

OALCF Task Cover Sheet

Task Title: Complete an Employee Theft Report

Learner Name:	
Date Started:	Date Completed:
Successful Completion: Yes ___ No ___	
Goal Path: Employment <input checked="" type="checkbox"/> Apprenticeship ___ Secondary School ___ Post Secondary ___ Independence ___	
Task Description: Employees who work in retail need to be familiar with workplace reports and protocols related to reporting theft. In this task the learner will read a case study about an employee theft and complete the proper form.	
Competency: A. Find and Use Information B. Communicate Ideas and Information	Task Group(s): A1: Read continuous text A2: Interpret documents B3: Complete and create documents
Level Indicators: A1.2: Read texts to locate and connect ideas and information A2.2: Interpret simple documents to locate and connect information B3.2a: Use layout to determine where to make entries in simple documents	
Performance Descriptors: see chart on last page	
Materials Required: <ul style="list-style-type: none">• Case study—Theft at Quick Market• Pen/pencil• Employee Theft Incident Report	

Instructor Preparation: Distribute copies of the case study Theft at Quick Market and the Employee Theft Incident Report. If necessary, read the case study with the learner.

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

Task 1: Using the information from the case study, fill in the missing information in the box at the top of the Employment Theft Report.

Task 2: Locate the place on the form where Carlos enters his name as the Reporting Party. Print Carlos' name in that location.

Task 3: Locate the place on the form where Walter's name needs to be entered as the person being reported. Print Walter's name in that location.

Task 4: What evidence does Carlos have that Walter stole the cigarettes? Write that information in the place on the form where it asks for evidence.

Task 5: Whose two signatures are required on the form? Print their names on the signature lines.

Case Study—Theft at Quick Market

Carlos Ortiz 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. Walter is 36 years old and is married with two young children. On weekends he works with either Sandra Shaw, who is in her 30s and has been working at the store for many years, or Eric Chang, a part-time university student in his 20s. Sandra is also the supervisor.

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 re-stocking 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

What type of case is this? Security--Theft---Internal (security)

Date and Time Incident Reported: January 25

Date Incident Occurred: _____

Where Incident Occurred: _____

REPORTING PARTY

Who is reporting the claim? _____

Employee title: _____

Phone: _____

E-mail: _____

Address: _____

INCIDENT REPORT

Who is being reported? _____

Employee title: _____

Describe the incident: _____

List any evidence you have to verify this claim: _____

Signature Employee Reporting Incident

Signature Supervisor Receiving Report

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Performance Descriptors		Needs Work	Completes task with support from practitioner	Completes task independently
A1.2	<ul style="list-style-type: none"> scans text to locate information 			
	<ul style="list-style-type: none"> locates multiple pieces of information in simple texts 			
	<ul style="list-style-type: none"> makes low-level inferences 			
A2.2	<ul style="list-style-type: none"> performs limited searches using one or two search criteria 			
	<ul style="list-style-type: none"> uses layout to locate information 			
	<ul style="list-style-type: none"> makes connections between parts of documents 			
B3.2a	<ul style="list-style-type: none"> uses layout to determine where to make entries 			
	<ul style="list-style-type: none"> begins to make some inferences to decide what information is needed, where and how to enter the information 			
	<ul style="list-style-type: none"> follows instructions on documents 			

This task: was successfully completed____ needs to be tried again____

Learner Comments

Instructor (print)

Learner Signature