas and Information

E: Manage Learning

**Task Groups:** B1: Interact with Others

B3: Complete and create documents

E.2: N/A

**Level Indicators:**

* B1.2: Initiate and maintain interactions with one or more persons to discuss, explain or exchange information and opinions
* B3.3a: Decide what, where, and how to enter information in somewhat complex documents
* E.2: Set realistic short- and long-term goals, use a limited number of learning strategies and monitor own learning

**Performance Descriptors:** See chart on the last page

**Materials Required:**

* Decide whether interactions will be in a small group or one on one with the instructor
* Pencil or pen

**Notes for instructors/facilitators:**

Review individually

* Discussions with the learner will be important for the circles section…maybe it could be done in a pair with another learner
* Learner can start with the checklist independently, unless literacy levels are lower

# Learner Information and Tasks

When opening an account at Libro you will be asked to fill in a Prosperity Planner. Look at the “My Prosperity Planner.”

**Task 1:** Fill out the Prosperity Planner

**Task 2:** Discuss the Prosperity Planner with your Instructor

Diagram

Description automatically generated

# Performance Descriptors

| Levels | Performance Descriptors | Needs Work | Completes task with support from practitioner | Completes task independently |
| --- | --- | --- | --- | --- |
| B1.2 | shows an awareness of factors that affect interactions, such as differences in opinions and ideas, and social, linguistic, and cultural differences |  |  |  |
|  | demonstrates some ability to use tone appropriately |  |  |  |
|  | uses strategies to maintain communication, such as encouraging responses from others and asking questions |  |  |  |
|  | speaks or signs clearly in a focused and organized way |  |  |  |
|  | rephrases to confirm or increase understanding |  |  |  |
|  | uses and interprets non-verbal cues (e.g. body language, facial expressions, gestures |  |  |  |
| B3.3a | uses layout to determine where to make entries |  |  |  |
|  | makes inferences to decide what, where, and how to enter information |  |  |  |
| E.2 | sets realistic short-and long-term goals |  |  |  |
|  | identifies steps required to achieve goals |  |  |  |
|  | identifies barriers to achieving goals |  |  |  |
| E.2 | begins to adjust goals, activities, and timelines to address obstacles to achieving goals |  |  |  |
|  | sequences activities in multi-step tasks |  |  |  |
|  | begins to identify how skills and strategies can transfer to different contexts |  |  |  |
|  | identifies multiple sources of information to complete tasks |  |  |  |

This task:

Was successfully completed Needs to be tried again

Learner Comments:

Instructor (print): Learner Signature