

# **Business and Administration NVQs/SVQs 2005**

## **Assessment Guidance**

### **Level 2**

### **SQA September 2005**



Business & Administration NVQ/SVQs

## Assessment Guide



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## About this guide

Levels 1 to 4 are available as separate documents. Each level is supported by this Assessment Guidance.

The Assessment Guide should be used in conjunction with your awarding body's scheme documentation.

This Assessment Guide has been jointly developed by the Council for Administration (CfA) and City & Guilds, Edexcel, IMI, LCCIEB, OCR and SQA. All partners have joint copyright<sup>1</sup>.

Centres are strongly advised to consult the CfA website for updates.

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<sup>1</sup> The national Training Organisation for Administration is the Council for Administration. The National Occupational Standards which form the basis of this award were developed by the Council for Administration — CfA.

# Assessment Guide for NVQs/SVQs in Business and Administration

## 1. Purpose

This guidance is written for assessors and verifiers, and gives information about acceptable forms of assessment and types of evidence for each Unit. The guide also defines:

- ◆ the occupational competence needed to assess and verify
- ◆ which aspects of the standards must always be assessed through performance at work and
- ◆ guidance on assessing contingencies where these could occur

This guide cannot provide exhaustive guidance on every Unit and set of performance indicators but should allow assessors to gain confidence in assessing candidates producing evidence for the revised Units.

## 2. Who can assess?

Anyone assessing or verifying these NVQ/SVQs must be a qualified assessor or verifier. The assessment team is central to ensuring the consistent and effective assessment of standards. To perform this role successfully, it is essential that assessors and internal verifiers are themselves competent in the occupational area they assess or verify; we are also giving you definitions of what we mean by 'occupational competence'.

All assessors and verifiers must be occupationally competent and appropriately qualified to assess or verify the Business and Administration NVQs/SVQs. In publicly funded provision, teachers and trainers must also be occupationally competent and appropriately qualified to teach or train learners. Business and Administration teachers, trainers, assessors and verifiers are key to effective and consistent delivery. External verifiers are charged with specific responsibilities to ensure occupational competence requirements for assessors and verifiers are met at all times.

## 3. Proving Occupational Competence

The following information specifies the minimum requirements of occupational competence that assessors or verifiers must demonstrate.

### 3.a. Assessor and Verifier Qualifications

In line with the document, *The Code of Practice for NVQ Awarding Bodies (QCA)*, the following outlines the requirement for assessor and verifier qualifications. Please note assessors and verifiers in Scotland should refer to the document, *Implementing SVQs: A Guide for Awarding Bodies (SQA)*.

- ◆ external verifiers must have the V2 or D35 Unit. Unqualified external verifiers have twelve months to achieve the V2 qualification, during which time they should be supported by their awarding body throughout their training period
- ◆ internal verifiers must have the V1 or D34 Unit. Unqualified internal verifiers have eighteen months to achieve the V1 qualification, during which time they must be supported by a qualified internal verifier throughout their training period

- ◆ assessors must hold the A1 Unit or D32 and D33 Units. Unqualified assessors have eighteen months to achieve the A1 qualification, during which time they must be supported by a qualified assessor and internal verifier throughout their training period.

All assessors and verifiers must receive appropriate induction to the NVQ/SVQ standards. They must also have access to ongoing training and updating on current Business and Administration issues and maintain their occupational competence to NVQ/SVQ level 3 Business and Administration standards for levels 1-3 and level 4 Business and Administration standards for level 4 NVQs/SVQs.

### **3.b. Business Administration occupational competence for assessors and verifiers**

External verifiers must demonstrate administration occupational competence in all the mandatory Units and a significant proportion of the optional Units, together with an industry awareness of, and familiarity with, the remaining optional Units. Awarding bodies must maintain a record of occupational competence across their external verifier team and provide expert support from within the team when required by other external verifiers.

Assessors and internal verifiers must possess the appropriate occupational competence to assess and verify the NVQs/SVQs in Business and Administration<sup>2</sup>. Assessment centres are required to maintain continuous professional development records for all assessors and verifiers, showing how Business and Administration competence was originally acquired and is maintained and upgraded over time.

Assessors and internal verifiers must demonstrate occupational competence to assess or verify individual Units in line with the requirements set out below:

#### **3.b.1 To assess or verify the level 1-3 Business and Administration NVQs/SVQs assessors and verifiers must:**

- ◆ possess a level 3 NVQ/SVQ in Business and Administration
- or
- ◆ possess a vocational qualification closely related to the Business and Administration competences, at a minimum of level 3
- or
- ◆ for those Units they wish to assess or verify have at least one year's experience as a level 3 administrator in the last three years
- and
- ◆ a record of continuous professional development that is planned and reviewed on at least an annual basis.

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<sup>2</sup> These should be viewed as minimum requirements.

### **3.b.2 Health and safety Units – levels 1–3**

In line with guidance from the Employment National Training Organisation, where there is assessment and verification of the health and safety Units, assessors and verifiers must hold the relevant Unit themselves or demonstrate:

- ◆ a good understanding of health and safety issues and have attended a recognised health and safety training course
- and**
- ◆ experience of contributing to health and safety within the workplace within the last five years.

### **3.b.3 To assess or verify the level 4 Business and Administration NVQ/SVQ assessors and verifiers must:**

- ◆ possess a level 4 Business and Administration NVQ/SVQ
- or**
- ◆ possess a vocational qualification closely related to the Business and Administration competences, at a minimum of level 4
- or**
- ◆ for those Units they wish to assess and verify have at least two years' experience as a level 4 administrator in the past five years
- and**
- ◆ a record of continuous professional development that is planned and reviewed on at least an annual basis.

### **3.c. Verifying the Occupational Competence of Assessors and Internal Verifiers**

Before centres are approved to offer the NVQs/SVQs in Business and Administration, they must provide their awarding body with evidence of appropriate occupational competence for each member of the Business and Administration team in accordance with awarding body procedures.<sup>3</sup>

The Business and Administration NVQs/SVQs cover a broad range of occupational activities, and it is very unlikely that any one member of the team will be occupationally competent in every Unit.

After initial 'subject approval', external verification visits will investigate the maintenance and upgrading of the team's occupational competence in Business and Administration. Assessment centres must provide external verifiers with detailed records of continuous professional development for every member of the Business and Administration team.

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<sup>3</sup> Centres should engage in some form of discussion regarding the occupational competence of their assessors and verifiers to ascertain which aspects of the revised qualification they are now competent to assess or verify.

### 3.d. Competence and qualifications at a glance

| Delivering Business and Administration assessment and verification | A1<br>or<br>D32/33 | V1<br>or<br>D34 | V2<br>or<br>D35 | H/S | BA N/SVQ 3<br>or<br>BA N/SVQ 3<br>=<br>or<br>O/C | BA N/SVQ 4<br>or<br>BA N/SVQ 4<br>=<br>or<br>O/C | CPD |
|--|--------------------|-----------------|-----------------|-----|--|--|-----|
| Assessing level 1-3  | E                  |                 |                 | E   | E  |  | E   |
| Assessing level 4  | E                  |                 |                 |     |  | E  | E   |
| Internally verifying level 1-3                                     | D                  | E               |                 | E   | E  |  | E   |
| Internally verifying level 4                                       | D                  | E               |                 |     |  | E  | E   |
| Externally verifying level 1-3                                     | D                  | D               | E               | E   | E  |  | E   |
| Externally verifying level 4                                       | D                  | D               | E               |     |  | E  | E   |

E = essential  
D = desirable.

## 4. Structure of the Business and Administration National Occupational Standards

Levels 1 to 4 now have the following structure:

| Level | Number of Core Units | Number of Optional Units required | Number of Optional Units from which to choose |
|-------|----------------------|-----------------------------------|---|
| 1     | 2                    | 2                                 | 8   |
| 2     | 2                    | 3                                 | 24  |
| 3     | 2                    | 4                                 | 30  |
| 4     | 2                    | 4                                 | 18  |

## 5. Flexibility supports workplace assessment

A further and important benefit of this new structure is that every candidate should now be able to choose a combination of Units to make up their NVQ/SVQ that accurately matches their job role and can therefore be assessed at work.

## 6. Role of the Core Units

Though the content of core Units is largely the same they should be assessed at the appropriate level. The core Units have been designed to be assessed with evidence from the optional Units. Core Units should not be assessed separately and assessors should plan well to ensure that all the core Units' performance and knowledge indicators are covered by evidence produced from the optional Units. Therefore, CfA stress that the choice of optional Units is critical and the wrong choice of Units might result in candidates not having enough evidence to meet the demands of the core Units. In addition, given that evidence for the core Units need to be obtained from candidates' choice of optional Units it is envisaged that completion of the core Units will probably extend to the length of candidates' programmes. The other role of the core Units is to assess candidates' behaviours and attitudes in their workplace. During the consultation process it was clear from stakeholders that they wanted to see their employees show wider competence than is contained in the optional Units and assessors will need to be aware of this approach when assessing the core Units.

## 7. Assessing clusters of Performance Indicators

In order to reduce the assessment burden on the assessor the Units in the 2005 NVQ/SVQs have been designed to assess a larger amount of evidence than in the last NVQ/SVQ Units. The reasoning behind this is to dissuade assessors from assessing individual performance indicators or a few performance indicators at a time. In some Units, the cluster of performance indicators cover the whole Unit and you will effectively be assessing the whole Unit at one time. When you are planning for assessment opportunities, you will need to bear in mind that you are assessing a larger cluster of performance indicators or possibly a whole Unit at one time.

## 8. Removal of scope

The last National Occupational Standards contained scope that defines the different contexts within which a candidate must demonstrate competence. The revised National Occupational Standards no longer contain scope. Assessors must ensure candidates can demonstrate competence at work and transfer that competence to a different work environment. This will involve the use of 'what-if' questions and/or a range of alternative questioning techniques.

However Units imported from AOSG (Units 306 and 307) do contain 'range' which is similar to scope and assessment guidance has been written for the Units in question.

## 9. Contingencies

Though scope has been removed there are a number of areas in the revised standards that require some flexibility in the assessment of evidence. These largely occur in the core Units and Units assessing 'soft skills' such as working as part of a team. For example in Unit 302 Work within your business environment Performance Indicator number 5 asks candidates to seek guidance on 'objectives, policies, systems, procedures and values'. This is not much of an issue if the candidate works in a medium or large organisation where all of the above would be in place, but could well be an issue if the candidate works for a SME or micro organisation where not all of the above will be available. The assessor will need to ask the candidate a series of 'what-if' questions that cover the same Performance Indicators for Levels 1 and 2 or through professional discussion and an assignment or case study at Levels 3 and 4 to ensure that the candidate is competent.

## 10. Types of evidence

There are two major categories of evidence used in NVQ/SVQ assessment. These are:

- ◆ **Performance Evidence** – this includes the outcomes of performance (**work products**) and **observation** of performance
- ◆ **Supporting Evidence** – the answers that candidates give to **questions** (either written or spoken) and the **witness testimony** of other people with whom they work

For work-based qualifications, candidates should be aiming to provide **performance evidence** for Performance Indicator clusters.

**Witness testimony** is a particularly useful form of evidence in peripatetic assessment centres. It can also be used to support performance evidence but cannot be a substitute for performance evidence for clusters of Performance Indicators.

### 10.a. How we expect you to use each method

In line with good practice as determined by the Lifelong Learning Sector Skills Council (the standards setting body for Training and Development) we expect:

### **10.a.1 Performance Evidence: Observation**

Observation of all performance evidence at work will be carried out by a qualified and occupationally competent assessor, in a way that makes it clear how the performance relates to the national standards (for example by producing a written record describing the observed performance). Assessors should also provide some detail about the context of assessment.

### **10.a.2 Performance Evidence: Work Products**

Work products, such as copies of work produced by the candidate (reports, letters, memos, printouts, etc) are also valuable items of performance evidence. However, candidates and assessors may also want to present a claim of competence through evidence recorded in what is generally referred to as a “paperless” portfolio. This method, although not in fact entirely paperless, does reduce the amount of product evidence collected in a portfolio. The assessor examines the evidence on site and records where it can be found within the candidate’s workplace. Assessors and verifiers who propose to present evidence in this way should discuss this first with their awarding body.

### **10.a.3. Supporting Evidence: Questioning**

Questioning includes all forms of written and oral questions. Observation of the candidate in the workplace and examination of products by the assessor will generate productive conversations between the assessor and candidate where questions are asked. It is very likely that these activities will cover all, or much, of the knowledge and understanding for each Unit so specific questions need only be asked to fill the gaps. This style of assessment still requires the assessor to confirm how knowledge and understanding has been addressed but avoids over assessment of the candidate. Questioning also includes “personal statements” produced by the candidate, if these are in effect answering questions about why a candidate did what they did in the way that they did it.

## 10.a.4. Supporting Evidence: Professional Discussion

Professional discussions are:

A series of structured, planned and in-depth discussions recorded in writing by the assessor, or on audio or video tape. Evidence from these discussions can drive the overall assessment process and corroborate observation reports, examination of work products, witness testimony, other questioning techniques (as well as filling any gaps there may be in assessment records).

This approach ensures that candidates' can:

- ◆ show the assessor the range of their experience
- ◆ confidently present evidence of competence
- ◆ locate sources of evidence at work
- ◆ demonstrate knowledge and understanding to the national standard

## 10.a.5. Supporting Evidence: Witness Testimony

Witness testimony can provide valuable evidence for a candidate. In line with established principles it must be authentic, for example:

- ◆ consist of a clear statement indicating how the candidate carries out their job
- ◆ evidence must be dated and signed and include information about the job title of the witness

## 11. Using other related qualifications as evidence

Other qualifications can be used as supporting evidence in a candidate portfolio, providing the qualification is current and benchmarks to the national standards of work, or knowledge and understanding, for one or more Units. However, it will only be supporting evidence, as assessors must make judgements about how the candidate demonstrates competence at work.

## 12. Holistic Assessment

Holistic assessment is simply assessing as many different parts of your candidate's NVQ/SVQ at one time through identifying 'evidence-rich' opportunities.

By focusing on the candidate's job and the tasks he or she carries out, opportunities for assessment of larger quantities of the NVQ/SVQ become easier to identify. Matching assessment opportunities to the content of national standards should provide a 'map', against which assessment can be planned and achievement measured. We must stress that assessment using this approach is not an easy option but rather one that can be offered as a streamlined and efficient alternative to other assessment models.

## 13. Proxy qualifications

The CfA has begun to approve qualifications as proxy qualifications, of which a full list will be available in due course on the CfA website at [www.cfa-uk.com](http://www.cfa-uk.com). You may use the qualification as evidence of competence in one or more CfA Units. No separate assessment of competence at work is required. Where candidates have achieved one or more of the qualifications, assessors are required to verify original certificates and keep a certified copy of the certificate(s) in the candidate's portfolio.

## 14. Quality in Assessment

You will notice that this new version of the Administration standards does not generally specify a minimum number of times that a candidate should have evidence of performing a task before they can be deemed competent. Experience has shown that merely asking for multiple items of the same evidence does not actually guarantee competence. We are looking to you, as the assessor, to make professional judgements about the quantity and quality of evidence needed, bearing in mind the golden rules about evidence for NVQ/SVQs. In every case you must ensure that the evidence you assess is:

- ◆ authentic
- ◆ valid
- ◆ sufficient
- ◆ current
- ◆ reliable

## 15. Ensuring sufficiency of evidence

In our view, it is better for the candidate and assessor to present a number of different but related items of evidence, rather than essentially the same item in duplicate or triplicate. For example, if you were assessing how well a candidate communicated with colleagues, it would be best to present a variety of evidence, for example:

- ◆ observation of the candidate interacting with colleagues, giving instructions and feedback
- ◆ work products – memos, emails, notes
- ◆ questions – keep a record of the questions asked
- ◆ testimony – get a line manager to confirm candidate communication skills

Combining different sorts of evidence in this way is referred to as “triangulation”, and is essentially what qualified assessment is all about – making judgments based on diverse evidence. For each Unit or cluster of Performance Indicators, assessors assess evidence from a variety of sources. True competence means consistent performance over time. As an assessor, you must be sure that the evidence you assess confirms consistent competence. Both the assessment centre and external verifier need to have a high level of confidence in the quality of assessment undertaken, and the consistent performance of the candidates to the standards. The administration standards do not specify minimum timescales, preferring to rely on the professional judgement of assessors and verifiers and your ability to work within the quality requirements outlined above. Some of the imported Units, however, do specify timescales and you must ensure that these requirements are met.

## 16. Separating training from assessment

Materials used for training, or evidence of the outcomes of training, are not evidence of competence and **must be** separated from the summative assessment process. Only assessed evidence of competence should be presented for the NVQ/SVQ. The roles of assessor and trainer must also be separate. QCA and SQA prefer the candidate’s trainer or lecturer to be a different person from their assessor but the CfA is aware that this practice is not always possible. Where the same person delivers training and assessment the centre must ensure that the roles are clearly delineated. Both assessor and candidate must understand the importance of separating these roles. The centre must also implement sufficient risk management strategies to ensure risks to the integrity of the assessment practice are minimised.

## 17. Where you can assess

### 17.a Real work is best

If your candidates are to demonstrate that they can perform their job to the national standards, the best way they can do this is by being assessed performing **real work**, in their workplace. By **real work** we mean:

'where the candidate is engaged in activities that contribute to the aims of the organization by whom they are employed', e.g. administrators in paid employment, administrators working in a voluntary capacity or on extensive work experience programmes.

### 17.b. Realistic working environments

*A realistic working environment (RWE) is: 'where the candidate is subjected to a work environment and is producing performance evidence subject to all of the following conditions:*

- ◆ time pressures
- ◆ work problems
- ◆ accountabilities
- ◆ office environment
- ◆ tools to do the job'

*eg learners in a model or virtual office*

External verifiers will need to approve RWEs on an individual basis before any assessment can begin. Authenticity is essential and approval needs to be endorsed on an annual basis by the external verifier.

## 18. The use of simulation

The use of simulation is not permitted in the revised Business and Administration NVQs/SVQs **unless** it is allowed in an imported Unit and whether or not that sector allows any form of simulated assessment activity. This guide will indicate if a Unit has been imported from another occupational sector. Units imported from the E-skills UK standards all allow simulation.

## 19. Specific guidance for Assessors

The assessment requirements for these NVQs/SVQs do bring with them some change of practice and emphasis for assessors. The major changes are:

- ◆ **Establishing occupational competence.** Assessors must be able to demonstrate their occupational competence for the Units they wish to assess. Because the revised Business and Administration NVQ/SVQs contain a broad range of optional Units, it may not be possible for one assessor to cover the full range of Units within each qualification.
- ◆ **The importance of CPD.** Assessors can identify any areas where their occupational competence is not adequate or sufficiently current, by benchmarking their current skills and knowledge to the national standards. They must ensure that they maintain their occupational competence in a way that can be demonstrated through a CPD record. If they are no longer working in a job covered by the standards, they may do this through a period of industrial placement, time spent on real work or in a realistic working environment, or by achieving appropriate NVQ/SVQ Units themselves.
- ◆ **The use of simulation.** There are no opportunities for candidates to produce evidence through simulation. This means assessors must work closely with candidates to identify an appropriate selection of optional Units which properly reflect the candidate's job role, so that the NVQ/SVQ is achieved in the workplace.
- ◆ The assessment strategy, and this assessment guidance, makes it clear that assessors must use their professional judgement in coming to decisions about candidate evidence. Assessors must be able to justify their claim that candidate evidence not only meets the standards, but also meets all the criteria for quality evidence.

## 20. Specific guidance for Internal Verifiers

The assessment requirements for these new standards do also bring with them some change of practice and emphasis for internal verifiers. The major changes are listed below.

Internal verifiers are responsible for monitoring the occupational competence of new and existing assessors. They can do this by:

- ◆ keeping copies of assessor/IV CVs and written statements
- ◆ maintaining records of personal interviews, e.g. appraisal or development interviews, and observations of administrative competence at work
- ◆ benchmarking current skills/practice to Business Administration NVQ/SVQ standards
- ◆ implementing CPD to maintain assessor/IV currency of occupational competence
- ◆ maintaining quality records of relevant assessor work experience
- ◆ seeing and recording original evidence of relevant qualifications

Internal verifiers must also maintain the currency of their own occupational competence to verify.

This guidance gives clear criteria for the definition of realistic working environments. It is the responsibility of internal verifiers to ensure that any assessment that takes place outside real work is in a context that meets these criteria. Again, external verifiers will monitor this closely.

Considerable emphasis has been placed within this guidance on the professional judgements of assessors. This is key to ensuring quality in the determination and presentation of evidence. Research indicates that assessors do this best when they receive regular observations, ongoing support, constructive feedback and, when necessary, coaching from their internal verifier. Assessment centres should ensure that individual and collective confidence is built in judging evidence and making assessment decisions. This is most easily achieved through the systematic provision of opportunities for assessors and IVs to meet with each other - to share experiences and good practice, learn new skills, identify areas for individual and team development, and plan to use new techniques or increase understanding. These could be standardisation meetings, risk management workshops and regular updates on good practice elsewhere as highlighted in OfSTED and ALI inspection reports or from reports from awarding bodies or in CoVEs appointed in the Business and Administration area.

## 21. How the Assessment Guide works

The assessment guidance provided for each Unit has been designed to give you all the key information that you need. The first section tells you “at a glance”:

- ◆ whether the Unit is core or option
- ◆ the minimum performance evidence requirements for each cluster of Performance Indicators
- ◆ the Performance Indicators that are deemed to be contingencies; and
- ◆ the methods of assessment that can be used

The methods of assessment are represented by a set of icons. These are:

| Icon  | Translation       | When to use  | Evidence type  |
|---|-------------------|--|--|
|    | Observation       | To confirm that the candidate can provide evidence through performance | Observing candidate performing a task or series of tasks               |
|   | Work products     | Recorded evidence  | Paper-based documentation or computer or audio-visual evidence         |
|  | Questioning       | To confirm competence through questioning the candidate                | When the assessor wants to check understanding of skills and knowledge |
|  | Witness testimony | Speaking to line managers and supervisors, colleagues or customers     | When assessor wishes to check validity of third-party evidence         |

## 22. Using the At a Glance table:

Each Unit contains a table that allows you to determine quickly if the Unit is a core or optional Unit, whether the Unit contains possible contingencies and what occupational area competence the assessor needs. It will also state if simulation is acceptable or not for the Unit.

|                      |  |                                |                       |
|----------------------|--|--------------------------------|-----------------------|
| <b>Core</b>          | ✓  | <b>Optional</b>                | X                     |
| <b>Simulation</b>    | X  | <b>Occupational Competence</b> | <b>Administration</b> |
| <b>Contingencies</b> |  |                                |                       |
| <b>P I 1</b>         | If the organisation has no stated mission the candidate should ask their employer for guidance.                    |                                |                       |
| <b>P I 4</b>         | If the organisation has no stated values the candidate should ask their employer for guidance.                     |                                |                       |
| <b>P I 7</b>         | If no guidance is needed during the assessment period 'what if' questions may be asked to confirm competence.      |                                |                       |
| <b>P I 10</b>        | If no procedures are in place during the assessment period 'what if' questions may be asked to confirm competence. |                                |                       |

## 23. Assessment overview

Each Unit contains a statement (example below) that provides an overview of what needs to be assessed in that Unit. The overview covers all of the Performance Indicators in that Unit; these have been condensed into a smaller number than the total Performance Indicators for convenience. Realistic Working Environment RWE only applies to Levels 1 and 2.

You have to assess your candidate doing **four** things at work or in an approved Realistic Working Environment:

- ◆ plan and prioritise work
- ◆ seek ways to improve their own performance
- ◆ behave in a professional manner
- ◆ take part in discussions with individuals and groups

## Level 2 Units

| <b>SQA codes</b> | <b>Unit</b>     |  |
|------------------|-----------------|--|
| DP7D 04          | <b>Unit 201</b> | <b>Carry out your responsibilities at work 2</b>                 |
| DP7A 04          | <b>Unit 202</b> | <b>Work within your business environment 2</b>                   |
| DD56 04          | <b>Unit 110</b> | <b>Ensure your own actions reduce risks to health and safety</b> |
| DP80 04          | <b>Unit 203</b> | <b>Manage customer relations</b>                                 |
| DP81 04          | <b>Unit 204</b> | <b>Manage diary systems</b>                                      |
| DP6F 04          | <b>Unit 205</b> | <b>Organise business travel and accommodation</b>                |
| DP7K 04          | <b>Unit 206</b> | <b>Deal with visitors</b>  |
| DE7Y 04          | <b>Unit 207</b> | <b>Process customers' financial information</b>                  |
| DE81 04          | <b>Unit 208</b> | <b>Operate credit control procedures</b>                         |
| DP73 04          | <b>Unit 209</b> | <b>Store, retrieve and archive information</b>                   |
| DP6Y 04          | <b>Unit 210</b> | <b>Research and report information</b>                           |
| DP8A 04          | <b>Unit 211</b> | <b>Organise and support meetings</b>                             |
| D5JN 04          | <b>Unit 212</b> | <b>Use IT Systems 2</b>  |
| DJ5W 04          | <b>Unit 213</b> | <b>Use IT to exchange information 2</b>                          |
| DJ60 04          | <b>Unit 214</b> | <b>Word processing software 2</b>                                |
| DJ61 04          | <b>Unit 215</b> | <b>Spreadsheet software 2</b>                                    |
| DJ62 04          | <b>Unit 216</b> | <b>Database software 2</b>                                       |
| DJ65 04          | <b>Unit 217</b> | <b>Presentation software 2</b>                                   |
| DJ66 04          | <b>Unit 218</b> | <b>Specialist or bespoke software 2</b>                          |
| DP75 04          | <b>Unit 219</b> | <b>Use a telephone system</b>                                    |

|         |                 |  |
|---------|-----------------|--|
| DP88 04 | <b>Unit 220</b> | <b>Operate office equipment</b>                      |
| DP6K 04 | <b>Unit 221</b> | <b>Prepare text from notes</b>                       |
| DP6M 04 | <b>Unit 222</b> | <b>Prepare text from shorthand</b>                   |
| DP6L 04 | <b>Unit 223</b> | <b>Prepare text from recorded audio instructions</b> |
| DP6P 04 | <b>Unit 224</b> | <b>Produce documents</b>                             |
| DP78 04 | <b>Unit 225</b> | <b>Work effectively with other people</b>            |

# Unit 201 Carry out your responsibilities at work 2

## About this Unit:

This is a **core** unit. The unit is about the way the candidate communicates, plans their work, uses feedback on their performance and behaves appropriately in the workplace or Realistic Working Environment.

## At a Glance:

|  |   |   |  |
|--|---|---|--|
| <b>Core</b>  | ✓   | <b>Optional</b>   | X  |
| <b>Simulation</b>  | X   | <b>Occupational Competence</b>  | <b>Administration</b>  |
| <b>Contingencies</b>   |   |   |  |
| <b>P I 10</b>  | If no problems arise during the assessment period 'what if' questions may be asked to confirm competence. |   |  |
| <b>P I 14</b>  | If the organisation has no codes of practice 'what if' questions may be asked to confirm competence.      |   |  |
| <b>Performance Evidence</b>  |   | <b>Supplementary Evidence</b>   |  |
| <br>Observation | <br>Work products      | <br>Questions | <br>Witness testimony |
| <b>Observation</b>   | <b>Work products</b>  | <b>Questions</b>  | <b>Witness testimony</b>   |

You have to assess your candidate doing **five** things at work or in an approved Realistic Working Environment:

- ◆ plan and prioritise work
- ◆ seek ways to improve their own performance
- ◆ behave in a professional manner
- ◆ take part in discussions with individuals and groups
- ◆ read written information, extracting relevant points and disseminating them

Examples of evidence:



Observation

Observing the candidate's behaviour towards others while collecting evidence for optional units; also observing that the candidate takes part in conversations with colleagues and others to the standards required by the organisation.



Work Product



Appraisals, reviews, minutes of meetings, to-do lists, memos, personal development plan, reports.



Questioning

Responses to questions to confirm the candidate's competence particularly for knowledge and contingencies, which should include checking the candidate understands the importance of planning and accepting responsibility for their own work.



Witness Testimony

Witness testimonies from the candidate's line-manager or colleagues to confirm consistent performance.

Evidence **will** be generated for this unit while gathering evidence for optional units at Level 2. Assessment should be planned alongside the appropriate optional units.

# Unit 202 Working within your business environment 2

## About this Unit:

This is a **core** unit. The unit is about the way the candidate works within the organisation to promote its aims while being aware of their own rights and responsibilities in the workplace or Realistic Working Environment.

## At a Glance:

|  |  |  |  |
|--|--|--|--|
| <b>Core</b>  | ✓  | <b>Optional</b>  | X  |
| <b>Simulation</b>  | X  | <b>Occupational Competence</b>   | <b>Administration</b>  |
| <b>Contingencies</b>   |  |  |  |
| <b>P I 1</b>   | If the organisation has no stated mission the candidate should ask his or her employer for guidance.               |  |  |
| <b>P I 3 &amp; 5</b>   | If the organisation has no stated values the candidate should ask their employer for guidance.                     |  |  |
| <b>P I 9</b>   | If no guidance is needed during the assessment period 'what if' questions may be asked to confirm competence.      |  |  |
| <b>P I 12</b>  | If no procedures are in place during the assessment period 'what if' questions may be asked to confirm competence. |  |  |
| <b>P I 15</b>  | If no concerns arise during the assessment period 'what if' questions may be asked to confirm competence.          |  |  |
| <b>Performance Evidence</b>  |  | <b>Supplementary Evidence</b>  |  |
| <br>Observation | <br>Work products               | <br>Questions | <br>Witness testimony |
| <b>Observation</b>   | <b>Work products</b>   | <b>Questions</b>   | <b>Witness testimony</b>   |

You have to assess your candidate doing **four** things at work or in an approved Realistic Working Environment:

- ◆ work towards the organisation's objectives
- ◆ act within their responsibilities and rights
- ◆ interact with others sensitively, respecting their diversity
- ◆ preserve the security of property and confidentiality of information

Examples of evidence:



Observation

Observing the candidate's behaviour towards others while collecting evidence for optional units; also observing that the candidate works in a way that promotes the organisation's aims and maintains security and confidentiality to the standards required by the organisation.



Work Product



Work completed to meet targets, notes from meetings, reports, information about rights and responsibilities, contract of employment, memos such as security or confidentiality.



Questioning

Responses to questions to confirm the candidate's competence. This should include checking the candidate understands; issues surrounding diversity if their workplace does not readily provide performance evidence; how to learn from other people; and legislation relevant to the workplace.



Witness Testimony

Witness testimonies from the candidate's line-manager or colleagues to confirm consistent performance.

Evidence **will** be generated for this unit while gathering evidence for optional units at Level 2. Assessment should be planned alongside the appropriate optional units.

## Unit 203 Manage customer relations

### About this Unit:

This is an **optional** unit. The unit is about the way the candidate interacts with customers both within the organisation and outside to meet their needs in the workplace or Realistic Working Environment.

### At a Glance:

|  |   |  |  |
|--|---|--|--|
| <b>Core</b>  | X   | <b>Optional</b>  | ✓  |
| <b>Simulation</b>  | X   | <b>Occupational Competence</b>   | <b>Administration</b>  |
| <b>Contingencies</b>   |   |  |  |
| <b>P I 6</b>   | If no complaints occur within the assessment period the assessor should look for records of previous complaints dealt with by the candidate before considering 'what if' questions to confirm competence. |  |  |
| <b>Performance Evidence</b>  |   | <b>Supplementary Evidence</b>  |  |
| <br>Observation | <br>Work Product   | <br>Questioning | <br>Witness Testimony |
| <b>Observation</b>   | <b>Work products</b>  | <b>Questions</b>   | <b>Witness testimony</b>   |

You have to assess your candidate doing **two** things at work or in an approved Realistic Working Environment:

- ◆ Find out what the customer wants
- ◆ take action to deliver what the customer wants

Examples of evidence:



Observation

Observe the candidate's behaviour towards customers both internal and external; also action taken to deliver satisfactory service and solutions to problems.



Work Product

Records of communications with customers, complaints records, memos, suggestions, minutes of meetings.



Questioning

Responses to questions to confirm the candidate's competence, particularly for knowledge and contingencies.



Witness Testimony

Witness testimonies from the candidate's line-manager, colleagues or customers to confirm consistent performance.

While gathering evidence for this unit, evidence **may** be generated for units 110, 201, 202, 206, 209, 216, 219 and 225.

## Unit 204 Manage diary systems

### About this Unit:

This optional unit is about the candidate organising their own and others' commitments using an electronic or paper-based diary system.

### At a Glance:

|  |  |  |  |
|--|--|--|--|
| <b>Core</b>  | X  | <b>Optional</b>  | ✓  |
| <b>Real Work</b>   | ✓  | <b>Approved RWE</b>  | ✓  |
| <b>Simulation</b>  | X  | <b>Occupational Competence</b>   | <b>Administration</b>  |
| <b>Contingencies</b>   |  |  |  |
| <b>PI 4</b>  | If no problems arise during the assessment period then 'what if' questions may be asked to confirm competence. |  |  |
| <b>Performance Evidence</b>  |  | <b>Supplementary Evidence</b>  |  |
| <br>Observation | <br>Work Product            | <br>Questioning | <br>Witness Testimony |
| <b>Observation</b>   | <b>Work products</b>   | <b>Questions</b>   | <b>Witness testimony</b>   |

You have to assess your candidate doing **two** things:

- ◆ maintain a diary
- ◆ deal with changes to previous entries

Examples of evidence:



Observation

Observe the candidate using a manual or electronic diary to organise activities and change arrangements. The candidate must keep everyone informed to the standard required by their own organisation.



Work  
Product



Diary entries, memos, letters, e-mails or similar records to and from colleagues and external contacts affected by entries or changes.



Questioning

Responses to questions to confirm the candidate's competence, particularly for knowledge and contingencies. This should include checking the candidate understands alternative diary systems.



Witness  
Testimony

Witness testimonies from the candidate's line-manager, colleagues or external contacts to confirm consistent performance.

While gathering evidence for this unit, evidence **may** be generated for units 110, 201, 202, 205, 209, 211, 212, 213, 216, 219, 224 and 225 or 301, 302, 303, 308, 311, 313 and 320.

## Unit 205 Organise business travel and accommodation

### About this Unit:

This is an **optional** unit. The unit is about the way the candidate arranges their colleagues' business travel and accommodation in the workplace or Realistic Working Environment

### At a Glance:

|  |  |  |  |
|--|--|--|--|
| <b>Core</b>  | X  | <b>Optional</b>  | ✓  |
| <b>Simulation</b>  | X  | <b>Occupational Competence</b>   | <b>Administration</b>  |
| <b>Contingencies</b>   |  |  |  |
| <b>P I 3</b>   | If no meetings are required during any trips arranged during the assessment period 'what if' questions may be asked to confirm competence. |  |  |
| <b>P I 8</b>   | If no problems arise during the assessment period then 'what if' questions may be asked to confirm competence.                             |  |  |
| <b>Performance Evidence</b>  |  | <b>Supplementary Evidence</b>  |  |
| <br>Observation | <br>Work Product  | <br>Questioning | <br>Witness Testimony |
| <b>Observation</b>   | <b>Work products</b>   | <b>Questions</b>   | <b>Witness testimony</b>   |

You have to assess your candidate doing **four** things at work or in an approved Realistic Working Environment:

- ◆ find out what the traveller needs
- ◆ make the necessary arrangements
- ◆ inform the traveller of the arrangements
- ◆ evaluate suppliers' performance

Examples of evidence:



Observation

Observe the candidate communicating with colleagues to establish their needs; making arrangements by telephone, fax, e-mail or letter; informing their colleagues of the arrangements made.



Work  
Product



Records of communications with colleagues and suppliers; records of evaluations carried out; copies of itineraries; copies of travel documentation; payment records.



Questioning

Responses to questions to confirm the candidate's competence, particularly for knowledge and contingencies. This should particularly check how candidates would deal with problems that may arise.



Witness  
Testimony

Witness testimonies from the candidate's line-manager, colleagues or suppliers to confirm consistent performance.

While gathering evidence for this unit, evidence **may** be generated for units 110, 201, 202, 204, 209, 210, 211, 212, 213, 214, 215, 216, 219, 224 and 225.

## Unit 206 Deal with visitors

### About this Unit:

This is an **optional** unit about providing a reception service to visitors to the workplace or Realistic Working Environment.

### At a Glance:

|  |   |  |  |
|--|---|--|--|
| <b>Core</b>  | X   | <b>Optional</b>  | ✓  |
| <b>Simulation</b>  | X   | <b>Occupational Competence</b>   | <b>Administration</b>  |
| <b>Contingencies</b>   |   |  |  |
| <b>P I 5</b>   | If the workplace does not expect colleagues to be informed of a visitor's arrival, 'what if' questions should be asked to confirm competence. |  |  |
| <b>Acceptable assessment methods</b>   |   |  |  |
| <br>Observation | <br>Work Product   | <br>Questioning | <br>Witness Testimony |
| <b>Observation</b>   | <b>Work products</b>  | <b>Questions</b>   | <b>Witness testimony</b>   |

You have to assess your candidate doing **three** things at work or in an approved Realistic Working Environment:

- ◆ receive visitors in a professional way
- ◆ meet visitors' needs
- ◆ follow security procedures

Examples of evidence:



Observation

Observing the candidate receiving visitors to the standards required by the organisation.



Work Product

Organisation chart, internal telephone list, security procedures.



Questioning

Responses to questions to confirm the candidate's competence, particularly for knowledge and contingencies.



Witness Testimony

Witness testimonies from the candidate's line-manager, colleagues or visitors to confirm consistent performance.

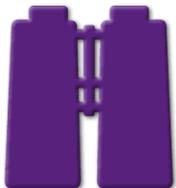
While gathering evidence for this unit, evidence **may** be generated for units 110, 201, 202, 219 and 225.

## Unit 207 Process customer financial transactions

### About this Unit:

This is an **optional** unit imported from the FSSC Standards about handling payments to and from customers in the workplace or Realistic Working Environment.

### At a Glance:

|  |   |  |  |
|--|---|--|--|
| <b>Core</b>  | X   | <b>Optional</b>  | ✓  |
| <b>Simulation</b>  | X   | <b>Occupational Competence</b>   | <b>Financial</b>   |
| <b>Contingencies</b>   |   |  |  |
| <b>P I 4 &amp; 7</b>   | If no discrepancies occur during the assessment period 'what if' questions may be asked to confirm competence.            |  |  |
| <b>P I 9</b>   | If there are no balances outstanding during the assessment period 'what if' questions may be asked to confirm competence. |  |  |
| <b>Performance Evidence</b>  |   | <b>Supplementary Evidence</b>  |  |
| <br>Observation | <br>Work Product                       | <br>Questioning | <br>Witness Testimony |
| <b>Observation</b>   | <b>Work products</b>  | <b>Questions</b>   | <b>Witness testimony</b>   |

You have to assess your candidate doing **three** things at work or in an approved Realistic Working Environment:

- ◆ receive payments from customers
- ◆ make payments to customers
- ◆ monitor payments

Examples of evidence:



Observation

Observe the candidate receiving payments from and making payments to customers and monitoring payments to the standards required by the organisation.



Work  
Product



Documents, entries and records, correspondence with customers and colleagues, (assessors should ensure candidates consider the issue of confidentiality).



Questioning

Responses to questions to confirm the candidate's competence, particularly for knowledge and contingencies. Ensure candidates have knowledge of relevant legislation.



Witness  
Testimony

Witness testimonies from the candidate's line-manager, colleagues or customers to confirm consistent performance.

While gathering evidence for this unit, evidence **may** be generated for units 110, 201, 202, 203, 209, 212, 213, 215, 216, 219, 220, 224 and 225.

## Unit 208      Operate credit control procedures

### About this Unit:

This is an **optional** unit imported from the FSSC Standards about dealing with customers' failure to make payments and recover debts in the workplace or Realistic Working Environment.

### At a Glance:

|  |  |   |  |
|--|--|---|--|
| <b>Core</b>  | X  | <b>Optional</b>   | ✓  |
| <b>Simulation</b>  | X  | <b>Occupational Competence</b>  | <b>Financial</b>   |
| <b>Contingencies</b>   |  |   |  |
| <b>P I 4</b>   | If no issues outside of the candidate's authority occur during the assessment period 'what if' questions may be asked to confirm competence. |   |  |
| <b>P I 8</b>   | If no discrepancies occur during the assessment period 'what if' questions may be asked to confirm competence.                               |   |  |
| <b>P I 12</b>  | If no continued non-payment occurs during the assessment period 'what if' questions may be asked to confirm competence.                      |   |  |
| <b>Performance Evidence</b>  |  | <b>Supplementary Evidence</b>   |  |
| <br>Observation | <br>Work products   | <br>Questions | <br>Witness testimony |
| <b>Observation</b>   | <b>Work products</b>   | <b>Questions</b>  | <b>Witness testimony</b>   |

You have to assess your candidate doing **three** things at work or in an approved Realistic Working Environment:

- ◆ identify potential non-payment and bad debt problems
- ◆ take action to deal with the problems
- ◆ keep accurate records

Examples of evidence:



Observation

Observe the candidate carrying out procedures to identify and recover non-payments from customers to the standards required by the organisation.



Work  
Product



Documents, entries and records, correspondence with customers and colleagues, (assessors should ensure candidates consider the issue of confidentiality).



Questioning

Responses to questions to confirm the candidate's competence, particularly for knowledge and contingencies. Ensure candidates have knowledge of relevant legislation.



Witness  
Testimony

Witness testimonies from the candidate's line-manager, colleagues or customers to confirm consistent performance.

While gathering evidence for this unit, evidence **may** be generated for units 110, 201, 202, 203, 207, 209, 212, 213, 215, 216, 219, 220, 224 and 225.

## Unit 209 Store, retrieve and archive information

### About this Unit:

This is an **optional** unit about filing, retrieving and archiving information in either a paper-based or electronic system in the workplace or Realistic Work Environment.

### At a Glance:

|  |   |  |  |
|--|---|--|--|
| <b>Core</b>  | X   | <b>Optional</b>  | ✓  |
| <b>Simulation</b>  | X   | <b>Occupational Competence</b>   | <b>Administration</b>  |
| <b>Contingencies</b>   |   |  |  |
| <b>P I 3</b>   | The candidate may use manual <b>or</b> electronic systems. Where either is not in use 'what if' questions may be asked to confirm competence. |  |  |
| <b>P I 8</b>   | If no problems arise during the assessment period 'what if' questions may be asked to confirm competence.                                     |  |  |
| <b>Performance Evidence</b>  |   | <b>Supplementary Evidence</b>  |  |
| <br>Observation | <br>Work products  | <br>Questions | <br>Witness testimony |
| <b>Observation</b>   | <b>Work products</b>  | <b>Questions</b>   | <b>Witness testimony</b>   |

You have to assess your candidate doing **four** things at work or in an approved Realistic Working Environment:

- ◆ file information
- ◆ update information
- ◆ retrieve information
- ◆ archive information

Examples of evidence:



Observation

Observe the candidate collecting, storing, updating, retrieving and archiving information to the standards required by the organisation.



Work Product



Documents amended by the candidate, file list, systems for signing out and archiving files.



Questioning

Responses to questions to confirm the candidate's competence, particularly for knowledge and contingencies. Candidates should also demonstrate their knowledge of legal and regulatory periods for retaining records.



Witness Testimony

Witness testimonies from the candidate's line-manager or colleagues to confirm consistent performance.

While gathering evidence for this unit, evidence **may** be generated for units 110, 201, 202, 212, 216, 220 and 225.

## Unit 210      Research and report information

### About this Unit:

This is an **optional** unit about obtaining information for colleagues in the workplace or Realistic Working Environment.

### At a Glance:

|  |   |  |  |
|--|---|--|--|
| <b>Core</b>  | X   | <b>Optional</b>  | ✓  |
| <b>Simulation</b>  | X   | <b>Occupational Competence</b>   | <b>Administration</b>  |
| <b>Contingencies</b>   |   |  |  |
| <b>P I 7</b>   | If no feedback is required within the assessment period 'what if' questions may be asked to confirm competence. |  |  |
| <b>Performance Evidence</b>  |   | <b>Supplementary Evidence</b>  |  |
| <br>Observation | <br>Work Product             | <br>Questioning | <br>Witness Testimony |
| <b>Observation</b>   | <b>Work products</b>  | <b>Questions</b>   | <b>Witness testimony</b>   |

You have to assess your candidate doing **three** things at work or in an approved Realistic Working Environment:

- ◆ research information
- ◆ record information
- ◆ report information

Examples of evidence:



Observation

Observe the candidate communicating with colleagues to confirm their needs; researching information using electronic and/or paper-based sources; recording the information and reporting their findings to the standards required by the organisation.



Work  
Product



Downloads from websites, reports, requests from colleagues for information, notes taken during research, bibliographies, minutes of meetings.



Questioning

Responses to questions to confirm the candidate's competence, particularly for knowledge and contingencies.



Witness  
Testimony

Witness testimonies from the candidate's line-manager or colleagues to confirm consistent performance.

While gathering evidence for this unit, evidence **may** be generated for units 110, 201, 202, 209, 212, 213, 214, 216, 217, 219, 220, 224 and 225.

## Unit 211 Organise and support meetings

### About this Unit:

This is an **optional** unit about being responsible for arranging and ensuring the smooth running of meetings in the workplace or Realistic Working Environment.

### At a Glance:

|  |   |  |  |
|--|---|--|--|
| <b>Core</b>  | X   | <b>Optional</b>  | ✓  |
| <b>Simulation</b>  | X   | <b>Occupational Competence</b>   | <b>Administration</b>  |
| <b>Contingencies</b>   |   |  |  |
| <b>P I 11</b>  | If no information or support is required during the assessment period 'what if' questions may be asked to confirm competence. |  |  |
| <b>P I 13</b>  | If no amendments are necessary during the assessment period 'what if' questions may be asked to confirm competence.           |  |  |
| <b>Performance Evidence</b>  |   | <b>Supplementary Evidence</b>  |  |
| <br>Observation | <br>Work Product                           | <br>Questioning | <br>Witness Testimony |
| <b>Observation</b>   | <b>Work products</b>  | <b>Questions</b>   | <b>Witness testimony</b>   |

You have to assess your candidate doing **three** things at work or in an approved Realistic Working Environment:

- ◆ prepare for meetings
- ◆ support meetings
- ◆ produce minutes of meetings

Examples of evidence:



Observation

Observing the candidate communicating with colleagues to confirm their needs; confirming requirements; producing and distributing necessary papers; arranging the room; taking notes during the meeting to the standards required by the organisation.



Work  
Product



Minutes of meetings, copy agendas, correspondence, meeting papers, notes taken during meetings.



Questioning

Responses to questions to confirm the candidate's competence, particularly for knowledge and contingencies.



Witness  
Testimony

Witness testimonies from the candidate's line-manager or colleagues to confirm consistent performance.

While gathering evidence for this unit, evidence **may** be generated for units 110, 201, 202, 209, 210, 212, 213, 214, 216, 219, 220, 221, 222, 224 and 225.

## Unit 212 Use IT systems 2

### About this Unit:

This is an **optional** unit imported from the E-Skills UK IT User Standards about setting up and using hardware and protecting hardware, software and data in the workplace or Realistic Working Environment.

### At a Glance:

|  |   |   |  |
|--|---|---|--|
| <b>Core</b>  | X   | <b>Optional</b>   | ✓  |
| <b>Simulation</b>  | ✓   | <b>Occupational Competence</b>  | <b>I T</b>   |
| <b>Contingencies</b>   |   |   |  |
| <b>None</b>  |   |   |  |
| <b>Performance Evidence</b>  |   | <b>Supplementary Evidence</b>   |  |
| <br>Observation | <br>Work Product | <br>Questioning | <br>Witness Testimony |
| <b>Observation</b>   | <b>Work products</b>  | <b>Questions</b>  | <b>Witness testimony</b>   |

You have to assess your candidate doing **three** things at work or in an approved Realistic Working Environment:

- ◆ set up computer hardware
- ◆ access computer software
- ◆ protect hardware, software and data

Examples of evidence:



Observing the candidate using basic hardware, changing settings and linking to other hardware; also observing them accessing files and networks; using passwords and anti-virus software and backing-up data to the standards required by the organisation.



Record of back-up procedures.



Responses to questions to confirm the candidate's competence. This should include checking the candidate understands the organisation's policies on avoiding viruses etc.



Witness testimonies from the candidate's line-manager or colleagues to confirm consistent performance over a period of time.

Simulation:

Simulation refers to the simulation of work tasks and activities, not to the use of IT. The techniques involved in using IT must always be assessed at least in part through evidence gained from practical tasks or activities. All assessment must be based on the use of real IT software and hardware to carry out tasks and activities that may be simulated. Where tasks and activities are simulated they must be undertaken in an approved Realistic Working Environment.

While gathering evidence for this unit, evidence **may** be generated for units 110, 201, 202, 213, 214, 215, 216, 217, 218 and 225

## Unit 213 Use IT to exchange information 2

### About this Unit:

This is an **optional** unit imported from the E-Skills UK IT User Standards that may contribute to the NVQ in Business and Administration at Levels 2 and 3. The unit is about sending and receiving messages, accessing and receiving information using browser software from the Internet, intranets and the world-wide web in the workplace or Realistic Working Environment.

### At a Glance:

|  |   |   |  |
|--|---|---|--|
| <b>Core</b>  | X   | <b>Optional</b>   | ✓  |
| <b>Simulation</b>  | ✓   | <b>Occupational Competence</b>  | <b>I T</b>   |
| <b>Contingencies</b>   |   |   |  |
| <b>None</b>  |   |   |  |
| <b>Performance Evidence</b>  |   | <b>Supplementary Evidence</b>   |  |
| <br>Observation | <br>Work Product | <br>Questioning | <br>Witness Testimony |
| <b>Observation</b>   | <b>Work products</b>  | <b>Questions</b>  | <b>Witness testimony</b>   |

You have to assess your candidate doing **three** things at work or in an approved Realistic Working Environment:

- ◆ send e-mails
- ◆ receive e-mails
- ◆ search for information on the internet

## Examples of evidence:



Observation

Observing the candidate receiving, sending and replying to e-mails and using a search engine to the standards required by the organisation.



Work Product



Saved copies of sent and received e-mails, results of searches, bookmarks or favourites, attachments etc. These need only be printed if this is required by the organisation, otherwise the assessor should record where they can be found on the system.



Questioning

Responses to questions to confirm the candidate's competence, particularly for knowledge and contingencies. This should include checking the candidate understands the organisation's policies on avoiding viruses etc.



Witness Testimony

Witness testimonies from the candidate's line-manager or colleagues to confirm consistent performance over a period of time with particular reference to the use of search engines, book-marking websites and using tools such as favourites.

## Simulation:

Simulation refers to the simulation of work tasks and activities, not to the use of IT. The techniques involved in using IT must always be assessed at least in part through evidence gained from practical tasks or activities. All assessment must be based on the use of real IT software and hardware to carry out tasks and activities that may be simulated. Where tasks and activities are simulated they must be undertaken in an approved Realistic Working Environment.

While gathering evidence for this unit, evidence **may** be generated for units 110, 201, 202, 210, 212 and 225 or 301, 302 and 310.

## Unit 214 Word processing software 2

### About this Unit:

This is an **optional** unit imported from the E-Skills UK IT User Standards about producing word processing documents in the workplace or Realistic Working Environment.

### At a Glance:

|  |  |   |  |
|--|--|---|--|
| <b>Core</b>  | X  | <b>Optional</b>   | ✓  |
| <b>Simulation</b>  | ✓  | <b>Occupational Competence</b>  | I T  |
| <b>Contingencies</b>   |  |   |  |
| <b>None</b>  |  |   |  |
| <b>Performance Evidence</b>  |  | <b>Supplementary Evidence</b>   |  |
| <br>Observation | <br>Work products | <br>Questions | <br>Witness testimony |
| <b>Observation</b>   | <b>Work products</b>   | <b>Questions</b>  | <b>Witness testimony</b>   |

You have to assess your candidate doing **six** things at work or in an approved Realistic Working Environment:

- ◆ handle files
- ◆ combine information
- ◆ enter and editing data
- ◆ format and layout documents
- ◆ produce and check accuracy of the document
- ◆ make use of software tools and techniques to improve efficiency

Examples of evidence:



Observation

Observing the candidate producing professional looking documents including letters, reports and tables from word processing software to the standards and house style required by the organisation; also observing the candidate setting up short-cuts and using various tools and techniques.



Work Product

Copies of documents produced. These need only be printed if this is required by the organisation, otherwise the assessor should record where they can be found on the system.



Questioning

Responses to questions to confirm the candidate's competence. This should include checking the candidate's understanding of techniques not regularly used within the organisation.



Witness Testimony

Witness testimonies from the candidate's line-manager or colleagues to confirm consistent performance over a period of time.

Simulation:

Simulation refers to the simulation of work tasks and activities, not to the use of IT. The techniques involved in using IT must always be assessed at least in part through evidence gained from practical tasks or activities. All assessment must be based on the use of real IT software and hardware to carry out tasks and activities that may be simulated. Where tasks and activities are simulated they must be undertaken in an approved Realistic Working Environment.

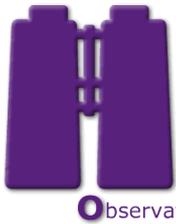
While gathering evidence for this unit, evidence **may** be generated for units 110, 201, 202, 209, 210, 212, 221, 222, 223, 224 and 225.

## Unit 215 Spreadsheet software 2

### About this Unit:

This is an **optional** unit imported from the E-skills IT User Standards about performing calculations with numerical data in the workplace or Realistic Working Environment.

### At a Glance:

|  |   |   |  |
|--|---|---|--|
| <b>Core</b>  | X   | <b>Optional</b>   | ✓  |
| <b>Simulation</b>  | ✓   | <b>Occupational Competence</b>  | <b>I T</b>   |
| <b>Contingencies</b>   |   |   |  |
| <b>None</b>  |   |   |  |
| <b>Performance Evidence</b>  |   | <b>Supplementary Evidence</b>   |  |
| <br>Observation | <br>Work Product | <br>Questioning | <br>Witness Testimony |
| <b>Observation</b>   | <b>Work products</b>  | <b>Questions</b>  | <b>Witness testimony</b>   |

You have to assess your candidate doing **nine** things at work or in an approved Realistic Working Environment:

- ◆ handle files
- ◆ combine information
- ◆ enter and editing data
- ◆ format spreadsheets
- ◆ use functions and formulas
- ◆ check spreadsheets
- ◆ analyse and interpreting spreadsheets
- ◆ present spreadsheets
- ◆ improve efficiency

Examples of evidence:



Observation

Observing the candidate producing spreadsheets to the standards and house style required by the organisation; also observing the candidate using a range of techniques.



Work  
Product

Copies of spreadsheets produced. These need only be printed if this is required by the organisation, otherwise the assessor should record where they can be found on the system.



Questioning

Responses to questions to confirm the candidate's competence. This should include checking the candidate's understanding of techniques not regularly used within the organisation.



Witness  
Testimony

Witness testimonies from the candidate's line-manager or colleagues to confirm consistent performance over a period of time.

Simulation:

Simulation refers to the simulation of work tasks and activities, not to the use of IT. The techniques involved in using IT must always be assessed at least in part through evidence gained from practical tasks or activities. All assessment must be based on the use of real IT software and hardware to carry out tasks and activities that may be simulated. Where tasks and activities are simulated they must be undertaken in an approved Realistic Working Environment.

While gathering evidence for this unit, evidence **may** be generated for units 110, 201, 202, 207, 208, 209, 210, 212, 213 and 225.

## Unit 216 Database software 2

### About this Unit:

This is an **optional** unit imported from the E-skills UK IT User Standards about organising and collating related information in a database in the workplace or Realistic Working Environment.

### At a Glance:

|  |   |   |  |
|--|---|---|--|
| <b>Core</b>  | X   | <b>Optional</b>   | ✓  |
| <b>Simulation</b>  | ✓   | <b>Occupational Competence</b>  | <b>I T</b>   |
| <b>Contingencies</b>   |   |   |  |
| <b>None</b>  |   |   |  |
| <b>Performance Evidence</b>  |   | <b>Supplementary Evidence</b>   |  |
| <br>Observation | <br>Work Product | <br>Questioning | <br>Witness Testimony |
| <b>Observation</b>   | <b>Work products</b>  | <b>Questions</b>  | <b>Witness testimony</b>   |

You have to assess your candidate doing **six** things at work or in an approved Realistic Working Environment:

- ◆ enter data
- ◆ modify databases
- ◆ format data
- ◆ check data
- ◆ produce reports
- ◆ improve efficiency

Examples of evidence:



Observation

Observing the candidate using databases to the standards required by the organisation; also observing the candidate using a range of techniques.



Work Product



Copies of databases produced. These need only be printed if this is required by the organisation, otherwise the assessor should record where they can be found on the system.



Questioning

Responses to questions to confirm the candidate's competence. This should include checking the candidate's understanding of techniques not regularly used within the organisation.



Witness Testimony

Witness testimonies from the candidate's line-manager or colleagues to confirm consistent performance over a period of time.

Simulation:

Simulation refers to the simulation of work tasks and activities, not to the use of IT. The techniques involved in using IT must always be assessed at least in part through evidence gained from practical tasks or activities. All assessment must be based on the use of real IT software and hardware to carry out tasks and activities that may be simulated. Where tasks and activities are simulated they must be undertaken in an approved Realistic Working Environment.

While gathering evidence for this unit, evidence **may** be generated for units 110, 201, 202, 208, 209, 210, 212, 213 and 225.

## Unit 217 Presentation software 2

### About this Unit:

This is an **optional** unit imported from the E-skills IT User Standards about using software to produce presentations in the workplace or Realistic Working Environment.

### At a Glance:

|  |   |  |  |
|--|---|--|--|
| <b>Core</b>  | X   | <b>Optional</b>  | ✓  |
| <b>Simulation</b>  | ✓   | <b>Occupational Competence</b>   | <b>I T</b>   |
| <b>Contingencies</b>   |   |  |  |
| <b>None</b>  |   |  |  |
| <b>Performance Evidence</b>  |   | <b>Supplementary Evidence</b>  |  |
| <br>Observation | <br>Work Product | <br>Questioning | <br>Witness Testimony |
| <b>Observation</b>   | <b>Work products</b>  | <b>Questions</b>   | <b>Witness testimony</b>   |

You have to assess your candidate doing **six** things at work or in an approved Realistic Working Environment:

- ◆ handle files
- ◆ enter and edit presentations
- ◆ check content
- ◆ format slides
- ◆ produce presentations
- ◆ present slides

Examples of evidence:



Observation

Observing the candidate using presentation software to the standards required by the organisation; also observing the candidate using a range of techniques.



Work Product

Copies of presentations produced. These need only be printed if this is required by the organisation, otherwise the assessor should record where they can be found on the system.



Questioning

Responses to questions to confirm the candidate's competence. This should include checking the candidate's understanding of techniques not regularly used within the organisation.



Witness Testimony

Witness testimonies from the candidate's line-manager or colleagues to confirm consistent performance over a period of time.

Simulation:

Simulation refers to the simulation of work tasks and activities, not to the use of IT. The techniques involved in using IT must always be assessed at least in part through evidence gained from practical tasks or activities. All assessment must be based on the use of real IT software and hardware to carry out tasks and activities that may be simulated. Where tasks and activities are simulated they must be undertaken in an approved Realistic Working Environment.

While gathering evidence for this unit, evidence **may** be generated for units 110, 201, 202 and 225.

## Unit 218 Specialist or bespoke software 2

### About this Unit:

This is an **optional** unit imported from the E-skills UK IT User Standards about using specialist software in the workplace or Realistic Working Environment.

### At a Glance:

|   |  |  |   |
|---|--|--|---|
| <b>Core</b>   | X  | <b>Optional</b>  | ✓   |
| <b>Simulation</b>   | ✓  | <b>Occupational Competence</b>   | <b>I T</b>  |
| <b>Contingencies</b>  |  |  |   |
| <b>None</b>   |  |  |   |
| <b>Performance Evidence</b>   |  | <b>Supplementary Evidence</b>  |   |
| <br>Observation | <br>Work products | <br>Questions | <br>Witness testimony |
| <b>Observation</b>  | <b>Work products</b>   | <b>Questions</b>   | <b>Witness testimony</b>  |

You have to assess your candidate doing **six** things at work or in an approved Realistic Working Environment:

- ◆ handle files
- ◆ combine information
- ◆ enter information
- ◆ edit information
- ◆ process information
- ◆ check information

Examples of evidence:



Observation

Observing the candidate using specialist software to the standards required by the organisation; also observing the candidate using a range of techniques.



Work Product

Copies of documents produced. These need only be printed if this is required by the organisation, otherwise the assessor should record where they can be found on the system.



Questioning

Responses to questions to confirm the candidate's competence. This should include checking the candidate's understanding of techniques not regularly used within the organisation.



Witness Testimony

Witness testimonies from the candidate's line-manager or colleagues to confirm consistent performance over a period of time.

Simulation:

Simulation refers to the simulation of work tasks and activities, not to the use of IT. The techniques involved in using IT must always be assessed at least in part through evidence gained from practical tasks or activities. All assessment must be based on the use of real IT software and hardware to carry out tasks and activities that may be simulated. Where tasks and activities are simulated they must be undertaken in an approved Realistic Working Environment.

While gathering evidence for this unit, evidence **may** be generated for units 110, 201, 202, 212, 214, 215, 216, 217 and 225.

## Unit 219 Use a telephone system

### About this Unit:

This is an **optional** unit about using the telephone in the workplace or Realistic Working Environment to communicate with others both within the organisation and outside.

### At a Glance:

|  |   |  |  |
|--|---|--|--|
| <b>Core</b>  | X   | <b>Optional</b>  | ✓  |
| <b>Simulation</b>  | X   | <b>Occupational Competence</b>   | <b>Administration</b>  |
| <b>Contingencies</b>   |   |  |  |
| <b>P I 11</b>  | Whether the transfer is from one extension to another <b>or</b> by handing the phone to a colleague, the candidate must demonstrate that they pass the information gathered from the caller to the recipient. |  |  |
| <b>Performance Evidence</b>  |   | <b>Supplementary Evidence</b>  |  |
| <br>Observation | <br>Work products  | <br>Questions | <br>Witness testimony |
| <b>Observation</b>   | <b>Work products</b>  | <b>Questions</b>   | <b>Witness testimony</b>   |

You have to assess your candidate doing **five** things at work or in an approved Realistic Working Environment:

- ◆ make calls
- ◆ receive calls
- ◆ transfer calls
- ◆ deal with incoming messages
- ◆ leave messages

Examples of evidence:



Observation

Observing the candidate making, receiving and transferring internal and external calls to the standards required by the organisation; also observing the candidate checking for, responding to and deleting incoming messages and leaving recorded messages on other people's systems.



Work Product



Telephone messages taken by the candidate and passed on to colleagues, notes made before and during calls, telephone log, message tapes.



Questioning

Responses to questions to confirm the candidate's competence, particularly for knowledge and contingencies.



Witness Testimony

Witness testimonies from the candidate's line-manager or colleagues to confirm consistent performance.

While gathering evidence for this unit, evidence **may** be generated for units 110, 201, 202 and 225.

## Unit 220 Operate office equipment

### About this Unit:

This is an **optional** unit about using various items of office equipment in the workplace or Realistic Working Environment

### At a Glance:

|  |   |  |  |
|--|---|--|--|
| <b>Core</b>  | X   | <b>Optional</b>  | ✓  |
| <b>Simulation</b>  | X   | <b>Occupational Competence</b>   | <b>Administration</b>  |
| <b>Contingencies</b>   |   |  |  |
| <b>P I 5</b>   | If no problems arise during the assessment period 'what if' questions may be asked to confirm competence. |  |  |
| <b>Performance Evidence</b>  |   | <b>Supplementary Evidence</b>  |  |
| <br>Observation | <br>Work Product       | <br>Questioning | <br>Witness Testimony |
| <b>Observation</b>   | <b>Work products</b>  | <b>Questions</b>   | <b>Witness testimony</b>   |

You have to assess your candidate doing **three** things at work or in an approved Realistic Working Environment:

- ◆ prepare to use a variety of office equipment
- ◆ use the equipment to produce work
- ◆ ensure the equipment is ready for the next user

Examples of evidence:



Observation

Observing the candidate producing work using the available office equipment to the standards required by the organisation.



Work Product

Work products icon: Samples of work produced using the relevant equipment.



Questioning

Responses to questions to confirm the candidate's competence, particularly for knowledge and contingencies. This should include checking the candidate's understanding of the use of equipment commonly found in offices but not in use in the candidate's organisation.



Witness Testimony

Witness testimonies from the candidate's line-manager or colleagues to confirm consistent performance with particular reference to the Performance Indicators which are not evidenced by product.

While gathering evidence for this unit, evidence **may** be generated for units 110, 201, 202, 219 and 225.

## Unit 221 Prepare text from notes

### About this Unit:

This is an **optional** unit about producing text documents from notes in the workplace or Realistic Working Environment.

### At a Glance:

|  |   |  |  |
|--|---|--|--|
| <b>Core</b>  | X   | <b>Optional</b>  | ✓  |
| <b>Simulation</b>  | X   | <b>Occupational Competence</b>   | <b>Administration</b>  |
| <b>Contingencies</b>   |   |  |  |
| <b>P I 4</b>   | If no corrections are necessary during the assessment period previously produced examples should be looked for and 'what if' questions may be asked to confirm competence.  |  |  |
| <b>P I 5</b>   | If no clarification is necessary during the assessment period previously produced examples should be looked for and 'what if' questions may be asked to confirm competence. |  |  |
| <b>Performance Evidence</b>  |   | <b>Supplementary Evidence</b>  |  |
| <br>Observation | <br>Work Product   | <br>Questioning | <br>Witness Testimony |
| <b>Observation</b>   | <b>Work products</b>  | <b>Questions</b>   | <b>Witness testimony</b>   |

You have to assess your candidate doing **four** things at work or in an approved Realistic Working Environment:

- ◆ preparing to produce text
- ◆ producing text
- ◆ checking text
- ◆ presenting text

Examples of evidence:



Observing the candidate communicating with colleagues; producing, checking and presenting text to the standards required by the organisation.



Samples of own work produced, completed work requested by others, original notes taken by the candidate and written up, draft copies, final versions.



Responses to questions to confirm the candidate's competence, particularly for knowledge and contingencies. This should include checking the candidate understands the use of spell checking and grammar checking features.



Witness testimonies from the candidate's line-manager or colleagues to confirm consistent performance with particular reference to the Performance Indicators which are not evidenced by product.

While gathering evidence for this unit, evidence **may** be generated for units 110, 201, 202, 212, 214, 224 and 225

## Unit 222 Prepare text from shorthand

### About this Unit:

This is an **optional** unit about producing text documents from shorthand notes in the workplace or Realistic Working Environment.

### At a Glance:

|  |   |  |  |
|--|---|--|--|
| <b>Core</b>  | X   | <b>Optional</b>  | ✓  |
| <b>Simulation</b>  | X   | <b>Occupational Competence</b>   | <b>Administration</b>  |
| <b>Contingencies</b>   |   |  |  |
| <b>P I 3</b>   | If no clarification is necessary during the assessment period previously produced examples should be looked for and 'what if' questions may be asked to confirm competence. |  |  |
| <b>P I 6</b>   | If no corrections are necessary during the assessment period previously produced examples should be looked for and 'what if' questions may be asked to confirm competence.  |  |  |
| <b>Performance Evidence</b>  |   | <b>Supplementary Evidence</b>  |  |
| <br>Observation | <br>Work Product   | <br>Questioning | <br>Witness Testimony |
| <b>Observation</b>   | <b>Work products</b>  | <b>Questions</b>   | <b>Witness testimony</b>   |

You have to assess your candidate doing **five** things at work or in an approved Realistic Working Environment:

- ◆ prepare to produce text
- ◆ take shorthand
- ◆ produce text
- ◆ check text
- ◆ present text

Examples of evidence:



Observation

Observing the candidate communicating with colleagues; taking shorthand notes; producing, checking and presenting text to the standards required by the organisation.



Work Product



Samples of work produced, work requests, shorthand notes taken by the candidate, draft copies.



Questioning

Responses to questions to confirm the candidate's competence, particularly for knowledge and contingencies. This should include checking the candidate understands the use of spell checking and grammar checking features.



Witness Testimony

Witness testimonies from the candidate's line-manager or colleagues to confirm consistent performance with particular reference to the Performance Indicators that are not evidenced by product.

While gathering evidence for this unit, evidence **may** be generated for units 110, 201, 202, 212, 214, 221, 224 and 225

## Unit 223 Prepare text from recorded audio instruction

### About this Unit:

This is an **optional** unit about producing text documents from audio recordings in the workplace or Realistic Working Environment.

### At a Glance:

|  |   |  |  |
|--|---|--|--|
| <b>Core</b>  | X   | <b>Optional</b>  | ✓  |
| <b>Simulation</b>  | X   | <b>Occupational Competence</b>   | <b>Administration</b>  |
| <b>Contingencies</b>   |   |  |  |
| <b>PI 4</b>  | If no corrections are necessary during the assessment period previously produced examples should be looked for and 'what if' questions may be asked to confirm competence.  |  |  |
| <b>PI 5</b>  | If no clarification is necessary during the assessment period previously produced examples should be looked for and 'what if' questions may be asked to confirm competence. |  |  |
| <b>Performance Evidence</b>  |   | <b>Supplementary Evidence</b>  |  |
| <br>Observation | <br>Work products  | <br>Questions | <br>Witness testimony |
| <b>Observation</b>   | <b>Work products</b>  | <b>Questions</b>   | <b>Witness testimony</b>   |

You have to assess your candidate doing **four** things at work or in an approved Realistic Working Environment:

- ◆ prepare to produce text
- ◆ produce text
- ◆ check text
- ◆ present text

Examples of evidence:



Observing the candidate communicating with colleagues; producing, checking and presenting text to the standards required by the organisation.



Samples of work produced, work requests, audio tapes used by the candidate, draft copies.



Responses to questions to confirm the candidate's competence, particularly for knowledge and contingencies. This should include checking the candidate understands the use of spell checking and grammar checking features.



Witness testimonies from the candidate's line-manager or colleagues to confirm consistent performance with particular reference to the Performance Indicators which are not evidenced by product.

While gathering evidence for this unit, evidence **may** be generated for units 110, 201, 202, 212, 214, 224 and 225.

## Unit 224 Produce documents

### About this Unit:

This is an **optional** unit about producing text documents in the workplace or Realistic Working Environment.

### At a Glance:

|  |   |   |  |
|--|---|---|--|
| <b>Core</b>  | X   | <b>Optional</b>   | ✓  |
| <b>Simulation</b>  | X   | <b>Occupational Competence</b>  | <b>Administration</b>  |
| <b>Contingencies</b>   |   |   |  |
| <b>P I 7</b>   | If no corrections are necessary during the assessment period previously produced examples should be looked for and 'what if' questions may be asked to confirm competence.  |   |  |
| <b>P I 8</b>   | If no clarification is necessary during the assessment period previously produced examples should be looked for and 'what if' questions may be asked to confirm competence. |   |  |
| <b>Performance Evidence</b>  |   | <b>Supplementary Evidence</b>   |  |
| <br>Observation | <br>Work Product   | <br>Questioning | <br>Witness Testimony |
| <b>Observation</b>   | <b>Work products</b>  | <b>Questions</b>  | <b>Witness testimony</b>   |

You have to assess your candidate doing **four** things at work or in an approved Realistic Working Environment:

- ◆ prepare to produce documents
- ◆ produce documents
- ◆ check documents
- ◆ present documents

Examples of evidence:



Observation

Observing the candidate communicating with colleagues; producing, checking and presenting documents to the standards required by the organisation.



Work  
Product

Samples of work produced, work requests, draft copies.



Questioning

Responses to questions to confirm the candidate's competence, particularly for knowledge and contingencies. This should include checking the candidate understands the use of spell checking and grammar checking features.



Witness  
Testimony

Witness testimonies from the candidate's line-manager or colleagues to confirm consistent performance with particular reference to the Performance Indicators which are not evidenced by product.

While gathering evidence for this unit, evidence **may** be generated for units 110, 201, 202, 212, 214, 221, 222, 223 and 225

## Unit 225 Work effectively with other people

### About this Unit:

This is an **optional** unit about working as a team to achieve common aims in the workplace or Realistic Working Environment.

### At a Glance:

|  |   |  |  |
|--|---|--|--|
| <b>Core</b>  | X   | <b>Optional</b>  | ✓  |
| <b>Simulation</b>  | X   | <b>Occupational Competence</b>   | <b>Administration</b>  |
| <b>Contingencies</b>   |   |  |  |
| <b>P I 7</b>   | If no problems arise during the assessment period 'what if' questions may be asked to confirm competence. |  |  |
| <b>Performance Evidence</b>  |   | <b>Supplementary Evidence</b>  |  |
| <br>Observation | <br>Work Product       | <br>Questioning | <br>Witness Testimony |
| <b>Observation</b>   | <b>Work products</b>  | <b>Questions</b>   | <b>Witness testimony</b>   |

You have to assess your candidate doing **three** things at work or in an approved Realistic Working Environment:

- ◆ communicate with others
- ◆ work as part of a team
- ◆ produce quality work

Examples of evidence:



Observation

Observing the candidate communicating with colleagues; taking part in group activities; producing work to the standards required by the organisation.

Samples of work produced, minutes of team meetings.



Work  
Product



Questioning

Responses to questions to confirm the candidate's competence, particularly for knowledge and contingencies.



Witness  
Testimony

Witness testimonies from the candidate's line-manager or colleagues to confirm consistent performance with particular reference to the Performance Indicators which are not evidenced by product.

While gathering evidence for this unit, evidence **may** be generated for any other units at Level 2.