Assessment Guidance for the SVQ Business and Administration SCQF level 5 (GT9J 22)

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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	Description	Date	Authorised by

Contents

About this guide

This guide provides guidance on how to assess candidates for the **SVQ Business and Administration SCQF level 5**. You may use other ways of assessing candidates and recording your decisions about their competence.

Following this guidance does not guarantee successful external verification — it is still your responsibility to ensure that assessment and internal verification meets the requirements of the Assessment Strategy and SQA requirements.

Introduction

This document has been provided to assist assessors and internal verifiers with the delivery of **SVQ Business and Administration SCQF level 5**.

It should be noted that this document may 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 SCQF levels 4–11. 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, candidates 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 Scottish Credit and Qualifications Framework (SCQF) levels

SVQs may be at differing SCQF levels and have differing amount of credit points, depending on the structure and context of the SVQ.

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.

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.

SCQF level 6 / 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.

SCQF level 8 / 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.

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.

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

About this SVQ

Target audience

The SVQ in Business and Administration at SCQF level 5 involves a range of activities with some degree of complexity and limited autonomy. Mandatory units cover; undertaking allocated work, communicating and managing own performance in a business environment. There are a wide range of optional units including document production, supporting events, meetings and diaries, customer service, IT and various specialist administrative functions.

Suitable candidates will typically hold job titles such as:

♦ Administration / Administrative Assistant.
♦ Administrator.
♦ Sales Administrator.
♦ HR Administrator.
♦ Receptionist.
♦ Office Administrator.
♦ Operations Support Administrator.
♦ IT Support Administrator.
♦ Data Management Administrator.
♦ Medical Administrator.

This is not an exhaustive list. Candidates are likely to be undertaking work as allocated to them by others and be supporting the work of others, rather than being responsible for tasks from beginning to end.

General information

Assessors and internal verifiers are required to prove they have the appropriate occupational competence to assess and verify the SVQ. Occupational competence is defined in the NOS-based units and Assessment Strategy for this SVQ — see SQA's website: **www.sqa.org.uk**

Assessors and internal verifiers are also expected to obtain an appropriate qualification in assessment and verification — this can be the L&D workplace assessment and verification units (the national standards for assessment and verification), or an alternative qualification which SQA also recognises.

The Assessment Strategy specifies the assessment conditions, types of evidence and competence requirements of assessors, internal verifiers and external verifiers.

The steps involved in assessing a candidate for an SVQ

These are the main stages in the assessment process:

♦ planning for assessment.
♦ generation and collection of candidate evidence that shows competence in the selected units.
♦ judging the evidence of the candidate's competence and making an assessment decision based on this evidence.
♦ recording the assessment decision and the candidate's achievement.

Preparing to assess the SVQ

This section offers advice on how to begin assessing candidates. This advice is offered as guidance, you may develop your own approaches to assessing your candidates.

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

Induction

It is best practice to arrange an initial induction meeting between assessor and candidate(s) 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 what could be covered at Induction.

If you want you could include the employer at this stage as 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.

Induction could include some of the following:

♦ An overview of the SVQ — This need not be a detailed explanation at this stage (too much detail may overwhelm the candidate).

♦ Introduce the concept of performance evidence and supporting evidence – and emphasise that performance evidence is used to demonstrate competence. Centre should consider using the understanding standards material for SVQ Business and Administration (available on SQA's website to introduce candidates into the variety of assessment instruments used to gather evidence.

♦ A discussion of the candidate's job 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 (a skills scan) — 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. The Skills Scan profile, previous certificates and candidate job roles are all reviewed and aligned with the requirements of the SVQ and the appropriate units and level of award chosen.

♦ Development needs and special assessment needs are identified at this time or within the first couple of weeks and these are taken into account when planning assessment in terms of timing, assessment methods, etc.

♦ An introduction to the centre's E Portfolio System — if they are using one.

♦ Introduction to their assessor and to the role of the internal verifier.

♦ Introduction to the centre's policy on plagiarism and malpractice – possibly resulting in a candidate disclaimer being signed.

♦ Introduce the concept of assessment planning.

Structure of the SVQs

SVQ Business and Administration SCQF level 5 (GT9J 22)

Total number of units that the candidate needs to achieve for the qualification is 8.

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

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

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

Mandatory units

Group A — Mandatory units

SQA ref	SCQF level	SCQF credit points	SSC ref	Title
FD8W 04	5	4	S201	Agree how to Manage and Improve own Performance in a Business Environment
FD8X 04	5	2	S202	Undertake Work in a Business Environment
F93W 04	5	3	S205	Prepare to Communicate in a Business Environment

Optional units

Group B — Optional units 3–5 units must be selected

SQA ref	SCQF level	SCQF credit points	SSC ref	Title
FD90 04	5	3	S204	Work with Other People in a Business Environment
F93T 04	5	4	S211	Produce Documents in a Business Environment [a]
FD99 04	5	2	S219	Provide Archive Services
H985 04	5	3	S221	Maintain and Issue Stock Items
FD9F 04	5	3	S225	Respond to Change in a Business Environment
H984 04	5	3	S216	Collate and Organise Data
FD9N 04	5	5	S222	Support the Organisation and Co-Ordination of Events
FD9P 04	5	3	S223	Support the Organisation of Business Travel or Accommodation

SQA ref	SCQF level	SCQF credit points	SSC ref	Title
FD9R 04	5	4	S224	Support the Organisation of Meetings
H983 04	5	1	S206	Use Voicemail Message Systems
F93N 04	5	3	S106	Make and Receive Telephone Calls
FD92 04	5	3	S207	Use a Diary System
FD93 04	5	4	S208	Take Minutes
FD94 04	5	3	S209	Handle Mail
F93X 04	5	3	S210	Provide Reception Services
FD96 04	5	3	S250	Meet and Welcome Visitors
FD98 04	5	4	S217	Research Information
H559 04	5	3	S218	Store and Retrieve Information Using a Filing System
J6SW 04	5	3	S112	Use Office Equipment in Accordance with Occupational Regulations and Safety Guidelines
FD9G 04	5	3	S227	Administer HR Records
FD9H 04	5	4	S228	Administer the Recruitment and Selection Process
FE0F 04	6	7	S315	Support the Design and Development of Information Systems
J6WT 04	6	6	S324	Support Organisational Projects
FE0X 04	6	4	S311	Design and Produce Documents in a Business Environmenta
FE0D 04	6	3	S309	Develop a Presentation
FE0E 04	6	3	S310	Deliver a Presentation
J6X2 04	6	3	S325	Deliver and Evaluate Customer Service
FE0M 04	6	8	S329	Provide Administrative Support in Schools
FN6X 04	5	6	S255	Calculate Critical Dates for Sentences
FN6Y 04	5	6	S256	Make Administrative Arrangements for the Movement of Individuals Outside the Custodial Establishment
FN70 04	5	6	S257	Administer Documentation for the Appeals Process
FN71 04	5	6	S258	Administer Personal Money for Individuals in Custody
FN72 04	5	6	S259	Prepare Documentation to Help Authorities Decide the Conditions on which to Release Individuals from Custody
FN74 04	5	6	S260	Make Administrative Arrangements for the Release of Individuals from Custody
FN6W 04	6	6	S253	Process Court Documentation
FN9M 04	6	6	S254	Contribute to Maintaining Security and Protecting Individuals' Rights in the Custodial Environment

SQA ref	SCQF level	SCQF credit points	SSC ref	Title
FN76 04	6	6	S352	Verify the Release Process
FN75 04	7	6	S351	Verify Critical Dates for Sentences
FD9K 04	7	8	S247	Control Payroll
FD9L 04	8	3	S248	Account for Income and Expenditure
FD9M 04	8	3	S249	Draft Financial Statements
FD8V 04	6	8	S125	Calculate Pay

Restricted subgroup 0–1unit must be selected

SQA ref	SCQF level	SCQF credit points	SSC ref	Title
FD9W 04	6	4	S212	Prepare Text from Notes
FD9X 04	5	3	S213	Prepare Text from Notes Using Touch Typing (40 wpm)
FE11 04	6	4	S312	Prepare Text from Notes using Touch Typing (60 wpm)
FD9T 04	5	8	S214	Prepare Text from Shorthand (60 wpm)
FE0Y 04	6	8	S313	Prepare Text from Shorthand (80 wpm)
FD9V 04	5	4	S215	Prepare Text from Recorded Audio Instruction (40 wpm)
FE10 04	6	4	S314	Prepare Text from Recorded Audio Instruction (60 wpm)

Group C — Optional units 0–2 units must be selected

SQA ref	SCQF level	SCQF credit points	SSC ref	Title
F9AP 04	5	3	S236a	Bespoke Software 2b
F9AV 04	5	3	S236b	Specialist Software 2c
F9C2 04	5	3	S237	Database Management Software 2d
F9C5 04	5	4	S238	Database Software 2e
F99E 04	5	4	S239	Improving Productivity Using IT 2f
F99T 04	5	2	S240	IT Security for Users 2g
F9CT 04	5	4	S241	Presentation Software 2h
F99K 04	5	4	S242	Set up an IT System 2i
F9D1 04	5	4	S243	Spreadsheet Software 2j
F9A7 04	5	4	S244	Using Collaborative Technologies 2k
F9D4 04	5	4	S245	Website Software 2l
F9D7 04	5	4	S246	Word Processing Software 2m
F9A4 04	5	3	S252	Using Email 2n

SCQF level 4 group 0–1 unit must be selected

SQA ref	SCQF level	SCQF credit points	SSC ref	Title
F9AN 04	4	2	S114a	Bespoke Software 1b
F9AT 04	4	2	S114b	Specialist Software 1c
F9C1 04	4	2	S115	Data Management Software 1d
F9C4 04	4	3	S116	Database Software 1e
F99D 04	4	3	S117	Improving Productivity Using IT 1f
F99R 04	4	1	S118	IT Security for Users 1g
F9CR 04	4	3	S119	Presentation Software 1h
F99J 04	4	3	S120	Setting up an IT System 1i
F9D0 04	4	3	S121	Spreadsheet Software 1j
F9A6 04	4	3	S122	Using Collaborative Technologies 1k
F9D3 04	4	3	S123	Website Software 1l
F9D6 04	4	3	S124	Word Processing Software 1m
F9A3 04	4	2	S113	Using Email 1n

Restricted combinations:

Group B:
Either CFABAA211 Produce documents in a business environmenta or CFABAA212
Design and produce documents in a business environmenta, but not both.
Restricted sub-group: A maximum of TWO units may be selected.
One unit can be selected from these combinations:
CFABAA213, CFABAA213b or CFABAA213c.
CFABAA311a or CFABAA311b.
CFABAD312a or CFABAD312b.

Group C:
A maximum of TWO units from IT may be selected either from SCQF level 5 or
SCQF level 4 groups.
Either Bespoke software 2b or Bespoke software 1b, but not both.
Either Specialist software 2c or Specialist software 1c, but not both.
Either Database management software 2d or Data management software 1d, but not
both.
Either Database software 2e or Database software 1e, but not both.
Either Improving productivity using IT 2f or Improving productivity using IT 1f, but not
both.
Either IT security for users 2g or IT security for users 1g, but not both.
Either Presentation software 2h or Presentation software 1h, but not both.
Either Set up an IT system 2i or Setting up an IT System 1i, but not both.
Either Spreadsheet software 2j or Spreadsheet software 1j, but not both.
Either Using collaborative technologies 2k or Using collaborative technologies 1k, but
not both.
Either Website software 2l or Website software 1l, but not both.
Either Word processing software 2m or Word Processing software 1m, but not both.
Either Using email 2n or Using email 1n, but not both.

Key terminology and definitions

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. It is important that the evidence is signposted / referenced to the performance indicators and knowledge and understanding so that internal and external verifiers can follow the judgements on competence and knowledge.

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. Each observation record should reference the task being observed to the performance indicators and any knowledge claimed. This indication is a crucial part of the assessment process and is an essential aid to the internal verification process.

Work products

Work products are 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 within a storyboard, reflective account, personal statement, on the evidence or within the professional discussion.

Supporting evidence

This evidence supports the key performance evidence. Supporting evidence includes: questioning, professional discussion and witness testimony. Supporting evidence plays an important role in the triangulation of evidence. It can also help to authenticate performance evidence.

Personal statement / storyboard / reflective account

A personal statement is a technique used to place evidence in context and to demonstrate knowledge. It can also be useful to provide authentication of performance evidence. Some centres use the terms *storyboard* or r*eflective 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 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. Many candidates attach work product / screenshots / photos to the personal statement, either by embedding the evidence within the personal statement or attaching the evidence using a '*See Evidence X*' approach.

Questioning

Questioning is normally used to fill knowledge gaps. This includes both written and oral questioning. Responses to oral questions should be recorded. Much of the knowledge will be covered by performance evidence and additional written or oral questioning may not be required. Oral questions could be asked by assessors during an observation, during a professional discussion or as work product is being considered by the assessor. The assessor should use their judgement to decide the most appropriate opportunity to collect this type of evidence.

Professional discussion

Professional discussions are structured, well planned, in-depth discussions between the assessor and candidate, recorded in writing, on audio or digital video. 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 conventional questioning. Some observations can change from a direct observation to a professional discussion to draw out a more in-depth understanding of a particular area of knowledge,

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.

There is a risk that the colleague or line manager may not be familiar with the standards which can result in the testimony not being as strong or relevant as it could be. It is therefore important that the person providing the testimony has at least an awareness of the standards and therefore the context of the testimony. There is no reason that the unit(s) cannot be referred to when providing testimony, however the testimony itself should be in the individual's own words not a regurgitation of the unit criteria.

Triangulation

Combining different sorts of evidence — performance evidence and supporting evidence — to ensure authenticity, validity, sufficiency, currency and reliability. Triangulation helps ensure authenticity and evidence consistent performance over time in an efficient and robust manner, rather than relying on multiple examples of the same assessment which may provide limited insight. For example, many examples of documents produced have value, but are limited in explaining the candidate's role and actions in the absence of any supporting evidence to provide context.

Simulation

This is the use of activities designed to replicate real life work situations. Whilst permissible if necessary, simulation should always be used as a last resort and must be regarded as a way to fill gaps for a small number of performance criteria where performance evidence does not arise naturally. Using simulation to evidence entire units is not acceptable.

Assessment that is simulated must be undertaken in a 'realistic working environment' (RWE). 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 complaint or 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 planning

Assessment plan

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 inflexible. 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 meetings

At the assessment planning meeting, the assessor and candidate should agree and record the following information:

♦ what is to be assessed.
♦ the assessment method.
♦ the location, date and time of the assessment.

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. Some centres develop a proforma to record the assessment plan and the results of the assessment plan.

Assessment requirements

The assessment strategy specifies the assessment conditions, types of evidence and quality assurance criteria, therefore all assessment and internal verification must comply with its requirements.

The assessment strategy is available on SQA's website: **www.sqa.org.uk**

Type and amount of evidence

Performance (or primary) evidence (observation, work poduct) is required to meet the performance criteria within the units. Performance evidence should be triangulated with supporting (or secondary) evidence (reflective accounts, personal statements, questioning, professional discussion, case studies, etc.) therefore providing a rounded picture of competence and robust confidence in assessment judgements. Triangulation is usually more effective than multiple examples of the same type of evidence with no supporting / secondary evidence.

The assessment process

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

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 undertake work, agree how to manage own performance, etc). The optional units are designed around specific competences (eg produce documents, use a diary system, 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 can be 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 they run 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, ie *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.

♦ 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 not 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 / reflective accounts / storyboards 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. Many centres use personal statements / reflective accounts / storyboards to place the evidence in context and either embed the work product evidence within the personal satement / reflective account / storyboard or adopt a '*See Evidence X*' approach where the evidence is shown separately from the personal statement / reflective account / storyboard. Both methods are very effective.

Holistic assessment

A holistic approach is based on gathering evidence through work situations towards one or more units rather than focusing only on one unit at a time. In real life, our work activities are unlikely to be restricted to one very specific set of competencies such as producing documents. In the course of doing this candidates will be communicating, working with others and problem solving which is likely to generate evidence towards several units. This is particularly the case for mandatory units and therefore 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 latter stages of the SVQ. Using a holistic approach is efficient and allows evidence to be drawn from a range of activities which more naturally arises 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.

Sufficiency of evidence

The evidence presented against each unit must clearly demonstrate the candidate's ability to perform the activity competently. 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)

There may be situations where evidence cannot be stored in a 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 (eg where evidence relates to HR records, customer financial records, medical files, etc) 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. 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.

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*'.

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*.

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.

Assessing knowledge and understanding

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

It is critical that evidence is signposted / tracked against the performance indicators and knowledge and understanding being claimed within the specific standards. 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 — eg the Evidence gathering sheet.

Tracking progress

Regular reviews with candidates, involving both the assessor and line manager, should be carried out to measure and maintain progress towards achievement of the qualification.

Reviews should take account of:

♦ actions agreed at the last review meeting.
♦ progress made in relation to the agreed learning plan.
♦ assessments undertaken.
♦ any problems or obstacles encountered and how these will be addressed.
♦ any changes in candidate or workplace circumstances, eg changed work role.
♦ future learning needs and how they will be addressed.
♦ any implications for the assessment plan and revising this as appropriate.
♦ progress reviews should also be used to check that the candidate and the line manager:
  — understand and are comfortable with the assessment process.
  — know what progress the candidate has made towards achievement of the SVQ.
  — are aware of the option of certification for individual units.
  — understand the appeals 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

Mandatory units

Unit S201: Agree How to Manage and Improve Own Performance in a Business Environment

SQA Code FD8W 04

General overview

This mandatory unit is about accepting responsibility for your own work and its delivery, improve own performance and behave in a way that encourages effective working.

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

♦ Agreeing realistic targets and achievable timescales.
♦ Planning how to make best use of your time.
♦ Confirming working methods with work colleagues.
♦ Following the correct procedure to deal with problems.
♦ Keeping other people informed of progress.
♦ Meeting deadlines or renegotiating timescales.
♦ Taking responsibility for own work and accept responsibility for any mistakes.
♦ Setting a high standard for their own work, following agreed procedures.
♦ Showing a willingness to take on new challenges and adapt readily to change.

Improving own performance

♦ Encouraging and accepting feedback from other people.
♦ Using feedback to improve own work.
♦ Agreeing where further learning and development could improve own performance.
♦ Following through a learning plan.
♦ Reviewing own progress and updating own learning plan.

Behaving in a way that supports effective working

♦ Setting high standards for your work and show commitment to achieving these standards.
♦ Understanding of your own needs and rights.
♦ Showing a willingness to take on new challenges.
♦ Adapting readily to change.
♦ Treating other people with honesty, respect and consideration.

A key piece of 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 / reflective account / storyboard.

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.

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.
♦ To do lists, outlook printouts.
♦ Learning plan and reviews of progress.
♦ 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 S202: Undertake Work in a Business Environment

SQA Code FD8X 04

General overview

This mandatory unit is about supporting sustainability, respecting diversity and protecting security and confidentiality 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.
♦ Making best use of available technology.

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.

A key piece of 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.

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.
- Equipment logs.
- Organisational procedures with annotation / testimony.
- Feedback on performance from colleagues.

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 S205: Prepare to Communicate in a Business Environment

SQA Code F93W 04

General overview

This mandatory unit is about communicating verbally and in writing 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 and the audience.
♦ Deciding which method of communication to use.

Communicating in writing

♦ Finding and selecting information that supports the purpose of the communication.
♦ Organising and presenting information to suit the audience's needs and what you want to say.
♦ Confirming and reading written material that contains information that is needed.
♦ Extracting the main points needed from written material.
♦ Using accurate grammar, punctuation and spelling.
♦ Proofreading work and making necessary amendments.
♦ Producing the communication to meet deadlines.
♦ Keeping copies of all communications.

Communicating verbally

♦ Presenting information and ideas clearly to others.
♦ Making contributions to discussions that help to move the discussion forward.
♦ Listening actively to information that other people are communicating and respond appropriately.
♦ Asking relevant questions to clarify anything not understood.
♦ Summarising the communication with the person being communicated with to make sure the meaning has been understood.

After communication

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

A key piece of 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.

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.
♦ Spreadsheets.
♦ Presentations.
♦ Rough notes outlining what has to be communicated.
♦ Minutes of meetings.
♦ Appraisals, reviews.
♦ 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.

Optional units

Unit S204: Work with Other People in a Business Environment

SQA Code FD90 04

General overview

This unit is about working within the organisation to present and promote a positive image of the organisation and working collaboratively with others to achieve the organisational goals and objectives.

This involves:

♦ Working in a way that supports the team's objectives.
♦ Welcoming opportunities to work with other people to achieve a positive outcome.
♦ Sharing work goals and plan work objectives.
♦ Following the policies, systems and procedures that are relevant to the role.
♦ Putting relevant organisational values into practice.
♦ Working with outside organisations and individuals in a way that protects the image of the organisation.
♦ Seeking guidance from others when unsure about objectives, policies, systems, procedures and values.
♦ Communicating with other people.
♦ Working in a way that recognises the strengths of others in the team.
♦ Providing support to members of the team.
♦ Showing respect for individuals.
♦ Producing quality work on time.
♦ Identifying and referring any problems.
♦ Sharing feedback with others on the achievement of objectives.

A key piece of 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.

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 meetings.
♦ Action / Project plans.
♦ Organisational policies, systems, procedures and values with annotation / testimony.
♦ Feedback to / from colleagues.

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 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 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.

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 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.

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 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.

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

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 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.

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 shorthand transcription speed using a timed exercise. The word count would be based on the total number of words in the dictation passage and the length of the dictation in seconds. A number of websites will convert this for you. The candidate should have no more than one transcription character error for every minute of dictation.

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 at a minimum speed of 40 words per minute in an agreed format from an audio recording.

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 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.

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 audio transciption 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 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 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.

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 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.

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 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.

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 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 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.
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 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

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 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.

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 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 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.

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 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.

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 organization.
♦ 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 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.

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 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 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

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 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.

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 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.

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 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.

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 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 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.

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 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.

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 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 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.

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 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.

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 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 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 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.

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 the 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 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.

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 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.

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.

Unit S256: Make Administrative Arrangements for the Movement of Individuals Outside of 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 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.

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 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.

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 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.

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 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 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.

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 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.

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 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 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.

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 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.

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 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.

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 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.

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 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.

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 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.

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 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.

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 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.

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 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.

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 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.

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 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.

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 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.

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 E-mail 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 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.

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.

Unit S311: Design and Produce Documents in a Business Environment

SQA Code J6X0 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 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.

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 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.

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 accurately taking notes using shorthand at a minimum speed of 80 wpm and producing accurate and correct text in an agreed format from these notes.

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 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

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 shorthand transcription speed using a timed exercise. The word count would be based on the total number of words in the dictation passage and the length of the dictation in seconds. A number of websites will convert this for you. The candidates should have no more than one transcription character error for every minute of dictation.

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 at a minimum speed of 60 wpm in an agreed format from an audio recording.

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 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.

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 audio transcription 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 S106: Make and Receive Telephone Calls

SQA Code F93N 04

General overview

This unit is about making, receiving and transferring telephone calls in line with organisational requirements. It involves identifying the purpose of the call, obtaining name and numbers of people to be contacted, making contact with people, communicating information and summarising outcomes of conversations. It also involves answering calls, projecting a positive image, identifying the caller and caller's needs, providing accurate information while maintaining security and confidentiality and taking and passing on messages. It involves transferring calls promptly, explaining when the call cannot be transferred and regularly checking when a caller is on hold. In addition it involves reporting faults with the telephone system and problems in handling calls to an appropriate colleague.

A key piece of 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.

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

Make calls (PI 1–6)

The types of evidence that may be used could include:

♦ Assessor observation.
♦ Speed dial list.
♦ Extension list.
♦ E-mails or notes detailing who is to be called.
♦ Guidelines and procedures for making calls and testimony confirming candidate follows this.
♦ Guidelines and procedures for reporting telephone system faults and testimony confirming candidate follows this.
♦ Contact record sheets.
♦ Outgoing call logs.
♦ E-mails or fault reports informing colleague of problems with telephone system.

Receive calls (PI 7–12)

The types of evidence that may be used could include:

♦ Assessor observation.
♦ Incoming call log.
♦ Guidelines and procedures for answering calls and testimony confirming candidate follows this.
♦ Extension list.
♦ E-mails or message slips.
♦ E-mails or records reporting problems in handling calls to colleague.

Transfer calls (PI 13–15)

The types of evidence that may be used could include:

♦ Assessor observation.
♦ E-mails or telephone message slips.
♦ Extension list.
♦ Procedure for transferring calls and testimony to confirm candidate follows this.

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 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.

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 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.

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 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 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.

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 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

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 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.

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 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 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.

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 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.

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 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.

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 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 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.

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 S114a: Bespoke Software 1

SQA Code F9AN 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.
♦ 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: Sort, pre-set queries, simple operator formulas, charts and graphs.
  — 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 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.

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 6, digital recorded sound, graphs, charts, tables.
♦ Screen dumps.
♦ Hard copy of documents constructed using bespoke software.
♦ Electronic copy 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 S114b: Specialist Software 1

SQA Code F9AT 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.
♦ 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, labeling, alignment, orientation, color, resolution, size, pitch.
    — Process: Sort, pre-set queries, simple operator formulas, charts and graphs.
    — 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 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.

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 copy of documents constructed using specialist software.
♦ Electronic copy 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 S115: Database Management Software 1

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 using basic database software tools and techniques to:

♦ Enter straightforward or routine information using pre-set data-entry screens.
♦ Retrieve information by running predefined methods.
♦ Produce reports using predefined menus or shortcuts.

This unit is imported from the e-skills IT Users suite. This involves:

♦ Entering data into records to meet requirements.
♦ Locating and amending data records.
♦ Responding appropriately to data entry error messages.
♦ Checking data meets needs, using IT tools and making corrections as necessary.
♦ Following local and / or legal guidelines for the storage and use of data.
♦ Searching for and retrieving information using predefined methods.
♦ Selecting and viewing specific reports to output information to meet given requirements.

A key piece of 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.

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 database table.
♦ Printout of records.
♦ Printout of queries.
♦ Printout of reports.
♦ Printouts showing records before and after amendment.
♦ E-mail detailing amendments required and / or confirming data meets needs.

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 S116: Database Software 1

SQA Code F9C4 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 using basic database software tools and techniques to:

♦ Enter straightforward or routine information into a database.
♦ Set up a single table in a flat file database.
♦ Retrieve information by running routine queries.
♦ Produce reports using predefined menus or shortcuts.

The structure and functionality of the database will be predefined. Any aspects that are unfamiliar will require support and advice from others.

This unit is imported from the e-skills IT Users suite. This involves:

♦ Creating a database table using specified fields.
♦ Entering structured data into records to meet requirements.
♦ Locating and amending data records.
♦ Responding appropriately to data entry error messages.
♦ Checking data meets needs, using IT tools and making corrections as necessary.
♦ Running simple database queries.
♦ Generating and printing predefined database reports.

A key piece of 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.

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 database table.
♦ Printout of records.
♦ Printout of queries.
♦ Printout of reports.
♦ Printouts showing records before and after amendment.
♦ E-mail detailing amendments required and / or confirming data meets needs.

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 S117: Improving Productivity Using IT 1

SQA Code F99D 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 their use of predefined or commonly used IT tools for activities that are straightforward or routine. As a result of reviewing their work, an individual will be able to identify and use automated methods or alternative ways of working to improve productivity. Any aspect that is unfamiliar will require support and advice from other people.

This involves:

♦ Planning how to carry out the task using IT to achieve the required purpose and outcome.
♦ Selecting IT systems and software applications as appropriate for the purpose.
♦ Using automated routines that aid efficient processing or presentation.
♦ Completion of planned tasks using IT.
♦ Reviewing outcomes to make sure they meet the requirements of the task.

A key piece of 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.

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 / completing / reviewing the task.
♦ 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 S118: IT Security for Users 1

SQA Code F99R 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 identifying day-to-day security risks and the laws and guidelines that affect the use of IT, and using simple methods to protect software and personal data.

This involves:

♦ Taking appropriate security precautions to protect IT systems and data.
♦ Taking appropriate precautions to keep information secure.
♦ Following relevant guidelines and procedures for the secure use of IT.
♦ Ensuring personal data is backed up to appropriate media.

A key piece of 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.

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 relevant guidelines and procedures (front page but with evidence of questions relating to the guidelines).
♦ Screen dump showing files backed up.
♦ Screen dump of anti-virus software update.
♦ Screen dump of file and / or media encryption.
♦ Screen dump showing access and / or modification passwords being set or updated.

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 S119: Presentation Software 1

SQA Code F9CR 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 using a range of basic presentation software tools and techniques to produce straightforward or routine presentations. Any aspect that is unfamiliar will require support and advice from others.

This involves:

♦   Selecting and using different slide layouts for different types of information.
♦   Entering information into presentation slides so that it is ready for editing and formatting.
♦   Combining information of different forms and from different sources.
♦   Storing and retrieving presentation files effectively.
♦   Selecting and using an appropriate template to structure slides.
♦   Selecting and using appropriate techniques to edit slides.
♦   Selecting and using appropriate techniques to format slides.
♦   Preparing slides for presentation.
♦   Checking presentation meets needs using IT tools and making corrections as necessary.

A key piece of 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.

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 slides.
♦ Printout of presentation.
♦ Electronic copy of presentation.
♦ E-mails detailing changes and / or confirming presentation meets needs.
♦ 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 S120: Setting Up an IT System 1

SQA Code F99J 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 connecting up the basic components of an IT system, removable storage media and a communication service safely using default setup routines and run simple tests to check it is working successfully.

This involves:

♦ Connecting up the components of an IT system safely, including a printer and other peripheral devices.
♦ Connecting removable storage media safely.
♦ Connecting communication hardware safely to a PC.
♦ Connecting to a communication service from a PC.
♦ Configuring the user interface to meet needs.
♦ Setting up and configuring virus protection software.
♦ Setting up files and software.
♦ Running tests to check that the system and communication service are working successfully.
♦ Responding to error messages and reporting faults as appropriate.

A key piece of 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.

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.
- Test results.
- Screen dumps of error messages.
- Photographs showing IT system connections to printer and other devices.
- Photograph showing connection to removable storage media.
- Screen dump showing connection to communication service.
- Screen dump showing set up and configuration of virus protection software.

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 S121: Spreadsheet Software 1

SQA Code F9D0 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 using a range of basic spreadsheet software tools and techniques to produce, present and check spreadsheets that are straightforward or routine. Any aspect that is unfamiliar will require support and advice from others.

This involves:

♦ Entering and editing numerical and other data.
♦ Storing and retrieving spreadsheet files effectively.
♦ Using functions and formulas to meet calculation requirements.
♦ Using spreadsheet tools and techniques to summarise and display information.
♦ Selecting and using appropriate tools.

A key piece of 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.

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 or electronic copies of spreadsheet files.
♦ Printouts of cell contents showing functions and formulas used.
♦ Annotation / testimony to support work product.

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 S122: Using Collaborative Technologies 1

SQA Code F9A6 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 safely using IT tools and devices to work collaboratively by:

♦ Preparing and assessing IT tools and devices.
♦ Playing a responsible and active role in real-time communication.
♦ Contributing relevant information.

Any aspect that is unfamiliar will require support and advice from others.

This involves:

♦ Following guidelines for working with collaborative technology.
♦ Carrying out straightforward checks on others' online identities and different types of information.
♦ Setting up IT tools and devices that will enable you to contribute to collaborative work.
♦ Using given details to access collaborative technologies needed for a collaborative task.
♦ Adjusting basic settings on collaborative technologies.
♦ Changing the environment of collaborative technologies.
♦ Setting up and using a data reader to feed information.
♦ Contributing responsibly and actively to collaborative working.
♦ Contributing to producing and archiving the agreed outcome of collaborative working.
♦ Responding to simple problems with collaborative technologies.

A key piece of 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.

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 or electronic copy of completed work showing your contribution.
♦ Screen dump showing the checks you have made on others' online identities and different types of information.
♦ Screen dump showing how you have set up IT tools that enable you to contribute to collaborative work.
♦ Screen dump showing adjustments to basic settings and changing the environment of collaborative technologies.
♦ Screen dump showing your contribution to collaborative working.
♦ Screen dump showing how you responded to simple problems encountered.
♦ E-mails detailing changes or accepting your contribution.

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 S123: Website Software 1

SQA Code F9D3 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 using basic website software tools and techniques appropriately to produce straightforward or routine single web pages from pre-set templates. Any aspect that is unfamiliar will require support and advice from others.

This involves:

♦ Selecting and using a website design template to create a single web page.
♦ Entering and inserting content for web pages so that it is ready for editing and formatting.
♦ Organising and combining information needed for web pages.
♦ Storing and retrieving web files.
♦ Selecting and using website features to help the user navigate simple websites.
♦ Using appropriate editing and formatting techniques.
♦ Checking web pages meet needs.
♦ Uploading content to a website.
♦ Responding appropriately to common problems.

A key piece of 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.

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.
- ♦ E-mails or notes containing detail of what to include on web page.
- ♦ E-mails detailing changes or confirming that web pages are ready for upload.

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 S124: Word Processing Software 1

SQA Code F9D6 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 using a range of basic word processing software tools and techniques to produce appropriate, straightforward or routine documents. Any aspect that is unfamiliar will require the support and advice of others. It involves using a keyboard or other input method to enter or insert text and other information, combining information of different types to or from different sources into a document and entering information into existing tables, forms and templates. It also involves using editing tools to amend the content of documents and storing and retrieving files effectively. Tables need to be created and modified to organise tabular or numeric information and heading styles need to be selected and applied to text. Appropriate techniques need to be selected and used to format characters and paragraphs and page layouts selected and used to present and print document. It also involves checking documents to ensure they meet needs using IT tools and making corrections as necessary.

A key piece of 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.

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

Enter, edit and combine text and other information accurately within word processing documents (PI 1–5)

The types of evidence that may be used could include:

♦ Assessor observation.
♦ E-mails detailing requirements of documents.
♦ Copies of documents showing requested changes.
♦ Finished documents with annotation / testimony.

Structure information within word processing documents (PI 6–7)

The types of evidence that may be used could include:

♦ Assessor observation.
♦ E-mails detailing requirements of documents.
♦ Copies of tables showing requested changes.
♦ Finished documents with annotation / testimony.

Use word processing software tools to format and present documents (PI 8–10)

The types of evidence that may be used could include:

♦ Assessor observation.
♦ Finished documents with annotation / testimony.

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 S113: Using E-mail 1

SQA Code F9A3 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. It involves using software tools to compose and format e-mail messages, attaching files to messages, sending e-mail messages and using an address book to store and retrieve contact information. It also involves following guidelines and procedures, reading and responding to e-mails appropriately, organising and storing e-mails and responding appropriately to common e-mail problems.

A key piece of 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.

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:

Use e-mail software tools and techniques to compose and send messages (PI 1–4)

- ♦ Assessor observation.
- ♦ Notes detailing information to be e-mailed.
- ♦ Printouts of e-mail messages.
- ♦ Printouts or screenshots of address book contents.

Manage incoming e-mail effectively (PI 5–8)

- Assessor observation.
- System guidelines or procedures for retrieving information and testimony confirming candidate follows these.
- Printouts of e-mail responses.
- Printouts or screenshots of e-mail organisation.

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 S112: Use Office Equipment in Accordance with Occupational Regulations and Safety Guidelines

SQA Code J6WS 04

General overview

This unit is about using a range of office equipment to produce work to agreed standards within negotiated deadlines in accordance with occupational regulations and safety guidelines while following the concepts of ergonomic practice.

This involves:

- Identifying the requirements for tasks to be carried out.
- Agreeing deadlines for tasks with managers, colleagues or customers.
- Locating and selecting the equipment and resources needed to complete tasks.
- Maintaining ergonomic good practice when typing at a work station.
- Operating within organisational guidelines to position your body to the size, slope and type of keyboard being used.
- Setting up your body position to align with the size and shape of the workstation being used.
- Maintaining workstations being used for typing operations.
- Following manufacturer's operating instructions, organisational instructions and health and safety requirements for using office equipment.
- Using as few resources as possible to minimise waste.
- Following your organisation's procedures to maintain clean and hygienic equipment.
- Dealing with equipment and resource problems according to the manufacturer's and organisational procedures.
- Reporting problems that you cannot deal with to the appropriate colleague.
- Producing the final work product to meet the agreed requirements within agreed deadlines.
- Preparing the equipment, resources and work area for the next user.
- Following the relevant health and safety requirements and legislation for the use of equipment.

A key piece of 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 / Reflective Account / Storyboard.

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.

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.
♦ Examples of identifying the requirements of the task.
♦ Examples of agreeing deadlines.
♦ Examples of locating and selecting equipment and resources to complete tasks.
♦ Manufacturer's operating instructions with annotation / testimony.
♦ Emails / memos / notes discussing problems / negotiating timescales etc.
♦ Final Work Product to the required standard submitted within agreed deadlines.
♦ Leaving equipment ready for next user.
♦ Workstation audit report.
♦ Photographs or video recording of candidate maintaining ergonomic good practice when typing at workstation.

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: Support Organisational Projects

SQA Code J6WT 04

General overview

This unit is about providing administrative support to organisational projects. It covers supporting the planning, implementation and monitoring of projects. It includes communicating with all those involved in the projects, keeping records of project activities and preparing progress reports.

This involves:

♦ Identifying all stakeholders involved in the project.
♦ Supporting the project team by preparing information which confirms the purpose of the project with all relevant stakeholders.
♦ Supporting the project team by preparing information which confirms the project scope, timescale, aims and objectives.
♦ Contributing to the preparation of a project specifications and plans.
♦ Supporting the project team by preparing information which confirms the activities and resources required for the project.
♦ Contributing to the development of a contingency plan to mitigate potential risks.
♦ Collecting and collating information to implement and monitor the project to meet the agreed budget and timescales.
♦ Communicating with all stakeholders involved in or affected by the project.
♦ Identifying any issues within your control and seeking advice for those which are outside your competence and authority.
♦ Keeping records of all project activities in the agreed format.
♦ Supporting the project team to provide interim reports on project progress to the relevant stakeholders at the agreed stages.
♦ Supporting the project team to report project completion to all relevant stakeholders.

A key piece of 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 / Reflective Account / Storyboard.

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.

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 meetings.
♦ Project specifications including scope, timescale, aims and objectives.
♦ Records of all project activity including plans and contingencies.
♦ Interim reports.
♦ Records of accessing assistance with issues outside your control.
♦ Records of dealing with issues within your control.

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 and Evaluate Customer Service

SQA Code J6X2 04

General overview

This unit is about delivering and evaluating customer service. The customers may be both internal and external to your organisation. It includes identifying customer needs and expectations, providing services to agreed timescales and quality standards and taking action to improve services based on customers' feedback.

This involves:

Identify customer needs and expectations

♦   Building working relationships with internal and external customers.
♦   Identifying and confirming customer needs.
♦   Agreeing timescales and quality standards with customers.
♦   Managing expectations of all customers to make sure they are met.

Deliver customer service

♦   Providing services to agreed timescales and quality standards.
♦   Following organisational procedures if agreed timescales are not achieved.
♦   Checking customer needs and expectations are met.
♦   Following correct procedures to handle complaints in a professional manner and within set timescales.

Monitor and evaluate customer services

♦   Obtaining and recording customer feedback.
♦   Analysing and evaluating customer feedback.
♦   Taking action to improve service to customers.
♦   Following relevant legal and data protection legislation in relation to delivering customer service and information handling.

A key piece of 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 / Reflective Account / Storyboard.

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.

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.
♦ Customer feedback.
♦ Examples of confirming customer needs and expectations.
♦ Examples of handling complaints.

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.

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	Included in portfolio (Yes / No) If no, state location	Sampled by the IV (initials and date)

Element achievement record

Unit

Element

Evidence index no	Description of evidence	PC / performance statements						Areas of knowledge and understanding / scope																						

Unit

Element

Notes / comments

The candidate has satisfied the assessor and internal verifier that the performance evidence has been met.

Candidate's signature _____ **Date** _____

Assessor's signature _____ **Date** _____

Internal verifier's signature _____ **Date** _____

Assessment plan

Units	
Elements	

Activities	Performance criteria (PC)	Method of assessment / sources of evidence	Date of assessment	Evidence already available	Links to other units (performance criteria and range)
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 (enter numbers)	Units, elements, performance criteria, and range covered

Candidate's signature _____ **Date** _____

Observation record

Unit / element(s) _____

Candidate _____

Evidence index number _____

Date of observation _____

Skills / activities observed	Performance criteria covered

Knowledge and understanding apparent from this observation

Other units / elements to which this evidence may contribute

Assessor comments and feedback to candidate

I can confirm the candidate's performance was satisfactory.

Assessor's signature _____ **Date** _____

Candidate's signature _____ **Date** _____

Witness testimony

SVQ title and level	194
Candidate name	
Evidence index no	
Where applicable, evidence number to which this testimony relates	
Element(s)	
Range	
Date of evidence	
Witness name	
Designation / relationship to candidate	

Details of testimony

I can confirm the candidate's performance was satisfactory.

Witness signature _____ **Date** _____

Witness (please select the appropriate box)**:**

☐   Holds A1 / A2 or D32 / D33 qualifications

☐   Is familiar with the SVQ standards to which the candidate is working

Record of questions and candidate's answers

Unit	
Element(s)	
Evidence index number	

Circumstances of assessment

List of questions and candidate's responses

Q	
A	
Q	
A	
Q	
A	
Q	
A	
Q	
A	

Assessor's signature _____**Date** _____

Candidate's signature _____**Date** _____