**Assistive Technology Training Task List Assessment Form**

January 2015

This form is designed to assist Assistive technology trainers in providing concise and accurate information to SSB counselors as to what material has been covered during a client’s technology training. The task list contains a table for filling out client information and is broken down in to categories that can be navigated by heading. Under each category is a table containing a header row describing what information is being requested along with a list of tasks pertaining to that specific group. The following instructions will assist you in how to fill out this form.

1. Complete the Pre Score and Pre Comments columns prior to starting training.
2. Complete the Final Score and Final Comments columns once all training is finished.

Rate each task using the following scale:

1. Subject area does not apply to student; magnification for a totally blind student.
2. Student has no experience in this subject area.
3. Student has some knowledge of subject area but will need significant training to become independent. Student is reliant on repeated verbal and/or physical prompts to complete tasks.
4. Student has knowledge of the subject area and is semi-independent with verbal prompts. Student can demonstrate task with the instructor available at all times for questions and prompts.
5. Student has in depth knowledge of subject and can perform most tasks with no prompting from the instructor. Student might be uncertain how to proceed on a few tasks and feels more comfortable with instructor available to answer questions.
6. Student demonstrates complete independence on tasks. Student has in depth knowledge of subject area and feels comfortable completing tasks without the presence of the instructor. Student can complete tasks efficiently, with minimal errors.

|  |  |
| --- | --- |
| **Instructor Name** |  |
| **Student Name** |  |
| **Pre-Assessment Date** |  |
| **Final Assessment Date** |  |

# Assistive Technology Resource Guide

(1 to 2 hours)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Task | Pre Score | Pre Comments | Final Score | Final Comments |
| Find and Open AT Resource Guide |  |  |  |  |
| Locate Device Serial Numbers |  |  |  |  |
| Locate software Serial Numbers/Product Keys |  |  |  |  |
| Back up AT Resource Guide and Serial Numbers |  |  |  |  |
| Navigate AT Resource guide with Screen Reader or Magnifier |  |  |  |  |
| Locate Hardware and Software Technical Support Contact Information |  |  |  |  |
| Review the Technical Support Process |  |  |  |  |
| Identify Additional Sections and Available Information in Resource Guide |  |  |  |  |

# Using a Screen Reader

(15 to 30 hours)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Task | Pre Score | Pre Comments | Final Score | Final Comments |
| Screen and Document Reading Commands |  |  |  |  |
| Dialog Box Reading Commands |  |  |  |  |
| Different Cursors and Their Commands |  |  |  |  |
| Adjusting Screen Reader Settings |  |  |  |  |
| Speech Settings |  |  |  |  |
| Screen Echo |  |  |  |  |
| Keyboard Echo |  |  |  |  |
| Verbosity Settings |  |  |  |  |
| Switching Settings |  |  |  |  |
| Changing Pronunciation |  |  |  |  |
| Saving Settings |  |  |  |  |
| Restoring Default Settings |  |  |  |  |
| Different Keyboard Layouts |  |  |  |  |
| Using Help Features |  |  |  |  |
| Keyboard Help |  |  |  |  |
| Screen Sensitive Help |  |  |  |  |
| Evoking Help |  |  |  |  |
| Windows Help |  |  |  |  |
| App Specific Help |  |  |  |  |
| Using Items in Help Menu |  |  |  |  |
| Other |  |  |  |  |

# Windows XP/Vista/7/8

(30 to 50 hours)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Task | Pre Score | Pre Comments | Final Score | Final Comments |
| Start and Exit Programs |  |  |  |  |
| Switch Between Programs |  |  |  |  |
| Menu Bar & Pulldown Navigation |  |  |  |  |
| Dialog Box Navigation |  |  |  |  |
| File Management |  |  |  |  |
| Browsing Files & Folders Using My Computer & Windows Explorer |  |  |  |  |
| Adjusting View Settings |  |  |  |  |
| Open Files and Folders |  |  |  |  |
| Move, Copy, & Delete Files & Folders |  |  |  |  |
| Search for Files and Folders |  |  |  |  |
| Restore Files & Folders from Recycle Bin |  |  |  |  |
| Empty Recycle bin |  |  |  |  |
| Printing |  |  |  |  |
| Setup a Printer |  |  |  |  |
| Print a File |  |  |  |  |
| Manage a Print Queue |  |  |  |  |
| Using Task Tray |  |  |  |  |
| Computer Maintenance |  |  |  |  |
| Update & Use Virus Checker |  |  |  |  |
| Update & Use Anti-Spyware Program |  |  |  |  |
| Obtain & Install Windows Updates |  |  |  |  |
| Run disk Maintenance Utilities like Disk Clean-up and Defrag |  |  |  |  |
| Other |  |  |  |  |

# Windows 7/8 for Upgrading Windows Users

(5 to 10 hours)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Task | Pre Score | Pre Comments | Final Score | Final Comments |
| Settings |  |  |  |  |
| Windows Explorer/My Computer |  |  |  |  |
| Control Panel |  |  |  |  |
| Other Differences |  |  |  |  |
| Other |  |  |  |  |

# **Microsoft Word**

(25 to 50 hours)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Task | Pre Score | Pre Comments | Final Score | Final Comments |
| Start & Exit the program |  |  |  |  |
| Save & Retrieve Documents from Documents Folder |  |  |  |  |
| Save & Retrieve Documents from Other Folders |  |  |  |  |
| Entering Text |  |  |  |  |
| Moving the Cursor |  |  |  |  |
| Editing Text |  |  |  |  |
| Selecting Text |  |  |  |  |
| Cut, copy, and Paste Text |  |  |  |  |
| Formatting Text |  |  |  |  |
| Align Text |  |  |  |  |
| Adjust Font & font Size |  |  |  |  |
| Bold, Underline, & Italicize Text |  |  |  |  |
| Identify Font & formatting |  |  |  |  |
| Modify Default Formatting Settings |  |  |  |  |
| Using Spell check |  |  |  |  |
| Using Grammar Check |  |  |  |  |
| Using Find, Fine & Replace |  |  |  |  |
| Bulleted & Numberd Lists, Outlines |  |  |  |  |
| Working with Tables |  |  |  |  |
| Print documents |  |  |  |  |
| Writing Term Papers (For Students) |  |  |  |  |
| Create title page |  |  |  |  |
| Insert Foot & end Notes |  |  |  |  |
| Create Headers & Footers |  |  |  |  |
| Insert page Numbers |  |  |  |  |
| Printing |  |  |  |  |
| Setup Mail Merge |  |  |  |  |
| Converting Between Versions of MS Word |  |  |  |  |
| Other |  |  |  |  |

# Internet Explorer

(20 to 50 hours)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Task | Pre Score | Pre Comments | Final Score | Final Comments |
| Understanding Wired & Wireless Internet Connections |  |  |  |  |
| Define Common Terms & concepts |  |  |  |  |
| Online Safety |  |  |  |  |
| Reading & Navigating Web pages |  |  |  |  |
| Filling Out Online Forms |  |  |  |  |
| Using a Search Engine |  |  |  |  |
| Dealing with CAPTCHA’s |  |  |  |  |
| Using a Resume Posting Site like MN works |  |  |  |  |
| Using Job Search Site like Monster.com |  |  |  |  |
| Using Book Download Sites like Bookshare & learning Ally |  |  |  |  |
| Online Banking Sites |  |  |  |  |
| Using Social networking Sites like Facebook & Linked-In |  |  |  |  |
| Using Twitter |  |  |  |  |
| Other |  |  |  |  |

# Microsoft Excel

(25 to 50 hours)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Task | Pre Score | Pre Comments | Final Score | Final Comments |
| Move Around in a Spreadsheet |  |  |  |  |
| Entering & Editing Information |  |  |  |  |
| Selecting Ranges |  |  |  |  |
| Cut, Copy, & Paste Formulas |  |  |  |  |
| Create & Edit Formulas |  |  |  |  |
| Insert & Delete Rows & Columns |  |  |  |  |
| Add, Move, and Delete Worksheets |  |  |  |  |
| Creating Charts |  |  |  |  |
| Format Spreadsheets for Printing |  |  |  |  |
| Using Screen Reader Help Features to learn Excel Commands |  |  |  |  |
| Techniques for Reading Unfamiliar Spreadsheets |  |  |  |  |
| Other |  |  |  |  |

# E-Mail Programs such as Microsoft Outlook

(15 to 50 hours – 15 hours approximately for basic E-mail)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Task | Pre Score | Pre Comments | Final Score | Final Comments |
| E-mail |  |  |  |  |
| E-mail Safety Topics |  |  |  |  |
| Viruses |  |  |  |  |
| Chain Messages |  |  |  |  |
| Hoaxes, Scams, and Phishing |  |  |  |  |
| Reading Messages |  |  |  |  |
| Replying to Messages |  |  |  |  |
| Forwarding messages |  |  |  |  |
| Deleting Messages |  |  |  |  |
| Open, Save, & Save Attachments |  |  |  |  |
| Organize messages into Folders |  |  |  |  |
| Saving Messages |  |  |  |  |
| Search for Messages |  |  |  |  |
| Work with File Attachments |  |  |  |  |
| Other E-mail Programs |  |  |  |  |
| Web-based E-mail like Gmail & Hotmail |  |  |  |  |
| Other E-mail clients like Eudora & Thunderbird |  |  |  |  |
| Calendar |  |  |  |  |
| Reading the Calendar |  |  |  |  |
| Move Around the Calendar |  |  |  |  |
| Reading Appointments |  |  |  |  |
| Create & Edit Appointments |  |  |  |  |
| Create Recurring Appointments |  |  |  |  |
| Delete Appointments |  |  |  |  |
| Setting Reminders |  |  |  |  |
| Contacts |  |  |  |  |
| Review Contacts |  |  |  |  |
| Create & Edit Contacts |  |  |  |  |
| Delete Contacts |  |  |  |  |
| Search for Contacts |  |  |  |  |
| Tasks |  |  |  |  |
| Review Tasks |  |  |  |  |
| Create & Edit Tasks |  |  |  |  |
| Organize Tasks |  |  |  |  |
| Set Reminders |  |  |  |  |
| Other |  |  |  |  |

# Microsoft PowerPoint

(10 to 30 hours)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Task | Pre Score | Pre Comments | Final Score | Final Comments |
| Read/Navigate Presentations |  |  |  |  |
| Switch Between & Reading Panes |  |  |  |  |
| Move to Desired Slide |  |  |  |  |
| Read a Slideshow |  |  |  |  |
| Create & Edit Presentations |  |  |  |  |
| Create Slides |  |  |  |  |
| Add Slides to a Presentation |  |  |  |  |
| Move Slides |  |  |  |  |
| Use Animations |  |  |  |  |
| Delete Slides |  |  |  |  |
| Other |  |  |  |  |

# Kurzweil 1000/Open Book

(10 to 20 hours)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Task | Pre Score | Pre Comments | Final Score | Final Comments |
| Scan & Read Print Documents |  |  |  |  |
| Start & Cancel a Scan |  |  |  |  |
| Start & Stop Reading |  |  |  |  |
| Read by Line, Sentence, word, Letter, etc. |  |  |  |  |
| Navigate & Read Tables |  |  |  |  |
| Erase Pages |  |  |  |  |
| Use Help Key to Learn Other Key Functions |  |  |  |  |
| Scan Currency |  |  |  |  |
| Manually Edit Text & Correct Errors |  |  |  |  |
| Save & Retrieve Documents in General Folder |  |  |  |  |
| Working with Folders |  |  |  |  |
| Switch Between Folders |  |  |  |  |
| Create New Folder |  |  |  |  |
| Dlete a Folder |  |  |  |  |
| Save & Retrieve Documents in Other Folders & Formats |  |  |  |  |
| Optimizing Scanning Settings |  |  |  |  |
| Adjusting Settings |  |  |  |  |
| Column Identification |  |  |  |  |
| Speech Settings |  |  |  |  |
| Scanning Settings |  |  |  |  |
| Recognition Settings |  |  |  |  |
| Display Settings |  |  |  |  |
| General Settings |  |  |  |  |
| Save & Retrieve Settings |  |  |  |  |
| Scan & Read PDF files |  |  |  |  |
| Using Help Features |  |  |  |  |
| Using Help Key |  |  |  |  |
| Using F1 Key |  |  |  |  |
| Access, Read, & Navigate manual |  |  |  |  |
| Search for Book & magazines Online |  |  |  |  |
| Use Fax & Photo Copier |  |  |  |  |
| Exporting Scanned Material to MP3 Format |  |  |  |  |
| Using Study Tools (for Students) |  |  |  |  |
| Printing in Braille |  |  |  |  |
| Other |  |  |  |  |

# Microsoft Office 2007, 2010, 2013 for Office 2003 Users

(5 to 10 hours)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Task | Pre Score | Pre Comments | Final Score | Final Comments |
| Access & navigate the Ribbon |  |  |  |  |
| Access Help Information |  |  |  |  |
| Learning Frequently Used Keyboard Shortcuts |  |  |  |  |
| Saving in Office 2003 Formats |  |  |  |  |
| Other |  |  |  |  |

# Using Screen Magnification

(15 to 30 hours)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Task | Pre Score | Pre Comments | Final Score | Final Comments |
| Intro to Magnification |  |  |  |  |
| Launch ZoomText or Magic |  |  |  |  |
| Orient to User Interface |  |  |  |  |
| Adjust magnification |  |  |  |  |
| Window Types |  |  |  |  |
| Deactivate/Activate |  |  |  |  |
| Magnification |  |  |  |  |
| Tracking & Alignment |  |  |  |  |
| Enhancements: Pointer, Cursor, color, Focus, & Font |  |  |  |  |
| Save Settings to Default or Other config File |  |  |  |  |
| Panning |  |  |  |  |
| Speech |  |  |  |  |
| Synthesizer Settings |  |  |  |  |
| Echo: Keyboard, Mouse, program, Verbosity |  |  |  |  |
| Readers & Settings |  |  |  |  |
| ZoomText: SpeakIt Tool, Reading Zones |  |  |  |  |
| Misc. Options |  |  |  |  |
| Application Settings |  |  |  |  |
| Freeze Window, QuickView Frame, View Locator |  |  |  |  |
| Finders: Desktop, Text, Web |  |  |  |  |
| Program Settings/Preferences |  |  |  |  |
| Assigning Hotkeys |  |  |  |  |
| Help Menu & Help System |  |  |  |  |
| Program Updates |  |  |  |  |
| Other |  |  |  |  |

# Note Takers

(20 to 50 hours)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Task | Pre Comments | Post Score | Final Score | Final Comments |
| Orientation to the Unit |  |  |  |  |
| Keyboard |  |  |  |  |
| Menus & Commands |  |  |  |  |
| Navigating with Speech and/or Braille |  |  |  |  |
| Settings & Configuration |  |  |  |  |
| System Settings |  |  |  |  |
| Speech Settings |  |  |  |  |
| Braille Settings |  |  |  |  |
| Other Settings |  |  |  |  |
| Using Applications |  |  |  |  |
| Word Processing |  |  |  |  |
| E-mail |  |  |  |  |
| Internet Browsing |  |  |  |  |
| Calendar & Planner |  |  |  |  |
| Contacts |  |  |  |  |
| Tasks |  |  |  |  |
| PowerPoint Presentations |  |  |  |  |
| Media Player |  |  |  |  |
| Messaging |  |  |  |  |
| Recording Audio |  |  |  |  |
| Stopwatch |  |  |  |  |
| Calculator |  |  |  |  |
| Radio |  |  |  |  |
| Other Apps & Utilities |  |  |  |  |
| Connections & Storage |  |  |  |  |
| Types of Connections (USB, Wireless, Etc.) |  |  |  |  |
| Storage Cards (Compact Flash, SD) |  |  |  |  |
| Storing, moving, converting Files |  |  |  |  |
| Print Vs Braille Files |  |  |  |  |
| Sync to Desktop |  |  |  |  |
| What is Sync |  |  |  |  |
| Setting up Computer & Note Taker |  |  |  |  |
| Connections |  |  |  |  |
| Syncing Files, Calendars, Contacts, Etc. |  |  |  |  |
| Printing |  |  |  |  |
| Printing in Ink |  |  |  |  |
| Printing in Braille |  |  |  |  |
| Other |  |  |  |  |

# Portable DAISY Players: VR Stream, BookSense, Etc

(5 to 20 hours)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Task | Pre Score | Pre Comments | Final Score | Final Comments |
| Orientation to Device |  |  |  |  |
| Explanation of DAISY Books |  |  |  |  |
| Using the Controls |  |  |  |  |
| Playback |  |  |  |  |
| Adjusting Settings: Volume, tone, Speed, etc. |  |  |  |  |
| Navigating within a Book |  |  |  |  |
| Obtaining & Transferring Books |  |  |  |  |
| Sources of Books |  |  |  |  |
| SSB on CD |  |  |  |  |
| Learning Ally on CD |  |  |  |  |
| SSB Download |  |  |  |  |
| Learning Ally Download |  |  |  |  |
| NLS on Cartridge |  |  |  |  |
| NLS Download |  |  |  |  |
| Bookshare Download Only |  |  |  |  |
| Transferring Books to Device |  |  |  |  |
| From CD: Locating & Copying Data |  |  |  |  |
| From Downloading: Locating Unzipping, & Copying Data |  |  |  |  |
| Using download Management Software (If Available) |  |  |  |  |
| Learning Ally download Manager |  |  |  |  |
| Humanware Companion |  |  |  |  |
| BookPort Transfer |  |  |  |  |
| Other Tasks |  |  |  |  |
| Obtaining & Installing Authorization Keys |  |  |  |  |
| Learning Ally |  |  |  |  |
| NLS Updating Firmware |  |  |  |  |
| Other |  |  |  |  |

# Smart Phones/PDA’s

(15 to 30 hours)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Task | Pre Score | Pre Comments | Final Score | Final Comments |
| Orientation to Device |  |  |  |  |
| Buttons |  |  |  |  |
| Slots, Cameras, & Jacks |  |  |  |  |
| Cards, Chargers, & Other Peripherals |  |  |  |  |
| Using Screen Reader (Talks or MobileSpeak) |  |  |  |  |
| Making & Receiving Calls |  |  |  |  |
| Contacts |  |  |  |  |
| Text Messages |  |  |  |  |
| Calendar |  |  |  |  |
| E-mail |  |  |  |  |
| Internet |  |  |  |  |
| Sync with PC |  |  |  |  |
| Initiating Other Apps: KNFB Reader, Wayfinder Access |  |  |  |  |
| Other |  |  |  |  |

# Apple iPhone/iPad/iPod touch

(15 to 30 hours)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Task | Pre Score | Pre Comments | Final Score | Final Comments |
| Orientation to Device |  |  |  |  |
| Touch Screen |  |  |  |  |
| Buttons & Switches |  |  |  |  |
| Slots, Cameras, & Jacks |  |  |  |  |
| Cables, Cases, & Other Peripherals |  |  |  |  |
| Using VoiceOver or Zoom |  |  |  |  |
| Initiating & Configuring Accessibility |  |  |  |  |
| Gestures & Other Commands |  |  |  |  |
| Entering Data |  |  |  |  |
| Making & Receiving Calls |  |  |  |  |
| Contacts |  |  |  |  |
| Text Messages |  |  |  |  |
| Calendar |  |  |  |  |
| E-mail |  |  |  |  |
| Internet |  |  |  |  |
| External Keyboards & Braille Displays |  |  |  |  |
| Using iTunes |  |  |  |  |
| Working with iTunes |  |  |  |  |
| App Store |  |  |  |  |
| iBook Store |  |  |  |  |
| Other Apps |  |  |  |  |
| Other |  |  |  |  |

# Handheld OCR (KNFB Reader Mobile)

(5 to 20 hours)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Task | Pre Score | Pre Comments | Final Score | Final comments |
| Orientation to Device |  |  |  |  |
| Taking a Picture |  |  |  |  |
| Arranging Environment |  |  |  |  |
| Lining Up |  |  |  |  |
| Field of View Report |  |  |  |  |
| Using tilt Feedback |  |  |  |  |
| Processing Picture & Reading Text |  |  |  |  |
| Re-Processing Image |  |  |  |  |
| Navigating Text |  |  |  |  |
| Saving Text |  |  |  |  |
| Settings |  |  |  |  |
| Identifying Currency |  |  |  |  |
| File Management |  |  |  |  |
| Language Translation |  |  |  |  |
| Using documentation |  |  |  |  |
| On the Phone |  |  |  |  |
| On CD |  |  |  |  |
| Printed Documentation |  |  |  |  |
| Maintaining & Upgrading Reader |  |  |  |  |
| Other |  |  |  |  |

# Deaf-Blind Communicator (DBC)

(10 to 20 hours)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Task | Pre Score | Pre Comments | Final Score | Final Comments |
| Orientation to Device & Software |  |  |  |  |
| Setting Up Braille Note & DBC |  |  |  |  |
| Face to Face Orientation & Settings |  |  |  |  |
| DBC to DBC |  |  |  |  |
| DBC to Companion |  |  |  |  |
| DBC to PC |  |  |  |  |
| TT Orientation & Setup |  |  |  |  |
| Incoming Calls |  |  |  |  |
| Ansering Live |  |  |  |  |
| Answering Machine |  |  |  |  |
| Outgoing Calls |  |  |  |  |
| From Address Book |  |  |  |  |
| To Relay Service |  |  |  |  |
| Other |  |  |  |  |

# Student Specific Tasks

(10 to 20 hours)
Please indicate any additional tasks not covered in the above sections here. These tasks could be advanced program features, class or job specific software training, etc.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Task | Pre Score | Pre Comments | Final Score | Final Comments |
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