Assessment Guidance for SVQ3 Business and Administration SCQF level 6 (GK6Y 23)

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History of changes

It is anticipated that changes will take place during the life of the qualification, and this section will record these changes. This document is the latest version and incorporates the changes summarised below.

Edition number	Description	Date	Authorised by
2	Clarification of rules of combination regarding IT and Finance Units.	March 2016	Qualifications Officer
3	Updated with enhanced guidance on preparing, planning and carrying out assessment.	August 2017	Qualifications Officer
4	Correction to unit H989 04 to clarify that internal and external customers may be used for evidence although both not required.	February 2018	Qualifications Officer
5	Addition of SCQF credit rating information.	September 2018	Qualifications Officer

Contents

About this guide

This guide provides some practical examples of how to assess your candidates for **SVQ3 Business and Administration SCQF level 6**. You may be able to think of other ways of assessing your candidates and recording your decisions about their competence.

Using assessments based on these examples does not guarantee successful verification — it is still your responsibility to ensure that internal quality assurance procedures are followed.

Introduction

This document has been provided to assist assessors and internal verifiers with the delivery of **SVQ3 Business and Administration SCQF level 6**.

It should be noted that this document will be updated throughout periodically in line with incremental change.

Whilst the guidance contained in this document is not mandatory, it illustrates the standard and range of evidence the External Verifier expects to see.

About SVQs and the SCQF

Scottish Vocational Qualifications (SVQs) are work-based qualifications which set the level of occupational competence for each sector of the economy and are usually delivered in the workplace or in partnership with a college or other training provider. The qualifications have been designed by standards-setting bodies made up of experienced practitioners who represent employers, professional bodies, trade unions, education and voluntary organisations.

Each standards-setting body is responsible for developing national standards which define *what* employees (or potential employees) must be able to do, *how well*, and *in what circumstances*, to show that they are competent in their work.

Each SVQ which a standards-setting body develops has to fit into a broad framework which allows qualifications in the UK and throughout Europe to be compared.

There are SVQs for nearly all occupations in Scotland and they are available at SVQ levels 1–5. SVQs are currently notionally placed in the SCQF as the individual SVQs may be at differing SCQF levels and have differing amount of credit points, depending on the structure and context of the SVQ. SVQs are a means of recognising the skills and knowledge people need in employment, ie job competence. Successful completion of an SVQ provides clear evidence that the learner works to nationally recognised occupational standards.

Each Unit defines one aspect of a job or work-role, and says what it is to be competent in that aspect of the job. To be awarded a full SVQ, learners must achieve each of the SVQ Units which make it up by demonstrating that they are competent in that aspect of the job. The Units which make up the SVQ can also be taken as freestanding awards. Some SVQs or SVQ Units are incorporated into other awards or programmes including HNCs and Modern Apprenticeships.

Explanation of levels

SVQ1
(SCQF level 4)
Competence involves the application of knowledge and skills in the performance of a range of varied work activities, most of which may be routine or predictable. SVQs may be at differing SCQF levels and have differing amount of credit points, depending on the structure and context of the SVQ.

SVQ2
(SCQF level 5)
Competence involves the application of knowledge and skills in a significant range of varied work activities, performed in a variety of contexts. At this level, there will be activities, which are complex or non-routine and there is some individual responsibility and autonomy. Collaboration with others, perhaps through membership of a work group or team, may often be a requirement. SVQs may be at differing SCQF levels and have differing amount of credit points, depending on the structure and context of the SVQ.

SVQ3
(either SCQF level 6 or 7)
Competence involves the application of knowledge and skills in a broad range of varied work activities, most of which are complex and non-routine. There is considerable responsibility and autonomy, and control or guidance of others is often present. SVQs may be at differing SCQF levels and have differing amount of credit points, depending on the structure and context of the of credit points, depending on the structure and context of the SVQ.

SVQ4
(either SCQF level 8 or 9)
Competence involves the application of knowledge and skills in a broad range of complex technical or professional work activities, performed in a wide variety of contexts and with a substantial degree of personal responsibility and autonomy. Responsibility for the work of others and the allocation of resources is often present. SVQs may be at differing SCQF levels and have differing amount of credit points, depending on the structure and context of the SVQ.

SVQ5
(SCQF level 11)
Competence involves the application of skills and a significant range of fundamental principles across a wide and often unpredictable variety of contexts. Very substantial personal autonomy and often significant responsibility for the work of others and for the allocation of substantial resources feature strongly, as do personal accountability. SVQs may be at differing SCQF levels and have differing amount of credit points, depending on the structure and context of the SVQ.

For further information on SCQF go to **www.scqf.org.uk**.

Structure of the SVQ

This section lists the Units which form SVQ 3 Business and Administration SCQF level 6.

Qualification structure

Please refer to the information provided on **restricted combinations** at the end of the qualification structure table.

To achieve the SVQ, you must complete **eight** Units in total.

No more than **two** Units may be selected from the **IT** and/or **Finance**.

All three mandatory Units must be completed and at least three Units from **Group B**, the remaining two Units may be selected from **Group B** or **Group C**.

SVQ3 Business and Administration SCQF level 6 — GK6Y 23				
Group A — Mandatory Units				
SQA number	**SSC number**	**Unit Title**	**SCQF level**	**SCQF credit**
FD9Y 04	S301	Plan How to Manage and Improve Own Performance in a Business Environment	6	4
FE01 04	S302	Review And Maintain Work in a Business Environment	6	4
FE02 04	S308	Communicate in a Business Environment	6	3
Group B — Optional Units: 3–5 Units must be selected				
FE03 04	S303	Solve Business Problems	6	4
FE04 04	S304	Support other People To Work in a Business Environment	6	4
FE05 04	S305	Contribute to Decision-Making in a Business Environment	6	3
FE06 04	S306	Contribute to Negotiations in a Business Environment	7	5
H987 04	S3071	Allocate Work to Team Members	5	6
H988 04	S3072	Quality Assure Work in Your Team	5	6
FE08 04	S322	Supervise an Office Facility	6	5
FE09 04	S324	Contribute to Running A Project	6	5
FE0X 04	S311	Design and Produce Documents in a Business Environment [a]	6	4
FE11 04	S312	Prepare Text from Notes Using Touch Typing (60 Wpm) [b]	6	4
FE0Y 04	S313	Prepare Text from Shorthand (80 Wpm) [c]	6	8
FE10 04	S314	Prepare Text from Recorded Audio Instruction (60 Wpm) [d]	6	4
FE0T 04	S319	Organise and Co-Ordinate Events [e]	6	8

SQA number	SSC number	Unit Title	SCQF level	SCQF credit
FE0V 04	S320	Plan and Organise Meetings [f]	6	5
FE0W 04	S321	Organise Business Travel or Accommodation [g]	6	5
H989 04	S325	Deliver, Monitor and Evaluate Customer Service to Internal and/or External Customers	6	3
FE0D 04	S309	Develop a Presentation	6	3
FE0E 04	S310	Deliver a Presentation	6	3
FE0F 04	S315	Support The Design and Development of Information Systems [i]	6	7
FE0G 04	S316	Monitor Information Systems	6	7
FE0H 04	S317	Analyse and Report Data	6	6
FE0J 04	S318	Order Products and Services	7	5
H68K 04	M&LEA4	Manage Budgets	6	4
FE0L 04	S323	Contribute to Innovation in a Business Environment [j]	6	4
FE0M 04	S329	Provide Administrative Support in Schools	6	8
FN75 04	S351	Verify Critical Dates for Sentences	7	6
FN76 04	S352	Verify the Release Process	6	6
FN7A 04	S353	Administer Agricultural Records	6	6
FN7C 04	S354	Make Agricultural Returns, Applications and Claims	6	8
FN77 04	S355	Administer Legal Files	6	7
FN78 04	S356	Build Case Files	6	4
FN79 04	S357	Manage Case Files	7	5
FE0N 04	S330	Administer Parking and Traffic Challenges, Representations and Civil Parking Appeals	6	9
FE0P 04	S331	Administer Statutory Parking and Traffic Appeals	7	9
FE0R 04	S332	Administer Parking and Traffic Debt Recovery	7	6
A maximum of 2 Units* can be selected from IT Units				
F9AR 04	S339	Bespoke Software 3 [k]	6	4
F9AW 04	S339	Specialist Software 3 [k]	6	4
F9C3 04	S340	Data Management Software 3 [l]	6	4
F9C6 04	S341	Database Software 3 [m]	6	6
F99F 04	S342	Improving Productivity Using IT 3 [n]	6	5
F99V 04	S343	IT Security for Users 3 [o]	6	3
F9CV 04	S344	Presentation Software 3 [p]	6	6
F99L 04	S345	Setting Up an IT System 3 [q]	6	5
F9D2 04	S346	Spreadsheet Software 3 [r]	6	6
F9A8 04	S347	Using Collaborative Technologies 3 [s]	6	6
F9D5 04	S348	Website Software 3 [t]	6	5
F9D8 04	S349	Word Processing Software 3 [u]	6	6
F9A5 04	S350	Using Email 3 [v]	6	3

SQA number	SSC number	Unit Title		
Group C — Optional Units: 0– 2 Units must be selected				
F93T 04	S211	Produce Documents in a Business Environment [a]	5	4
FD9W 04	S212	Prepare Text from Notes [b]	6	4
FD9X 04	S213	Prepare Text from Notes Using Touch Typing (40 Wpm) [b]	5	3
FD9T 04	S214	Prepare Text from Shorthand (60 Wpm) [c]	5	8
FD9V 04	S215	Prepare Text from Recorded Audio Instruction (40 Wpm) [d]	5	4
FD9N 04	S222	Support the Organisation and Co-Ordination of Events [e]	5	5
FD9P 04	S223	Support the Organisation of Business Travel or Accommodation [g]	5	3
FD9R 04	S224	Support the Organisation of Meetings [f]	5	4
FD94 04	S209	Handle Mail	5	3
F93X 04	S210	Provide Reception Services	5	3
FD96 04	S250	Meet and Welcome Visitors	5	3
H983 04	S206	Use Voicemail Message Systems	5	1
FD92 04	S207	Use a Diary System	5	3
FD93 04	S208	Take Minutes	5	4
H984 04	S216	Collate and Organise Data	5	3
FD98 04	S217	Research Information	5	4
H559 04	S218	Store and Retrieve Information Using a Filing System	5	3
FD99 04	S219	Provide Archive Services	5	2
FD9A 04	S226	Support the Management and Development of an Information System [h]	7	7
H98C 04	S413	Design and Develop an Information System [i]	8	7
FE1M 04	S414	Manage and Evaluate Information Systems [h]	8	6
F93V 04	S220	Use Office Equipment	5	3
H985 04	S221	Maintain and Issue Stock Items	5	3
FD9F 04	S225	Respond to Change in a Business Environment	5	3
H98D 04	S419	Explore Ideas for Innovation In A Business Environment [j]	8	6
FM4W 04	S420	Plan Change	9	15
FD9G 04	S227	Administer HR Records	5	3
FD9H 04	S228	Administer the Recruitment and Selection Process	5	4
FD9J 04	S251	Administer Parking Dispensations	5	4
H982 04	S112	Use Occupational And Safety Guidelines When Using A Workstation	4	2
FN6W 04	S253	Process Court Documentation	6	6
FN9M 04	S254	Contribute to Maintaining Security and Protecting Individuals' Rights in the Custodial Environment	6	6
FN6X 04	S255	Calculate Critical Dates for Sentences	5	6

SQA number	SSC number	Unit Title		
FN6Y 04	S256	Make Administrative Arrangements for the Movement of Individuals Outside the Custodial Establishment	5	6
FN70 04	S257	Administer Documentation for the Appeals Process	5	6
FN71 04	S258	Administer Personal Money for the Individuals in Custody	5	6
FN72 04	S259	Prepare Documentation to Help Authorities Decide on the Conditions on Which to Release Individuals From Custody	5	6
FN74 04	S260	Make Administrative Arrangements for the Release of Individuals from Custody	5	6
A maximum of 2 Units* can be selected from IT and Financial Services Units				
FD8V 04	S125	Calculate Pay	—	—
H5JS 04	S247	Control Payroll	7	8
FD9L 04	S248	Account for Income and Expenditure	—	—
FD9M 04	S249	Draft Financial Statements	—	—
F9AP 04	S236	Bespoke Software 2 [k]	5	3
F9AV 04	S236	Specialist Software 2 [k]	5	3
F9C2 04	S237	Data Management Software 2 [l]	5	3
F9C5 04	S238	Database Software 2 [m]	5	4
F99E 04	S239	Improving Productivity Using IT 2 [n]	5	4
F99T 04	S240	IT Security for Users 2 [o]	5	2
F9CT 04	S241	Presentation Software 2 [p]	5	4
F99K 04	S242	Setting Up an IT System 2 [q]	5	4
F9D1 04	S243	Spreadsheet Software 2 [r]	5	4
F9A7 04	S244	Using Collaborative Technologies 2 [s]	5	4
F9D4 04	S245	Website Software 2 [t]	5	4
F9D7 04	S246	Word Processing Software 2 [u]	5	4
F9A4 04	S252	Using Email 2 [v]	5	3

Restricted combinations:

Either Unit S311 or S211 may be selected but not both. [a]
Only one Unit may be selected from S312, S212 or S213. [b]
Either Unit S313 or S214 may be selected. [c]
Either Unit S314 or S215 may be selected. [d]
Either Unit S319 or S222 may be selected. [e]
Either Unit S320 or S224 may be selected. [f]
Either Unit S321 or S223 may be selected. [g]
Either Unit S226 or S414 may be selected. [h]
Either Unit S315 or S413 may be selected. [i]
Either Unit S323 or S419 may be selected. [j]
Only one Unit may be selected from S339a, S339b, S236a or S236b. [k]
Either Unit S340 or S237 may be selected. [l]
Either Unit S341 or S238 may be selected. [m]
Either Unit S342 or S239 may be selected. [n]
Either Unit S343 or S240 may be selected. [o]
Either Unit S344 or S241 may be selected. [p]
Either Unit S345 or S242 may be selected. [q]
Either Unit S346 or S243 may be selected. [r]
Either Unit S347 or S244 may be selected. [s]
Either Unit S348 or S245 may be selected. [t]
Either Unit S349 or S246 may be selected. [u]
Either Unit S350 or S252 may be selected. [v]

Target candidate group

The SVQ in Business and Administration at level 3 (SCQF level 6) a broad range of activities with significant complexity, responsibility and autonomy, often in a supervisory or team-leading role. Mandatory Units cover; managing workload, communicating and planning, and improving own performance in a business environment. There are a wide range of optional Units including work responsibilities, document production and design, managing events, customer service, managing business resources, and managing information and data.

Suitable candidates will typically hold job titles such as:

- Administrator
- Senior Administrator
- Team Leader
- Senior Receptionist
- Office Supervisor
- IT Support Administrator
- Administrative Officer
- Personal Assistant
- Executive Assistant
- Medical Administrator
- Accounts Assistant
- Team Co-ordinator
- Data Management Officer

This is not an exhaustive list. Candidates are likely to be working autonomously with limited supervision and possibly with responsibility for the allocation and monitoring of work of others. Candidates may also have responsibility for some degree of resources and are likely to be leading tasks from beginning to end.

Roles and responsibilities

Assessment of an SVQ depends on clarity, focus and planning. Both you and the candidate should be clear on your roles in the assessment process before you begin.

Assessor's role

♦ ensure candidates understand **what** is to be assessed and **how** it is to be assessed
♦ ensure the conditions and resources required for assessment are available
♦ help candidates to identify and gather evidence
♦ help candidates to present or signpost evidence
♦ observe and record candidates' performance
♦ authenticate the evidence candidates provide
♦ judge evidence and make assessment decisions
♦ identify gaps or shortfalls in candidates' competence
♦ provide feedback to candidates throughout the assessment process
♦ record achievement

Candidates' role

♦ prepare for assessment — become familiar with the standards and understand what is to be assessed and how the assessment will be carried out
♦ help to identify sources of evidence and how these could be assessed
♦ carry out activities, collate work products, answer questions, write personal statements etc.
♦ signpost evidence to the standards
♦ make evidence available in an organised manner when required by assessor, internal verifier and/or external verifier
♦ reflect upon and act on feedback from the assessor

Internal verifier's role

The internal verifier has a key role in ensuring the integrity and quality of the assessment process. An internal verifier is responsible for providing a quality check on assessment decisions, usually on a sample basis. Samples may be greater or smaller depending on the experience of the assessor and taking into account other risk factors. The internal verifier is not re-assessing the evidence but judging the validity and reliability of the assessment decisions sampled.

The internal verifier function is responsible for ensuring the validity of internal assessments and the reliability of assessors' judgements. This responsibility has several components:

♦ checking assessment instruments to ensure validity
♦ sampling assessment decisions
♦ maintaining assessment and verification records
♦ managing standardisation activity
♦ Identifying possible CPD needs and continuous improvement opportunities
♦ providing general support to assessors

Depending on the size of the centre and the respective responsibilities allocated, individual internal verifiers will contribute to these areas but may not have sole responsibility for them.

For more information on internal verification refer to *Internal Verification: A Guide for Centres offering SQA Qualifications* (Pub code FA5291), available at www.sqa.org.uk

Starting an SVQ – first steps

It is best practice to arrange an initial induction meeting with the candidate to help familiarise with the requirements of an SVQ. Candidates may have previously completed an SVQ or be completely new to the process. The candidate's previous experience and familiarity - or lack thereof – with SVQs will influence the next stage of planning. Experienced candidates may be confident in moving straight to assessment planning, whereas initial assessment plans may need to be more limited and tentative for new candidates finding their way.

Regardless of a candidate's previous experience, there may be a degree of training and/or learning required before he or she is ready to begin gathering evidence for assessment. This is most likely to be the case with younger, less experienced candidates who have recently left school and/or Modern Apprentices. However, ultimately this is down to the circumstances of the individual candidate.

It is also important to establish a working relationship with the employer to maximise the candidate's access to opportunities to gather evidence, and to avoid as much as possible, any barriers arising that could impede progress. It is important that employers understand that an SVQ is a competence-based qualification requiring assessment in the workplace via observation and products of work. They should therefore be prepared to consent to the assessor having some access to the workplace for assessment, and the use of products of real-life work as evidence for the SVQ. Establishing this at the outset will go some way to preventing difficulties at a later stage regarding confidentiality and any other sensitivities or expectations an employer may have.

An initial induction meeting may cover the following:

♦ An overview of the SVQ – i.e. its purpose (to certificate competence in a job role) and how this influences the way they are assessed. This need not be a detailed explanation at this stage (too much detail may overwhelm the candidate), rather cover the basic principle that performance evidence is used to demonstrate competence and supporting evidence for knowledge (not explicit from performance). A NOS unit may be used as an example and you may wish to outline some of the different forms of performance and supporting evidence.

♦ A discussion of the candidate's role - this will help identify suitable optional units (it is not necessary to identify all of them at the outset). It may also offer opportunities to identify colleagues who could potentially provide supporting evidence in the form of witness statements, or even by providing mentoring support.

♦ An initial assessment of the candidate's knowledge, skills and experience – this will help identify any learning/training needs that may be required for the candidate to achieve. Experienced candidates may be able to progress to assessment without much preparation, whereas candidates new to their job role may require a period of training before they can demonstrate the level of competence required. This is usually the case with Modern Apprentices.

Planning assessment

Assessment plans are an important means of ensuring the assessment process runs as smoothly and efficiently as possible. This is especially critical at the outset and particularly in the case of inexperienced candidates. Assessment plans should identify when and how assessment will be carried out. Candidates need to have a clear understanding of what is being assessed, what methods will be used and what evidence they have agreed to produce.

Assessment planning can help candidates to relate their routine work place activities to the standards within the SVQ units and therefore avoid the pitfall of generating evidence that is not relevant to the qualification.

Although assessment planning is vital, it provides a framework to guide candidates in the generation of evidence – assessment plans should not be inflexibile. They should not be considered assessment tasks to be rigidly adhered to and either passed or failed. Real-life workplaces are a fluid and dynamic environment, and unforeseen opportunities to gather evidence are likely to arise. These should be capitalised on as much as possible.

In developing an assessment plan, assessors should:

♦ have a thorough knowledge of the SVQ
♦ get to know the candidate and their workplace
♦ plan realistically around the candidate's role, working pattern and circumstances
♦ identify opportunities for gathering relevant evidence
♦ use feedback to inform subsequent plans and establish any training needs

Assessment planning meeting

At an assessment planning meeting, the following should be agreed and recorded between the assessor and candidate:

♦ what is to be assessed
♦ the assessment method
♦ a date for when the evidence will be submitted to the assessor

Assessment plans are working documents — they can be updated and changed according to progress. Their purpose is to guide the candidate by providing a framework for working through the qualification, therefore if assessment methods vary and/or dates are moved, this is not an issue providing the evidence complies with the relevant standard(s) and Assessment Strategy.

When planning assessment, make the most of opportunities to *integrate* assessment. This means planning to assess an *activity* that draws on the contents of different Units. It can be an efficient and cost-effective way of assessing your candidate's competence.

Beginning assessment

Don't try to cover the mandatory Units first. The mandatory units consist mainly of softer generic knowledge and skills embedded throughout the routine activities associated with the job role (eg review and maintain work, communicate in a business environment, etc). The optional units are designed around focused specific competences (eg plan and organise meetings, analyse and report data, etc). This means that evidence towards the mandatory units will naturally occur from assessment of the optional units and so any assessment of the mandatory units prior to completion of optional units will inevitably lead to overassessment.

It is usually a good idea to begin assessment by asking the candidate to provide performance evidence for a unit (or units) without reference to the Knowledge. This is because the candidate is likely to generate some knowledge evidence implicitly via their performance evidence. If the candidate begins with knowledge evidence he/she runs the risk that this evidence is later covered implicitly via performance and therefore is an unnecessary duplication. Once the performance evidence has been evaluated, the assessor and candidate can identify the outstanding knowledge requirements that remain to be met.

Assessment – recommended approaches

The following recommended approaches are likely to help you achieve positive outcomes in assessing the Business and Administration SVQ:

♦ be candidate-led rather than provider-driven — organise assessment according to each candidate's circumstances rather than pre-determined programmes or templates
♦ always prioritise naturally-occurring evidence (the majority of performance evidence should always be generated in the workplace)
♦ employ a holistic approach – assessment focused on *activities* (rather than units) that provides evidence towards more than one Unit.
♦ use a range of assessment methods and evidence, driven by candidates' activities in the workplace i.e. *Triangulation*
♦ use Performance Evidence to cover Knowledge where possible
♦ use questions to supplement (rather than duplicate) observation — there is no need to separately evidence Knowledge that has been clearly demonstrated through performance
♦ consider competence over time holistically (usually by Unit) rather than by individual Performance Indicator – covering PIs multiple times will inevitably lead to overassessment, although hitting most PIs more than once is likely to occur naturally

Be flexible

Although assessment planning is important, it should not be overly rigid. Assessment planning is about providing a framework for candidates to gather evidence, not a series of mandatory assessment tasks. It is rarely possible to foresee everything that may arise in a fluid and dynamic business environment, therefore assessors should be prepared to deviate from plans in the interests of capitalising on unforeseen opportunities to gather evidence outwith the plan, eg if a problem or unexpected customer query arises.

A good Observation will often include questioning to capture Knowledge that may not be completely explicit from the practice. It is recommended that Work Products and Personal Statements be combined where possible, for example, through the use of screenshots embedded within the document to illustrate documents/emails etc at the point referred to (see, *Examples of Practice*). Different forms of assessment blended in this way are very powerful means of providing high quality evidence that in turn gives us a high degree of confidence in judgements of competence. This is a very good example of Triangulation.

Assessing Knowledge

Knowledge is an integral aspect of competence and should be assessed in the context of performance as much as possible. Assessment of knowledge in isolation from performance threatens the validity of competence-based assessment. In reality, knowledge is used to support performance, not the other way around. Knowledge that is decoupled from performance is less meaningful and increases the risk of a rote memory approach that fails to consolidate understanding and is forgotten after a short period of time.

Having said this, it is unlikely that all aspects of Knowledge will occur naturally in the course of completing an SVQ, so it is acceptable to use questions, both verbal and written – or even case studies – to evidence Knowledge. A useful way of evidencing Knowledge in context is for candidates to produce Personal Statements/Reflective Accounts written in the context of work they have completed. Again, it is not always possible for this to be produced in context, therefore it is acceptable for Knowledge to be evidenced generically; however the Assessor is required to take a holistic view in judging whether the candidate has demonstrated a sound understanding of the required Knowledge or simply memorised some information.

Presenting evidence

Good referencing and presentation helps all concerned – candidate, assessor, IV and EV. It helps candidates see progress and can therefore boost morale and motivation. It helps IVs to be clear on Assessor's judgements. It makes it easier for the EV to be clear on centre's assessment judgements and therefore puts the centre on a solid foundation when EV visits take place. Ultimately, the onus is on the centre and candidate to demonstrate that the standards have been met in a way that is verifiable, so clear referencing and presentation is in everyone's interests.

When collating evidence, quality rather than quantity should be the aim — triangulation is better than lots of the same type of evidence — and complexity should be avoided. Candidate Portfolio pro-formas are available on SQA website to assist in the collection and referencing of evidence.

Evidence in Situ

There may be situations where evidence cannot be stored in a candidate's portfolio. In such cases evidence may be kept in situ – that is stored in its original location in the workplace rather than the candidate's portfolio.

In the context of Business and Administration, SQA would normally expect this to be used only in situations where there is a compelling need for confidentiality, and where redaction of sensitive data would remove too much of the context of the evidence for robust assessment judgements to be made with confidence.

Such evidence should be referenced appropriately to provide a robust quality audit trail. **Evidence held in situ must be made available to assessors, internal verifiers and external verifiers as required to ensure the validity of the assessment process.**

Examples of Practice

Exemplification of a variety of assessment approaches for SVQs in Business and Administration are available on SQA's Understanding Standards website - http://www.understandingstandards.org.uk/Subjects/SVQ/BusinessAdministration/svq_ba_home

Guide to Evidence and Assessment

Performance evidence
This is first hand evidence of how a candidate works in relation to the standards. It includes the output of performance (**work products**) and **observation** of performance. The use of performance evidence is the principal method of demonstrating valid and reliable competence.
Assessor observation
Observation of the candidate in the workplace — carried out by a qualified and occupationally competent assessor. This evidence is both valuable and reliable. At the right or left hand side of each observation record, assessors should reference the task being observed to the performance indicators. This indication is a crucial part of the assessment process and is an essential aid to the internal verification process. An observation should contain information about the context of the assessment.
Work product
Work products are also valuable and reliable items of performance evidence. Work products are outputs of performance such as documents, e-mails, records/reports, etc and should be annotated to place the evidence in context. This annotation could be recorded on a personal statement, written on the evidence or within a professional discussion.
Supporting evidence
This evidence supports the key performance evidence. Supporting evidence includes — personal statement/personal statement, questioning, professional discussion and witness testimony. Supporting evidence plays an important role in the triangulation of evidence.
Personal statement/Storyboard/Reflective account
A personal statement is a technique used to place evidence in context and to demonstrate knowledge. Some centres use the terms *Storyboard* or *Reflective account*. The terms are interchangeable — the important feature is that they are a candidate's own written description of their role in producing the evidence and/or their Knowledge. They can be written to cover parts of a Unit, parts of several Units, an entire Unit or even more two or more whole Units; however it is good practice to target personal statements/personal statements at Knowledge that has not been demonstrated through performance rather than starting with a 'catch all' approach from the outset.
Questioning
Questioning is normally used to fill knowledge gaps. This includes both written and verbal questioning. Responses to verbal questions should be recorded. Knowledge is likely to be covered by performance evidence, therefore additional written or verbal questioning may only be required for small parts of some Units. If questions are required they may be asked in written or verbal form. Assessors could ask verbal questions during an observation, during a professional discussion or as work product is being considered by the assessor. The assessor should use his/her judgement to decide the most appropriate opportunity to collect this type of evidence.

Professional discussion
Professional discussions are structured, planned, in depth discussions recorded in writing or captured on audio or digital video between the assessor and candidate. The assessor will plan in advance the areas to be covered and will guide the conversation to ensure it remains relevant to these areas. As professional discussion takes the form of a conversation, it may allow the candidate to be more expressive in their response, and therefore to cover more Knowledge, than to conventional questioning. Professional discussion is unlikely to take place during the course of an observation as it requires pre-planning — direct questioning is more likely to be appropriate under those circumstances.
Witness testimony
Witness testimony is confirmation by a colleague or line manager attesting to the candidate's competence and/or the authenticity of evidence. This may be a written document, a statement added to a piece of work product or as a discussion recorded by the assessor in audio, video or written form. Witness testimony can often be arranged to coincide with an observation of the candidate. It can be used to support the validity, authenticity, currency and reliability of the evidence. It can also be used to highlight competence of a candidate performing a task over a period of time.
Simulation
Whilst permissible, simulation should always be used as a last resort and must be regarded as a way to fill gaps. Using simulation to evidence entire Units is not acceptable. If a Unit or any part of a Unit is simulated it must be undertaken in a 'realistic working environment' (RWE). Units which have been imported into the Business and Administration SVQ must be assessed in compliance with the Assessment Strategy from the relevant area. Simulation can be used where candidates face barriers to gathering evidence through normal workplace activity in a Unit which forms part of their normal role in the workplace (eg where a customer service complaint/equipment problem does not naturally occur). The RWE must replicate the key characteristics of the workplace in which the skill to be assessed is normally employed. Centres should refer to the Assessment Strategy for detailed information on RWE criteria.
Assessment
Units with Words Per Minute Criteria (WPM) **(Prepare Text from Notes/Shorthand/Recorded Audio Instruction)**
Some Units incorporate a requirement for candidates to input text or take shorthand at a relevant rate in words per minute. It would be best practice to measure this speed using a timed exercise. The word count is based on five keystrokes per word with the candidate input being measured over a 5 minute period with no more than five input errors. Where a candidate makes more than five errors in completing this exercise, a re-assessment needs to take place.

Separating training from assessment
Materials used for training, or evidence of the outcomes of training, are not evidence of competence and should not be included in a Business and Administration SVQ portfolio of evidence. Only evidence of the candidate's practice in the workplace which has been assessed as meeting the standards should be presented in the SVQ portfolio. Evidence of Knowledge may be derived from personal statement, questioning and professional discussion (see above).
How much is enough evidence?
The evidence presented against each Unit must clearly demonstrate the candidate's ability to perform the activity competently across a breadth of scope consistently to the required standard over time. All Performance Indicators and Knowledge should be referenced by at least one piece of appropriate evidence. For performance — supporting evidence may be used to fill small gaps. Performance over time is not about performing the same tasks several times, rather having different forms of evidence that complement each other over a period of time. In practice it is likely that there will be overlap in certain areas of the qualification in terms of tasks performed and evidence acquired, that will allow some PIs and Knowledge to be referenced more than once.
Use of confidential information as evidence (Evidence in situ)
Some Units naturally rely on confidential and sensitive work product to confirm competence (eg HR records, customer financial records, medical files, etc). Where this is the case, steps must be taken to ensure the sensitive/confidential content is redacted. For some Units there may be a bulk of sensitive or confidential information where redacting the content would remove too much of the context for a reliable assessment judgement. In these instances it may be more appropriate to sign-post this evidence in the candidate portfolio and leave the evidence in its normal location (in situ). Where evidence in situ is used, assessors must ensure that a clear and detailed explanation of the evidence itself is included in the portfolio together with details of where the original evidence is located, eg '*HR records maintained by the candidate which include — updates of personal details, grievance records, disciplinary records, training records, holiday and sickness leave — can be found in the filing cabinet in room 6.2 the HR Office*'. In situ evidence must be available to the Internal verifier on request and External Verifier when the Unit is selected for verification. Where used it must be discussed with the External Verifier at the visit planning stage so that suitable arrangements for can be made for the evidence to be available.
Triangulation
Combining different types of evidence — performance evidence and supporting evidence — to ensure authenticity, validity, sufficiency, currency and reliability. Triangulation also helps ensure consistent performance over time as evidence is gathered at different points in time.

Holistic assessment
Evidence should be assessed using a holistic approach. Evidence presented against one Unit may fulfil parts of another Unit and may be cross-referenced against as many Units as applicable. Many of the Units in the SVQ are interrelated and evidence naturally meets the PIs of other Units. This is particularly the case for mandatory Units and best practice would be to start with optional Units and cross reference evidence to the mandatory ones. It should be possible to gather the majority of evidence for mandatory Units in this way allowing the gaps to be filled towards the conclusion of the SVQ. Using a holistic approach means that the assessment process is streamlined and avoids duplication of assessment. It provides a rigorous approach to assessment and allows evidence to be drawn from a range of activities which more naturally falls from a candidate performing their job role, helping ensure breadth of scope and competence over time without over-assessing the candidate in a particular area.

Mandatory Units

Unit S301: Plan How to Manage and Improve Own Performance in a Business Environment

SQA Code FD9Y 04

General Overview

This Unit is about accepting responsibility for own work and its delivery and improving own performance.

The optional Units chosen will be the main source of evidence for this Unit. Careful planning in the choice of optional Units and careful thought relating to the type of evidence needed for this Unit is crucial.

This involves:

Planning and being accountable for own work

♦ Negotiating and agreeing realistic targets
♦ Prioritising targets and agreeing achievable timescales
♦ Planning how to make best use of own time
♦ Keeping other people informed of progress
♦ Meeting deadlines, or re-negotiated targets, timescales and plans in good time
♦ Taking responsibility for own work and accept any responsibility for any mistakes
♦ Following agreed guidelines, procedures and, where appropriate, codes of practice
♦ Setting high standards for own work and showing drive and commitment to achieve those standards
♦ Coping with pressure and overcoming difficulties and setbacks
♦ Asserting own needs and rights
♦ Showing a willingness to take on new challenges
♦ Adapting readily to change

Improving own performance

♦ Encouraging and accepting feedback from other people
♦ Evaluating own work and use feedback from other people to identify where to make improvements
♦ Identifying where further learning and development could improve performance
♦ Developing and following through a learning plan
♦ Reviewing progress and updating plans for improvement

Behaving in a way that supports effective working

Setting high standards for your work and showing drive and commitment in achieving these standards.

♦ Coping with pressure and overcoming difficulties and setbacks
♦ Asserting your own needs and rights when necessary
♦ Showing a willingness to take on new challenges
♦ Adapting readily to change
♦ Treating other people with honesty, respect and consideration
♦ Helping and supporting other people

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Records of negotiation – targets/deadlines, etc
♦ Letters, e-mails, memos
♦ Printouts/records of e-mail diaries, to-do lists
♦ Learning plan and reviews of progress
♦ Documentation relating to the processing of payments and refunds
♦ Guidelines, procedures and codes of practice with annotation/testimony
♦ Records of resolving difficulties/setbacks/assertiveness/adapting to new challenges/providing support to others/treating others with respect

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S302: Review and Maintain Work in a Business Environment

SQA Code FE01 04

General Overview

This Unit is about supporting sustainability, respecting diversity, maintaining security and confidentiality and assessing and managing risks in line with organisational requirements.

The optional Units chosen will be the main source of evidence for this Unit. Careful planning in the choice of optional Units and careful thought relating to the type of evidence needed for this Unit is crucial.

This involves:

Supporting sustainability by:

♦ Keeping waste to a minimum
♦ Following procedures for the recycling and disposal of hazardous materials
♦ Following procedures for maintenance of equipment
♦ Continuously reviewing working methods, including the use of technology, and identifying ways of improving efficiency
♦ Choosing sources of equipment and materials that provide best value for money
♦ Supporting colleagues to maximise their performance and value to the organisation

Supporting diversity by:

♦ Interacting with other people in a way that is sensitive to their individual needs and respects their background, abilities, values, customs and beliefs
♦ Learning from other people and using this to improve own way of working
♦ Following organisational procedures and legal requirements in relation to discrimination legislation

Maintaining security and confidentiality by:

♦ Maintaining the security of property
♦ Maintaining the security and confidentiality of information
♦ Reporting any concerns about security and confidentiality to an appropriate person

Assessing and managing risk

♦ Identifying and agreeing possible sources of risk
♦ Assessing and confirming the level of risk
♦ Putting in place ways of minimising the risk
♦ Monitoring risk
♦ Being alert to new risks and managing these when they occur
♦ Reviewing and learning from own experience of assessing and managing risk

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Letters, e-mails, memos
♦ Risk assessments
♦ Equipment maintenance logs
♦ Organisational policies/procedures and legislation with annotation/testimony
♦ Records of dealing with concerns security risks
♦ Records of showing support to others/interacting with others

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S308: Communicate in a Business Environment

SQA Code FE02 04

General Overview

This Unit is about communicating in writing and verbally in a business environment.

The optional Units chosen will be the main source of evidence for this Unit. Careful planning in the choice of optional Units and careful thought relating to the type of evidence needed for this Unit is crucial.

This involves:

Planning communication

♦ Identifying the purpose of the communication, the evidence and the outcomes to be achieved
♦ Deciding which method of communication to use

Communicate in writing

♦ Identifying sources of information that support the purpose of the communication
♦ Selecting information that supports the purpose of the communication
♦ Presenting the information using a format, layout, style that is appropriate to the subject matter
♦ Using language that is appropriate to the audience and the purpose of the communication
♦ Organising, structuring and presenting information to suit different audiences
♦ Selecting and reading written material that contains information that is needed
♦ Identifying and extracting the main points needed from written material
♦ Using accurate grammar, punctuation and spelling
♦ Proofreading
♦ Evaluating written material to identify how well it met its purpose
♦ Producing the communication to meet deadlines recognising the difference between what is important and what is urgent
♦ Keeping a file copy of all communication

Communicate verbally

♦ Presenting information and ideas to others
♦ Making contributions to discussions that suit the audience, purpose and situation
♦ Using appropriate body language and voice tone
♦ Listening actively to information that other people are communicating and respond appropriately
♦ Asking relevant questions to clarify anything not understood
♦ Summarise the communication with the person being communicated with to make sure the correct meaning has been understood

After communication

♦ Seeking feedback on whether the communication achieved its purpose
♦ Reflecting on outcomes of communication and identifying ways to develop communication skills further

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Variety of written communication – E-mails/Word Documents/Powerpoint presentations/spreadsheets
♦ Working notes/briefs
♦ Working drafts
♦ Minutes of meeting
♦ Appraisals and review
♦ Records of correspondence about the document — clarification/feedback/ suggested amendments, etc

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Optional Units

Unit S303: Solve Business Problems

SQA Code FE03 04

General Overview

This Unit is about identifying, analysing, planning and solving business problems.

This involves:

Planning and being accountable for own work

♦ Recognising when a business problem exists
♦ Confirming the problem is understood
♦ Identifying reasons for problems occurring
♦ Analysing the problem
♦ Discussing the problem with others
♦ Developing and justifying an approach to solve the problem
♦ Planning the chosen approach
♦ Deciding how to recognise when a problem is solved
♦ Agreeing the plan
♦ Putting the plan into action
♦ Using support and feedback from others
♦ Reviewing progress towards solving the problem, adjusting the plan as necessary
♦ Evaluating the approach used and evaluating other possible approaches

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Plans/action notes
♦ Feedback
♦ Minutes of meetings
♦ Letters, e-mails, memos
♦ Records of discussion with appropriate authority/colleague(s)
♦ Evaluation of plans/approaches/actions

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S304: Support Other People to Work in a Business Environment

SQA Code FE04 04

General Overview

This Unit is about working with other people to achieve team and organisational goals and objectives.

This involves:

Planning and being accountable for own work

♦ Working in a way that supports your organisation's overall mission and your team's objectives
♦ Welcoming opportunities to work with other people to achieve positive outcomes
♦ Following policies, systems and procedures relevant to your job
♦ Putting your organisation's values into practice
♦ Sharing work goals and planning work objectives together
♦ Sharing feedback with others on the achievement of objectives
♦ Contributing to improving objectives, policies, systems, procedures and values in a way that is consistent with your role
♦ Seeking guidance from others when you are unsure about objectives, policies, systems, procedures and values
♦ Agreeing the plan
♦ Working in a way that recognises the strengths of others within a team
♦ Providing support to members of a team
♦ Showing respect for individuals
♦ Producing quality work on time
♦ Working with outside organisations and individuals in a way that protects and improves the image of your organisation
♦ Communicating with other people
♦ Identifying and referring problems and disagreements

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Minutes of meetings
♦ Letters, e-mails, memos
♦ Appraisals and review
♦ Records demonstrating support of others/working as a team/producing quality work
♦ Records of correspondence with internal colleagues/external stakeholders
♦ Work goals/action plans — records of sharing with colleagues
♦ Feedback shared with colleagues against objectives
♦ Records of contribution to objectives, policies, systems, procedures and values

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S305: Contribute to Decision-making in a Business Environment

SQA Code FE05 04

General Overview

This Unit is about contributing information and ideas to influence the decision-making process.

This involves:

Planning and being accountable for own work

♦ Researching information to add value to the decision-making process
♦ Using accurate and current information to develop ideas to present to others
♦ Making constructive, relevant and timely contributions to meetings or other discussions
♦ Responding positively when asked to supply information to help decision-making
♦ Contributing to identifying decision-making criteria
♦ Structuring ideas, information and recommendations in a way that helps other people understand
♦ Proactively engaging with colleagues and respecting their decisions
♦ Influencing decision-making by using evidence, argument, questioning and assertiveness
♦ Showing support for the decision even when not in agreement

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Research plan
♦ Records of information researched and used to develop ideas and contributions
♦ Minutes of meetings
♦ Letters, e-mails, memos
♦ Records of discussion with colleagues

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S306: Contribute to Negotiations in a Business Environment

SQA Code FE06 04

General Overview

This Unit is about preparing and taking part in negotiations to achieve planned objectives.

This involves:

Planning and being accountable for own work

♦ Preparing a negotiating brief
♦ Identifying potential problems in negotiations and suggest solutions
♦ Clarifying other people's understanding and responding to their queries
♦ Suggesting solutions to problems
♦ Working within limits of job role
♦ Referring matters which require a higher level of authority
♦ Reaching an agreement to the mutual satisfaction of all those involved
♦ Conducting and completing negotiations in a way which creates goodwill and promoting a positive image of self and organisation
♦ Maintaining clear and accurate records of the outcomes and agree them with all members

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- Negotiating brief
- Proposals
- Clear and accurate records of negotiations
- Letters, e-mails, memos
- Records of outcomes of negotiation agreed by relevant parties

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S3071: Allocate Work to Team Members

SQA Code H987 04

General Overview

This Unit is about ensuring that the work required of your team is effectively and fairly allocated amongst team members taking accounts of their skills, knowledge and competence, their workloads and opportunities for their development.

This involves:

♦ Confirm the work required of the team with your manager and seek clarification, where necessary, on any outstanding points and issues.
♦ Plan how the team will undertake its work, identifying any priorities or critical activities and making effective use of the available resources.
♦ Allocate work to team members on a fair basis taking account of:

— their skills, knowledge and competence
— their backgrounds and experience,
— their existing workloads, and
— opportunities for their development

♦ Brief team members on the work they have been allocated and the standard of performance expected.
♦ Encourage team members to ask questions, make suggestions and seek clarification in relation to the work they have been allocated.
♦ Address any concerns team members may have about their work.

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- Scheduling activities and resources
- Feedback from team members
- Minutes of meetings
- Action grids/records of discussion
- Project plans

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S3072: Quality Assure Work in Your Team

SQA Code H988 04

General Overview

This Unit is about checking the progress and quality of the work of team members to ensure that the required standard of performance is being met.

This Unit is relevant to managers, supervisors and team leaders who monitor the progress of work in their team and check the quality of the output. This involves:

♦ Check regularly the progress and quality of the work of team members against the standard performance expected.
♦ Provide team members with prompt, specific feedback designed to maintain and improve their performance.
♦ Support team members in identifying and dealing with problems and unforeseen events.
♦ Motivate team members to complete the work they have been allocated on time and to the standard required.
♦ Provide any additional support and/or resources team members require to complete their work on time and to the standard required.
♦ Identify any unsatisfactory performance, discuss the causes and agree ways of improving performance with team members.
♦ Recognise successful completion of significant pieces of work by team members.
♦ Motivate team members to maintain and continuously improve their performance over time.
♦ Use information collected on the performance of team members in any formal appraisal of performance, where appropriate.

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Scheduling activities and resources
♦ Feedback from team members
♦ Performance records
♦ Records of feedback on performance
♦ Records relating to queries/clarification/providing support to team members

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S322: Supervise an Office Facility

SQA Code FE08 04

General Overview

This Unit is about supervising a team by planning and implementing work and supporting team members to help achieve agreed goals and objectives.

This involves:

♦ Identifying and agreeing the needs of office facility users
♦ Maintaining office facilities and equipment to meet the needs of users and keeping within agreed budgets
♦ Supervising the use of office resources
♦ Using and reviewing office systems and procedures
♦ Making sure office equipment is working
♦ Identifying office facilities and equipment in need of repair or replacement
♦ Building and maintaining relationships with suppliers
♦ Contributing to reviewing the office environment in line with health and safety and security policy
♦ Resolving problems in a timely manner
♦ Providing information and guidance
♦ Communicating priorities to office facility users
♦ Monitoring the use of office facilities

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Minutes of meetings
♦ Letters, e-mails, memos
♦ Problem logs
♦ Health and safety checklists
♦ Appraisals and reviews
♦ Health and safety policies/legislation with annotation/testimony

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S324: Contribute to Running a Project

SQA Code FE09 04

General Overview

This Unit is about contributing to project planning and supporting the implementation and monitoring of projects to achieve planned outcomes.

This involves:

Contributing to project planning

♦ Identifying all stakeholders involved in the project
♦ Confirming the purpose of the project with all stakeholders
♦ Confirming the project scope, timescale, aims and objectives
♦ Contributing to the preparation of a project specification
♦ Confirming the resources needed for the project

Running the project

♦ Implementing and monitoring the project to meet the agreed budget and timescales
♦ Communicating with all those involved in the project
♦ Seeking advice in response to unexpected events
♦ Keeping record of all project activity
♦ Providing interim reports on project progress
♦ Achieving required outcomes on time and to budget

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- Letters, e-mails, memos
- Minutes of the meeting
- Project specifications
- Records of all project activity including budgets and timescales
- Interim reports
- Appraisals, reviews

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S311: Design and Produce Documents in a Business Environment

SQA Code FE0X 04

General Overview

This Unit is about designing and producing high-quality, attractive documents to agreed specifications.

This involves:

♦ Agreeing the purpose, content, style, quality standards and deadlines for the document
♦ Identifying and preparing the resources needed
♦ Researching and organising the content needed
♦ Keeping other people informed of progress
♦ Making appropriate and efficient use of available technology
♦ Designing and producing the document
♦ Integrating non-text objects
♦ Checking for accuracy and correcting as necessary
♦ Storing the document safely and securely
♦ Clarifying document requirements, when necessary
♦ Presenting the document in the required format within agreed deadlines

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- E-mails agreeing purpose, format, content, style, standards and deadlines
- Preparatory notes
- Design plans
- Intermediate stages of document showing corrections and clarifications
- Completed documents
- Screenshots of files stored in subfolders/password protections

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S312: Prepare Text from Notes Using Touch Typing (60 wpm)

SQA Code FE11 04

General Overview

This Unit is about presenting accurate and correct text in an agreed format, from notes — using touch typing at a speed of 60 wpm.

This involves:

Planning and being accountable for own work

- Agreeing the purpose, format and deadlines for the transcription
- Inputting text using touch typing to 60 wpm
- Formatting the text, making efficient use of available technology
- Checking content for accuracy
- Seeking text clarification when necessary
- Storing text and original notes safely and securely
- Presenting text in the required format within agreed deadlines

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- Notes used as source for documents
- Finished documents
- E-mails confirming deadlines, formats or clarifications of content
- Intermediate stages of document showing corrections and clarifications
- Speed test/evidence of wpm criteria being met

It would be best practice to measure speed using a timed exercise. The word count would be based on five keystrokes per word with the candidate input measured over a 5 minute period with no more than five input errors.

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S313: Prepare Text from Shorthand (80 wpm)

SQA Code FE0Y 04

General Overview

This Unit is about taking shorthand notes and producing accurate and correct text in an agreed format from these notes, at a minimum speed of 80 wpm.

This involves:

♦ Agreeing the purpose, format, quality standards and deadlines for the text
♦ Taking dictation using shorthand at a minimum speed of 80 wpm
♦ Inputting and formatting the text from shorthand notes, making efficient use of available technology
♦ Checking content for accuracy
♦ Seeking text clarification when necessary
♦ Storing text and original notes safely and securely
♦ Presenting text in the required format within agreed deadlines and quality standards

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Notes used as source for documents
♦ Finished documents
♦ E-mails confirming deadlines, formats or clarifications of content
♦ Intermediate stages of document showing corrections and clarifications
♦ Speed test/evidence of wpm criteria being met

It would be best practice to measure speed using a timed exercise. The word count would be based on five keystrokes per word with the candidate input measured over a 5 minute period with no more than five input errors.

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S314: Prepare Text from Recorded Audio Instruction (60 wpm)

SQA Code FE10 04

General Overview

This Unit is about transcribing accurate and correct text on an agreed format from an audio recording, at a minimum speed of 60 wpm.

This involves:

Planning and being accountable for own work

♦ Agreeing the purpose, format and deadlines for the transcription
♦ Inputting text using audio to 60 wpm
♦ Formatting the text, making efficient use of available technology
♦ Checking content for accuracy
♦ Seeking text clarification when necessary
♦ Storing text and original notes safely and securely
♦ Presenting text in the required format within agreed deadlines and quality standards

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Notes used as source for documents
♦ Finished documents
♦ E-mails confirming deadlines, formats or clarifications of content
♦ Intermediate stages of document showing corrections and clarifications
♦ Speed test/evidence of wpm criteria being met

It would be best practice to measure speed using a timed exercise. The word count would be based on five keystrokes per word with the candidate input measured over a 5 minute period with no more than five input errors.

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S319: Organise and Co-ordinate Events

SQA Code FE0T 04

General Overview

This Unit is about agreeing a brief and budget for organising an event and to decide the operational activities and technical requirements to deliver the event.

This involves:

Before the event

♦ Agreeing the event brief and budget
♦ Agreeing a plan for the event which will meet agreed objectives and address identified risks and contingencies
♦ Identifying and agreeing resources and support needed
♦ Identifying and costing suitable venues
♦ Making sure all relevant legal and contractual requirements are met
♦ Making sure the event complies with all relevant health and safety and security requirements
♦ Liaising with the venue to confirm event requirements
♦ Making sure invitations are sent out to delegates
♦ Managing resources and the production of event materials
♦ Managing delegate responses
♦ Preparing joining instructions and event materials to be sent to delegates
♦ Making arrangements for rehearsals, if required, and make sure that the event runs smoothly
♦ Making sure all those involved are briefed and trained to fulfil their roles
♦ Delegating functions to the event team

At the event

♦ Preparing the venue and making sure all necessary resources are in place
♦ Co-ordinating activities and resources during the event
♦ Identifying where further learning and development could improve performance
♦ Helping delegates to feel welcome
♦ Responding to delegates' needs
♦ Resolving problems in a timely manner
♦ Overseeing the work of key staff during the event
♦ Monitoring compliance with relevant health, safety and security requirements
♦ Liaising with venue management to make sure resources are in place

After the event

♦ Clearing and vacating the venue
♦ Preparing and circulating papers
♦ Reconciling accounts to budgets
♦ Seeking and collecting feedback from those involved in the event
♦ Analysing the feedback and sharing the analysis
♦ Agreeing key learning points and use these to improve the running of future events

A key piece of evidence could be a comprehensive personal statement supported by performance evidence (observation and work product) and supplementary evidence (professional discussion, witness testimony and questioning). Good practice would be to include those items of knowledge not evident from performance into the personal statement.

If a personal statement is not used to place the evidence in context then the work product mentioned above would have to be well annotated and/or a combination of witness testimony, questioning and/or professional discussion used to do so. While gathering evidence against this Unit, please refer to the mandatory Units and try to gather evidence to cover them.

Remember evidence should be triangulated — performance evidence complemented by supporting evidence

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Event brief
♦ Plan for the event
♦ Costing for venues
♦ Comparison of venues and facilities
♦ Delegate list for invitation
♦ Invitations
♦ Delegate responses
♦ Analysis of delegate requirements
♦ Joining/registration instructions
♦ Event materials/papers
♦ Accounts relating to the event
♦ Feedback from delegates/colleagues and analysis

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S320: Plan and Organise Meetings

SQA Code FE0V 04

General Overview

This Unit is about planning and organising meetings, ensuring the necessary activities are carried out before, during and after the meeting.

This involves:

Before the event

♦ Planning and agreeing the meeting brief
♦ Agreeing a budget for the meeting
♦ Organising and confirming venue, equipment and catering requirements
♦ Agreeing and preparing agenda and meeting papers
♦ Inviting attendees, confirming attendance and identifying any special arrangements
♦ Making sure attendees needs are met
♦ Collating and dispatching papers for the meeting within agreed timescales
♦ Making sure the chair receives an appropriate briefing
♦ Arranging the equipment and layout of the room
♦ Arranging catering
♦ Making sure somebody has been nominated to take the minutes

At the meeting

♦ Making sure attendees are welcomed and receive suitable refreshments
♦ Making sure attendees have the papers and other resources they need
♦ Providing information, advice and support when required

After the event

♦ Evaluating and maintaining a record of external services
♦ Collecting and evaluating feedback from the meeting
♦ Agreeing learning points and use these to improve the organisation of future meetings

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Meeting brief
♦ Budget
♦ Costing for venues
♦ Comparison of venues and facilities
♦ Attendee list for invitation
♦ Invitations
♦ Attendee responses
♦ Analysis of delegate requirements
♦ Letters, e-mails, memos
♦ Meeting paper
♦ Evaluations
♦ Feedback
♦ Record of external services

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S321: Organise Business Travel or Accommodation

SQA Code FE0W 04

General Overview

This Unit is about researching, organising and agreeing arrangements for travel or accommodation to make sure they meet the brief and agreed budget.

This involves:

♦ Confirming travel or accommodation requirements
♦ Checking draft itinerary and schedule with the traveller
♦ Researching and booking travel arrangements or accommodation
♦ Obtaining foreign currency, insurance and visas, if required
♦ Obtaining and collating documents/information for travel or accommodation
♦ Maintaining records of travel or accommodation
♦ Arranging payment facilities for travel or accommodation
♦ Following correct procedures when there are problems with travel or accommodation
♦ Providing the traveller with an itinerary, documents and information in good time
♦ Confirming with the traveller that itinerary, documents meet requirements
♦ Evaluating and maintaining a record of external services used

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Copy of travel or accommodation and budget requirements
♦ Draft itinerary
♦ Records of booked travel or accommodation arrangements
♦ Records of foreign currency receipt, insurance and visa, if required
♦ Records of payment information for travel and/or accommodation
♦ Itinerary
♦ Attendee responses
♦ Letters, e-mails, memos
♦ Research analysis notes
♦ Feedback from traveller evaluations

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for Performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S325: Deliver, Monitor and Evaluate Customer Service to Internal and/or External Customers

SQA Code H989 04

General Overview

This Unit is about delivering, monitoring, evaluating and improving services to meet internal and/or external customer needs.

This involves:

Identifying customer needs and expectations

♦ Building positive working relationships with internal and/or external customers
♦ Managing expectations of internal and/or external customers to make sure they are realistic
♦ Identifying and confirming customer needs
♦ Agreeing timescales and quality standards with internal and/or external customers

Delivering customer services

♦ Providing services to agreed timescales and quality standards and follow procedures if these are not achieved
♦ Checking internal and/or external customer needs and expectations are met
♦ Following the correct procedures to handle complaints in a professional manner and to a given timescale
♦ Monitoring and evaluating internal and/or external customer services
♦ Obtaining and recording internal and/or external customer feedback
♦ Analysing and evaluating internal and/or external customer feedback
♦ Taking action to improve service to internal and/or external customers

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Letters, e-mails, memos
♦ Department contact logs
♦ Feedback analysis
♦ Internal customer feedback

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S309: Develop a Presentation

SQA Code FE0D 04

General Overview

This Unit is about researching, planning and preparing a presentation for specific audiences.

This involves:

♦ Agreeing the purpose, content, style and time of presentation and who the audience will be
♦ Researching and planning the presentation
♦ Choosing the equipment required to deliver the presentation
♦ Preparing the presentation
♦ Estimating how long the presentation will last
♦ Obtaining feedback on the presentation and making any necessary adjustments
♦ Producing presentation handouts
♦ Reflecting on feedback obtained and identifying learning points

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Research results/notes
♦ Presentations
♦ Feedback on presentations
♦ Presentation handouts

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for Performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S310: Deliver a Presentation

SQA Code FE0E 04

General Overview

This Unit is about preparing for, delivering and evaluating a formal presentation.

This involves:

- Choosing equipment and planning how to use the equipment's features
- Developing contingency plans
- Practicing and timing the delivery of the presentation
- Obtaining feedback on the presentation and making necessary adjustments
- Making sure the equipment and resources are in working order
- Making sure the audience receive presentation materials
- Introducing self to audience and stating the aims of the presentation
- Addressing the audience by speaking clearly and confidently
- Using equipment to enhance the presentation and deal with any problems that may occur
- Varying voice tone, pace and volume to emphasise points and maintain audience interest
- Using body language to reinforce message
- Gauging audience reaction during the presentation
- Summarise the key points
- Providing the opportunities to ask questions
- Listening carefully to questions and respond in a way that meets the audience's needs
- Collecting feedback on the presentation
- Reflecting on own performance and identifying changes that will improve future presentations
- Evaluating the presentation and identifying changes that will improve presentations

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- Presentation handouts
- Feedback on presentations
- Self evaluation/reflection

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S315: Support the Design and Development of Information Systems

SQA Code FE0F 04

General Overview

This Unit is about contributing to the design and supporting the development of information systems to meet users' needs.

This involves:

♦ Identifying the information that will be managed within the system
♦ Identifying the resources required and available to implement the system
♦ Contributing to the design of the system specification
♦ Supporting the development of the information system
♦ Supporting the testing of the information system
♦ Resolving faults within limits of own authority

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Design of system specification
♦ Example of information system that meets the specification
♦ Letters, memos, e-mails
♦ Minutes of meetings/details of discussions
♦ System test documentation

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S316: Monitor Information Systems

SQA Code FE0G 04

General Overview

This Unit is about maintaining and monitoring information systems to meet agreed specifications within legislation and organisational requirements.

This involves:

♦ Identifying the information to be monitored and the resources available
♦ Providing training and ongoing support to users
♦ Maintaining and updating the information system
♦ Monitoring the use of the information system
♦ Resolving problems when they occur
♦ Reviewing and further development of the information system
♦ Making sure legal and organisational requirements are followed

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Records/evidence of checking/monitoring the information system
♦ Records of updating the information system
♦ Records of resources used
♦ Records of problems and actions taken to resolve
♦ System specifications with annotation/testimony
♦ Legal and organisational requirements with annotation/testimony

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S317: Analyse and Report Data

SQA Code FE0H 04

General Overview

This Unit is about selecting, organising, analysing and reporting data.

This involves:

♦ Selecting relevant, valid and reliable data for analysis
♦ Organising data for analysis
♦ Applying analysis and evaluation techniques and producing accurate, unbiased results and conclusions
♦ Getting feedback on what you have found and presenting data on time

A key piece of evidence could be a comprehensive personal statement supported by performance evidence (observation and work product) and supplementary evidence (professional discussion, witness testimony and questioning). Good practice would be to include those items of knowledge not evident from performance into the personal statement.

While gathering evidence against this Unit, please refer to the mandatory Units and try to gather evidence to cover them.

Remember evidence should be triangulated — performance evidence complemented by supporting evidence

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Raw data
♦ Data selected for analysis with annotation/testimony
♦ Accurate unbiased results of analysis presented in appropriate format
♦ Feedback on analysis
♦ Letters, memos and e-mails

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S318: Order Products and Services

SQA Code FE0J 04

General Overview

This Unit is about identifying and obtaining relevant products and services to meet agreed specifications as negotiated with suppliers to achieve best value for money.

This involves:

♦ Keeping up-to date with products and services related to candidate's own work area
♦ Developing and agreeing a budget and specification for products to be ordered
♦ Identifying quality products that meet the specification
♦ Identifying products which represent value for money
♦ Procuring products following organisational procedures
♦ Negotiating with suppliers to reach an agreement which offers value for money
♦ Agree a contract for the product
♦ Creating and maintaining partnerships with suppliers
♦ Monitoring the performance of suppliers
♦ Following procedures to deal with problems
♦ Monitoring and evaluating the procurement procedures
♦ Taking action to improve efficiency and obtain better value for money

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Budget and specification for products to be ordered
♦ Letters, e-mails of negotiations with suppliers
♦ Copy of contract/order confirmation/invoice
♦ Organisational/procurement procedures with annotation/testimony
♦ Records of follow up action

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S416: Manage Budgets

SQA Code H68K 04

General Overview

This optional Unit is about controlling, monitoring and recording transactions for an agreed budget.

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Minutes of budget review meetings (including discussions on overspends)
♦ Reviews
♦ Copies of budget performance (recording transactions)
♦ Purchase orders
♦ Invoices
♦ Signed off budgets

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S323: Contribute to Innovation in a Business Environment

SQA Code FE0L 04

General Overview

This Unit is about contributing to improve working methods, services or products in a business environment.

This involves:

♦ Questioning ways of working within own area of work
♦ Helping to research and identify possible improvements to working methods
♦ Helping gather information to develop ideas
♦ Contributing to the evaluation of ideas
♦ Asking appropriate questions to extend own thinking and question own assumptions
♦ Communicating and sell ideas to others
♦ Taking feedback into account and showing willingness to compromise

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Research results
♦ Evaluation of research, questionnaires, surveys
♦ Minutes of meeting
♦ Action notes
♦ Letters, e-mails, memos
♦ Feedback, appraisals, reviews

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S329: Provide Administrative Support in Schools

SQA Code FE0M 04

General Overview

This Unit is about working with school contacts and wider community contacts to contribute to school goals and priorities.

This involves:

♦ Building positive working relationships
♦ Presenting a positive image of yourself and your school
♦ Communicating effectively with contacts
♦ Following school policies and procedures for dealing with parents, guardians and carers
♦ Following school policies and procedures for dealing with colleagues and the wider community
♦ Providing effective administrative and organisational support to school contacts and the wider community
♦ Operating school administration systems
♦ Analysing and evaluating information
♦ Producing reports in line with school procedures
♦ Safeguarding confidential information
♦ Acting within the limits of your authority
♦ Referring issues beyond your authority to the appropriate person

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Printouts from school administration system
♦ Letters, e-mails, memos
♦ Reports
♦ School policies/procedures/organisational structure with annotation/testimony

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S351: Verify Critical Dates for Sentences

SQA Code FN75 04

General Overview

This Unit is about verifying critical dates for sentences so that individuals are released from custody on time.

This involves:

♦ Verifying that the documentation allows lawful imprisonment or detention of the individual
♦ Checking that all information on the documentation has been interpreted correctly
♦ Checking with the relevant authority if you are in doubt about how to interpret information
♦ Checking that all information has been accurately entered into systems
♦ Providing advice and guidance to those interpreting documentation and calculating critical dates
♦ Checking the interpretation of documentation and calculations of critical dates to ensure they are accurate
♦ Identifying errors in interpretation of documentation or calculation of critical dates and ensure these errors are corrected
♦ Checking with the relevant authority where you are in doubt about critical dates

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- Documents relating to the lawful imprisonment or detention of individuals
- Calculations of critical dates
- Evidence that documentation allows lawful imprisonment or detention of the individual
- Correspondence confirming interpretation of information on the documentation
- Correspondence providing advice and guidance to those interpreting documentation and calculating critical dates
- Correspondence detailing errors in interpretation of documentation or calculation of critical dates and ensuring these errors are corrected
- Correspondence confirming critical dates

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Please refer to the Skills for Justice Assessment Strategy for SVQs in the Justice, Community Safety and Legal sectors for full Assessment Criteria.

Unit S352: Verify the Release Process

SQA Code FN76 04

General Overview

This Unit is about checking that individuals are eligible for release and that all administrative arrangements have been made correctly.

This involves:

♦ Maintaining systems which give you accurate information about individuals' eligibility for release
♦ Recalculating release dates for individuals
♦ Referring promptly to the releasing authorities if there is any doubt about an individual's eligibility for release
♦ Communicating in ways that can be understood by individuals, responding to their different needs, abilities and preferences
♦ Providing advice and guidance to those preparing documentation and entitlements for individuals on release
♦ Checking that the correct documentation and entitlements have been prepared for each individual to be released
♦ Identifying any errors in the preparation of documentation and entitlements and ensure these errors are corrected
♦ Presenting documentation in the required format so that the release of individuals from custody can be authorised

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- Documents relating to the release process
- Correspondence and records regarding individual's eligibility for release
- Communications to individuals regarding their release appropriate to their different needs, abilities and preferences
- Correspondence providing advice and guidance to those preparing documentation and entitlements for individuals in release
- Correspondence detailing errors in the preparation of documentation and entitlements and ensure these errors are corrected

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Please refer to the Skills for Justice Assessment Strategy for SVQs in the Justice, Community Safety and Legal sectors for full Assessment Criteria.

Unit S353: Administer Agricultural Records

SQA Code FN7A 04

General Overview

This Unit is about recording and updating agricultural data.

This involves:

♦ Gathering accurate data from relevant sources and within required timescales
♦ Recording data in line with the legal requirements and those of external agencies
♦ Checking that records are complete, requesting missing information as appropriate
♦ Keeping records up-to-date
♦ Reconciling data with that held by external agencies
♦ Submitting data to external agencies in necessary timescales
♦ Making sure other people understand how the data is recorded and how to access it
♦ Storing records securely and confidentially
♦ Analysing data to produce management reports
♦ Presenting reports in an appropriate format

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Agricultural records
♦ Data reconciliation
♦ Reports
♦ Legal/organisational requirements with annotation/testimony

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for Performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S354: Make Agricultural Returns, Applications and Claims

SQA Code FN7C 04

General Overview

This Unit is about preparing relevant returns, applications and claims in the agricultural industry.

This involves:

♦ Collating information necessary to prepare the return, application or claim
♦ Preparing returns, applications and claims
♦ Checking information and actions with relevant person
♦ Making sure all returns, applications or claims are signed by appropriate person
♦ Complying with relevant timescales for submission
♦ Keeping copies of returns, applications and claims securely and confidently
♦ Answering any queries about the return, application or claim
♦ Monitoring the progress of the return, application or claim and dealing with any problems that arise
♦ Making sure payment has been received and recorded in the financial records

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Copies of returns, applications and claims
♦ Correspondence relating to returns, applications or claims
♦ Financial records showing payment has been received and recorded
♦ Records of queries resolved

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for Performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S355: Administer Legal Files

SQA Code FN77 04

General Overview

This Unit is about opening, maintaining and administering a file, reviewing and closing a file, preparing final bills and storing and arranging files to be archived.

This involves:

♦ Carrying out checks and searches and reporting on outcomes to the fee earner
♦ Receiving money on account from clients as instructed and processing in line with organisational requirements
♦ Opening a file and entering information
♦ Generating client care letters
♦ Maintaining and administering a current file
♦ Producing and amending correspondence and documents
♦ Making sure all relevant timescales and dates are entered in appropriate diaries
♦ Carrying out research as instructed and reporting back to fee earner
♦ Making sure all costs and disbursements are recorded accurately
♦ Making sure all file management activities conform to house style
♦ Making sure all time spent on the matter is recorded accurately
♦ Generating bills as requested
♦ Reviewing the file and identifying any outstanding issues and unbilled disbursements
♦ Reporting outstanding issues to the fee earner for resolution
♦ Dealing with reimbursements
♦ Checking with the fee earner whether any documents, knowledge or data needs to be added to the organisation's precedent, knowledge or data bank
♦ Ensuring the file is complete for preparation of the final bill
♦ Preparing the final bill
♦ Completing file closing documentation and checking that the account shows a nil balance
♦ Notifying relevant people that the file is closing
♦ Sorting the file, removing unnecessary material, and checking with the fee earner on the appropriate distribution of documents
♦ Making sure that hard copies of electronic communications are in the file
♦ Preparing a schedule of the file contents so that they can be readily retrieved
♦ Correctly label files for storage and amend records to show that the file is closed
♦ Arranging for the file to be archived

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Documentation relating to the receipt of money from clients
♦ Care letters
♦ Records of costs and disbursements
♦ Copies of bills
♦ Copies of schedule of file contents
♦ Letters, memos and e-mails including examples of amended correspondence
♦ Records of checks and searches and reporting on outcomes to the fee earner
♦ Record of file log and maintenance including confirming all time spent is recorded and reviewing outstanding issues and unbilled disbursements and notification of closure
♦ Forward planning of activities to comply with timescales
♦ Reporting outstanding issues to the fee earner for resolution
♦ File archive records and archive storage records

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the Skills for Justice Assessment Strategy for SVQs in the Justice, Community Safety and Legal sectors for full Assessment Criteria.

Unit S356: Build Case Files

SQA Code FN78 04

General Overview

This Unit is about receiving and opening a case file, reviewing and building a case file, submitting a case file and following up any actions.

This involves:

♦ Receiving and opening a case file
♦ Reviewing the case file and identifying additional evidence and materials required
♦ Obtaining all additional items of evidence and materials
♦ Producing documents and correspondence
♦ Consulting other people where necessary
♦ Making sure information is kept secure and confidential
♦ Reviewing the materials to make sure all the relevant information is present
♦ Submitting the case file on time
♦ Taking responsibility for any follow up actions

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Copy of case file
♦ Emails, memos
♦ Related documents
♦ Records of queries, consultation and correspondence
♦ Records of secure storage
♦ Submission of case file
♦ Action notes

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the Skills for Justice Assessment Strategy for SVQs in the Justice, Community Safety and Legal sectors for full Assessment Criteria.

Unit S357: Manage Case Files

SQA Code FN79 04

General Overview

This Unit is about receiving and opening case files, reviewing and updating case files. Preparing court bundles, processing appeal documentation and follow up actions. Preparing case files for closure and closing case files.

This involves:

♦ Receiving and opening a case file
♦ Reviewing the file and planning its management to meet required deadlines
♦ Obtaining or identifying the location of all file documents and materials
♦ Producing and amending documents
♦ Liaising with the relevant people to progress the case
♦ Keeping the case file up-to-date
♦ Making sure information is kept secure and confidential
♦ Preparing court bundles as requested
♦ Consulting other people as necessary
♦ Submitting documents on time
♦ Actioning and recording hearing outcomes
♦ Processing appeal documentation
♦ Liaising with the relevant people to progress the appeal
♦ Recording the outcome of the appeal
♦ Preparing the case file for closure
♦ Notifying the relevant people that the case file is closing
♦ Closing the case file
♦ Arranging for the case file to be archived

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- Letters, memos and e-mail
- Case file — this should include additions and amendments you have made, action and record hearing outcomes and any appeal documentation
- Copies of documents
- Case bundles
- Appeal documentation
- Archive documentation
- Records of file reviews and plans to meet required deadlines
- Records of submissions

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Please refer to the Skills for Justice Assessment Strategy for SVQs in the Justice, Community Safety and Legal sectors for full Assessment Criteria.

Unit S330: Administer Parking and Traffic Challenges, Representations and Civil Parking Appeals

SQA Code FE0N 04

General Overview

This Unit is about providing administrative services for parking challenges, representations and civil parking notice (CPN) appeals.

This involves:

♦ Registering receipt of challenges, representations and CPN appeals
♦ Responding promptly to a customer's initial enquiry with accurate advice
♦ Recording that you have received the written challenge, representation or CPN appeal
♦ Making sure you have the information you need to understand the customer's case
♦ Checking the details of the documentation you have received for accuracy, consistency and validity
♦ If the documentation fails to meet the requirements for considering the challenge, representation or CPN appeal promptly inform the customer of this and the courses of action they can take
♦ If the customer's situation does not fall within recognised criteria for cancellation inform the customer of this and the courses of action they can take
♦ At all stages, comply with organisational and legal requirements

Responding to challenges, representations and CPN appeals

♦ Collating evidence for response to the challenge, representation or CPN appeal
♦ If necessary, taking prompt action to suspend the enforcement process while the case is being investigated
♦ Making sure all internal records are accurate, reliable, valid and up-to-date
♦ Reviewing the documentation to make sure there is sufficient evidence, and deciding whether you need additional evidence
♦ Where necessary, obtain the additional items of evidence needed
♦ Referring any matter which is beyond the limits of your responsibility to the appropriate person
♦ Reviewing all evidence and making a decision
♦ Informing the customer, in writing and within agreed timescales, of your decision and the courses of action that they can take
♦ Where appropriate, reactivating the enforcement process
♦ Keeping copies of all correspondence and update records
♦ At all stages, complying with current organisational and legal requirements

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Letters, memos and e-mail/ correspondence with customers
♦ Evidence collated with annotation/testimony
♦ Register of receipt of challenges, representations or CPN appeal
♦ Internal records
♦ Organisational/legal requirements with annotation/testimony

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S331: Administer Statutory Parking and Traffic Appeals

SQA Code FE0P 04

General Overview

This Unit is about processing documentation and responding to statutory appeals against parking penalty charge notices (PCN) including those following a successfully filed statement of truth on grounds 1, 2, 3 or 4. This standard covers the statutory appeals process. It may be appropriate for evidence relating to this Unit to be left in situ.

This involves:

♦ Preparing case evidence
♦ Recording that you have received the statutory appeal notification or revocation order
♦ Taking action to suspend the enforcement process during the investigation
♦ Checking the details of the documentation you have received for accuracy and consistency and notifying the appropriate person of any discrepancies
♦ Making sure that you understand the grounds on which the customer is appealing or the statement of truth has been filed
♦ At all stages complying with current organisational and legal requirements
♦ At all stages carry out work within the given deadline for the case

Investigating the case for statutory appeal and decide how to proceed

♦ Making sure all necessary evidence is present, accurate, valid and reliable
♦ Identifying and obtain any additional items of evidence that are needed
♦ Where necessary consulting other people to obtain further information
♦ Referring any matter which is beyond the limits of your responsibility to the appropriate person
♦ Reviewing all evidence — making and recording a decision on the basis of the evidence
♦ Where the decision is not to contest the statutory appeal or the statement of truth, making sure that the adjudicator and appellant or respondent are informed and that the decision has been recorded properly
♦ Complying with current organisational and legal requirements

Contest the statutory appeal

♦ Preparing a case summary
♦ Collating, labelling and presenting documentation in the format required by the appeals service
♦ Making sure copies of documentation are provided to all relevant people
♦ Making sure you are prepared to respond to requests for further information
♦ If you attend the hearing, ensure that you are fully conversant with the case and that you comply with the code of conduct for personal attendance

Responding appropriately to the outcomes of the statutory appeal

♦ Updating all records
♦ Proceeding with the case as appropriate to the outcomes of the statutory appeal
♦ Reviewing and considering the adjudicator's feedback — take appropriate actions

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Letters, memos and e-mails
♦ Records of receipt of statutory appeal notification or revocation order
♦ Case evidence
♦ All case documentation
♦ Record of decision
♦ Case summary

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S332: Administer Parking and Traffic Debt Recovery

SQA Code FE0R 04

General Overview

This Unit is about providing administrative services for the recovery of parking and traffic debt.

This involves:

♦ Monitoring the quality of the data to be registered at TEC or magistrates court
♦ Ensuring debt recovery documentation is served in accordance with organisational policy and relevant legislation
♦ Investigating the case and preparing case evidence
♦ Reviewing all evidence — making and recording a decision on the basis of evidence
♦ Where the decision is not to pursue the case make sure that relevant people are informed and that the decision has been recorded properly
♦ Where the decision is to pursue the case proceed in accordance with organisational policy and relevant legislation
♦ Responding appropriately to the outcomes of the case, reviewing feedback and taking appropriate action
♦ Liaising with debt recovery agents
♦ Liaising with outside agencies
♦ Monitoring the performance of debt recovery agencies
♦ Producing relevant reports — updating and maintaining records in line with organisational policy and relevant legislation
♦ Carrying out work within the given deadlines for the case
♦ Closing the case in accordance with organisational policy and relevant legislation

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- Copies of debt recovery documentation
- Case evidence
- Investigation records
- Letters, memos and e-mails
- Documentation relation to the performance of debt recovery agents
- Reports

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit 339a: Bespoke Software 3

SQA Code F9AR 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

The Unit is about the ability to select and use a suitable bespoke software application to carry out an appropriate data processing task. It includes understanding the capabilities of the software and the types of tasks for which it is suitable, as well as the skills and techniques needed to use the software application appropriately and effectively.

Some organisations have software applications developed specifically for employees to be able to carry out particular tasks or activities (bespoke applications). For example, for customer relationship management, stock control, plant control, engineering diagnostics, credit management or analysing sales performance.

This involves:

♦   Inputting relevant information accurately so that it is ready for processing.
♦   Selecting and using appropriate techniques to link and combine information within the application and across different software applications.
♦   Creating, changing and using appropriate structures and/or layouts to organise information efficiently.
♦   Managing data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data where available.
♦   Selecting and using appropriate tools and techniques to edit, analyse and format information.
♦   Checking information meets needs, using IT tools and making corrections as necessary.
♦   Identifying and responding appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs.
♦   Selecting and using presentation methods to aid clarity and meaning.

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Bespoke information will vary according to the software — for example, text, numbers, photos, scanned images, graphic elements, digital recorded sound, graphs, charts, tables
♦ Screen dumps
♦ Hard copies of documents constructed using bespoke software
♦ Electronic copies of documents constructed using specialist software
♦ E-mails confirming information meets needs and/or detailing changes

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit 339b: Specialist Software 3

SQA Code F9AW 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

The Unit is about the ability to select and use a suitable specialist software application to carry out an appropriate data processing task. It includes understanding the capabilities of the software and the types of tasks for which it is suitable, as well as the skills and techniques needed to use the software application appropriately and effectively.

Examples of specialist software include:

♦ Logistics planning applications
♦ Computer Aided Design (CAD) applications
♦ Computer animation applications
♦ Music composition and editing applications

This involves:

♦ Inputting and combining information using specialist software.
♦ Selecting and using appropriate techniques to link and combine information within the application and across different applications.
♦ Creating, changing and using appropriate structures and/or layouts to organise information efficiently.
♦ Managing data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data.
♦ Selecting and using appropriate tools and techniques to edit, analyse and format information.
♦ Checking information meets needs, using IT tools and making corrections as necessary.
♦ Identifying and responding appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs.
♦ Selecting and using presentation methods to aid clarity and meaning.

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Specialist information will vary according to the software — for example, text, numbers, photos, scanned images, graphic elements, digital recorded sound, graphs, charts, tables
♦ Screen dumps
♦ Hard copies of documents constructed using specialist software
♦ Electronic copies of documents constructed using specialist software
♦ E-mails confirming information meets needs and/or detailing changes

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S340: Data Management Software 3

SQA Code F9C3 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

The Unit is about selecting and using advanced data management software tools and techniques.

This involves:

Entering, editing and maintaining data records in a data management system

♦ Entering data accurately into groups of records
♦ Configure characteristics of groups of records
♦ Checking data records meet needs
♦ Responding appropriately to data entry and other error messages
♦ Applying local and/or legal guidelines for the storage and use of data

Retrieving and displaying data records to meet requirements

♦ Creating and using queries to search for and retrieve information
♦ Creating, defining and setting up reports to output information
♦ Using the file handling techniques of the software to import and export data
♦ Using available techniques to combine and link data

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Data records showing entry and editing
♦ Printout of queries
♦ Printout of reports
♦ Letters, memos and e-mails
♦ Feedback
♦ Error log

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S341: Database Software 3

SQA Code F9C6 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

The Unit is about selecting and using advanced database software tools and techniques to enter information into databases, retrieve information by creating queries and producing reports.

This involves:

Planning, creating and modifying relational database tables

♦ Planning and creating multiple tables using a range of field types and properties
♦ Setting up and modifying relationships between database tables
♦ Responding to problems with tables
♦ Using database tools and techniques to ensure data integrity is maintained

Entering, editing and organising structured information in a database

♦ Designing and creating forms to access, enter, edit and organise data in a database
♦ Selecting and using appropriate tools and techniques to format data entry forms
♦ Checking data entry meets needs
♦ Responding appropriately to data entry errors

Using database software tools to create, edit and run queries and produce reports

♦ Creating and running database queries using multiple criteria
♦ Planning and producing database reports from a single table nonrelational database
♦ Selecting and using appropriate tools and techniques to format database reports
♦ Checking reports meet needs

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Printout of tables
♦ Printout showing relationships
♦ Printout of designed forms
♦ Printout of queries
♦ Printout of reports
♦ Letters, memos and e-mails
♦ Feedback

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S342: Improving Productivity Using IT 3

SQA Code F99F 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

The Unit is about planning and reviewing the use of predefined or commonly used IT tools for activities that are at times complex and non-routine. As a result of reviewing their work, the individual will be able to devise solutions to use IT tools to improve productivity.

This involves:

Planning, selecting and using appropriate IT systems and software for different purposes

♦   Developing plans for using IT for different tasks and purposes
♦   Selecting and using IT systems and software applications to produce effective outcomes

Evaluating the selection and use of IT tools to make sure that activities are successful

♦   Reviewing ongoing use of IT tools and techniques and change the approach as needed
♦   Evaluate and test solutions to make sure they match requirements and are fit for purpose
♦   Giving feedback on other people's selection and use of IT tools

Devising solutions to improve the use of IT tools and systems for self and others

♦   Developing solutions that make a demonstrable improvement to the use of IT tools and systems
♦   Testing solutions to ensure that they work as intended
♦   Recommending improvements to IT systems and procedures that increase productivity

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Plans
♦ Evaluations of test solutions
♦ Test documents
♦ Letters, memos and e-mails
♦ Feedback to others
♦ Recommendations for improvements

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S343: IT Security for Users 3

SQA Code F99V 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

The Unit is about monitoring potential risks and take steps to protect their own and other's systems data and software, eg from unauthorised remote access, disaster recovery or contingency planning.

This involves:

♦ Selecting, using and evaluating a range of security precautions to protect IT systems and monitor security
♦ Manage access to information sources securely to maintain confidentiality, integrity and availability of information
♦ Applying, maintaining and developing guidelines and procedures for the secure use of IT
♦ Selecting and using effective back up procedures for systems and data

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- Evaluations of test solutions
- Test documents
- Guidelines for security
- Letters, memos and e-mails
- Feedback to others

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S344: Presentation Software 3

SQA Code F9CV 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

The Unit is about selecting and using a wide range of advanced presentation software tools and techniques effectively to produce presentations that are complex or non-routine.

This involves:

Inputting and combining text and other information within presentation slides

♦ Entering text and other information using layouts appropriate to type of information
♦ Inserting charts and tables and link to source data
♦ Inserting images, video and sound to enhance the presentation
♦ Organising and combining information for presentations in line with any constraints
♦ Storing and retrieving presentation files effectively

Using presentation software tools to structure, edit and format presentations

♦ Creating, amending and using appropriate templates and themes for slides
♦ Selecting and using appropriate techniques to edit and format presentations
♦ Creating and using interactive elements to enhance presentations
♦ Selecting and using animation and transition effects to enhance presentations

Preparing slideshow for presentation

♦ Preparing interactive slideshow and associated products for presentation
♦ Checking presentation meets needs
♦ Identifying and responding to any quality problems with presentations

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Rough drafts
♦ Final presentations
♦ Handouts
♦ Discussion re brief/feedback

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S345: Setting Up an IT System 3

SQA Code F99L 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

The Unit is about selecting and connecting up an IT system with a range of hardware, removable storage media and a communication system safely and successfully and is able to help others to do so.

This involves:

Selecting and connecting up a personal computer safely with associated hardware and storage media to meet needs

♦ Selecting and connecting an IT system to a communication service
♦ Installing and configuring operating system and application software
♦ Configuring the user interface
♦ Installing, setting up and configuring virus protection and other security systems and software
♦ Establishing a backup routine for system and data files

Checking that the IT system and communication service are working successfully

♦ Selecting and running suitable tests to make sure that the system and communication service are working successfully
♦ Establishing procedures for recovery in the event of system faults or failure
♦ Responding to faults and error messages making use of the help facility

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Printouts from testing procedures
♦ Letters, memos, e-mails
♦ Fault log
♦ Installation log — license number, serial number of equipment, etc
♦ Back up logs

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S346: Spreadsheet Software 3

SQA Code F9D2 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

The Unit is about selecting and using a wide range of advanced spreadsheet software tools and techniques to produce, present and check spreadsheets that are at times complex and non-routine.

This involves:

Using a spreadsheet to enter, edit and organise numerical and other data

♦ Entering and editing numerical and other data
♦ Combining and linking data from different sources
♦ Storing and retrieving spreadsheet files effectively

Selecting and using appropriate formulas and data analysis tools to meet requirements

♦ Selecting and using a range of appropriate functions and formulas
♦ Use a range of tools and techniques to present, format and publish spreadsheet information
♦ Selecting and using appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheet
♦ Selecting and using appropriate tools and techniques to generate, develop and format charts and graphs
♦ Selecting and using appropriate page layouts to present, print and publish information
♦ Checking information meets needs
♦ Use auditing tools to identify and respond to any problems

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Variety of spreadsheets
♦ Letters, e-mails, memos
♦ Feedback on suitability of spreadsheets
♦ Printouts of cell contents of spreadsheets

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S347: Using Collaborative Technologies 3

SQA Code F9A8 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

The Unit is about managing, integrating and facilitating the safe use of multiple IT tools and devices so that groups can work collaboratively.

This involves:

Staying safe and secure when working with collaborative technology

♦   Developing and implementing guidelines for good practice in working with collaborative technology
♦   Developing and implementing guidelines for checking the authenticity of identities and different types of information
♦   Analysing and managing risks in the use of collaborative technologies

Planning and setting up IT tools and devices for collaborative working

♦   Selecting an appropriate combination of IT tools and devices to carry out collaborative tasks
♦   Connecting and configuring a combination of IT tools and devices needed for a collaborative task

Preparing collaborative technologies for use

♦   Managing levels of access and permissions for different purposes
♦   Selecting and integrating different elements across applications to create environments for collaborative technologies
♦   Setting and adjusting settings to facilitate use of collaborative technologies by others
♦   Managing data flow to benefit collaborative working
♦   Managing tasks using collaborative technologies
♦   Facilitating others' responsible contributions to and engagement with collaborative technologies
♦   Managing the moderation of collaborative technologies
♦   Oversee the archiving of the outcomes of collaborative working
♦   Responding to problems with collaborative technologies and being prepared to help others to do so

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Good practice/organisational guidelines with annotation/testimony
♦ Records of planning and setting up IT tools and devices
♦ Records of supporting others
♦ Plans/drafts/notes
♦ E-mails/memos

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S348: Website Software 3

SQA Code F9D5 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

The Unit is about selecting and using a wide range of advanced website software tools and techniques to develop multi-page websites with multimedia and interactive features.

This involves:

Creating structures and styles and use them to produce websites

♦ Plan and create web page templates
♦ Selecting and using website features and structures to enhance website navigation and functionality
♦ Creating, selecting and using styles to enhance website consistency and readability
♦ Storing and retrieving files effectively

Selecting and using website software tools and features to develop multiple page websites with multimedia and interactive features

♦ Preparing content for web pages so that it is ready for editing and formatting
♦ Organising and combining information needed for web pages including across different software
♦ Selecting and using appropriate editing and formatting techniques
♦ Selecting and using appropriate programming and development techniques to add features and enhance websites
♦ Selecting and using file formats that make information easier to download
♦ Check web pages meet needs

Publishing and testing multiple page websites with multimedia and interactive features

♦ Selecting and using appropriate testing methods to check that all elements and features of complex websites are working as planned
♦ Selecting and using an appropriate programme to upload and publish the website
♦ Respond appropriately to quality problems with websites

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Printouts of web pages
♦ Plan of website
♦ Letters, memos, e-mails
♦ Testing documentation
♦ Fault logs

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S349: Word Processing Software 3

SQA Code F9D8 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

The Unit is about selecting and using a range of advanced word processing software tools and techniques to produce complex and non-routine documents.

This involves:

Entering and combining text and other information accurately within word processing documents

♦ Using appropriate techniques to enter text accurately and efficiently
♦ Creating, using and modifying appropriate templates for different types of documents
♦ Combining or merging information within a document from a range of sources
♦ Storing and retrieving document and associated files effectively
♦ Selecting and using tools and techniques to work with multiple documents or users
♦ Customising interface to meet needs

Creating and modifying appropriate layouts, structures and styles for word processing documents

♦ Creating, using and modifying columns, tables and forms to organise information
♦ Defining and modifying styles
♦ Selecting and using tools and techniques to organise and structure long documents

Using word processing software tools and techniques to format and present documents effectively to meet requirements

♦ Selecting and using appropriate techniques to format characters and paragraphs
♦ Selecting and using appropriate page and section layouts to present and print multi-page and multi-section documents
♦ Checking documents meet needs
♦ Responding appropriately to any quality problems with documents

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- Evidence of word processed non-routine and unfamiliar documents
- Documents including columns, tables, forms
- Merging of documents
- Multi-page and multi-section documents

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S350: Using Email 3

SQA Code F9A5 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

The Unit is about understanding and using a range of basic e-mail software tools to send, receive and store messages for straightforward or routine activities. Any aspect that is unfamiliar will require support and advice from others.

This involves:

♦ Composing and formatting e-mail messages, including attachments
♦ Sending e-mail messages to individual and groups
♦ Using address book to manage contact information
♦ Developing and communicating guidelines and procedures for using e-mail effectively
♦ Responding appropriately to e-mail messages and attachments
♦ Using e-mail software tools and techniques to automate responses
♦ Organising, storing and archiving e-mail messages
♦ Customising e-mail software to make it easier to use
♦ Responding appropriately to e-mail problems

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Variety of e-mail messages
♦ Screen dump of stored e-mail messages and archived e-mail messages
♦ Screen dump of customisation of menus and or toolbars
♦ Screen dump of organising address book — contact and group maintenance
♦ Screen dump of examples of automated responses, eg rules, redirected responses, out of office, etc
♦ Screen dump of folders pane
♦ E-mail guidelines you have developed
♦ Screen dump showing how you resolved problems

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S211: Produce Documents in a Business Environment

SQA Code F93T 04

General Overview

This Unit is about producing high quality, attractive documents to agreed specifications.

This involves:

♦ Confirmation of purpose, content, style and deadlines for the document
♦ Preparation of required resources
♦ Organisation of required content
♦ Production of document(s) using available technology
♦ Integration of non-text objects where required
♦ Storing documents
♦ Following the relevant occupational health and safety requirements

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- Letters, memos, e-mails
- Document brief — when required, style, content, etc
- Finished documents with annotation/testimony

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S212: Prepare Text from Notes

SQA Code FD9W 04

General Overview

This Unit is about presenting accurate text from notes.

This involves:

♦ Agreeing the purpose, format and deadlines for the transcription
♦ Inputting the text
♦ Formatting the text
♦ Checking text for errors and correcting text
♦ Clarifying text requirements where necessary
♦ Storing the text and original notes securely
♦ Presenting the text in the required format within agreed deadlines

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Notes
♦ Finished documents
♦ E-mails confirming deadlines, formats or clarifications of content
♦ Intermediate stages of document showing corrections and clarifications

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S213: Prepare Text from Notes Using Touch Typing (40 wpm)

SQA Code FD9X 04

General Overview

This Unit is about presenting accurate and correct text in an agreed format, from notes — touch typing at a speed of 40 wpm.

This involves:

♦ Agreeing the purpose, format and deadlines for the transcription
♦ Evidence of touch typing to 40 wpm/speed test
♦ Formatting text appropriately
♦ Storing text and original notes
♦ Presenting text within agreed deadlines

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- Notes
- Finished documents
- E-mails confirming deadlines, formats or clarifications of content
- Intermediate stages of document showing corrections and clarifications
- Speed test/evidence of wpm criteria being met

Best practice would be to measure typing speed using a timed exercise. The word count would be based on five keystrokes per word with the candidate input measured over a 5 minute period with no more than five input errors.

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S214: Prepare Text from Shorthand (60 wpm)

SQA Code FD9T 04

General Overview

This Unit is about taking shorthand notes and producing accurate and correct text in an agreed format from these notes at a minimum speed of 60 words per minute.

This involves:

♦ Agreeing the purpose, format and deadlines for the text
♦ Taking dictation using shorthand at 60 wpm
♦ Clarifying text requirements when necessary
♦ Inputting and formatting text from notes within agreed deadlines
♦ Making efficient use of the technology available
♦ Checking content for accuracy and correcting text
♦ Storing text and original shorthand notes safely and securely

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Notes used as source for documents
♦ Finished documents
♦ E-mails confirming deadlines, formats or clarifications of content
♦ Intermediate stages of document showing corrections and clarifications
♦ Speed test/evidence of wpm criteria being met

Best practice would be to measure typing speed using a timed exercise. The word count would be based on five keystrokes per word with the candidate input measured over a 5 minute period with no more than five input errors.

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S215: Prepare Text from Recorded Audio Instruction (40 wpm)

SQA Code FD9V 04

General Overview

This Unit is about transcribing accurate and correct text in an agreed format from an audio recording, at a minimum speed of 40 words per minute.

This involves:

♦ Agreeing the purpose, format and deadlines for the transcription
♦ Inputting the text from audio to a speed of 40 wpm/speed test
♦ Appropriate formatting of text
♦ Checking content for accuracy and correcting text as required
♦ Seeking clarification when necessary
♦ Storing the text and original safely and securely
♦ Presenting of text in the required format within agreed deadlines

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Notes used as source for documents
♦ Finished documents
♦ E-mails confirming deadlines, formats or clarifications of content
♦ Intermediate stages of document showing corrections and clarifications
♦ Speed test/evidence of wpm criteria being met

Best practice would be to measure typing speed using a timed exercise. The word count would be based on five keystrokes per word with the candidate input measured over a 5 minute period with no more than five input errors.

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S222: Support the Organisation and Co-ordination of Events

SQA Code FD9N 04

General Overview

This Unit is about supporting the organisation and co-ordination of a events including the identification of venues, production of event materials, supporting activities during the event and following up on activities after the event.

This involves:

Before the event

♦ Supporting the implementation of the plan for the event to meet agreed guidelines
♦ Contributing to identifying and agreeing resources and support needed for the event
♦ Identifying and costing suitable venues
♦ Liaising with the venue to confirm event requirements
♦ Following all legal, contractual, security and health and safety requirements for the event
♦ Supporting production of event materials
♦ Preparing and sending out invitations to delegates
♦ Co-ordinating delegate responses
♦ Providing delegates with joining instructions and event materials

At the event

♦ Preparing the venue as required
♦ Supporting activities and resources during the event
♦ Helping delegates to feel welcome
♦ Responding to delegates needs throughout the event
♦ Following the correct procedures where there are problems

After the event

♦ Clearing and vacating the venue, in accordance with the terms of the contract

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Plan for the event
♦ Costing for venues
♦ Letters, e-mails, memos
♦ Event materials
♦ Invitations
♦ Delegate responses
♦ Registration/joining instructions

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S223: Support the Organisation of Business Travel or Accommodation

SQA Code FD9P 04

General overview

This Unit is about supporting arrangements for the booking of business travel and/or accommodation.

This involves:

♦ Confirming business travel or accommodation
♦ Confirming budget requirements
♦ Checking draft itinerary and schedule with traveller
♦ Researching and booking travel or accommodation
♦ Obtaining and collecting travel or accommodation documentation
♦ Maintaining records of travel or accommodation and store any confidential information securely
♦ Following arrangements for payment of travel or accommodation
♦ Following the correct procedures when there are problems with business travel
♦ Providing the traveller with an itinerary, documents and information in good time
♦ Confirming with traveller that itinerary, documentation and information meet requirements

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- Copy of travel, accommodation and budget requirements
- Research notes on possibly venues/carriers
- Draft itinerary
- Record of travel or accommodation arrangements
- Records of payments
- Confirmed Itinerary
- Letters, memos, e-mails
- Feedback from traveler
- Correspondence with agents/venues/carriers

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S224: Support the Organisation of Meetings

SQA Code FD9R 04

General Overview

This Unit is about supporting the planning and operational requirements of the agreed brief for a meeting.

This involves:

Before the meeting

♦ Following requirements of the meeting brief
♦ Obtaining an appropriate venue and catering arrangements
♦ Preparation of required papers
♦ Sending invitations to attendees
♦ Collating and dispatching of papers for the meeting
♦ Checking layout and equipment needs

During the meeting

♦ Any requirements during the meeting

After the meeting

♦ Clearing and vacating meeting room
♦ Circulating of meeting records within agreed timescales
♦ Maintenance of record of any internal services used

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- Meeting brief
- Venue and catering records/arrangements
- Meeting papers
- Copies of invites
- Minutes
- Evaluation
- Record of external services
- Letters, memos, e-mails

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S209: Handle Mail

SQA Code FD94 04

General Overview

This Unit is about organising the distribution and collection of incoming and outgoing mail or packages and providing specialist services.

This involves:

Incoming mail

♦ Receiving and checking incoming mail or packages
♦ Sorting incoming mail or packages
♦ Disposing of any unwanted 'junk' mail
♦ Identifying and/or reporting suspicious or damaged items
♦ Distributing incoming mail
♦ Following the correct procedures when there are problems with incoming mail

Outgoing mail

♦ Collecting and sorting outgoing mail or packages
♦ Identifying best options for dispatching mail
♦ Dispatching outgoing mail on time
♦ Arranging courier service where necessary
♦ Preparing items for urgent or special delivery
♦ Calculating correct postage
♦ Recording postage costs
♦ Following correct procedures when there are problems with outgoing mail

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Record of postage costs with annotation/testimony
♦ Courier documentation with annotation/testimony
♦ Incoming mail log with annotation/testimony
♦ Outgoing mail log with annotation/testimony
♦ Organisational procedures with annotation/testimony

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S210: Provide Reception Services

SQA Code F93X 04

General Overview

This Unit is about maintaining reception to enhance the vision and brand of the organisation.

This involves:

♦ Providing a positive image of self and organisation
♦ Providing requested information
♦ Implementing the correct entry and security procedures
♦ Maintaining the reception area and suggesting ideas for improving the area
♦ Following the relevant health and safety procedures
♦ Following organisational procedures in the event of an accident or emergency
♦ Referring any issues that you cannot deal with personally to the appropriate person
♦ Carrying out additional duties if they arise

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- Letters, memos, e-mails
- Visitor/staff logs with annotation/testimony
- Feedback from visitors/colleagues
- Organisational procedures with annotation/testimony

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S250: Meet and Welcome Visitors

SQA Code FD96 04

General Overview

This Unit is about meeting and welcoming visitors, ensuring their needs are met while presenting a positive image of the organisation.

This involves:

♦ Meeting and greeting visitors promptly, treating them politely and making them feel welcome
♦ Identifying visitors and the reason for their visit
♦ Recording the arrival of visitors using the organisation's systems
♦ Making sure visitors' needs are met
♦ Explaining to visitors the reason for any delay in dealing with them
♦ Presenting a positive image of yourself and your organisation
♦ Following organisational health, safety and security procedures
♦ Informing relevant people about visitors' arrival promptly
♦ Dealing with any problems or referring these to an appropriate colleague

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Record of visitors with annotation/testimony
♦ Organisational/health and safety policies and procedures with annotation/testimony
♦ Visitor feedback
♦ Records of problems resolved

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S206: Use Voicemail Message Systems

SQA Code H983 04

General Overview

This Unit is about using electronic message systems to deliver and receive messages.

This involves:

♦   Updating message system
♦   Checking the system for messages
♦   Responding to messages within agreed timescales
♦   Deleting messages when they have been dealt with
♦   Leaving clear recorded messages on other people's systems

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦   Assessor observation
♦   Recording of message

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S207: Use a Diary System

SQA Code FD92 04

General Overview

This Unit is about making, updating and co-ordinating appointments in a diary system making sure entries are accurately and clearly made.

This involves:

♦ Making diary entries accurately and clearly
♦ Prioritising requested changes
♦ Identifying the implications of any changes
♦ Recording any agreed changes
♦ Communicating agreed changes to appropriate people
♦ Keeping diary up-to-date and secure

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Copies of original diary entries
♦ Copies of changes to diary entries
♦ E-mails/notes requesting diary bookings or changes
♦ E-mails/notes confirming diary entries or changes
♦ Screenshots of electronic diaries
♦ Annotations to put work product in context

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S208: Take Minutes

SQA Code FD93 04

General Overview

This Unit is about producing accurate records of discussions and decisions taken during meetings.

This involves:

♦ Prior preparation for the meeting
♦ Noting any changes to the agenda, matters arising and action points from the last meeting
♦ Taking notes at the meeting
♦ Producing accurate minutes — making sure that follow up actions and those responsible have been clearly identified
♦ Making sure minutes are signed off
♦ Agreeing new minutes with relevant people
♦ Observing requirements for confidentiality and storage of minutes

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Previous minutes, meeting agenda with annotation/testimony
♦ Notes and copy of minutes with annotation/testimony
♦ Feedback from attendees on accuracy of minutes/requested changes
♦ Screenshots/record of files

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S216: Collate and Organise Data

SQA Code H984 04

General Overview

This Unit is about collating, organising and reporting data in agreed format and timescale.

This involves:

♦ Collating and organising data in a way that will help analysis
♦ Checking the accuracy of data and make adjustments if required
♦ Presenting data from research in an agreed format
♦ Getting feedback on the data from research

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Raw data/organised data with annotation/testimony
♦ Letters, e-mails, memos
♦ Feedback

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S217: Research Information

SQA Code FD98 04

General Overview

This Unit is about researching information, identifying sources of information researched and recording the data that has been extracted from the sources of information.

This involves:

♦ Agreeing aims, objectives and deadlines for the information researched
♦ Identifying sources of information required for research
♦ Searching for and obtaining information
♦ Checking information is suitable for the purpose of the research
♦ Meeting deadlines
♦ Identifying and selecting relevant and reliable data
♦ Recording the data and storing it securely
♦ Making a record of information sources used
♦ Getting feedback on what has been researched

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Research brief
♦ Letters, memos, e-mails
♦ Copy of information researched
♦ Feedback
♦ Record of information sources used

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S218: Store and Retrieve Information Using a Filing System

SQA Code H559 04

General Overview

This Unit is about storing, deleting and retrieving information using different information systems.

This involves:

♦ Processing information
♦ Identifying and collecting the required information
♦ Maintaining security and confidentiality
♦ Updating information as required
♦ Retrieving information
♦ Confirming the information for retrieval
♦ Complying with procedures and legislation for accessing information
♦ Locating and retrieving the required information
♦ Following the correct procedures when there are problems
♦ Providing information in the agreed format and within agreed timescales

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- Copies of the processed information
- Letters, memos, e-mails

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S219: Provide Archive Services

SQA Code FD99 04

General Overview

This Unit is about archiving and retrieving information to the agreed brief and in line with organisational requirements.

This involves:

♦ Identifying and agreeing on the information to be archived
♦ Identifying and agreeing on the retention period
♦ Archiving information in accordance with organisational policies, procedures and legal requirements and following requirements of external archive systems, if outsourced from the organisation
♦ Maintaining and updating a record of archived information
♦ Retrieving archived information
♦ Following agreed procedures for deleting information from the archived system
♦ Resolving or referring problems that occur with the archive systems

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Record of archived information
♦ Letters, memos, e-mails
♦ Requests for archived information
♦ Organisational procedures with annotation/testimony

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S226: Support the Management and Development of an Information System

SQA Code FD9A 04

General Overview

This Unit is about supporting the management and evaluation of an information system to meet organisational and users' needs.

This involves:

♦ Contributing to the provision of training and outgoing support
♦ Confirming management procedures are in place to identify, analyse and resolve problems with the information system
♦ Monitoring own use of an information system
♦ Following the legal and organisational requirements for handling information
♦ Making sure the information system is maintained and updated to meet user needs
♦ Confirming that all legal requirements are followed
♦ Collecting feedback on the performance of information system
♦ Contributing to the evaluation of feedback and prioritising development needs
♦ Contributing information to support further development
♦ Identifying and reporting problems as they occur
♦ Resolving problems within the limits of own authority

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- Copy of management structures
- Printouts showing update of information system
- Feedback on performance of information system
- Letters, memos, e-mails
- Monitoring records
- Training records
- Minutes of meetings regarding changes to information system

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S413: Design and Develop an Information System

SQA Code H98C 04

General Overview

This Unit is about designing, developing and testing information systems to meet organisational and users' needs.

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Agendas and minutes of meetings identifying and agreeing user needs, resources and budgets
♦ System specifications
♦ Implementation plans
♦ Copy of 'test log' detailing the information system being tested
♦ Copies of correspondence confirming the information system meets agreed specifications, users' needs and came in on budget

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S414: Manage and Evaluate Information Systems

SQA Code FE1M 04

General Overview

This Unit is about managing, monitoring and evaluating information systems to meet organisational and users' needs.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Training plans (including legislative and organisation requirements)
♦ Training records
♦ Training evaluation records
♦ Monitoring records
♦ Information system problems log
♦ Evaluation feedback/reports including recommendations
♦ Implementation of evaluation recommendations

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦   Personal statement (written/audio/video)
♦   Witness testimony
♦   Professional discussion
♦   Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S220: Use Office Equipment

SQA Code F93V 04

General Overview

This Unit is about using a range of office equipment applying the necessary standards of health and safety and operating practice. Examples of office equipment could be — but not limited to — photocopiers, faxes, binders, laminators, printers or PCs.

This involves:

♦   Selecting appropriate equipment and resources for the task
♦   Following manufacturer's operating instructions and health and safety requirements
♦   Keeping waste to a minimum
♦   Dealing with equipment and resource problems
♦   Final work product produced to agreed requirements and within agreed timescales
♦   Ensuring equipment, resources and work area are ready for the next user

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- E-mail/memos/notes requesting work product with timescales, etc
- E-mail/memos/notes discussing problems/negotiating timescales, etc
- Equipment work product — photocopies/scan to file images/bound documents, etc
- Manufacturer guidelines/instructions with annotation/testimony
- Organisational guidelines/procedures/policies with annotation/testimony

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S221: Maintain and Issue Stock Items

SQA Code H985 04

General Overview

This Unit is about ordering and checking stock items from external or internal suppliers.

This involves:

♦ Maintaining stock levels
♦ Maintaining, handling and storing stock safely and securely
♦ Following relevant organisational procedures
♦ Carrying out stock taking — reporting problems as necessary
♦ Ordering stock from suppliers
♦ Checking incoming deliveries against orders and report any problems
♦ Keeping stock records up-to-date

Issuing stock items

♦ Issuing stock as requested
♦ Keeping stock records accurate and up-to-date
♦ Disposing of unwanted or damaged stock
♦ Identifying ways in which the system for receiving and issuing stock could be improved

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Stock records
♦ Orders
♦ Requisitions
♦ Records of stock issued
♦ Records of resolving problems/discrepancies

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S225: Respond to Change In a Business Environment

SQA Code FD9F 04

General Overview

This Unit is about considering and using coping strategies when faced with change within a business environment.

This involves:

♦ Assisting the change process
♦ Contributing to plans for change
♦ Adapting realistically to change
♦ Identifying support mechanisms for self and colleagues during the change process
♦ Supporting others during change
♦ Asking questions to clarify aspects of the change process, when unsure
♦ Contributing to the evaluation of change

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Plans for change — roadmaps/flowcharts/reports/organisational diagrams, etc
♦ Evaluations
♦ Letters, e-mails, memos

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S419: Explore Ideas for Innovation in a Business Environment

SQA Code H98D 04

General Overview

This Unit is about contributing to identifying ideas and being prepared to put them forward when working in a business environment.

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ The organisation's mission and objectives
♦ Candidate job description detailing role and responsibilities
♦ A diagram of the candidate's role set
♦ The decision making responsibilities of the candidate
♦ Details of the decision making processes that exist and the line management responsibilities and relationships within the candidate's organisation
♦ Strengths, weaknesses, opportunities and threats (SWOT) analysis
♦ Political, environmental, social and technological (PEST) analysis
♦ Research identifying possible innovations to working methods, services or products
♦ Records of communication with colleagues evaluating the research ideas
♦ Evaluation of own ideas
♦ Cost benefit analysis
♦ Impact analysis
♦ Risk analysis
♦ Formal proposal identifying new working methods, services or products

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S420: Plan Change

SQA Code FM4W 04

General Overview

This Unit is about identifying and developing opportunities for change and planning change for a team.

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

Identify and develop opportunities for change

The types of evidence that may be used could include:

♦ Assessor observation
♦ Minutes of meetings detailing new products and/or services; improvements to existing products and/or services; improvements to existing practices, procedures, systems, ways of working within the team or those of the wider organisation or customers or suppliers
♦ Communications — notes, memos, minutes of meetings, reports identifying (internal/external) triggers for change
♦ Action plans detailing (SMART) objectives, budgets and timescales
♦ Research reports
♦ Resource plans
♦ Risk assessments
♦ Cost analysis
♦ Budgets
♦ Targets
♦ Personal statement detailing how to engage teams and individuals in the whole change process and encourage them to feel they are contributing to the process; the impact of change and innovation on teams and individuals and how to manage this impact to achieve positive outcomes

Plan for change

♦ Assessor observation
♦ Communications (notes, memos, minutes of meetings, reports) detailing plans for change
♦ Change plans (identifying vision, goals, objectives, timescales and resources)
♦ Updated plans (reflecting changes)
♦ Communicate change using e-mails, letters, meeting notes, memos
♦ Presentations
♦ Log of problems identified and solutions used

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S227: Administer HR Records

SQA Code FD9G 04

General Overview

This Unit is about the work a Human Resources administrator undertakes when dealing with employee records.

This involves:

Creating personnel files for new starters

♦ Opening a new personnel file
♦ Recording required information about the employee
♦ Filing documents relevant to the employee
♦ Process monitoring data, as appropriate
♦ Checking that information and documents are complete

Maintaining human resource information

Keeping required personnel information up-to-date.

Maintaining records of:

♦ Performance management and development
♦ Holiday, sickness and other leave
♦ Disciplinary and grievance
♦ Exit process

Processing and filing relevant correspondence.

Reporting human resource information

Providing as requested:

♦ Information from individual personnel files
♦ Management information reports

Complying with organisational and legal requirements

♦ Comply with organisational and legal requirements for confidentiality, freedom of information, data protection and security of information
♦ Removing out-of-date information in line with organisational policy and procedures
♦ Archiving relevant information in line with current legislation and organisational policy

Ensure that confidential personal information is redacted when presenting evidence for this Unit. If this removes too much of the context for an assessment judgement to be made with confidence, evidence could be signposted and left in situ. Where evidence is left in situ it must be available to the Internal verifier and External Verifier if requested.

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Personnel records created
♦ Updated personal information
♦ Management information reports
♦ Organisational policy and procedures with annotation/testimony

Records of:

♦ Performance management and development
♦ Holiday, sickness and other leave
♦ Disciplinary and grievance
♦ Exit process
♦ Freedom of Information requests relating to personnel

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S228: Administer the Recruitment and Selection Process

SQA Code FD9H 04

General Overview

This Unit is about a Human Resources administrator assisting with the recruitment and selection process.

This involves:

Advertising job vacancies

♦ Confirming personnel requirements with responsible people
♦ Confirming the information that will appear in job advertisements
♦ Confirming how the vacancy will be advertised
♦ Advertising the vacancy as agreed
♦ Liaising with any relevant agencies to confirm details of job vacancies

Responding to potential applicants

♦ Sending out application packs or other information to potential applicants
♦ Responding appropriately to queries from potential applicants
♦ Maintaining records of responses received
♦ Administer the selection process
♦ Collating applications
♦ Inviting shortlisted candidates
♦ Processing feedback for unsuccessful applicants
♦ Keeping records of responses from shortlisted candidates
♦ Providing support for the selection process
♦ Helping to make sure candidates have a positive impression of the organisation
♦ Keeping records of the outcomes of the selection process

Administering the appointment process

♦ Carrying out appropriate pre-employment checks
♦ Formatting and sending out letters and employment contracts
♦ Maintaining records of the recruitment and selection process

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Personnel requirements — job analysis
♦ Job adverts
♦ Application packs — eg job description, person specification, skill scan
♦ Record of responses
♦ Invite letters
♦ Copies of pre-employment checks
♦ Interview schedule
♦ Offer letters

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for Performance must be restricted to a small part of any Unit.

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S251: Administer Parking Dispensations

SQA Code FD9J 04

General Overview

This Unit is about providing administrative services for the issue of parking permits, suspensions and dispensations, including permits, season tickets, suspensions, dispensations/waivers and blue badges.

This involves:

Receiving and processing applications

♦ Advising customers on criteria for eligibility
♦ Reviewing applications and supporting evidence against published criteria
♦ Seeking additional evidence from the customer if required
♦ Carrying out relevant checks in accordance with organisational procedures
♦ Where necessary, seek opinions from appropriate medical professionals
♦ Handling supporting documentation securely and in line with current legislation or relevant terms and conditions
♦ Making a decision to approve or decline the application

Issuing documentation

♦ Communicating the decision to the customer, returning documentation where necessary and issuing appropriate paperwork
♦ Maintaining appropriate records including renewals
♦ Processing payments and handling refunds in line with organisational procedures
♦ Communicating the decision or information to other relevant departments

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- Letters, memos and e-mail
- Applications
- Records of decisions
- Maintain appropriate records including renewals
- Documentation relating to the processing of payments and refunds

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S112: Use Occupational and Safety Guidelines When Using a Workstation

SQA Code H982 04

General Overview

This Unit is about positioning the relevant parts of the body safely when typing at a workstation. It involves understanding the concepts of ergonomic practice when typing, following health and safety guidelines, positioning the body relative to the keyboard and workstation being used and caring and maintaining the workstation.

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Workstation audit report
♦ Occupational health and safety guidelines with annotation/testimony
♦ Photographs or video recording of candidate using keyboard

Simulation and/or supporting evidence may be used by exception to fill small gaps where performance evidence does not occur naturally but the Unit is part of the candidate's normal work duties. The use of simulation and/or supporting evidence for performance must be restricted to a small part of any Unit.

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Some of the Knowledge and Understanding may be covered by performance evidence. 'How to' Knowledge and Understanding criteria are obvious examples where this is likely to be the case.

Knowledge items not evident from performance could be addressed via a combination of personal statement, questions, professional discussion, witness testimony and/or annotation of work product.

Unit S253: Process Court Documentation

SQA Code FN6W 04

General Overview

This Unit is imported from the Skills for Justice NOS suite, therefore the Skills for Justice Assessment Strategy for SVQs in the Justice, Community Safety and Legal sectors should be used during assessment.

The Unit is about processing court documentation to ensure that individuals held in custody appear in court when required.

This involves:

♦ Maintaining systems to record court documentation and the dates when individuals must appear in courts
♦ Ensuring court documentation is served on individuals in custody and record this
♦ Confirming with the courts which individuals are required to be produced on which day
♦ Identifying whether the individuals could be released from court or whether they must return to the establishment.
♦ Updating records promptly

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Evidence of court documentation and dates when individuals must appear
♦ Records of release/return
♦ Records of the serving of court documentation to individuals in custody
♦ Correspondence confirming date and which court individuals are required to be produced on
♦ Evidence confirming records are updated promptly

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the Skills for Justice Assessment Strategy for SVQs in the Justice, Community Safety and Legal sectors for full Assessment Criteria.

Unit S254: Contribute to Maintaining Security and Protecting Individuals' Rights in a Custodial Environment

SQA Code FN9M 04

General Overview

This Unit is imported from the Skills for Justice NOS suite, therefore the Skills for Justice Assessment Strategy for SVQs in the Justice, Community Safety and Legal sectors should be used during assessment.

The Unit is about taking precautions to prevent breaches of security in the custodial environment, protecting the rights of individuals and promoting anti-discriminatory practice.

This involves:

♦ Organising and carrying out your duties in a way that follows both legal requirements and the policies and procedures of your organisation
♦ Taking appropriate steps to maintain the security of the organisation's property for which you are responsible
♦ Remaining constantly alert to the possibility of breaches in restrictions on individuals' liberty
♦ Providing relevant people with the information they need to maintain control and restrictions on individuals' liberty
♦ Resisting and reporting any pressure or inducement to reduce restrictions on individuals' liberty
♦ Contributing to protecting the rights of individuals and promoting anti-discriminatory practices
♦ Recording and using information about individuals in custody
♦ Providing information about individuals in custody only to those entitled to have it
♦ Identifying when individuals' rights are being infringed
♦ Following your organisation's policy in reporting infringements
♦ Resisting and reporting any pressure to infringe individuals' rights
♦ Promoting anti-discriminatory practice in ways that comply with legislative requirements and your organisation's policy
♦ Taking appropriate action to minimise unfair discrimination in the custodial establishment
♦ Communicating in ways that can be understood by individuals, responding to their different needs, abilities and preferences

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Letters, e-mails and memos
♦ Notes or records reporting possible breaches in security
♦ Notes or records reporting possible breaches in restrictions on individuals' liberty
♦ Notes or records reporting pressure or inducement to reduce restrictions on individuals' liberty
♦ Notes or records of your contribution to the protection of the rights of individuals
♦ Records relating to individuals in custody
♦ Records of information relating to individuals in custody and what restrictions and control are required
♦ Notes or records reporting the infringement of an individual's rights
♦ Notes or records of the reporting of any pressure to infringe individuals' rights
♦ Promoting anti-discriminatory practice in ways that comply with legislative requirements and your organisation's policy
♦ Correspondence relating to unfair discrimination
♦ Communications to individuals appropriate to their different needs, abilities and preferences

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the Skills for Justice Assessment Strategy for SVQs in the Justice, Community Safety and Legal sectors for full Assessment Criteria.

Unit S255: Calculate Critical Dates for Sentences

SQA Code FN6X 04

General Overview

This Unit is imported from the Skills for Justice NOS suite, therefore the Skills for Justice Assessment Strategy for SVQs in the Justice, Community Safety and Legal sectors should be used during assessment.

The Unit is about calculating and recalculating critical dates for sentences so that individuals are released from custody on time.

This involves:

♦ Verifying that the documentation allows lawful imprisonment or detention of the individual
♦ Interpreting correctly all information on the documentation
♦ Checking with the relevant authority if you are in doubt about how to interpret information
♦ Entering all information accurately into systems
♦ Assess information which may have an impact on critical dates
♦ Calculating critical dates for sentences
♦ Checking with the relevant authority where you are in doubt about critical dates
♦ Ensuring that full information relevant to critical dates is recorded and documented accurately on systems
♦ Communicating critical dates to those authorised to have this information, in the approved format and within the agreed time limits
♦ Explaining your calculations clearly when requested to do so by those authorised to have this information

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Documentation relating to the calculation of critical dates for sentences
♦ Correspondence confirming interpretation of information relating to sentence or critical dates
♦ Correspondence relating critical dates and your calculations of them to authorised parties

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the Skills for Justice Assessment Strategy for SVQs in the Justice, Community Safety and Legal sectors for full Assessment Criteria.
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Unit S256: Make Administrative Arrangements for the Movement of Individuals Outside the Custodial Establishment

SQA Code FN6Y 04

General Overview

This Unit is imported from the Skills for Justice NOS suite, therefore the Skills for Justice Assessment Strategy for SVQs in the Justice, Community Safety and Legal sectors should be used during assessment.

The Unit is about making administrative arrangements to move individuals held in custody to other establishments and other environments. This standard is imported from Skills for Justice Custodial Administration suite.

This involves:

♦ Identifying and recording requirements for moving individuals outside the custodial establishment
♦ Maintaining systems to record when individuals in custody need to be moved and where to
♦ Obtaining and recording sufficient, accurate and up-to-date information to allow the movement of individuals to be arranged
♦ Updating records promptly, if there are changes to the requirements for moving individuals
♦ Making administrative arrangements with escorting authorities, other establishments and other environments
♦ Making arrangements with other custodial establishments or other environments to receive individuals
♦ Communicating in ways that can be understood by individuals, responding to their different needs, abilities and preferences
♦ Confirming full details of movements with the relevant escorting authorities at the agreed time
♦ Informing internal authorities about the movements in time for them to get the individuals and their property ready
♦ Preparing the required paperwork to support the movements
♦ Informing only those authorised to have the information about the movements
♦ Checking that individuals have returned to the establishment where arrangements have been made for this to happen, and take appropriate action if they have not

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Letters, memos and e-mails
♦ Documentation relating to records of when individuals in custody need to be moved and where to
♦ Documentation relating to the receipt of individuals
♦ Documentation relating to the movements of individuals and their property including updates to requirements. This should cover relevant escorting authorities, internal authorities, other custodial establishments and other environments.
♦ Identifying and recording requirements for moving individuals outside the custodial establishment
♦ Communications to individuals appropriate to their different needs, abilities and preferences
♦ Records or documentation confirming individuals have returned to the establishment when relevant and detailing action taken if they have not

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the Skills for Justice Assessment Strategy for SVQs in the Justice, Community Safety and Legal sectors for full Assessment Criteria.

Unit S257: Administer Documentation for the Appeals Process

SQA Code FN70 04

General Overview

This Unit is imported from the Skills for Justice NOS suite, therefore the Skills for Justice Assessment Strategy for SVQs in the Justice, Community Safety and Legal sectors should be used during assessment.

The Unit is about providing limited administrative assistance in the appeals process. Ensuring that the correct appeals documentation is available, and recording details of the appellant.

This involves:

♦ Ensuring the correct appeals documentation is available
♦ Ensuring the appellant is aware that the establishment is not able to provide any advice about their appeals
♦ Ensuring the appellant is told to contact relevant sources if they require further information and advice
♦ Recording and documenting details of the appellant
♦ Informing only authorised people
♦ Referring to a higher authority if in doubt about role in assisting individuals with appeals

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Appeals documentation
♦ Details of appellant
♦ Correspondence relating to the appeal

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the Skills for Justice Assessment Strategy for SVQs in the Justice, Community Safety and Legal sectors for full Assessment Criteria.

Unit S258: Administer Personal Money for Individuals in Custody

SQA Code FN71 04

General Overview

This Unit is imported from the Skills for Justice NOS suite, therefore the Skills for Justice Assessment Strategy for SVQs in the Justice, Community Safety and Legal sectors should be used during assessment.

The Unit is about accounting for individuals' personal money and wages.

This involves:

♦ Maintaining systems to account for individuals' personal money
♦ Ensuring that deposits of individuals' personal money are accurately recorded
♦ Accurately entering and updating the limits of money individuals are allowed to spend within the establishment for money to be sent out
♦ Recording money spent by individuals within the establishment
♦ Making deductions from individuals' personal money account as instructed
♦ Recording and preparing money that individuals request
♦ Getting approval from the appropriate authority
♦ Providing information about individuals' personal money accounts to those authorised to have this information
♦ Communicating in ways that can be understood by individuals, responding to their different needs, abilities and preferences
♦ Reconciling individuals' personal money accounts
♦ Maintaining systems to record individuals' wages
♦ Ensuring that the rates at which individuals are paid are accurately entered and updated
♦ Ensuring that the work individuals have done is entered on the systems
♦ Providing information about individuals' wages to those authorised to have this information

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Records of deposits of individuals' personal money
♦ Records of money spent by individuals
♦ Records of deductions from individuals' personal account
♦ Records of money that individuals request to be sent out
♦ Records showing reconciling individuals' accounts
♦ Records of wages
♦ Communications to individuals regarding their wages and personal money accounts appropriate to their different needs, abilities and preferences
♦ Correspondence relating to individuals' wages and personal money accounts

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the Skills for Justice Assessment Strategy for SVQs in the Justice, Community Safety and Legal sectors for full Assessment Criteria.

Unit S259: Prepare Documentation to Help Authorities Decide on the Conditions on Which to Release Individuals from Custody

SQA Code FN72 04

General Overview

This Unit is imported from the Skills for Justice NOS suite, therefore the Skills for Justice Assessment Strategy for SVQs in the Justice, Community Safety and Legal sectors should be used during assessment.

The Unit is about preparing all the documentation required to allow the authorities to decide whether individuals should be released from custody and the conditions on which they should be released.

This involves:

Requesting and receiving reports on individuals in custody

♦ Identifying individuals eligible for release in time for the necessary documentation to be prepared
♦ Identifying the reports required and the internal and external authorities which must complete them
♦ Preparing the correct form and sending these to the internal and external authorities at the correct time
♦ Maintaining systems to track the return of reports from internal and external authorities
♦ Recording the return of completed reports on the systems
♦ Contacting the internal and external authorities in appropriate ways to request the immediate return of completed reports, if these are not returned on time
♦ Referring to a higher authority if completed reports are not returned despite requests
♦ Communicating in ways that can be understood by individuals, responding to their different needs, abilities and preferences

Preparing documentation for authorities to decide conditions of release

♦ Copying, collating and numbering all documentation
♦ Referring to a higher authority if you need to obtain documentation which is not available
♦ Providing reasons if not all the required documentation is available
♦ Sending the collated documentation to the releasing authorities in the required format at the required time
♦ Communicating in ways that can be understood by individuals, responding to their different needs, abilities and preferences

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Letters, memos and e-mails
♦ Reports on individuals in custody
♦ Documentation relating to conditions of release may include a log of collated and numbered documents and detail reasons for documentation not available for inclusion
♦ Records detailing eligibility for release in time for preparation of necessary documentation
♦ Tracking record for reports which details authority to complete report, confirms correct report sent to correct authority at correct time, records return of reports, requesting immediate return of completed reports by relevant authority if not returned on time, referral to higher authority if completed reports not retuned despite requests
♦ Communications to individuals appropriate to their different needs, abilities and preferences
♦ Referrals to a higher authority requesting documentation where not available

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the Skills for Justice Assessment Strategy for SVQs in the Justice, Community Safety and Legal sectors for full Assessment Criteria.

Unit S260: Making Administrative Arrangements for the Release of Individuals from Custody

SQA Code FN74 04

General Overview

This Unit is imported from the Skills for Justice NOS suite, therefore the Skills for Justice Assessment Strategy for SVQs in the Justice, Community Safety and Legal sectors should be used during assessment.

The Unit is about making administrative arrangements for all the official documentation, cash, travel warrants and personal property to be available so that individuals can be released from custody.

This involves:

♦ Processing information about the release of individuals from custody
♦ Maintaining systems which give you adequate notice about individuals' eligibility for release
♦ Identifying individuals eligible for release in time for the necessary documentation and entitlements to be prepared
♦ Providing information about release dates and terms:
— to the internal and external authorities
— only to those authorised to have this information:
– in the required format
– at the required time
♦ Communicating in ways that can be understood by individuals, responding to their different needs, abilities and preferences
♦ Preparing documentation and entitlements for individuals on release
♦ Identifying correctly the entitlements of individuals on release
♦ Preparing those entitlements for which you are directly responsible in time for release
♦ Preparing the required documentation in line with legal and organisational requirements
♦ Notify others in time for them to prepare entitlements ready for release

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Letters, memos and e-mail
♦ Documentation relating to release from custody
♦ Documentation and entitlements relating to individuals on release
♦ Records detailing eligibility for release including identification in time for preparation of necessary documentation and entitlements, detailing release dates and times
♦ Communications to individuals appropriate to their different needs, abilities and preferences

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the Skills for Justice Assessment Strategy for SVQs in the Justice, Community Safety and Legal sectors for full Assessment Criteria.

Unit S125: Calculate Pay

SQA Code FD8V 04

General Overview

This Unit is imported from the Financial Skills Partnership Accountancy and Finance NOS suite, therefore the SVQ Providing Financial Services Assessment Strategy should be used during assessment.

The Unit is about calculating gross and net pay for employees

This involves:

♦ Checking all data and documentation for accuracy and authorisation
♦ Identify where action is required to ensure correct payment
♦ Checking overtime rates against scales
♦ Accurately process temporary payments and deductions
♦ Accurately process termination payments
♦ Check employment status and verify entitlement to receive pay for the pay period
♦ Enter applicable pre-tax deductions and relevant statutory and non-statutory voluntary or contractual deductions into the system

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- Authorised timesheets
- Records of hourly rates and other payroll details
- Authorised overtime
- Overtime rate schedule
- Letters, e-mails and memos requesting authorisation
- Holiday records
- Tax tables
- Details of temporary payments and deductions
- Details of termination payments

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Please refer to the Financial Skills Partnership Assessment Strategy for SVQs in Financial Services for full Assessment Criteria.

Unit S247: Control Payroll

SQA Code FD9K 04

General Overview

This Unit is imported from the Financial Skills Partnership Accountancy and Finance NOS suite, therefore the SVQ Providing Financial Services Assessment Strategy should be used during assessment.

The Unit is about controlling the accuracy and compliance of payroll.

This involves:

♦ Correctly identifying the treatment of all allowances and enhancements with respect to tax, national insurance and pension deductions
♦ Updating rates for permanent and temporary payments and deductions against agreed scales for each type of employee affected
♦ Reconciling the national insurance liability for directors against the national insurance actually paid
♦ Monitoring compliance with attachments of earnings legislation
♦ Correctly coding and reconciling total charges to organisational budgets against agreed payroll totals
♦ Promptly reconciling the number of no pays and actual pays with the number of employees on the payroll

Calculating and reconciling aggregate payroll totals, including aggregate statutory payments and non-statutory deductions against authorised control totals

♦ Calculating and reconciling aggregate amounts payable to, or recoverable from, statutory and non-statutory bodies against control totals
♦ Reconciling payroll records with the organisation's financial reports
♦ Making payments to statutory and non-statutory bodies by the required deadline, accompanied by the applicable documentation
♦ Checking that individuals raising queries are authorised to receive the information they are requesting
♦ Seeking clarification or additional information from employees of managers where the nature of their queries is not clear
♦ Presenting accurate information extracted from the payroll system in an appropriate format
♦ Dealing effectively with enquiries from statutory agencies and non-statutory bodies
♦ Obtain employee authorisation where required prior to release of information
♦ Supplying information within the specified timescale and in compliance with relevant legislation
♦ Filing copies of responses in a logical and orderly manner

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Payroll documentation
♦ BACS reports
♦ Letters, memos, e-mails advising of amendments to payroll/clarification/enquiries/ employee authorisation
♦ Payroll reports
♦ Reconciliation checks
♦ Relevant legislation with annotation/testimony
♦ Organisational policy and procedure with annotation/testimony

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the Financial Skills Partnership Assessment Strategy for SVQs in Financial Services for full Assessment Criteria.

Unit S248: Account for Income and Expenditure

SQA Code FD9L 04

General Overview

This Unit is imported from the Financial Skills Partnership Accountancy and Finance NOS suite, therefore the SVQ Providing Financial Services Assessment Strategy should be used during assessment.

This Unit is about understanding an organisation's accounting processes and identifying and correcting or referring any errors or discrepancies as well as maintaining security and confidentiality of information.

This involves:

♦ Recording details from the relevant primary records in the cash book and ledgers
♦ Correctly calculating totals and balances of receipts and payments
♦ Comparing individual items on the bank statement and in the cash book for accuracy and identifying discrepancies
♦ Preparing a bank reconciliation statement that illustrates any discrepancies
♦ Making and recording authorised adjustments
♦ Balancing relevant accounts in the main ledger
♦ Reconciling control accounts with the totals of the balance in the subsidiary ledger accounts
♦ Reconciling the petty cash book with cash in hand and subsidiary records
♦ Identifying discrepancies arising from the reconciliation of control accounts and either resolve them or refer to the appropriate person
♦ Draft a trial balance and open a suspense account to record any imbalance where necessary
♦ Identifying reasons for imbalance, rectifying them and making accurate corrections in the journal

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Cash book/ledgers
♦ Copies of bank statement
♦ Bank reconciliation statement
♦ Control accounts
♦ Petty cash
♦ Draft trial balance
♦ Journal entries
♦ Suspense account

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the Financial Skills Partnership Assessment Strategy for SVQs in Financial Services for full Assessment Criteria.

Unit S249: Draft Financial Statements

SQA Code FD9M 04

General Overview

This Unit is imported from the Financial Skills Partnership Accountancy and Finance NOS suite, therefore the SVQ Providing Financial Services Assessment Strategy should be used during assessment.

This Unit is about drafting financial statements of incorporated organisations following the preparation of an initial trial balance.

This involves:

♦   Identifying the users of financial accounting information and financial statements
♦   Identifying the general purpose, elements and relationships between the elements of financial statements
♦   Use appropriate information to draft financial statements in the appropriate form and in compliance with relevant accounting standards
♦   Correctly identifying and implementing subsequent adjustments
♦   Identifying discrepancies, unusual features or queries and either resolve them or refer to the appropriate person
♦   Preparing simple consolidated accounts
♦   Preparing and interpreting a cash flow statement
♦   Interpreting financial statements using ratio analysis
♦   Drawing valid conclusions from the information contained within financial statements
♦   Presenting issues, interpretations and conclusions clearly to the appropriate people

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- Draft financial statements
- Simple consolidated accounts
- Cash flow statement
- Ratio analysis calculations
- Letters, memos, e-mails

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Please refer to the Financial Skills Partnership Assessment Strategy for SVQs in Financial Services for full Assessment Criteria.

Unit S236a: Bespoke Software 2

SQA Code F9AP 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

This Unit is about the ability to select and use a suitable bespoke software application to carry out an appropriate data processing task. It includes understanding the capabilities of the software and the types of tasks for which it is suitable, as well as the skills and techniques needed to use the software application appropriately and effectively

Some organisations have software applications developed specifically for employees to be able to carry out particular tasks or activities (bespoke applications). For example, for customer relationship management, stock control, plant control, engineering diagnostics, credit management or analysing sales performance.

This involves:

♦ Inputting information so that it is ready for processing — inputting tools and techniques will vary according to the technology being used, for example, keyboard, mouse, stylus, touch screen, microphone, camera
♦ Organising and combining information of different forms or from different sources — combining techniques: insert, size, position, wrap, order, group
♦ Following local and/or legal guidelines for the storage and use of data, import data, links and references to external data
♦ Responding appropriately to data entry error messages
♦ Using appropriate tools and techniques to edit, process and format information:
    — Editing: Select, insert, delete, cut, copy, paste, drag and drop, find, replace, page layout, labelling, alignment, orientation, colour, resolution, size, pitch
    — Process/Analysis: Design queries, mathematical, logical or statistical functions
    — Formatting: Characters, lines, paragraphs, pages, file types
♦ Checking information meets needs, using IT tools and making corrections as necessary
♦ Using appropriate presentation methods — on-screen display, publishing on the web, hard copy, digital file

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Bespoke information will vary according to the software — for example, text, numbers, photos, scanned images, graphic elements, digital recorded sound, graphs, charts, tables
♦ Screen dumps
♦ Hard copies of documents constructed using bespoke software
♦ Electronic copies of documents constructed using specialist software
♦ E-mails confirming information meets needs and/or detailing changes
♦ Personal statement
♦ Witness testimony
♦ Professional discussion/oral questioning/written questioning

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S236b: Specialist Software 2

SQA Code F9AV 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

This Unit is about the ability to select and use a suitable specialist software application to carry out an appropriate data processing task. It includes understanding the capabilities of the software and the types of tasks for which it is suitable, as well as the skills and techniques needed to use the software application appropriately and effectively.

Examples of specialist software include:

♦ Logistics planning applications
♦ Computer Aided Design (CAD) applications
♦ Computer animation applications
♦ Music composition and editing applications

This involves:

♦ Inputting information so that it is ready for processing — inputting tools and techniques will vary according to the technology being used; for example, keyboard, mouse, stylus, touch screen, microphone, camera
♦ Organising and combining information of different forms or from different sources — combining techniques; insert, size, position, wrap, order, group
♦ Following local and/or legal guidelines for the storage and use of data, import data, links and references to external data
♦ Responding appropriately to data entry error messages
♦ Using appropriate tools and techniques to edit, process and format information:
   — Editing: Select, insert, delete, cut, copy, paste, drag and drop, find, replace, page layout, labelling, alignment, orientation, colour, resolution, size, pitch
   — Process/Analysis: Design queries, mathematical, logical or statistical functions
   — Formatting: Characters, lines, paragraphs, pages, file types
♦ Checking information meets needs, using IT tools and making corrections as necessary
♦ Using appropriate presentation methods — on-screen display, publishing on the web, hard copy, digital file

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Specialist information will vary according to the software — for example, text, numbers, photos, scanned images, graphic elements, digital recorded sound, graphs, charts, tables
♦ Screen dumps
♦ Hard copies of documents constructed using specialist software
♦ Electronic copies of documents constructed using specialist software
♦ E-mails confirming information meets needs and/or detailing changes
♦ Personal statement
♦ Witness testimony
♦ Professional discussion/oral questioning/written questioning

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S237: Data Management Software 2

SQA Code F9C2 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

The Unit is about selecting and using intermediate data management software tools and techniques.

This involves:

Entering, editing and maintaining data records in a data management system

♦ Entering data accurately into groups of records
♦ Locating and amending data
♦ Checking data records meet needs
♦ Responding appropriately to data entry and other error messages
♦ Applying local and/or legal guidelines for the storage and use of data

Retrieving and displaying data records to meet requirements

♦ Selecting and using queries to search for and retrieve information
♦ Creating and viewing reports

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Printout showing records have been added
♦ Printouts of search queries
♦ Printouts of reports
♦ Letters, memos, e-mails
♦ Error log
♦ Personal statement
♦ Witness testimony
♦ Professional discussion/oral questioning/written questioning

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S238:   Database Software 2

SQA Code F9C5 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

The Unit is about selecting and using intermediate database software tools and techniques to enter information into databases, retrieve information by creating queries and producing reports.

This involves:

Creating and modifying non-relational database tables

♦ Creating and modifying database tables using a range of field types
♦ Responding to problems with tables
♦ Using database tools and techniques to ensure data integrity is maintained

Entering, editing and organising structured information in a database

♦ Selecting and using appropriate tools and techniques to format data entry forms
♦ Checking data entry meets needs
♦ Responding appropriately to data entry errors

Using database software tools to run queries and produce reports

♦ Creating and running database queries using multiple criteria
♦ Planning and producing database reports from a single table non relational database
♦ Selecting and using appropriate tools and techniques to format database reports
♦ Checking reports meet needs

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Screen dump of creation of tables including field types
♦ Screen dump of form used to enter, edit and organise data
♦ Printouts of search queries
♦ Printouts of reports from single table non relational database
♦ Personal statement
♦ Witness testimony
♦ Professional discussion/oral questioning/written questioning

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S239: Improving Productivity Using IT 2

SQA Code F99E 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

This Unit is about planning and reviewing the use of predefined or commonly used IT tools for activities that are at times non-routine or unfamiliar. As a result of reviewing their work, the individual will be able to devise solutions to use IT tools to improve productivity.

This involves:

Planning, selecting and using appropriate IT systems and software for different purposes

♦ Planning how to carry out tasks using IT to achieve the required purpose
♦ Selecting and using IT systems and software applications to complete planned tasks and produce effective outcomes

Reviewing and adapting the ongoing use of IT tools and systems to make sure that activities are successful

♦ Reviewing ongoing use of IT tools and techniques and change the approach as needed
♦ Developing and testing solutions to improve the ongoing use of IT tools and systems
♦ Developing solutions to improve own productivity in using IT
♦ Testing solutions to ensure that they work as intended

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Evidence of planning
♦ Evidence of use of IT systems and software to complete planned tasks
♦ Evidence of testing of solutions to improve own productivity in using IT
♦ Letters, memos, e-mails
♦ Personal statement
♦ Witness testimony
♦ Professional discussion/oral questioning/written questioning

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S240: IT Security for Users 2

SQA Code F99T 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

This Unit is about avoiding common security risks and controlling access to software and data and using a wider range of methods to protect software and data.

This involves:

Selecting and using appropriate methods to minimise security risk to IT systems and data

♦ Applying a range of security precautions to protect IT systems and data
♦ Keeping information secure and manage personal access to information sources securely
♦ Applying guidelines and procedures for the secure use of IT
♦ Selecting and using effective back up procedures for systems and data

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Evidence of range of security precautions in use
♦ Evidence of back up procedures
♦ Personal statement
♦ Witness testimony
♦ Professional discussion/oral questioning/written questioning

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S241: Presentation Software 2

SQA Code F9CT 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

This Unit is about selecting and using a wide range of advanced presentation software tools and techniques effectively to produce presentations that are non-routine or unfamiliar.

This involves:

Inputting and combining text and other information within presentation slides

♦ Entering text and other information using layouts appropriate to type of information
♦ Inserting charts and tables and link to source data
♦ Inserting images, video and sound to enhance the presentation
♦ Organising and combining information for presentations in line with any constraints
♦ Storing and retrieving presentation files effectively

Using presentation software tools to structure, edit and format presentations

♦ Creating, amending and using appropriate templates and themes for slides
♦ Selecting and using appropriate techniques to edit and format presentations
♦ Creating and using interactive elements to enhance presentations
♦ Selecting and using animation and transition effects to enhance presentations

Preparing slideshow for presentation

♦ Preparing interactive slideshow and associated products for presentation
♦ Checking presentation meets needs
♦ Identifying and responding to any quality problems with presentations

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Slideshows
♦ Handouts
♦ Personal statement
♦ Witness testimony
♦ Professional discussion/oral questioning/written questioning

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S242: Setting up an IT System 2

SQA Code F99K 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

This Unit is about selecting and connecting up an IT system with a range of hardware, removable storage media and a communication system safely and run more advanced tests to check it is working successfully

This involves:

Selecting and connecting up a personal computer safely with associated hardware and storage media

Selecting and connecting an IT system to a communication service

Installing and configuring software

- ♦ Configuring the user interface
- ♦ Installing, setting up and configuring virus protection and other security systems and software
- ♦ Installing application software
- ♦ Establishing a back up routine for system and data files

Checking that the IT system and communication service are working successfully

- ♦ Selecting and running suitable tests to make sure that the system and communication service are working successfully
- ♦ Establishing procedures for recovery in the event of system faults or failure
- ♦ Responding to faults and error messages making use of the help facility

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Printouts from testing procedures
♦ Letters, memos, e-mails
♦ Fault log
♦ Installation log — license numbers, serial number of equipment, etc
♦ Back up logs
♦ Personal statement
♦ Witness testimony
♦ Professional discussion/oral questioning/written questioning

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S243: Spreadsheet Software 2

SQA Code F9D1 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

This Unit is about selecting and using a wide range of intermediate spreadsheet software tools and techniques to produce, present and check spreadsheets that are at times non-routine or unfamiliar.

This involves:

Using a spreadsheet to enter, edit and organise numerical and other data

♦ Entering and editing numerical and other data
♦ Combining and linking data across worksheets
♦ Storing and retrieving spreadsheet files effectively

Selecting and using appropriate formulas and data analysis tools to meet requirements

♦ Selecting and using a range of appropriate functions and formulas
♦ Use a range of tools and techniques to analyse and manipulate data
♦ Selecting and using tools and techniques to format spreadsheet information
♦ Selecting and using appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets
♦ Selecting and formatting an appropriate chart or graph to display selected information
♦ Selecting and using appropriate page layouts to present and print information
♦ Checking information meets needs
♦ Responding to any problems

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Variety of appropriate spreadsheets
♦ Personal statement
♦ Witness testimony
♦ Professional discussion/oral questioning/written questioning

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S244: Using Collaborative Technologies 2

SQA Code F9A7 04

General overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

This Unit is about facilitating the use of appropriate combinations of IT tools and devices for groups to work collaboratively.

This involves:

Staying safe and secure when working with collaborative technology

♦ Taking appropriate steps to avoid risks
♦ Using appropriate methods to promote trust
♦ Carrying out appropriate checks on others' online identities and different types of information
♦ Identifying and responding to inappropriate content and behavior

Planning and setting up IT tools and devices for collaborative working

♦ Selecting an appropriate combination of IT tools and devices to carry out collaborative tasks
♦ Connecting and configuring a combination of IT tools and devices needed for a collaborative task

Preparing collaborative technologies for use

♦ Setting up and using access rights to enable others to access information
♦ Setting up and using permissions to filter information
♦ Adjusting settings so that others can access IT tools and devices
♦ Selecting and using different elements to control environments for collaborative technologies
♦ Selecting and joining networks and data feeds to manage data to suit collaborative tasks
♦ Contribute to tasks using collaborative technologies
♦ Enabling others to contribute responsibly
♦ Presenting relevant and valuable information
♦ Moderating the use of collaborative technologies
♦ Archive the outcome of collaborative working
♦ Responding to problems with collaborative technologies

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Letters, memos and e-mails
♦ Evidence of planning and setting up IT tools and devices
♦ Personal statement
♦ Witness testimony
♦ Professional discussion/oral questioning/written questioning

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S245: Website Software 2

SQA Code F9D4 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

This Unit is about selecting and using a wide range of intermediate website software tools and techniques to produce multi-page websites.

This involves:

Planning and creating web page templates to layout

♦ Selecting and using website features and structures to help the user navigate round web pages
♦ Creating, selecting and using styles to keep the appearance of web pages consistent and make them easy to understand
♦ Storing and retrieving files effectively

Using website software tools to prepare content for websites

♦ Preparing content for web pages so that it is ready for editing and formatting
♦ Organising and combining information needed for web pages including across different software
♦ Selecting and using appropriate editing and formatting techniques
♦ Selecting and using appropriate development techniques to link information across pages
♦ Change the file formats appropriately
♦ Check web pages meet needs

Publish websites

♦ Selecting and using appropriate testing methods to check that all elements of websites are working as planned
♦ Selecting and using an appropriate programme to upload and publish the website
♦ Respond appropriately to problems with multiple page websites

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Printouts of web pages
♦ Plan of website
♦ Letters, memos, e-mails
♦ Testing documentation
♦ Fault logs
♦ Personal statement
♦ Witness testimony
♦ Professional discussion/oral questioning/written questioning

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S246: Word Processing Software 2

SQA Code F9D7 04

General Overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

This Unit is about selecting and using a range of intermediate word processing software tools and techniques to produce documents that are at times non-routine or unfamiliar.

This involves:

Entering and combining text and other information accurately with word processing documents

♦ Using appropriate techniques to enter text accurately and efficiently
♦ Selecting and using appropriate templates for different purposes
♦ Combining or merging information within a document from a range of sources
♦ Storing and retrieving document and template files effectively

Creating and modifying appropriate layouts, structures and styles for word processing documents

♦ Creating, using and modifying columns, tables and forms to organise information
♦ Selecting and applying styles to text

Using word processing software tools and techniques to format and present documents effectively to meet requirements

♦ Selecting and using appropriate techniques to format characters and paragraphs
♦ Selecting and using appropriate page and section layouts to present and print multi-page and multi-section documents
♦ Checking documents meet needs
♦ Responding appropriately to any quality problems with documents

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

- Assessor observation
- Variety of word processed documents
- Draft documents
- E-mails detailing amendments to documents/giving feedback
- Personal statement
- Witness testimony
- Professional discussion/oral questioning/written questioning

Knowledge and Understanding

- Personal statement (written/audio/video)
- Witness testimony
- Professional discussion
- Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Unit S252: Using Email 2

SQA Code F9A4 04

General overview

This Unit is imported from E-skills SVQ for IT User suite, therefore the E-skills Assessment Strategy should be used during assessment.

This Unit is about understanding and using a range of basic e-mail software tools to send, receive and store messages for straightforward or routine activities. Any aspect that is unfamiliar will require support and advice from others.
This involves:

♦ Composing and formatting e-mail messages, including attachments
♦ Sending e-mail messages to individual and groups
♦ Using address book to manage contact information
♦ Follow guidelines and procedures for using e-mail effectively
♦ Responding appropriately to e-mail messages
♦ Organising, storing and archiving e-mail messages
♦ Responding appropriately to e-mail problems

A key piece of supporting evidence could be a comprehensive personal statement supporting the performance evidence (observation and work product). Knowledge items not evident from performance can be covered in the personal statement.

It is good practice to have a range of supporting evidence across the portfolio — questioning, professional discussion and witness testimony, rather than relying on any one form of evidence entirely. Annotation of work product is an excellent way of contextualising evidence and can also be an opportunity to cover Knowledge.

This is known as triangulation of evidence and is an effective way of demonstrating performance over time without duplicating tasks.

While gathering evidence, please refer to the mandatory Units and use opportunities as they arise to map evidence against them. A balance should be struck between seeking such opportunities and allowing evidence to be gathered naturally to ensure the most efficient holistic approach.

Performance Indicators

The types of evidence that may be used could include:

♦ Assessor observation
♦ Variety of e-mail messages
♦ Screenshot of stored e-mail messages and archived e-mail messages
♦ Screenshot of organising address book — contact and group maintenance
♦ Screenshot of folders pane
♦ Screenshot/records showing how problems were resolved

Knowledge and Understanding

♦ Personal statement (written/audio/video)
♦ Witness testimony
♦ Professional discussion
♦ Verbal/written questioning

Please refer to the E-Skills Assessment Strategy for SVQ for IT Users for full Assessment Criteria.

Appendix 1: Blank recording forms

Unit progress record

Qualification and level _____

Candidate _____

To achieve the whole qualification, you must prove competence in the **three mandatory Units** and **five optional** Units.

Unit Checklist

Mandatory					
Optional					

Mandatory Units achieved

Unit number	Title	Assessor's signature	Date

Optional Units achieved

Unit number	Title	Assessor's signature	Date

Index of evidence

SVQ title and level	

Evidence number	Description of evidence	Evidence location

Achievement record

Unit

Evidence Index No	Description of Evidence	Performance Indicators (PI)												Knowledge and Understanding											

Unit

Comments

The candidate has satisfied the assessor that the performance indicator(s) have been met.

Candidate's signature _____ **Date** _____

Assessor's signature _____ **Date** _____

Internal verifier's signature _____ **Date** _____

Assessment plan

Activities	Performance Indicator (PI)	Method of assessment/ sources of evidence	Date of assessment	Evidence already available	Links to other Units (Performance Indicator)
Questioning for Knowledge and Understanding not apparent from performance to be identified from 2nd review					

Assessor's signature _____ **1st review due** _____

Candidate's signature _____ **2nd review due** _____

Date of agreement _____ **Date of completion** _____

Personal statement

Date	Evidence index number	Details of statement	Links to other evidence (cross-reference)	Units, Performance Indicators covered

Candidate's signature _____ **Date** _____

Observation record

Unit(s) _____

Candidate _____

Evidence index number _____

Date of observation _____

Skills/activities observed	Performance Indicator(s) covered

Knowledge and Understanding covered in this observation

Performance Indicators/Knowledge with other Units which this evidence covers

Assessor comments and feedback to candidate

Assessor's signature _____ **Date** _____

Candidate's signature _____ **Date** _____

Witness testimony

SVQ title and level	251
Candidate name	
Evidence index no	
Where applicable, evidence number to which this testimony relates	
Date of evidence	
Witness name	
Designation/relationship to candidate	

Details of testimony

I can confirm the candidate's performance was satisfactory.

Witness's signature _____ **Date** _____

Record of Performance Indicator/Knowledge and Understanding candidate questioning

Unit	
Evidence index number	

Context of discussion (ie Knowledge evidence does not flow naturally from performance)

List of questions and candidate's responses	
Q	
A	
Q	
A	

Assessor's signature _____ **Date** _____

Candidate's signature _____ **Date** _____