



SVQ in Business and Administration level 1

Candidate Portfolio

Award Code: G7Y2 21

Candidate name:

Publication code: Z0258

The National Occupational Standards which form the basis of this award were developed by the Council for Administration. This document is for candidate use only and should not be used as substitute for the National Occupational Standards.

Published by the Scottish Qualifications Authority
The Optima Building, Ironmills Road,
58 Robertson Street, Dalkeith,
Glasgow G2 8DQ Midlothian EH22 1LE

© Scottish Qualifications Authority 2009

Index

Section	Contents	Page
1	Portfolio forms	4
	— Title Page	5
	— Portfolio checklist	6
	— Award achievement record	7
	— Evidence index matrix	8
	— Evidence gathering form	10
	— Evidence descriptor	12
	— Witness status list	13
	— Unit assessment plan	14
2	The Units and the recording documents for your SVQ	15
	— DP79 04 (101) Carry Out Your Responsibilities at Work 1	16
	— DR36 04 (102) Work Within Your Business Environment 1	20
	— DP77 04 (103) Welcome Visitors	24
	— DP7P 04 (104) Handle Mail	28
	— DP72 04 (105) Store and Retrieve Information	32
	— DJ59 04 (106) Use IT to Exchange Information 1	36
	— DJ5D 04 (107) Word Processing Software 1	40
	— DP7V 04 (108) Make and Receive Telephone Calls	44
	— DP76 04 (109) Use Office Equipment	48
	— DD56 04 (110) Ensure Your Own Actions Reduce Risks to Health and Safety	52

Introduction

The candidate portfolio has been developed to provide you with all of the Unit descriptors and forms you will require when compiling your SVQ portfolio. The portfolio has been split into two sections:

Section 1 — Portfolio forms

Section 2 — The Units and recording documents for your SVQ

Although we have provided you with forms, your centre may have their own recording documents which they would prefer you to use. Remember to sign and date each piece of evidence you produce to show that it is your own work.

Prior to starting your SVQ you should start by carefully reading through the standards and, together with your assessor, decide which Units you might like to work on, making sure that the most appropriate Units for your job role have been chosen. Once this decision has been made, you will only be required to print the Units relevant to your SVQ and insert these into your portfolio.

In addition to the candidate portfolio, Candidate Guidance has been produced. The Candidate Guidance will provide you with information such as:

- ◆ General information on your SVQ, including: how your SVQ is achieved, how your SVQ is assessed and what is evidence? etc.
- ◆ Guidance on how to compile your portfolio
- ◆ Example forms

Section 1 — Portfolio forms

Title Page:	
Candidate Name:	
Organisation:	
Centre Name:	
SVQ title:	
Start date:	
Completion Date:	
Assessor name and contact details:	
Internal verifier name and contact details:	

Portfolio checklist

Use this checklist either as you work through your SVQ or at the end before you submit your completed portfolio for verification.

	Completed?	Page/Section number
Title page for the portfolio	<input type="checkbox"/>	
Witness Status List	<input type="checkbox"/>	
Personal profile		
◆ your own personal details	<input type="checkbox"/>	
◆ a brief CV or career profile	<input type="checkbox"/>	
◆ description of your job	<input type="checkbox"/>	
◆ information about your employer/training provider/college	<input type="checkbox"/>	
Unit Assessment Plans	<input type="checkbox"/>	
Award Achievement Record	<input type="checkbox"/>	
Completed Element Achievement Records for each Unit		
◆ signed by yourself, your assessor and the internal verifier (where relevant)	<input type="checkbox"/>	
◆ evidence reference numbers included	<input type="checkbox"/>	
Index of evidence (with cross-referencing information completed)	<input type="checkbox"/>	
Evidence in numerical order and individually labelled (with evidence descriptor attached)	<input type="checkbox"/>	

Award achievement record

Candidate Name:

Start Date:

SVQ Title: **Business and Administration level 1**

For level 1 candidates must achieve two mandatory Units and two optional Units.

Mandatory Units

Unit Title	Date Achieved	Assessor Signature	IV Signature

Optional Units

Unit Title	Date Achieved	Assessor Signature	IV Signature

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

Evidence gathering form

Candidate Name:

Date:

Evidence type — tick relevant box

Direct Observation

Personal Statement

Oral Questions

Professional Discussion

Witness testimony

Evidence

	PI	K

Related Units

Unit	PI	K

Assessor /Witness Comments

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

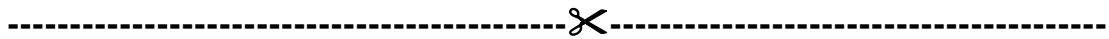
Date: _____

Evidence descriptor

Evidence Number: _____

Description of evidence: _____

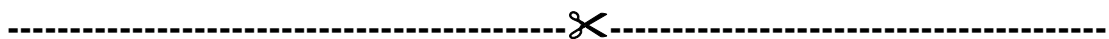
What this evidence shows: _____



Evidence Number: _____

Description of evidence: _____

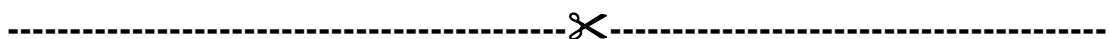
What this evidence shows: _____



Evidence Number: _____

Description of evidence: _____

What this evidence shows: _____



Witness status list

Candidate Name:

Qualification:

Name	Contact Details	Signature	Relationship to candidate	Assessor or verifier qualification

Unit assessment plan

Candidate Name:

Date:

Unit Title:

Evidence to be gathered	Evidence Type	Date (where applicable)	PI/K

Accreditation of prior learning

Item and how evidenced	Applies to Knowledge statement

Section 2 — The units and recording documents for your SVQ

Unit Progress Record

Qualification and level: **Business and Administration level 1**

Candidate: _____

To achieve the whole qualification, you must prove competence in the **two mandatory** Units plus any **two optional** Units.

Please note the table below shows the SSC identification codes listed alongside the corresponding SQA unit numbers. It is important that the SQA unit numbers are used in all your recording documentation and when your results are communicated to SQA. SSC identification codes are **not valid** in these instances.

Unit Checklist — circle the reference number of each unit as you complete it.

Mandatory	101	102								
Optional	103	104	105	106	107	108	109	110		

Mandatory Units *(all units should be completed)*

SQA Unit Number	SSC Unit Number	Title	Assessor	Internal Verifier	Date
DP79 04	101	Carry Out Your Responsibilities at Work 1			
DR36 04	102	Work Within Your Business Environment 1			
Optional Units					
SQA Unit Number	SSC Unit Number	Title	Assessor	Internal Verifier	Date
DP77 04	103	Welcome Visitors			
DP7P 04	104	Handle Mail			
DP72 04	105	Store and Retrieve Information			
DJ5904	106	Use IT to Exchange Information 1			
DJ5D 04	107	Word Processing Software 1			
DP7V 04	108	Make and Receive Telephone Calls			
DP76 04	109	Use Office Equipment			
DD56 04	110	Ensure Your Own Actions Reduce Risks to Health and Safety			

UNIT DP7904 (101) Carry Out Your Responsibilities at Work 1

Unit Summary

Communicate effectively, accept responsibility for own work and its delivery, improve own performance and behave in a way that encourages effective working.

Skills

You will apply the following skills:

Communicating
Managing time
Team working

Performance indicators

You will:

Communicate information

- 1 Actively focus on information that other people are communicating, questioning any points you are unsure about
- 2 Provide accurate and clear information to other people in a way that meets their needs
- 3 Make contributions to discussions

Be accountable for your work

- 4 Accept instructions given to you for your work and follow these instructions
- 5 Agree how you will make best use of your time and the working methods you will use
- 6 Report problems when they arise, using the support of other people when necessary
- 7 Keep other people informed of your progress
- 8 Take responsibility for your own work and accept responsibility for any mistakes you make
- 9 Follow agreed guidelines, procedures and, where appropriate, codes of practice

Improve your own performance

- 10 Accept feedback from other people
- 11 Use feedback to agree ways to improve your own work and put them into practice
- 12 Follow through a learning plan that meets your own needs
- 13 Review progress with your learning plan

Behave in a way that supports effective working

- 14 Set achievable standards for your work and show commitment in achieving these standards
- 15 Understand your own needs and rights
- 16 Show a willingness to take on new challenges
- 17 Adapt readily to change
- 18 Treat other people with honesty, respect and consideration

* **Highlighted PIs indicate contingencies**

UNIT DP7904 (101) Carry Out Your Responsibilities at Work 1

Knowledge

You will know:

- 1 Why effective communication is important
- 2 How to focus actively on what others are communicating
- 3 Why it is important to question things you are not sure about
- 4 Why communication is important to meet the needs of other people
- 5 How to contribute positively to discussions
- 6 Where to find information that you need for your work
- 7 How to listen to and follow instructions carefully
- 8 How to plan your work
- 9 Why it is important to keep other people informed about progress
- 10 Why it is important to acknowledge and learn from your mistakes
- 11 Guidelines, procedures and codes of practice that are relevant to your work
- 12 Why it is important to try to continuously improve your work
- 13 Why it is important to accept feedback from others
- 14 How learning and development can help you to improve your work and further your career
- 15 The main career progression routes available to you
- 16 The learning and development opportunities that are available to you
- 17 Why the way you behave in the workplace is important
- 18 Why it is important to set achievable standards for your work
- 19 Why it is important to be ready to take on new challenges and adapt to change
- 20 Why it is important to treat others with honesty, respect and consideration
- 21 Types of behaviour that show you are honest, respectful and considerate and types of behaviour that show you are not

UNIT DP7904 (101) Carry Out Your Responsibilities at Work 1

Record of Evidence

Performance indicators	Evidence numbers	Evidence type
1 Actively focus on information that other people are communicating, questioning any points you are unsure about		
2 Provide accurate and clear information to other people in a way that meets their needs		
3 Make contributions to discussions		
4 Accept instructions given to you for your work and follow these instructions		
5 Agree how you will make best use of your time and the working methods you will use		
6 Report problems when they arise, using the support of other people when necessary		
7 Keep other people informed of your progress		
8 Take responsibility for your own work and accept responsibility for any mistakes you make		
9 Follow agreed guidelines, procedures and, where appropriate, codes of practice		
10 Accept feedback from other people		
11 Use feedback to agree ways to improve your own work and put them into practice		
12 Follow through a learning plan that meets your own needs		
13 Review progress with your learning plan		
14 Set achievable standards for your work and show commitment in achieving these standards		
15 Understand your own needs and rights		
16 Show a willingness to take on new challenges		
17 Adapt readily to change		
18 Treat other people with honesty, respect and consideration		

* **Highlighted PIs indicate contingencies**

The evidence is authentic and/or the assessment has been conducted under the specified conditions or context.

UNIT DP7904 (101) Carry Out Your Responsibilities at Work 1

Knowledge requirements	Evidence numbers	Evidence type
1 Why effective communication is important		
2 How to focus actively on what others are communicating		
3 Why it is important to question things you are not sure about		
4 Why communication is important to meet the needs of other people		
5 How to contribute positively to discussions		
6 Where to find information that you need for your work		
7 How to listen to and follow instructions carefully		
8 How to plan your work		
9 Why it is important to keep other people informed about progress		
10 Why it is important to acknowledge and learn from your mistakes		
11 Guidelines, procedures and codes of practice that are relevant to your work		
12 Why it is important to try to continuously improve your work		
13 Why it is important to accept feedback from others		
14 How learning and development can help you to improve your work and further your career		
15 The main career progression routes available to you		
16 The learning and development opportunities that are available to you		
17 Why the way you behave in the workplace is important		
18 Why it is important to set achievable standards for your work		
19 Why it is important to be ready to take on new challenges and adapt to change		
20 Why it is important to treat others with honesty, respect and consideration		
21 Types of behaviour that show you are honest, respectful and considerate and types of behaviour that show you are not		

The evidence is authentic and/or the assessment has been conducted under the specified conditions or context.

Candidate: _____ **Date:** _____

Assessor: _____ **Date:** _____

Internal Verifier: _____ **Date:** _____
(if sampled)

UNIT DR36 04 (102) Work Within Your Business Environment 1

Unit Summary

Work effectively within your organisation, supporting its purpose and values, applying employment rights and responsibilities, respecting diversity and protecting security and confidentiality.

Skills

You will apply the following skills:

Reading
Communicating
Interpersonal skills
Team working

Performance indicators

You will:

Work to achieve your organisation's purpose and values

- 1 Work in a way that supports your team's objectives
- 2 Follow the systems and procedures that are relevant to your role
- 3 Work with people in a way that presents a good image of your organisation
- 4 Seek guidance from others when you are unsure about your work

Apply your employment responsibilities and rights

- 5 Demonstrate your employment responsibilities and rights
- 6 Work within your contract of employment
- 7 Seek guidance when you are unsure about your employment responsibilities and rights

Support sustainability

- 8 Keep waste to a minimum and follow procedures for recycling and disposal of hazardous materials

Support diversity

- 9 Treat other people in a way that respects their background, abilities, values, customs and beliefs
- 10 Learn from other people and use this to improve the way you work
- 11 Follow your organisation's procedures and legal requirements in relation to discrimination legislation

Maintain security and confidentiality

- 12 Keep property secure in a way that is consistent with your organisation's procedures and legal requirements
- 13 Keep information secure and confidential in a way that is consistent with your organisation's procedures and legal requirements

* **Highlighted PIs indicate contingencies**

UNIT DR36 04 (102) Work Within Your Business Environment 1

Knowledge

You will know:

- 1 Your responsibilities at work
- 2 How your role fits into your organisation's structure
- 3 Your organisation's systems and procedures that are relevant to your role
- 4 Who you should consult if you are unsure about policies, objectives, systems and values
- 5 The main terms and conditions of your contract of employment
- 6 Who you should contact if you have a grievance at work or need guidance and support on an employment issue
- 7 What you should do if you witness or experience discrimination or bullying at work
- 8 What procedures you should follow if you are ill or need time off from work
- 9 Why it is important to keep waste to a minimum
- 10 The main types of waste that occur in a business administration environment and how to minimise waste
- 11 The procedures you should follow for recycling and disposal of hazardous materials and why these are important
- 12 What is meant by 'diversity' and why it should be valued
- 13 How to treat other people in a way that respects their abilities, background, values, customs and beliefs
- 14 Ways in which you could learn from others
- 15 The importance of maintaining security and confidentiality
- 16 Legal and organisational requirements in relation to security and confidentiality

UNIT DR36 04 (102) Work Within Your Business Environment 1

Record of Evidence

Performance indicators	Evidence numbers	Evidence type
1 Work in a way that supports your team's objectives		
2 Follow the systems and procedures that are relevant to your role		
3 Work with people in a way that presents a good image of your organisation		
4 Seek guidance from others when you are unsure about your work		
5 Demonstrate your employment responsibilities and rights		
6 Work within your contract of employment		
7 Seek guidance when you are unsure about your employment responsibilities and rights		
8 Keep waste to a minimum and follow procedures for recycling and disposal of hazardous materials		
9 Treat other people in a way that respects their background, abilities, values, customs and beliefs		
10 Learn from other people and use this to improve the way you work		
11 Follow your organisation's procedures and legal requirements in relation to discrimination legislation		
12 Keep property secure in a way that is consistent with your organisation's procedures and legal requirements		
13 Keep information secure and confidential in a way that is consistent with your organisation's procedures and legal requirements		

* **Highlighted PIs indicate contingencies**

The evidence is authentic and/or the assessment has been conducted under the specified conditions or context.

UNIT DR36 04 (102) Work Within Your Business Environment 1

Knowledge requirements	Evidence numbers	Evidence type
1 Your responsibilities at work		
2 How your role fits into your organisation's structure		
3 Your organisation's systems and procedures that are relevant to your role		
4 Who you should consult if you are unsure about policies, objectives, systems and values		
5 The main terms and conditions of your contract of employment		
6 Who you should contact if you have a grievance at work or need guidance and support on an employment issue		
7 What you should do if you witness or experience discrimination or bullying at work		
8 What procedures you should follow if you are ill or need time off from work		
9 Why it is important to keep waste to a minimum		
10 The main types of waste that occur in a business administration environment and how to minimise waste		
11 The procedures you should follow for recycling and disposal of hazardous materials and why these are important		
12 What is meant by 'diversity' and why it should be valued		
13 How to treat other people in a way that respects their abilities, background, values, customs and beliefs		
14 Ways in which you could learn from others		
15 The importance of maintaining security and confidentiality		
16 Legal and organisational requirements in relation to security and confidentiality		

The evidence is authentic and/or the assessment has been conducted under the specified conditions or context.

Candidate: _____ **Date:** _____

Assessor: _____ **Date:** _____

Internal Verifier: _____ **Date:** _____
(if sampled)

UNIT DP77 04 (103) Welcome Visitors

Unit Summary

Welcome visitors and make sure their needs are met.

You will apply the following skills:

Interpersonal skills
Presenting yourself
Questioning
Listening
Communicating

Performance indicators

You will:

Welcome visitors

- 1 Help visitors feel welcome
- 2 Present a positive image of yourself and your organisation
- 3 Identify visitors and the reason for their visit
- 4 If appropriate, inform colleagues of the visitors' arrival
- 5 Make sure visitors' needs are met

* **Highlighted PIs indicate contingencies**

UNIT DP77 04 (103) Welcome Visitors

Knowledge

You will know:

- 1 How to make visitors feel welcome
- 2 Why it is important to present a positive image of yourself and your organisation
- 3 The types of visitors you receive, the requirements that they have and how to meet their needs
- 4 Organisation structures and communication channels within your organisation

UNIT DP77 04 (103) Welcome Visitors

Record of Evidence

Performance indicators	Evidence numbers	Evidence type
1 Help visitors feel welcome		
2 Present a positive image of yourself and your organisation		
3 Identify visitors and the reason for their visit		
4 If appropriate, inform colleagues of the visitors' arrival		
5 Make sure visitors' needs are met		

* **Highlighted PIs indicate contingencies**

The evidence is authentic and/or the assessment has been conducted under the specified conditions or context.

UNIT DP77 04 (103) Welcome Visitors

Knowledge requirements	Evidence numbers	Evidence type
1 How to make visitors feel welcome		
2 Why it is important to present a positive image of yourself and your organisation		
3 The types of visitors you receive, the requirements that they have and how to meet their needs		
4 Organisation structures and communication channels within your organisation		

The evidence is authentic and/or the assessment has been conducted under the specified conditions or context.

Candidate: _____ **Date:** _____

Assessor: _____ **Date:** _____

Internal Verifier: _____ **Date:** _____
(if sampled)

UNIT DP7P 04 (104) Handle Mail

Unit Summary

Receive, sort, distribute and dispatch mail.

Skills

You will apply the following skills:

Reading
Checking
Sorting
Recording
Decision-making
Problem solving
Prioritising

Performance indicators

You will:

Incoming mail

1. Receive, check and register incoming mail
2. Sort incoming mail
3. Record and/or report suspicious or damaged items
4. Distribute incoming mail

Outgoing mail

5. Collect and sort outgoing mail
6. Identify best options for despatching mail
7. Prepare items for urgent or special delivery
8. Frank or stamp outgoing mail
9. Despatch outgoing mail on time

* Highlighted PIs indicate contingencies

UNIT DP7P 04 (104) Handle Mail

Knowledge

You will know:

1. Why the efficient distribution of mail is important
2. Your organisational structure and the titles, names, roles and locations of individuals and teams
3. The range of internal and external mail services available and how to choose the most appropriate service
4. Why security procedures are important when handling mail

UNIT DP7P 04 (104) Handle Mail

Record of Evidence

Performance indicators	Evidence numbers	Evidence type
1 Receive, check and register incoming mail		
2 Sort incoming mail		
3 Record and/or report suspicious or damaged items		
4 Distribute incoming mail		
5 Collect and sort outgoing mail		
6 Identify best options for dispatching mail		
7 Prepare items for urgent or special delivery		
8 Frank or stamp outgoing mail		
9 Dispatch outgoing mail on time		

* **Highlighted PIs indicate contingencies**

The evidence is authentic and/or the assessment has been conducted under the specified conditions or context.

UNIT DP7P 04 (104) Handle Mail

Knowledge requirements	Evidence numbers	Evidence type
1 Why the efficient distribution of mail is important		
2 Your organisational structure and the titles, names, roles and locations of individuals and teams		
3 The range of internal and external mail services available and how to choose the most appropriate service		
4 Why security procedures are important when handling mail		

The evidence is authentic and/or the assessment has been conducted under the specified conditions or context.

Candidate: _____ **Date:** _____

Assessor: _____ **Date:** _____

Internal Verifier: _____ **Date:** _____
(if sampled)

UNIT DP72 04 (105) Store and Retrieve Information

Unit Summary

Use a manual or electronic information system to store and retrieve information.

Skills

You will apply the following skills:

Planning
Organising
Reading
Writing
Using number
Communicating
Using technology

Performance indicators

You will:

Process information

- 1 Collect required information
- 2 Follow agreed procedures and legislation for maintaining security and confidentiality
- 3 Store information accurately in approved locations
- 4 Update information as required

Retrieve information

- 5 Confirm information for retrieval
- 6 Comply with procedures and legislation for retrieving information
- 7 Locate and retrieve the required information
- 8 Report problems with information systems

* **Highlighted PIs indicate contingencies**

UNIT DP72 04 (105) Store and Retrieve Information

Knowledge

You will know:

- 1 Why it is important to store and retrieve information effectively and efficiently
- 2 The different information systems and their main features
- 3 Legal and organisational requirements covering the security and confidentiality of information
- 4 Why it is important to confirm information to be collected, stored and retrieved
- 5 The methods you can use to collect required information
- 6 The procedures you should follow to retrieve information
- 7 The types of problems that occur with information systems and who to report them to

UNIT DP72 04 (105) Store and Retrieve Information

Record of Evidence

Performance indicators	Evidence numbers	Evidence type
1 Collect required information		
2 Follow agreed procedures and legislation for maintaining security and confidentiality		
3 Store information accurately in approved locations		
4 Update information as required		
5 Confirm information for retrieval		
6 Comply with procedures and legislation for retrieving information		
7 Locate and retrieve the required information		
8 Report problems with information systems		

* **Highlighted PIs indicate contingencies**

The evidence is authentic and/or the assessment has been conducted under the specified conditions or context.

UNIT DP72 04 (105) Store and Retrieve Information

Knowledge requirements	Evidence numbers	Evidence type
1 Why it is important to store and retrieve information effectively and efficiently		
2 The different information systems and their main features		
3 Legal and organisational requirements covering the security and confidentiality of information		
4 Why it is important to confirm information to be collected, stored and retrieved		
5 The methods you can use to collect required information		
6 The procedures you should follow to retrieve information		
7 The types of problems that occur with information systems and who to report them to		

The evidence is authentic and/or the assessment has been conducted under the specified conditions or context.

Candidate: _____ **Date:** _____

Assessor: _____ **Date:** _____

Internal Verifier: _____ **Date:** _____
(if sampled)

UNIT DJ59 04 (106) Use IT to Exchange Information 1

Unit Summary

Use basic e-mail facilities such as using address books, sending and opening attachments and using key words to search using a search engine. This is based on the e-skills Area of Competence: Use IT to Exchange Information, Level 1 unit.

Skills

You will apply the following skills:

Planning
Organising
Communicating
Using technology
Reading
Writing

Performance indicators

You will:

Send and receive e-mails

- 1 Use basic send commands, such as send to individuals, send carbon copies
- 2 Use basic reply commands, such as receive, forward, reply to individuals, reply to all and reply with history
- 3 Delete e-mail
- 4 Send and open e-mails with attachments
- 5 Save attachments to appropriate places
- 6 Find e-mails
- 7 Follow any rules and guidelines for sending and replying to e-mails

Search for information on the Internet or an intranet

- 8 Use a search engine to find and select appropriate information
- 9 Use suitable techniques to make it easier to find useful information again (eg bookmarks or favourites) and to pass it on to others (eg send web pages and web links via e-mail) Keep records of where useful information came from.
- 10 Save the results of searches so useful information can be found again

Knowledge**You will know:**

- 1 What are e-mail messages
- 2 The basic options for sending and replying
- 3 How to send and receive attachments
- 4 How to use an address book
- 5 Why some computer users may have difficulty in sending and receiving e-mails with attachments
- 6 What to do about e-mails from unknown users
- 7 What viruses are and the problems they cause
- 8 How using anti-virus software can help to keep risks to a minimum
- 9 What risks there may be in downloading documents and software
- 10 The risks in sharing information such as personal details
- 11 Where and when to seek advice
- 12 What laws and guidelines affect the day-to-day use of IT, for example those covering Data Protection, Equal Opportunities, Disability, Health and Safety, copyright and guidelines set up by your own employer or organisation

UNIT DJ59 04 (106) Use IT to Exchange Information 1

Record of Evidence

Performance indicators	Evidence numbers	Evidence type
1 Use basic send commands, such as send to individuals, send carbon copies		
2 Use basic reply commands, such as receive, forward, reply to individuals, reply to all and reply with history		
3 Delete e-mail		
4 Send and open e-mails with attachments		
5 Save attachments to appropriate places		
6 Find e-mails		
7 Follow any rules and guidelines for sending and replying to e-mails		
8 Use a search engine to find and select appropriate information		
9 Use suitable techniques to make it easier to find useful information again (eg bookmarks or favourites) and to pass it on to others (eg send web pages and web links via e-mail)		
10 Keep records of where useful information came from.		
11 Save the results of searches so useful information can be found again		

The evidence is authentic and/or the assessment has been conducted under the specified conditions or context.

UNIT DJ59 04 (106) Use IT to Exchange Information 1

Knowledge requirements	Evidence numbers	Evidence type
1 What are e-mail messages		
2 The basic options for sending and replying		
3 How to send and receive attachments		
4 How to use an address book		
5 Why some computer users may have difficulty in sending and receiving e-mails with attachments		
6 What to do about e-mails from unknown users		
7 What viruses are and the problems they cause		
8 How using anti-virus software can help to keep risks to a minimum		
9 What risks there may be in downloading documents and software		
10 The risks in sharing information such as personal details		
11 Where and when to seek advice		
12 What laws and guidelines affect the day-to-day use of IT, for example those covering Data Protection, Equal Opportunities, Disability, Health and Safety, copyright and guidelines set up by your own employer or organisation		

The evidence is authentic and/or the assessment has been conducted under the specified conditions or context.

Candidate: _____ **Date:** _____

Assessor: _____ **Date:** _____

Internal Verifier: _____ **Date:** _____
(if sampled)

UNIT DJ5D 04 (107) Word Processing Software 1

Unit Summary

Use word processing software to produce simple documents, for example, letters, envelopes, memos, faxes and agendas. This is based on the e-skills Area of Competence: Word Processing Software, Level 1 unit.

Skills

You will apply the following skills:

Presentation
Planning
Organising
Communicating
Using technology
Reading
Checking

Performance indicators

You will:

- 1 Use basic file handling techniques for the software, such as create, open, save (as) and print
- 2 Use basic techniques to combine information, such as insert, size and position
- 3 Use basic editing techniques appropriately, such as insert, delete, cut, copy, paste, drag and drop, find and replace
- 4 Format simple word processing documents using appropriate tools and techniques, for: characters (such as size, font (typeface), colour, bold, underline and italic), paragraphs (such as alignment, bullets, numbering, line spacing, borders, shading, tabs and indents), lines (such as spacing, alignment and breaks) and pages (such as size, orientation, margins, page numbers, date and time)
- 5 Create simple tables and add data to them
- 6 Enter text into existing templates, such as for letters, faxes and web pages
- 7 Use spell check, grammar check and word count to check the accuracy of simple text

UNIT DJ5D 04 (107) Word Processing Software 1

Knowledge

You will know:

- 1 Who and what the information is for, where it will be used (eg on screen or hardcopy) and when it is needed
- 2 How to produce simple word processing documents that are accurate and well laid out. Simple documents will have a structure and style that is often used. Producing them may involve using a template or working from an existing example

UNIT DJ5D 04 (107) Word Processing Software 1

Record of Evidence

Performance indicators	Evidence numbers	Evidence type
1 Use file handling techniques appropriate to the software, such as create, open, save (as) and print		
2 Use basic techniques to combine information, such as insert, size and position		
3 Use basic editing techniques appropriately, such as insert, delete, cut, copy, paste, drag and drop, find and replace		
4 Format simple word processing documents using appropriate tools and techniques for: characters (such as size, font (typeface), colour, bold, underline and italics), paragraphs (such as alignment, bullets, numbering, line spacing, borders, shading, tabs and indents), lines (such as spacing, alignment and breaks) and pages (such as size, orientation, margins, page numbers, date and time)		
5 Create simple tables and add data to them		
6 Enter text into existing templates, such as for letters, faxes and web pages		
7 Use spell check, grammar check and word count to check the accuracy of simple text		

The evidence is authentic and/or the assessment has been conducted under the specified conditions or context.

UNIT DJ5D 04 (107) Word Processing Software 1

Knowledge requirements	Evidence numbers	Evidence type
1 Who and what the information is for, where it will be used (eg on screen or hardcopy) and when it is needed		
2 How to produce simple word processing documents that are accurate and well laid out. (Simple documents will have a structure and style that is often used. Producing them may involve using a template or working from an existing example)		

The evidence is authentic and/or the assessment has been conducted under the specified conditions or context.

Candidate: _____ **Date:** _____

Assessor: _____ **Date:** _____

Internal Verifier: _____ **Date:** _____
(if sampled)

UNIT DP7V 04 (108) Make and Receive Telephone Calls

Unit Summary

Use a telephone system to make, receive and transfer internal and external calls.

Skills

You will apply the following skills:

Questioning
Listening
Communicating
Presenting yourself
Summarising
Using technology

Performance indicators

You will:

Making calls

- 1 Identify the purpose of the call
- 2 Confirm the name and number of the person to be contacted
- 3 Make contact with the person
- 4 Communicate information to achieve the purpose of the call
- 5 Project a positive image of yourself and your organisation

Receiving calls

- 6 Answer the phone according to your organisation's procedures
- 7 Project a positive image of yourself and your organisation
- 8 Identify the caller, where they are calling from and what they need
- 9 Provide accurate and up-to-date information whilst protecting confidentiality and security
- 10 Transfer calls where requested
- 11 Take and relay messages according to the caller's needs

* **Highlighted PIs indicate contingencies**

Knowledge**You will know:**

- 1 Why it is important to identify the purpose of a call before you make it
- 2 How to use telephone systems to make contact with people inside and outside your organisation
- 3 Why it is important to project a positive image of yourself and your organisation
- 4 How to follow your organisation's procedures when making and receiving calls
- 5 How to identify the caller and their needs
- 6 Why it is important to give accurate and up-to-date information to callers
- 7 Why confidentiality and security are important when dealing with callers
- 8 How to identify the appropriate person to whom you should transfer a call
- 9 The information you should give when transferring calls and taking messages

UNIT DP7V 04 (108) Make and Receive Telephone Calls

Record of Evidence

Performance indicators	Evidence numbers	Evidence type
1 Identify the purpose of the call		
2 Confirm the name and number of the person to be contacted		
3 Make contact with the person		
4 Communicate information to achieve the purpose of the call		
5 Project a positive image of yourself and your organisation		
6 Answer the phone according to your organisation's procedures		
7 Project a positive image of yourself and your organisation		
8 Identify the caller, where they are calling from and what they need		
9 Provide accurate and up-to-date information whilst protecting confidentiality and security		
10 Transfer calls where requested		
11 Take and relay messages according to the caller's needs		

* **Highlighted PIs indicate contingencies**

The evidence is authentic and/or the assessment has been conducted under the specified conditions or context.

UNIT DP7V 04 (108) Make and Receive Telephone Calls

Knowledge requirements	Evidence numbers	Evidence type
1 Why it is important to identify the purpose of a call before you make it		
2 How to use telephone systems to make contact with people inside and outside your organisation		
3 Why it is important to project a positive image of yourself and your organisation		
4 How to follow your organisation's procedures when making and receiving calls		
5 How to identify the caller and their needs		
6 Why it is important to give accurate and up-to-date information to callers		
7 Why confidentiality and security are important when dealing with callers		
8 How to identify the appropriate person to whom you should transfer a call		
9 The information you should give when transferring calls and taking messages		

The evidence is authentic and/or the assessment has been conducted under the specified conditions or context.

Candidate: _____ **Date:** _____

Assessor: _____ **Date:** _____

Internal Verifier: _____ **Date:** _____
(if sampled)

UNIT DP76 04 (109) Use Office Equipment

Unit Summary

Use a range of office equipment to carry out administrative tasks.

You will apply the following skills:

Organising
Communicating
Using technology

Performance indicators

You will:

- 1 Confirm the equipment and resources you need for the task
- 2 Follow the manufacturer's operating instructions
- 3 Waste as few resources as possible
- 4 Keep the equipment clean and hygienic
- 5 Report problems with equipment and resources
- 6 Make sure the final work product meets the required standard
- 7 Produce work product within agreed timescales
- 8 Make sure the equipment, resources and work area are ready for the next user

* **Highlighted PIs indicate contingencies**

UNIT DP76 04 (109) Use Office Equipment

Knowledge

You will know:

- 1 The different types of office equipment and what they can be used for
- 2 Why it is important to follow manufacturers' instructions when operating equipment
- 3 How to keep waste to a minimum
- 4 How to keep equipment clean and hygienic
- 5 The person you should report problems to
- 6 Why it is important to meet work standards and deadlines
- 7 Why it is important to leave the equipment, resources and work area ready for the next user

UNIT DP76 04 (109) Use Office Equipment

Record of Evidence

Performance indicators	Evidence numbers	Evidence type
1 Confirm the equipment and resources you need for the task		
2 Follow the manufacturer's operating instructions		
3 Waste as few resources as possible		
4 Keep the equipment clean and hygienic		
5 Report problems with equipment and resources		
6 Make sure the final work product meets the required standard		
7 Produce work product within agreed timescales		
8 Make sure the equipment, resources and work area are ready for the next user		

* **Highlighted PIs indicate contingencies**

The evidence is authentic and/or the assessment has been conducted under the specified conditions or context.

UNIT DP76 04 (109) Use Office Equipment

Knowledge requirements	Evidence numbers	Evidence type
1 The different types of office equipment and what they can be used for		
2 Why it is important to follow manufacturers' instructions when operating equipment		
3 How to keep waste to a minimum		
4 How to keep equipment clean and hygienic		
5 The person you should report problems to		
6 Why it is important to meet work standards and deadlines		
7 Why it is important to leave the equipment, resources and work area ready for the next user		

The evidence is authentic and/or the assessment has been conducted under the specified conditions or context.

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____
(if sampled)

Date: _____

UNIT DD56 04 (110) **Ensure Your Own Actions Reduce Risks to Health and Safety**

Unit Summary

Identify and deal with hazards and risks to health and safety.

You will apply the following skills:

Reading
Analysing
Decision-making
Communicating
Working safely
Personal presentation

Performance indicators

You will:

Identifying hazards and evaluating risks

- 1 Correctly name and locate the persons responsible for health and safety in your workplace
- 2 Identify which workplace policies are relevant to your working practices
- 3 Identify those working practices in any part of your job role which could harm yourself or other persons
- 4 Identify those aspects of the workplace which could harm yourself or others
- 5 Evaluate which of the potentially harmful aspects of the workplace are those with the highest risk to you or to others
- 6 Report those hazards with a high risk to the persons responsible for health and safety in the workplace
- 7 Deal with those hazards with low risks following workplace policies and legal requirements

Reducing risks to health and safety

- 8 Carry out your working practices in accordance with legal requirements
- 9 Follow the most recent workplace policies for your job role
- 10 Put right those health and safety risks that you are able to within the scope of your job responsibilities
- 11 Pass on any suggestions for reducing risks to health and safety within your job role to the responsible persons
- 12 Make sure your personal conduct in the workplace does not endanger the health and safety of yourself or others
- 13 Follow the workplace policies and suppliers' or manufacturers' instructions for the safe use of equipment, materials and products
- 14 Report any differences between workplace policies and suppliers' or manufacturers' instructions as appropriate
- 15 Make sure your personal presentation at work ensures the health and safety of yourself and others; meets any legal duties and is in accordance with workplace policies

* **Highlighted PIs indicate contingencies**

Knowledge**You will know:**

- 1 Your legal duties for health and safety in the workplace as required by the Health and Safety at Work Act 1974
- 2 Your duties for health and safety as defined by specific legislation covering your job role
- 3 What hazards may exist in your workplace
- 4 The particular health and safety risks which may be present in your own job role and the precautions you must take
- 5 The importance of remaining alert to the presence of hazards in the whole workplace
- 6 The importance of dealing with or promptly reporting risks
- 7 The requirements and guidance on the precautions
- 8 Agreed workplace policies relating to controlling risks to health and safety
- 9 Your responsibility for health and safety in your job description
- 10 The responsible persons to whom to report health and safety matters
- 11 The specific workplace policies covering your job role
- 12 Suppliers' and manufacturers' instructions for the safe use of equipment, materials and products
- 13 The safe working practices for your own job role
- 14 The importance of personal presentation in maintaining health and safety in the workplace
- 15 The importance of personal conduct in maintaining the health and safety of yourself and others
- 16 Your scope and responsibility for putting right risks
- 17 Workplace procedures for handling risks which you are unable to deal with

UNIT DD56 04 (110) Ensure Your Own Actions Reduce Risks to Health and Safety

Record of Evidence

Performance indicators	Evidence numbers	Evidence type
1 Correctly name and locate the persons responsible for health and safety in your workplace		
2 Identify which workplace policies are relevant to your working practices		
3 Identify those working practices in any part of your job role which could harm yourself or other persons		
4 Identify those aspects of the workplace which could harm yourself or others		
5 Evaluate which of the potentially harmful aspects of the workplace are those with the highest risk to you or to others		
6 Report those hazards with a high risk to the persons responsible for health and safety in the workplace		
7 Deal with those hazards with low risks following workplace policies and legal requirements		
8 Carry out your working practices in accordance with legal requirements		
9 Follow the most recent workplace policies for your job role		
10 Put right those health and safety risks that you are able to within the scope of your job responsibilities		
11 Pass on any suggestions for reducing risks to health and safety within your job role to the responsible persons		
12 Make sure your personal conduct in the workplace does not endanger the health and safety of yourself or others		
13 Follow the workplace policies and suppliers' or manufacturers' instructions for the safe use of equipment, materials and products		
14 Report any differences between workplace policies and suppliers' or manufacturers' instructions as appropriate		
15 Make sure your personal presentation at work ensures the health and safety of yourself and others; meets any legal duties and is in accordance with workplace policies		

* **Highlighted PIs indicate contingencies**

The evidence is authentic and/or the assessment has been conducted under the specified conditions or context.

UNIT DD56 04 (110) Ensure Your Own Actions Reduce Risks to Health and Safety

Knowledge requirements	Evidence numbers	Evidence type
1 Your legal duties for health and safety in the workplace as required by the Health and Safety at Work Act 1974		
2 Your duties for health and safety as defined by specific legislation covering your job role		
3 What hazards may exist in your workplace		
4 The particular health and safety risks which may be present in your own job role and the precautions you must take		
5 The importance of remaining alert to the presence of hazards in the whole workplace		
6 The importance of dealing with or promptly reporting risks		
7 The requirements and guidance on the precautions		
8 Agreed workplace policies relating to controlling risks to health and safety		
9 Your responsibility for health and safety in your job description		
10 The responsible persons to whom to report health and safety matters		
11 The specific workplace policies covering your job role		
12 Suppliers' and manufacturers' instructions for the safe use of equipment, materials and products		
13 The safe working practices for your own job role		
14 The importance of personal presentation in maintaining health and safety in the workplace		
15 The importance of personal conduct in maintaining the health and safety of yourself and others		
16 Your scope and responsibility for putting right risks		
17 Workplace procedures for handling risks which you are unable to deal with		

The evidence is authentic and/or the assessment has been conducted under the specified conditions or context.

Candidate: _____ **Date:** _____

Assessor: _____ **Date:** _____

Internal Verifier: _____ **Date:** _____
(if sampled)