



# **Candidate Guidance and Portfolio for the SVQ Business and Administration SCQF level 5**

**Award code: GT9J 22**

**Candidate name:**

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## **Note**

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

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# Section 1 — General information about SVQs

## Introducing SVQs

The qualification you are undertaking is a Scottish Vocational Qualification (SVQ).

SVQs are work-based qualifications which assess the skills and knowledge people have and need to perform their job role effectively. The qualifications are designed using National Occupational Standards.

For each industry sector there is a Sector Skills Council or Body (SSC / SSB) which is made up of representatives from the industry or profession and it is the SSC / B's responsibility to develop the National Occupational Standards.

These standards define what employees, or potential employees, must be able to do, how well and in what circumstances to show they are competent in their work.

The Standards Skills Body for Business and Administration is: The Council for Administration.

Access to SVQs is open to all and you can be assessed either against a particular Unit(s) or against the full SVQ. There are no entry requirements, no prescribed method of delivery, and no time constraints for completion or age limits.

SVQs are available at five levels of achievement which reflect the various technical and supervisory skills, knowledge, and experience which employees should have as they progress in their industry.

## Who offers SVQs?

An organisation which offers SVQs is called a centre. This may be a school, college, university, employer, training provider or a combination of these. The centre has responsibility for the quality of the qualification and is required to work within an awarding body's policies and guidelines.

The Scottish Qualifications Authority (SQA) is your awarding body for this SVQ. This means that we are an organisation approved by government to design qualifications and awards. An awarding body endorses candidates' certificates so that an employer can be sure the qualification has gone through a rigorous and effective assessment process. SQA provides qualifications throughout the world and was formed by the merger of the Scottish Examination Board (SEB) and the Scottish Vocational Education Council (SCOTVEC).

## What is the structure of an SVQ?

All SVQs have a common structure and consist of standards which can be broken down into various parts:

<b>Units and elements</b>	<b>Units</b> define the broad functions carried out in your particular job and are made up of a number of <b>elements</b> . Each <b>element</b> describes a specific work activity which you have to perform and may relate to skills or to the demonstration of Knowledge and Understanding.
<b>Performance criteria</b>	The level and quality of how you should carry out these activities is determined by a number of statements called <b>performance criteria</b> . <b>Performance criteria</b> are used to judge your competence.
<b>Range / Scope statements</b>	A <b>range statement</b> tells you in what circumstances you must be able to prove your competence and allows you to demonstrate that you can carry out tasks in different circumstances. Items included in the range statements must not be treated as optional. <b>Range Statements</b> are also called <b>scope</b> in some National Occupational Standards.
<b>Evidence requirements</b>	The <b>evidence requirements</b> specify the amount and type of evidence which you will need to provide to your assessor to show that you have met the standards specified in the performance criteria and in all the circumstances defined in the range statements.
<b>Knowledge and understanding</b>	The section on <b>knowledge and understanding</b> states what you must know and understand and how this knowledge applies to your job.

If you are not yet clear about how we define standards — just remember that the standards have been developed by experts within your industry or profession and that all candidates aiming for this particular SVQ are being assessed against the same standards.

You will find an example of an SVQ Element overleaf.

## An example of an SVQ element

**UNIT: (1) Working safely in an engineering environment**

This is the **UNIT** title — it describes a role and task.

**Element 1 Comply with statutory regulations and organisational requirements**

This is the **ELEMENT** title. It describes part of the main role and task.

### Performance criteria

You must ensure that you

**PERFORMANCE CRITERIA** set out the standard of performance you need to demonstrate consistently to claim competence in a particular **element**.

- 1 Describe your duties and obligations (as an individual) under the Health and Safety at Work Act 1974.
- 2 Comply with Statutory Regulations at all times.
- 3 Comply with organisational safety policies and procedures at all times.

### Range

This means you need to cover:

- 1 Relevant sections of the Health and Safety at Work Act 1974 (eg with regard to your duties to work in a safe manner, not to interfere with remove or misuse equipment provided for the safety of yourself and others, not to endanger others by your acts or omissions).

The **RANGE** defines the various circumstances in which you must be able to prove you are competent.

You must cover all of the items in the **range** Statement.

### Evidence requirements

The things you must prove that you can do:

You need to demonstrate that you understand your duties and obligations under both statutory regulations and organisational requirements and you can do this by:

- 1 Giving an adequate explanation of the duties and responsibilities of every individual as described in the Health and Safety at Work Act 1974.
- 2 Ensuring that whilst carrying out your work and / or visiting other areas of the working environment you are aware of the specific safety requirements and regulations governing your activities.

### Knowledge and understanding

You must prove that you know and understand:

- 1 The roles and responsibilities of yourself and others under the Health and Safety at Work Act 1974.
- 2 The general regulations that apply to you being at work.
- 3 The specific regulations which govern your work activities.

The **KNOWLEDGE AND UNDERSTANDING** requirements state what you must know and understand and how this knowledge applies to your job.

## How are SVQs achieved?

When you consistently meet the standards described in the elements and show that you have the required skills and knowledge across the range, you can then claim that you are *competent* in each unit. You can claim certification for single units or whole awards. Your centre will register your claim to competence through the awarding body. The awarding body you are registered with for this SVQ is the Scottish Qualifications Authority (SQA).

The process of gaining an SVQ is flexible and depends on your needs. At the beginning of the process your assessor will review your existing competence in relation to the standards and identify the most suitable SVQ. The level you start at will depend on the type and breadth of your current job role together with your past experience, skills and any relevant prior learning.

To achieve an SVQ, or a unit of an SVQ, you must:

- ◆ Demonstrate you meet the requirements of the performance criteria by collecting appropriate evidence as specified by the evidence requirements. This evidence is assessed against the national standards by a qualified assessor, who will be allocated to you by your centre. This will usually be someone who knows you, such as a manager or supervisor.

Evidence may come from:

- ◆ the **accreditation of prior learning** — where evidence relates to past experience or achievements.
- ◆ **current practice** — where evidence is generated from a current job role.
- ◆ a **programme of development** — where evidence comes from assessment opportunities built into a learning / training programme whether at or away from the workplace.
- ◆ a combination of these.



## How are SVQs assessed?

Assessment is based on what you can do and involves you, your assessor, an internal verifier and an external verifier — see 'Who does what in SVQs' on the following page.

You will be asked to prove you are competent by providing evidence which shows:

- ◆ you can perform all the specified tasks consistently to the required standard (**performance criteria**).
- ◆ you understand why you are doing things (**knowledge and understanding**).
- ◆ you can apply the required skills in different ways (**range**).

Assessment is flexible and you can be certificated for each unit you successfully achieve, even if you do not complete the full SVQ. There is no set period of time in which you need to complete a unit. However, you and your assessor should still set target dates for completing each unit; otherwise your qualification could go on forever. Be realistic though, as there are many factors such as your previous experience, demands within your workplace and an availability of resources which will affect how quickly you are able to achieve the qualification.

## Who does what in SVQs?

A number of individuals and organisations have parts to play in SVQ assessment. Their roles have been designed to guarantee fair, accurate and consistent assessment.

	<b>Who are they?</b>	<b>What is their role?</b>
<b>Candidates</b>	The person who wants to achieve the SVQ — in this case, you.	Need to show they can perform to National Occupational Standards in order to be awarded an SVQ or unit(s).
<b>Assessors*</b>	An experienced person in the same area of work as the candidate, eg supervisor.	Judge the evidence of a candidate's performance, knowledge and understanding against the National Occupational Standards.  Decide whether the candidate has demonstrated competence. Provide guidance and support to the candidate. Assist with planning assessments, giving feedback and recording candidate progress.
<b>Internal verifiers</b>	Individuals appointed by an approved centre to ensure the quality of assessment within the centre.	Advise assessors and maintain the quality of assessment in a centre.  Systematically sample assessments to confirm the quality and consistency of assessment decisions.
<b>Approved centres</b>	Organisations approved by awarding bodies to co-ordinate assessment arrangements for SVQs.	Manage assessment on a day-to-day basis.  Must have effective assessment practices and internal verification procedures.  Must meet criteria laid down by awarding bodies and be able to provide sufficiently competent assessors and internal verifiers.

	Who are they?	What is their role?
<b>External verifiers*</b>	Individuals appointed by the awarding body to ensure that standards are being applied uniformly and consistently across all centres offering the SVQ.	<p>Check the quality and consistency of assessments, both within and between centres, by systematic sampling.</p> <p>Make regular visits to centres to ensure they still meet the criteria to deliver SVQs.</p>

\* Assessors and internal and external verifiers are required to have occupational expertise in the SVQs which they are assessing / verifying. They must also have, or be working towards, an appropriate qualification in assessment and verification.

## What is evidence?

To claim competence for an SVQ unit you need to gather evidence which shows you have met the standards. It is important that your evidence is easily understood so that it can be checked against the standards, by your assessor, your centre and the awarding body.

Evidence can take many forms including:

- ◆ direct observation of your performance by your assessor.
- ◆ products of your work.
- ◆ authenticated statement — witness testimony.
- ◆ personal statement.
- ◆ outcomes from questioning.
- ◆ outcomes from simulation.
- ◆ case studies.
- ◆ assignments or projects.
- ◆ Accreditation of Prior Learning (APL) — evidence from the past.

It is important that your evidence is:

- ◆ **valid** — it relates to the SVQ standard you are trying to prove.
- ◆ **authentic** — the evidence, or an identified part of it (eg a report) was produced by *you*.
- ◆ **consistent** — achieved on more than one occasion.
- ◆ **current** — usually not more than two years old.
- ◆ **sufficient** — covers all the performance and knowledge requirements laid down in the standards.

Your evidence may be collected through a range of sources, such as employment, voluntary work, training programmes and interests / activities which you perform outside your work. It can also be produced in various formats, eg your own reports; testimonies from colleagues, supervisors or members of the public; projects; models; audio tapes, photographs; videos.

When you first begin your SVQ, you and your assessor should identify all the units and elements where you can use **integration of assessment**. Further details about integration of assessment can be found on page 10.

### **Demonstrating knowledge, understanding and skills**

In order to meet the standards, you may also be required to prove knowledge and understanding. Each unit contains a list summarising the knowledge, understanding and skills a candidate must possess. Evidence of how these have been achieved and applied could be included in the performance evidence as one or all of the following:

- ◆ descriptions of why a particular approach was used.
- ◆ personal reports about the learning process.
- ◆ reflective reports which include how a theory or principle was applied.
- ◆ assessment interviews.
- ◆ assessment tests.
- ◆ responses to questioning.

These should be included in your portfolio.

### **How will my assessor check I have the knowledge and understanding listed in the standards?**

For some units, it will be clear to your assessor that you have the required knowledge and understanding from how you carry out your work. This is often referred to as *knowledge and understanding apparent from performance*. There will be other occasions though, when your assessor will be unsure if you know why, for example, it is important to give information to clients in certain situations. This could be because your assessor has not had the opportunity to observe all the performance criteria and range during assessment. In these situations, your assessor may wish to assess your knowledge and understanding by asking you some questions. These questions can be given orally or in writing, but will be recorded in your portfolio as evidence.

Your assessor could also check you have the required level of knowledge and understanding by asking you to produce personal statements or to complete a project or assignment.

## What if I have previous experience and knowledge and understanding from work and other qualifications?

If you have previous work experience, skills, and knowledge and understanding which you feel is relevant to your SVQ, you should tell your assessor about it. Your assessor may ask you for more proof in the form of letters from previous employers / training providers or details about any courses you have completed.

For example, you may have achieved an HNC in a relevant subject in which case your assessor may feel that you already have some of the knowledge and understanding required for the SVQ.

The process of matching your previous experience and learning is often referred to as the Accreditation of Prior Learning (APL). The purpose of this process is to try and give you some credit towards your SVQ for things you can already do to the national standard. Your assessor judges the evidence available and matches it against the requirements of the SVQ. This means that your assessor should not have to assess you for these things all over again.

However, the success of this process depends on **you** telling **your assessor** what previous work experience or knowledge and understanding you have and how you think it is relevant to your SVQ. The more information you can supply to support your claims, the easier it should be to convince your assessor that you are competent.

## When can simulation be used?

Throughout your SVQ, the emphasis is on you being able to carry out real work activities so assessment will normally be carried out in the workplace itself. There may be times, however, when it might not be appropriate for you to be assessed while you are working. For example your SVQ might require you to carry out emergency or contingency procedures (for safety or confidentiality reasons) or your job role may not cover all aspects of the qualification. In such instances, when you have no other means of generating evidence, **simulation** might be appropriate.

Simulation is any structured exercise involving a specific task which reproduces real-life situations. Care must be taken though to ensure that the conditions in which you are assessed *exactly* mirror the work environment ie it is a **realistic working environment**.

You and your assessor should check the assessment strategy for your SVQ carefully to find out the Standards Skills Council's (SSC's) view of what constitutes a realistic working environment. Some SSC's stipulate the specific performance indicators which are suitable for this approach.

## Integration of assessment

It is not necessary for you to have each Element assessed separately — doing so could result in assessment which takes too long and places too great a burden on you and your assessor.

There will be instances when you will be able to use one piece of evidence to prove your competence across different elements or performance criteria. You may even find that evidence is relevant for different Units — this is called **integration of assessment**.

When you first begin your SVQ, you and your assessor will spend time looking at the standards, planning how much time you are both able to devote to the qualification and drawing up an action plan.

At this stage, you should identify any activities which relate to more than one Unit or Outcome and arrange for the best way to collect a single piece of evidence which satisfactorily covers all the performance criteria.

If you are going to integrate assessments, make sure that the evidence is cross-referenced to the relevant units. Details of how to cross reference your evidence can be found in Section 2 'How to compile your portfolio'.

## Section 2 — How to compile your portfolio (with worked examples)

### General information

A portfolio, like a log book, is a way of recording evidence of your achievements. It is a collection of different items of evidence which indicates that you have the required skills, knowledge and understanding to support your claim to a qualification.

The production of a well organised, clearly labelled portfolio which relates each piece of evidence to the relevant outcomes and performance criteria requires a careful methodical approach. When your assessor looks through your portfolio, they will find the task of making judgements about your competence much easier if the information in it is presented in a logical sequence.

You will need to present your evidence in a format that is easy to read and in which materials can be added or taken away. This section gives suggestions on how to lay out and present your evidence and includes worked examples. There are also forms and matrices which will assist you to chart your progress through the award.

You do not have to lay out your evidence in the way suggested but you may find it helpful to do so. Each portfolio will be different in content but all should include information about you (the candidate), the organisation where you are undertaking your qualification, the assessor and so on.

### Evidence collection process

<b>Assessment plan</b>	<b>You and your assessor</b>
<b>Collect evidence</b>	<b>You and your assessor if observation / questioning is required</b>
<b>Present evidence</b>	<b>You and your assessor</b>
<b>Reference acceptable evidence</b>	<b>Assessor will judge evidence and give you feedback on which evidence meets the standards</b>
<b>Record evidence in Element achievement record</b>	<b>You</b>
<b>Store evidence in portfolio</b>	<b>You</b>

## Planning your portfolio

Start by carefully reading through the standards and, together with your assessor, decide which units you might like to work on first. You do not have to do the units in order. There may be some units that relate to tasks which you carry out on a regular basis, therefore making it easier to collect evidence right away. Alternatively, there may be activities in other units which you only undertake now and again, these can be left until the opportunity arises for you to collect evidence.

Before you start looking for different kinds of evidence and deciding if they should be included in your portfolio, you will find it helpful to plan how you will carry out the tasks and how long they are going to take.

The plan is usually referred to as an '**assessment plan**'. It should be produced in discussion with your assessor and will set out the different stages in developing your portfolio. You will probably want to produce a plan for each unit.

It is unlikely that you will be able to complete all of the units straightaway and you should therefore think about starting with those units where you have a lot of experience and in which you work well. You should also remember to identify any opportunities for **integration of assessment**.

We have provided you with a '**Unit progress record**' — see Example 2. Each time you complete a unit; your assessor should sign and date the relevant section on the form. At this stage, it might be a good idea to check that all your evidence and recording documents have been completed correctly and can easily be located. You can then circle the reference number of that unit in the checkboxes at the top of the form so that you can see at a glance what stage you are at in your SVQ.



## Starting your portfolio

Make sure that you clearly label your portfolio (or disk if you are recording your evidence electronically) with your name together with the title and level of the award.

Your portfolio will need a *title page* and a *contents page*. You should also complete a *Personal Profile* which records details about yourself and your job as well as providing information about your employer, training provider or college. Blank samples of these forms are provided in Section 4.

We recommend that you compile your portfolio in the following order:

<b>Title page</b>
<b>Contents checklist</b>
<b>Personal profile</b>
<b>Unit progress record</b>
<b>Completed Element achievement records</b>
<b>Index of evidence</b>
<b>Pieces of evidence</b>
<b>Glossary of terms</b>
<b>Standards</b>

## Contents checklist

You might also find it useful to complete the following checklist as you work your way through your portfolio. This will help you to see if you have included all the relevant items. Once you have completed your portfolio, you will be able to use this checklist again as a contents page, by inserting the relevant page or section numbers in the right hand column.

<b>Section</b>	<b>Completed</b>	<b>Page / Section number</b>
<b>Title page for the portfolio</b>		
<b>Personal profile</b>		
Your own personal details		
A brief CV or career profile		
A description of your job		
Information about your employer / training provider / college		
<b>Unit assessment plans</b>		
<b>Unit progress record</b>		
<b>Completed element achievement records for each unit</b>		
Signed by yourself, your assessor and the internal verifier (where relevant)		
Evidence reference numbers included		
<b>Index of evidence (with cross-referencing information completed)</b>		
Evidence (with reference numbers)		
Observation records		
Details of witnesses (witness testimony sheets)		
Personal statements		
Products of performance		

## Collecting your evidence

All of the evidence which you collect and present for assessment must be relevant to your SVQ. Your assessor will help you choose which pieces of evidence you should include.

We have provided blank forms in Section 4 of this document, which you can photocopy to help you record and present your evidence. Although we have provided you with sample forms, your centre may have their own recording documents which they would prefer you to use.

Some of these forms, eg **observation records** and the **record of questions and answers** will be completed by your assessor. Other forms (**witness testimonies**) will be used by people other than your assessor to testify that they have observed you doing your job, and there is one for you to complete called a **personal statement**.

These forms are an excellent support for center / candidates using paper portfolios.

If you are using an E Portfolio platform (Learning Assistant, Proof Positive, OneFile) equivalent forms will probably have been provided on your E Portfolio platform.

One of the most important forms shown here is the evidence gathering form.

Some E Portfolio providers have included a similar one in their presentation of evidence — as they see the value of this form.

If the E Portfolio provider has not included an equivalent form — some Centres have uploaded their own and use it to record reflective accounts / storyboards, observations and professional discussions.

Remember two of the main values of an evidence gathering form are the two blank columns on the right where you would record the performance indicators and the knowledge and understanding covered by the evidence.

Explanations are given below about how and when these forms should be used.

### **Observation record — Example 5**

The observation record is used by your assessor to record what tasks you have performed and to what standard. There is also a section for your assessor to note which other units or outcomes are covered by this evidence ('integration of assessment').

The assessor will discuss with you which performance criteria and range you have successfully achieved and give you feedback. This form should then be given a reference number and included in your portfolio as part of your evidence.

## **Witness testimony — Example 6**

There may be occasions when your assessor is not available to observe you carrying out certain aspects of your job. In such instances, it may be appropriate for another person to comment about your performance by completing a statement called a 'witness testimony'.

Witness testimony should only be used as supporting evidence and should:

- ◆ be provided by a person, not related to you, who is in a position to make a valid comment about your performance, eg supervisor, line manager or possibly a client / customer.
- ◆ contain comments which specifically relate your performance to the standards.
- ◆ be authenticated by the inclusion of the witness's signature, role, address, telephone number and the date.

It is unlikely that your assessor would make an assessment decision based on witness testimony alone. They would normally supplement this type of evidence with questioning.

## **Record of questions and candidate's answers — Example 7**

This form is used to record any questions which your assessor may ask, to establish whether you have the required level of Knowledge and Understanding associated with each unit. There is also space on the form for your answers to be noted.

## **Personal statement — Example 4**

There will be times when you need to put a piece of your evidence in context for your assessor so that they can decide if it is relevant to your SVQ. You can complete personal statements to help you do this — these can relate either to the pieces of evidence or to each outcome or unit.

For example, you may refer to paperwork which is often used in your organisation to help you pass on information to a colleague. It may not be clear to an assessor why you are communicating to your colleague in this way and a brief explanation of the paperwork and why it is relevant to a particular part of your SVQ may be required.

A personal statement might also be used to record your experience of something, such as, how you handled a specific situation. This can be documented in your personal statement and should be a description of what you did, how you did it and why you did it. It will also allow you to include the people who were present and either assisted you or witnessed your actions. This, in turn, might identify who you should approach for 'witness testimony'. In your personal statement you could also refer to product evidence that you have produced (eg reports, notes, completed forms), these can also be included as evidence in your portfolio.

The personal statement can be a piece of evidence in itself and should therefore be included in your portfolio.

## **Presenting your evidence**

It is important to present all of your evidence in a clear, consistent and legible manner. Your assessor will then find it much easier to make appropriate judgements about the quality, sufficiency and currency of the materials you are putting forward for consideration.

It is not necessary to produce all of your evidence in typewritten format — some hand-written pieces of evidence, such as notes, will be perfectly acceptable.

There may also be items of evidence which you cannot physically include in your portfolio. This might be for confidentiality reasons or it could be that something which you have produced as part of your day-to-day work is normally kept in a filing cabinet or stored electronically in a PC.

In compiling your portfolio, we suggest that anything you produce as part of your day-to-day work is kept in its normal location, but those pieces of evidence which have been produced specifically for your SVQ, eg witness testimony statements or personal statements, are filed in your portfolio.

However, assessors and verifiers should be able to locate and access your evidence at all times. It is, therefore, very important that you clearly reference every item of evidence.

## Referencing your evidence

Your assessor, as well as the internal and external verifiers, will need to find their way around your portfolio, so you should give each piece of evidence a number.

Remember, that where you have used 'integration of assessment', you need to give details of all the units and elements which are linked to a specific piece of evidence. The links should be noted on the pieces of evidence themselves as well as on the index of evidence (cross-referencing).

### How to complete the Index of evidence — Example 1

You should complete an index of evidence sheet and file it immediately before the actual pieces of evidence in your portfolio.

The index of evidence should be completed by:

- ◆ entering the evidence number in the first column.
- ◆ giving a brief description of each piece of evidence in the second column.
- ◆ explaining where the evidence can be found in the third column.

You must make sure that the information contained in the evidence index is accurate when you give your portfolio to your assessor, particularly in relation to where the evidence can be located.

### Completing the Element achievement records — Example 3

There is an element achievement record for every element within this portfolio. These records have been designed to allow you to record the evidence you have gathered for each element. Each record has boxes across it which represents the performance criteria, range statement, evidence requirements and knowledge and understanding statement, these will differ from element to element so it is important to make sure you are using the right one. Whilst collecting your evidence you should use these grids to display the performance criteria, range, knowledge and understanding and evidence requirement that piece of evidence relates to. In the first box write the evidence index number you have given to that piece of evidence. In the second box give a brief description of the evidence, then tick against the relevant performance criteria, range, evidence requirements and knowledge and understanding.

## **Worked examples**

To give you a clearer picture of how to compile your portfolio, you will find worked examples of the various forms over the next few pages. You should ask your assessor for further advice and support if you are still unsure about how to use the forms and who should complete them.

## Index of evidence — Example 1

SVQ title and level		Using IT at level 3	
Evidence number	Description of evidence	Included in portfolio (Yes / No) If no, state location	Sampled by the IV (initials and date)
1	Action plan identifying customer requirements	Yes	
2	Personal statement	Yes	
3	Witness testimony	Yes	
4	Record of questions and answers	Yes	
5	Log of configuration details and errors	Yes	
6	Observation checklist	Yes	
7	Procedure for shutting down system	Yes	
8	Company media storage policy	No. Can be found with General Manager.	



## Unit progress record — Example 2

Qualification and level	Using IT at level 3
Candidate's name	Anne Thomas

To achieve the whole qualification, you must complete all mandatory and optional Units.

Circle the reference numbers as you complete each unit. You can then easily see what stage you have reached in your SVQ.

Mandatory Units

Unit checklist — circle the reference numbers as you complete them.

Mandatory	208	301	302	303	308				
Optional	305	306	311	312					

### Mandatory Units

SQA Unit number	SSC/SSB Unit number	Title	Assessor	Internal Verifier	Date
	208	Ensure your own actions reduce risks to H&S			
	301	Select and enable IT for use	<i>P. Jones</i>		28/4/2014
	302	Maintain the Software Environment	<i>P. Jones</i>		28/4/2014
	303	Develop and maintain the effectiveness of the IT working environment	<i>P. Jones</i>		8/4/2014
	308	Develop your own effectiveness and productivity			

This section of the form is for your assessor to sign each time you successfully achieve a unit.

### Optional Units

	305	Design and produce documents using WP software			
	306	Design and produce spreadsheets			
	311	Design and use databases			
	312	Design and produce documents using graphics			

## Element achievement record — Example 3

Unit title: Select & enable IT for use

Element: 301.1 Select and configure equipment for use

Evidence index no	Description of evidence	Performance criteria								Range			Knowledge and understanding					
		a	b	c	d	e	f	g	h	1	2	3	K1	K2	K3	K4	K5	
1	Action Plan	✓	✓			✓				✓								
2	Personal Statement	✓	✓			✓				✓								
3	Copy of Legislation			✓	✓							✓						
4	Record of Questions & Answers	✓	✓	✓		✓				✓	✓	✓						
5	Log of Configuration Details							✓	✓	✓		✓						

These numbers relate to your evidence index and will allow your assessor to find your evidence easily.

Give a brief description of the evidence you are offering for assessment against each performance criterion, range and piece of knowledge and understanding.

As you collect your evidence for assessment you should tick the relevant boxes. There is a box which represents each performance criterion and range in the element.

Candidates should enter which areas of knowledge and understanding that piece of evidence covers.

<b>Candidate's signature</b>		<b>Date</b>	
<b>Assessor's signature</b>		<b>Date</b>	
<b>Internal verifier's signature</b>		<b>Date</b>	

## Personal statement — Example 4

Date	Evidence index number	Details of statement	Links to other evidence (enter numbers)	Units, elements, performance criteria, and range covered
4 / 4 / 14	1	<p>Statement that I know and understand customer requirements. Names of customer and software and hardware requirements in portfolio.</p> <p>Statements that I understand how to set up, equipment, configure software that met customer requirements. Details of equipment and software with dates are listed in portfolio.</p>	1	301.1.a,b,e Range 1

Candidate's signature *Anne Thomas* Date 4 / 4 / 2014

## Observation record — Example 5

Unit / element(s) (301) Select and Enable IT for Use

Candidate Anne Thomas

Evidence index number \_\_\_\_\_

Date of observation 28 / 4 / 2014

Skills / activities observed	Performance criteria covered
Saving and storing files	Element 301.3 PC: a-f Range: <b>materials</b> (consumables, removable storage media), <b>regulations</b> (current legislation, manufacturer's instructions, organisational procedures), <b>system</b> (application software, hardware, system software).

### Knowledge and understanding apparent from this observation

*Candidate can save and organise files. She can delete unwanted files and can shut down system according to organisation's procedures and manufacturer's instructions.*

### Other units / elements to which this evidence may contribute

302.1.b,c Range 1,3

### Assessor comments and feedback to candidate

I can confirm the candidate's performance was satisfactory.

Assessor's signature Peter Jones Date 28 / 4 / 2014

Candidate's signature Anne Thomas Date 28 / 4 / 2014

## Witness testimony — Example 6

<b>SVQ title and level</b>	Using IT level 3
<b>Candidate's name</b>	Anne Thomas
<b>Evidence index no</b>	4
<b>Where applicable, evidence number to which this testimony relates</b>	
<b>Element(s)</b>	301.2
<b>Range</b>	1
<b>Date of evidence</b>	8 / 4 / 2000
<b>Witness name</b>	Ian Cummings
<b>Designation / relationship to candidate</b>	Line manager

### Details of testimony

*I can attest that I observed Anne Thomas following company and national regulations in the use of software. She understands and has knowledge of these regulations and I observed her following them when selecting and configuring software.*

I can confirm the candidate's performance was satisfactory.

**Witness signature** Ian Cummings **Date** 8 / 4 / 2014

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

- Holds L and D Unit 9D / 9D1, 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

<b>Unit</b>	301 Select and enable IT for use
<b>Element(s)</b>	1
<b>Evidence index number</b>	5
<b>Circumstances of assessment</b>	
<p><i>As part of the staff induction scheme IT staff are regularly interviewed and asked about their knowledge and skills. Anne Thomas was interviewed on the 21 March 2014 and below is a summary of the interview where it relates to her knowledge of resources and problem solving.</i></p>	
<b>List of questions and candidate's responses</b>	
<b>Q</b>	If a member of staff asked you for a particular piece of equipment, what procedures would you follow?
<b>A</b>	<i>I would ensure that a hardware requisition form has been filled out with the rationale for needing such equipment, countersigned by their line and general managers. If approved, next step would be to ask the member of staff if they need specific training. Pc 301.1.a, b, e and Range 1, 2, 3.</i>
<b>Q</b>	You discover that a member of staff has installed a piece of software on their workstation PC. What do you do?
<b>A</b>	<i>If they installed it themselves then this is a serious breach of company regulations and I would inform the IT manager. I would then remove the software. Pc 301.1.c and Range 2, 3.</i>
<b>Q</b>	
<b>A</b>	

**Assessor's signature** *Davinder Singh* **Date** *21 / 3 / 2014*

**Candidate's signature** *Anne Thomas* **Date** *21 / 3 / 2014*

## Section 3 — The units and recording documents for your SVQ

### Unit progress record

Qualification and level	
Candidate's name	

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.

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.

<b>Mandatory</b>								
<b>Optional</b>								

### 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 <sup>a</sup>
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
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 Environment <sup>a</sup>
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



SQA ref	SCQF level	SCQF credit points	SSC ref	Title
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
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 0–1 unit 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.

## Glossary of terms

<b>Advisor</b>	A person who carries out, either singly or in combination, the functions of advising a candidate, collecting evidence of his or her competence on behalf of the assessor and authenticating the work candidates have undertaken. A mentor might also provide witness testimony.
<b>Assessment</b>	The process of generating and collecting evidence of a candidate's performance and judging that evidence against defined criteria.
<b>Authentication</b>	The process by which an advisor or assessor confirms that an assessment has been undertaken by a candidate and that all regulations governing the assessment have been observed.
<b>Candidate</b>	The person enrolling for an SQA qualification.
<b>Centre</b>	The college, training organisation or workplace where SQA qualifications are delivered and assessed.
<b>Element of competence</b>	Statements which define the products of learning. The statements describe the activities that the candidate needs to perform in order to achieve the unit. They contain performance criteria and sometimes statements on range and evidence. (see outcome).
<b>Evidence</b>	Materials the candidate has to provide as proof of his or her competence against specified performance criteria.
<b>Evidence requirements</b>	Specify the evidence that must be gathered to show that the candidate has met the standards laid down in the performance criteria.
<b>External verifier</b>	The person appointed by the SQA who is responsible for the quality assurance of a centre's provision. An external verifier is often appointed on a subject area basis or for cognate groups of units.
<b>Instrument of assessment</b>	A means of generating evidence of the candidate's performance.
<b>Internal verifier</b>	The person appointed from within the centre who ensures that assessors apply the standards uniformly and consistently.
<b>Observation</b>	A means of assessment in which the candidate is observed carrying out tasks that reflect the performance criteria given in outcomes.

<b>Outcome</b>	Statement which defines the products of learning. They describe the activities the candidate has to perform to achieve the unit, and contain performance criteria and sometimes, statements on range and evidence (see elements of competence).
<b>Performance criteria</b>	Statements which describe the standard to which candidates must perform the activities which are stated in the outcome.
<b>Portfolio</b>	A compilation of evidence which can form the basis for assessment. The portfolio is commonly used in SVQ awards and in alternative routes to assessment such as APL and credit transfer.
<b>Product evaluation</b>	A means of assessment which enables the quality of a product produced by the candidate, rather than the process of producing it, to be evaluated.
<b>Range / Scope</b>	A statement in the unit which specifies the different contexts in which the activities described in the outcome have to be demonstrated. Where they appear, range / scope statements are mandatory.

**Units for the SVQ Business and Administration SCQF level 5**

## UNIT FD8W 04 (S201) Agree How to Manage and Improve Own Performance in a Business Environment

### Unit summary

Accept plans 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:

- ◆ Analysing.
- ◆ Planning.
- ◆ Communicating.
- ◆ Presenting information.
- ◆ Decision-making.
- ◆ Problem solving.
- ◆ Organising.

### Performance indicators

You will:

#### Plan and be accountable for own work

- 1 Agree realistic targets and achievable timescales for own work.
- 2 Plan how to make best use of time and the other resources needed.
- 3 Confirm working methods with work colleagues.
- 4 Follow the correct procedures to deal with problems when they arise, using the support of other people when necessary.
- 5 Keep other people informed of progress.
- 6 Meet deadlines or renegotiate timescales and plans in good time.
- 7 Take responsibility for own work and accept responsibility for any mistakes made.
- 8 Follow agreed guidelines, procedures and, where appropriate, codes of practice.
- 9 Set high standards for own work and show commitment to achieving these standards.

#### Improve own performance

- 10 Encourage and accept feedback from other people.
- 11 Use feedback to agree ways to improve own work and put improvements into practice.
- 12 Agree where further learning and development could improve own performance.
- 13 Follow through a learning plan that meets own needs.
- 14 Review own progress and update own learning plan.

#### Behave in a way that supports effective working

- 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.

## UNIT FD8W 04 (S201) Agree How to Manage and Improve Own Performance in a Business Environment

### Knowledge

#### You will know:

##### **Plan and be accountable for own work**

- 1 The purpose of planning own work and being accountable to others.
- 2 How to agree realistic targets for own work and why this is important.
- 3 How to plan own work to meet agreed deadlines.
- 4 The types of problems that may occur during work and how to seek help if needed.
- 5 The purpose of keeping other people informed about progress.
- 6 The purpose and benefits of giving other people sufficient notice if revisions to plans are needed.
- 7 The benefits of acknowledging and learning from mistakes.
- 8 Guidelines, procedures and codes of practice that are relevant to own area of work.
- 9 The benefits of setting high standards for own work and how to set these standards.

##### **Improve own performance**

- 10 How learning and development can help to improve own work, benefit the organisation and further own career.
- 11 The main career progression routes available.
- 12 Learning and development opportunities that are available.

##### **Behave in a way that supports effective working**

- 13 The purpose and benefits of being ready to take on new challenges and adapt to change.
- 14 The types of behaviour that show you are honest, respectful and considerate and the types of behaviour that show you are not.
- 15 How to help and support others and why this is important.



## UNIT FD8W 04 (S201) Agree How to Manage and Improve Own Performance in a Business Environment

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Plan and be accountable for own work</b>		
1 Agree realistic targets and achievable timescales for own work.		
2 Plan how to make best use of time and the other resources needed.		
3 Confirm working methods with work colleagues.		
4 Follow the correct procedures to deal with problems when they arise, using the support of other people when necessary.		
5 Keep other people informed of progress.		
6 Meet deadlines or renegotiate timescales and plans in good time.		
7 Take responsibility for own work and accept responsibility for any mistakes made.		
8 Follow agreed guidelines, procedures and, where appropriate, codes of practice.		
9 Set high standards for own work and show commitment to achieving these standards.		
<b>Improve own performance</b>		
10 Encourage and accept feedback from other people.		
11 Use feedback to agree ways to improve own work and put improvements into practice.		
12 Agree where further learning and development could improve own performance.		
13 Follow through a learning plan that meets own needs.		
14 Review own progress and update own learning plan.		
<b>Behave in a way that supports effective working</b>		
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.		

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

## UNIT FD8W 04 (S201) Agree How to Manage and Improve Own Performance in a Business Environment

Knowledge requirements	Evidence numbers	Evidence type
<b>Plan and be accountable for own work</b>		
1 The purpose of planning own work and being accountable to others.		
2 How to agree realistic targets for own work and why this is important.		
3 How to plan own work to meet agreed deadlines.		
4 The types of problems that may occur during work and how to seek help if needed.		
5 The purpose of keeping other people informed about progress.		
6 The purpose and benefits of giving other people sufficient notice if revisions to plans are needed.		
7 The benefits of acknowledging and learning from mistakes.		
8 Guidelines, procedures and codes of practice that are relevant to own area of work.		
9 The benefits of setting high standards for own work and how to set these standards.		
<b>Improve own performance</b>		
1 How learning and development can help to improve own work, benefit the organisation and further own career.		
11 The main career progression routes available.		
12 Learning and development opportunities that are available.		
<b>Behave in a way that supports effective working</b>		
13 The purpose and benefits of being ready to take on new challenges and adapt to change.		
14 The types of behaviour that show you are honest, respectful and considerate and the types of behaviour that show you are not.		
15 How to help and support others and why this is important.		

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 FD8X 04 (S202) Undertake Work in a Business Environment

### Unit summary

Undertake the requirements for delivering sustainability; respect diversity; and, protect security and confidentiality in line with organisational requirements in a business environment.

### Skills

You will apply the following skills:

- ◆ Communicating.
- ◆ Interpersonal skills.
- ◆ Planning.
- ◆ Reading.

### Performance indicators

You will:

#### Support sustainability

- 1 Keep waste to a minimum.
- 2 Follow procedures for the recycling and disposal of waste materials.
- 3 Follow procedures for maintenance of equipment.
- 4 Make best use of available technology.

#### Support diversity

- 5 Interact with other people in a way that is sensitive to their individual needs and respects their background, abilities, values, customs and beliefs.
- 6 Learn from other people and use this to improve own way of working and interacting with others.
- 7 Follow organisational procedures and legal requirements in relation to discrimination legislation.

#### Maintain security and confidentiality

- 8 Maintain the security of property in a way that is consistent with organisational procedures and legal requirements.
- 9 Maintain the security and confidentiality of information in line with organisational procedures and legal requirements.
- 10 Report any concerns about security and confidentiality to an appropriate person.

## UNIT FD8X 04 (S202) Undertake Work in a Business Environment

### Knowledge

You will know:

#### Support sustainability

- 1 The main causes of waste in a business administration environment and how to minimise this waste.
- 2 The organisational procedures for recycling and disposal of waste materials.
- 3 How regular maintenance of equipment can help to minimise waste.
- 4 How to use technology to work more efficiently.

#### Support diversity

- 5 What is meant by diversity and why it should be valued.
- 6 How to be sensitive to people's individual needs and respect their abilities, background, values, customs and beliefs.
- 7 The ways in which it is possible to learn from others.

#### Maintain security and confidentiality

- 8 The purpose and benefits of maintaining security and confidentiality.
- 9 The legal and organisational requirements in relation to security and confidentiality.
- 10 The procedures to follow if there are any concerns about security and confidentiality.

## UNIT FD8X 04 (S202) Undertake Work in a Business Environment

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Support sustainability</b>		
1 Keep waste to a minimum.		
2 Follow procedures for the recycling and disposal of waste materials.		
3 Follow procedures for maintenance of equipment.		
4 Make best use of available technology.		
<b>Support diversity</b>		
5 Interact with other people in a way that is sensitive to their individual needs and respects their background, abilities, values, customs and beliefs.		
6 Learn from other people and use this to improve own way of working and interacting with others.		
7 Follow organisational procedures and legal requirements in relation to discrimination legislation.		
<b>Maintain security and confidentiality</b>		
8 Maintain the security of property in a way that is consistent with organisational procedures and legal requirements.		
9 Maintain the security and confidentiality of information in line with organisational procedures and legal requirements.		
10 Report any concerns about security and confidentiality to an appropriate person.		

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

## UNIT FD8X 04 (S202) Undertake Work in a Business Environment

Knowledge requirements	Evidence numbers	Evidence type
<b>Support sustainability</b>		
1 The main causes of waste in a business administration environment and how to minimise this waste.		
2 The organisational procedures for recycling and disposal of waste materials.		
3 How regular maintenance of equipment can help to minimise waste.		
4 How to use technology to work more efficiently.		
<b>Support diversity</b>		
5 What is meant by diversity and why it should be valued.		
6 How to be sensitive to people's individual needs and respect their abilities, background, values, customs and beliefs.		
7 The ways in which it is possible to learn from others.		
<b>Maintain security and confidentiality</b>		
8 The purpose and benefits of maintaining security and confidentiality.		
9 The legal and organisational requirements in relation to security and confidentiality.		
10 The procedures to follow if there are any concerns about 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 F93W 04 (S205) Prepare to Communicate in a Business Environment

### Unit summary

Prepare how to communicate in writing and verbally in a business environment.

### Skills

You will apply the following skills:

- ◆ Communicating.
- ◆ Organising.
- ◆ Planning.
- ◆ Reflecting.

### Performance indicators

You will:

#### Plan communication

- 1 Identify the purpose of the communication and the audience.
- 2 Decide which method of communication to use.

#### Communicate in writing

- 3 Find and select information that supports the purpose of the communication.
- 4 Organise, structure and present information to suit the audience's needs and what you want to say.
- 5 Confirm and read written material that contains information that is needed.
- 6 Extract the main points needed from written material.
- 7 Use accurate grammar, punctuation and spelling.
- 8 Proofread or check work and make any necessary amendments.
- 9 Produce the communication to meet deadlines recognising the difference between what is important and what is urgent.
- 10 Keep a file copy of all communication.

#### Communicate verbally

- 11 Present information and ideas clearly to others.
- 12 Make contributions to discussions that help to move the discussion forward.
- 13 Listen actively to information that other people are communicating and respond appropriately.
- 14 Ask relevant questions to clarify anything not understood.
- 15 Summarise the communication with the person/people being communicated with to make sure the meaning has been understood.

#### After communication

- 16 Seek feedback on whether the communication achieved its purpose.
- 17 Reflect on the outcomes of communication and identify ways to develop communication skills further.

## UNIT F93W 04 (S205) Prepare to Communicate in a Business Environment

### Knowledge

You will know:

#### Plan communication

- 1 The reasons for identifying the purpose of communication and the audience.
- 2 Methods of communication and situations in which to use them.

#### Communicate in writing

- 3 Relevant sources of information.
- 4 How to use language appropriate to the audience, the chosen communication method and the purpose of the communication.
- 5 How to organise, structure and present information for the audience.
- 6 How to check the accuracy of information.
- 7 How to use grammar, punctuation and spelling accurately.
- 8 The principles of plain English.
- 9 The reasons for proofreading or checking work.
- 10 How to recognise when work is urgent or important.
- 11 The organisational procedures for filing communications.

#### Communicate verbally

- 12 How to present information and ideas clearly.
- 13 Ways of contributing to discussions that will help to move them forward.
- 14 Methods of active listening.
- 15 The reasons for summarising communication.

#### After communication

- 16 How to seek feedback on whether the communication achieved its purpose.
- 17 The value of reflecting on the outcomes of communication and of identifying ways to further develop communication skills.



## UNIT F93W 04 (S205) Prepare to Communicate in a Business Environment

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Plan communication</b>		
1 Identify the purpose of the communication and the audience.		
2 Decide which method of communication to use.		
<b>Communicate in writing</b>		
3 Find and select information that supports the purpose of the communication.		
4 Organise, structure and present information to suit the audience's needs and what you want to say.		
5 Confirm and read written material that contains information that is needed.		
6 Extract the main points needed from written material.		
7 Use accurate grammar, punctuation and spelling.		
8 Proofread or check work and make any necessary amendments.		
9 Produce the communication to meet deadlines recognising the difference between what is important and what is urgent.		
10 Keep a file copy of all communication.		
<b>Communicate verbally</b>		
11 Present information and ideas clearly to others.		
12 Make contributions to discussions that help to move the discussion forward.		
13 Listen actively to information that other people are communicating and respond appropriately.		
14 Ask relevant questions to clarify anything not understood.		
15 Summarise the communication with the person/people being communicated with to make sure the meaning has been understood.		
<b>After communication</b>		
16 Seek feedback on whether the communication achieved its purpose.		
17 Reflect on the outcomes of communication and identify ways to develop communication skills further.		

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

## UNIT F93W 04 (S205) Prepare to Communicate in a Business Environment

Knowledge requirements	Evidence numbers	Evidence type
<b>Plan communication</b>		
1 The reasons for identifying the purpose of communication and the audience.		
2 Methods of communication and situations in which to use them.		
<b>Communicate in writing</b>		
3 Relevant sources of information.		
4 How to use language appropriate to the audience, the chosen communication method and the purpose of the communication.		
5 How to organise, structure and present information for the audience.		
6 How to check the accuracy of information.		
7 How to use grammar, punctuation and spelling accurately.		
8 The principles of plain English.		
9 The reasons for proofreading or checking work.		
10 How to recognise when work is urgent or important.		
11 The organisational procedures for filing communications.		
<b>Communicate verbally</b>		
12 How to present information and ideas clearly.		
13 Ways of contributing to discussions that will help to move them forward.		
14 Methods of active listening.		
15 The reasons for summarising communication.		
<b>After communication</b>		
16 How to seek feedback on whether the communication achieved its purpose.		
17 The value of reflecting on the outcomes of communication and of identifying ways to further develop communication skills.		

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 FD90 04 (S204)    Work with Other People in a Business Environment**

### **Unit summary**

Work within the organisation to present and promote a positive image of the organisation and work collaboratively with others to achieve the organisational goals and objectives.

### **Skills**

**You will apply the following skills:**

- ◆ Communicating.
- ◆ Managing time.
- ◆ Negotiating.
- ◆ Planning.
- ◆ Problem solving.
- ◆ Resolving disagreement.
- ◆ Working with others.

### **Performance indicators**

**You will:**

- 1 Work in a way that supports the team's objectives.
- 2 Welcome opportunities to work with other people to achieve a positive outcome.
- 3 Share work goals and plan work objectives together.
- 4 Follow the policies, systems and procedures that are relevant to the role.
- 5 Put relevant organisational values into practice in all aspects of own work.
- 6 Work with outside organisations and individuals in a way that protects the image of the organisation.
- 7 Seek guidance from others when unsure about objectives, policies, systems, procedures and values.
- 8 Communicate with other people.
- 9 Work in a way that recognises the strengths of others within a team.
- 10 Provide support to members of a team.
- 11 Show respect for individuals.
- 12 Produce quality work on time.
- 13 Identify and refer problems and disagreements to relevant colleagues.
- 14 Share feedback with others on the achievement of objectives.

## UNIT FD90 04 (S204) Work with Other People in a Business Environment

### Knowledge

#### You will know:

- 1 Own responsibilities at work.
- 2 How own role fits into the organisation's structure and contributes to its operation.
- 3 The policies, procedures, systems and values of the organisation that are relevant to own job role.
- 4 How to apply the organisation's values and policies.
- 5 Who to consult if unsure about policies, objectives, systems and values.
- 6 The situations in which working with others can achieve positive outcomes.
- 7 The purpose of sharing work goals and plans when working with others.
- 8 Different methods of communication and when to use them.
- 9 When it is essential to communicate with others within the team.
- 10 The purpose of acknowledging the strengths of others and of balancing own abilities with theirs.
- 11 The situations in which team members might need support.
- 12 The purpose of agreeing quality measures.
- 13 The types of problems and disagreements that occur when working with others and how to resolve them within the limits of own authority.
- 14 The purpose of giving and receiving constructive feedback.
- 15 How to make use of feedback to improve the work of others and the work of the team as a whole.

## UNIT FD90 04 (S204) Work with Other People in a Business Environment

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Work in a way that supports the team's objectives.		
2 Welcome opportunities to work with other people to achieve a positive outcome.		
3 Share work goals and plan work objectives together.		
4 Follow the policies, systems and procedures that are relevant to the role.		
5 Put relevant organisational values into practice in all aspects of own work.		
6 Work with outside organisations and individuals in a way that protects the image of the organisation.		
7 Seek guidance from others when unsure about objectives, policies, systems, procedures and values.		
8 Communicate with other people.		
9 Work in a way that recognises the strengths of others within a team.		
10 Provide support to members of a team.		
11 Show respect for individuals.		
12 Produce quality work on time.		
13 Identify and refer problems and disagreements to relevant colleagues.		
14 Share feedback with others on the achievement of objectives.		

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

## UNIT FD90 04 (S204)    Work with Other People in a Business Environment

Knowledge requirements	Evidence numbers	Evidence type
1 Own responsibilities at work.		
2 How own role fits into the organisation's structure and contributes to its operation.		
3 The policies, procedures, systems and values of the organisation that are relevant to own job role.		
4 How to apply the organisation's values and policies.		
5 Who to consult if unsure about policies, objectives, systems and values.		
6 The situations in which working with others can achieve positive outcomes.		
7 The purpose of sharing work goals and plans when working with others.		
8 Different methods of communication and when to use them.		
9 When it is essential to communicate with others within the team.		
10 The purpose of acknowledging the strengths of others and of balancing own abilities with theirs.		
11 The situations in which team members might need support.		
12 The purpose of agreeing quality measures.		
13 The types of problems and disagreements that occur when working with others and how to resolve them within the limits of own authority.		
14 The purpose of giving and receiving constructive feedback.		
15 How to make use of feedback to improve the work of others and the work of the team as a whole.		

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 F93T 04 (S211) Produce Documents in a Business Environment

### Unit summary

Produce high quality, attractive documents to agreed specifications.

### Skills

You will apply the following skills:

- ◆ Checking.
- ◆ Designing.
- ◆ Listening.
- ◆ Managing time.
- ◆ Negotiating.
- ◆ Organising.
- ◆ Questioning.
- ◆ Using technology.

### Performance indicators

You will:

- 1 Confirm the purpose, content, style and deadlines for the document.
- 2 Prepare the required resources.
- 3 Organise the required content.
- 4 Use available technology appropriate to the document being produced.
- 5 Produce the document in the agreed style.
- 6 Integrate non-text objects in the agreed layout, where required.
- 7 Check for accuracy, editing and correcting text as necessary.
- 8 Clarify document requirements, when necessary.
- 9 Store the document safely and securely in approved locations.

### Knowledge

You will know:

- 1 The different types of documents that may be produced and document styles that could be used.
- 2 The different formats in which the text may be presented.
- 3 The purpose and benefits of agreeing the purpose, content, style, quality standards and deadline for production of the document.
- 4 The different types of technology available for inputting, formatting and editing text and their main features.
- 5 The types of resources needed to produce high quality and attractive documents.
- 6 How to organise content needed for the document.
- 7 How to integrate and layout text and non-text objects.
- 8 How to check for accuracy and correctness, including spelling, grammar and punctuation and the purpose of doing this.
- 9 How to store the document safely and securely.
- 10 The purpose of confidentiality and data protection.

## UNIT F93T 04 (S211) Produce Documents in a Business Environment

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Confirm the purpose, content, style and deadlines for the document.		
2 Prepare the required resources.		
3 Organise the required content.		
4 Use available technology appropriate to the document being produced.		
5 Produce the document in the agreed style.		
6 Integrate non-text objects in the agreed layout, where required.		
7 Check for accuracy, editing and correcting text as necessary.		
8 Clarify document requirements, when necessary.		
9 Store the document safely and securely in approved locations.		

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



## UNIT F93T 04 (S211) Produce Documents in a Business Environment

Knowledge requirements	Evidence numbers	Evidence type
1 The different types of documents that may be designed and produced and document styles that could be used.		
2 The different formats in which the text may be presented.		
3 The purpose and benefits of agreeing the purpose, content, style, quality standards and deadline for production of the document.		
4 The different types of technology available for inputting, formatting and editing text and their main features.		
5 The types of resources needed to produce high quality and attractive documents.		
6 How to organise content needed for the document.		
7 How to integrate and layout text and non-text objects.		
8 How to check for accuracy and correctness, including spelling, grammar and punctuation and the purpose of doing this.		
9 How to store the document safely and securely.		
10 The purpose of confidentiality and data protection.		

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 FD9W 04 (S212) Prepare Text from Notes

### Unit summary

Present accurate and correct text in an agreed format from notes.

### Skills

You will apply the following skills:

- ◆ Checking.
- ◆ Keyboarding skills.
- ◆ Listening.
- ◆ Managing time.
- ◆ Questioning.
- ◆ Using technology.

### Performance indicators

You will:

- 1 Agree the purpose, format and deadlines for the transcription.
- 2 Input the text using keyboarding skills.
- 3 Format the text, making efficient use of available technology.
- 4 Check content for accuracy, editing and correcting text.
- 5 Clarify text requirements when necessary.
- 6 Store the text and the original notes safely and securely in approved locations.
- 7 Present the text in the required format within agreed deadlines.

### Knowledge

You will know:

- 1 The different types of documents that may be produced from notes and the formats they should follow.
- 2 The difference between producing text from own notes and producing text from others' notes.
- 3 The benefits of agreeing the purpose, format and deadline for the text.
- 4 The purpose of accuracy when preparing text.
- 5 How to check for accuracy and correctness, including spelling, grammar and punctuation and the purpose of doing this.
- 6 How to store text safely and securely.
- 7 The purpose of confidentiality and data protection.

## UNIT FD9W 04 (S212) Prepare Text from Notes

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Agree the purpose, format and deadlines for the transcription.		
2 Input the text using keyboarding skills.		
3 Format the text, making efficient use of available technology.		
4 Check content for accuracy, editing and correcting text.		
5 Clarify text requirements when necessary.		
6 Store the text and the original notes safely and securely in approved locations.		
7 Present the text in the required format within agreed deadlines.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 The different types of documents that may be produced from notes and the formats they should follow.		
2 The difference between producing text from own notes and producing text from others' notes.		
3 The benefits of agreeing the purpose, format and deadline for the text.		
4 The purpose of accuracy when preparing text.		
5 How to check for accuracy and correctness, including spelling, grammar and punctuation and the purpose of doing this.		
6 How to store text safely and securely.		
7 The purpose of confidentiality and data protection.		

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 FD9X 04 (S213) Prepare Text from Notes using Touch Typing (40 wpm)

### Unit summary

Present accurate and correct text in an agreed format, from notes; touch typing at a speed of 40 words per minute.

### Skills

You will apply the following skills:

- ◆ Checking.
- ◆ Keyboarding skills.
- ◆ Listening.
- ◆ Managing time.
- ◆ Questioning.
- ◆ Using technology.

### Performance indicators

#### You will:

- 1 Agree the purpose, format and deadlines for the transcription.
- 2 Input the text using touch typing to 40 words per minute.
- 3 Format the text, making efficient use of technology available.
- 4 Check content for accuracy, editing and correcting the text.
- 5 Clarify text requirements when necessary.
- 6 Store the text and the original shorthand notes safely and securely in approved locations.
- 7 Present the text in the required format within agreed deadlines.

### Knowledge

#### You will know:

- 1 The different types of documents that may be produced from notes and the formats they should follow.
- 2 The difference between producing text from own notes and producing text from others' notes.
- 3 The benefits of agreeing the purpose, format and deadline for the text.
- 4 The purpose of accuracy when preparing text.
- 5 How to check for accuracy and correctness, including spelling, grammar and punctuation and the purpose of doing this.
- 6 How to store text safely and securely.
- 7 The purpose of confidentiality and data protection.

## UNIT FD9X 04 (S213) Prepare Text from Notes using Touch Typing (40 wpm)

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Agree the purpose, format and deadlines for the transcription.		
2 Input the text using touch typing to 40 words per minute.		
3 Format the text, making efficient use of technology available.		
4 Check content for accuracy, editing and correcting the text.		
5 Clarify text requirements when necessary.		
6 Store the text and the original shorthand notes safely and securely in approved locations.		
7 Present the text in the required format within agreed deadlines.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 The different types of documents that may be produced from notes and the formats they should follow.		
2 The difference between producing text from own notes and producing text from others' notes.		
3 The benefits of agreeing the purpose, format and deadline for the text.		
4 The purpose of accuracy when preparing text.		
5 How to check for accuracy and correctness, including spelling, grammar and punctuation and the purpose of doing this.		
6 How to store text safely and securely and how to do so.		
7 The purpose of confidentiality and data protection.		

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 FD9T 04 (S214) Prepare Text from Shorthand (60 wpm)

### Unit summary

Take shorthand notes and produce accurate and correct text in an agreed format from these notes, at a minimum speed of 60 words per minute.

### Skills

You will apply the following skills:

- ◆ Checking.
- ◆ Listening.
- ◆ Managing time.
- ◆ Noting.
- ◆ Questioning.
- ◆ Using technology.

### Performance indicators

You will:

- 1 Agree the purpose, format and deadlines for the text.
- 2 Take dictation using shorthand at a minimum speed of 60 words per minute.
- 3 Clarify text requirements when necessary.
- 4 Input and format the text from shorthand notes.
- 5 Make efficient use of available technology.
- 6 Check content for accuracy, editing and correcting the text.
- 7 Store the text and the original shorthand notes safely and securely in approved locations.
- 8 Present the text in the required format within agreed deadlines.

### Knowledge

You will know:

- 1 The different types of documents that may be produced from notes and the formats they should follow.
- 2 The benefits of agreeing the purpose, format and deadline for the text.
- 3 How to check for accuracy and correctness, including spelling, grammar and punctuation and the purpose of doing this.
- 4 The purpose of storing text safely and securely and how to do so.
- 5 How to store the original shorthand notes safely and securely.
- 6 The purpose of confidentiality and data protection.
- 7 The different formats in which the text may be presented.

## UNIT FD9T 04 (S214) Prepare Text from Shorthand (60 wpm)

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Agree the purpose, format and deadlines for the text.		
2 Take dictation using shorthand at a minimum speed of 60 words per minute.		
3 Clarify text requirements when necessary.		
4 Input and format the text from shorthand notes.		
5 Make efficient use of available technology.		
6 Check content for accuracy, editing and correcting the text.		
7 Store the text and the original shorthand notes safely and securely in approved locations.		
8 Present the text in the required format within agreed deadlines.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 The different types of documents that may be produced from notes and the formats they should follow.		
2 The benefits of agreeing the purpose, format and deadline for the text.		
3 How to check for accuracy and correctness, including spelling, grammar and punctuation and the purpose of doing this.		
4 The purpose of storing the text safely and securely and how to do so.		
5 How to store the original shorthand notes safely and securely.		
6 The purpose of confidentiality and data protection.		
7 The different formats in which the text may be presented.		

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 FD9V 04 (S215) Prepare Text from Recorded Audio Instruction (40 wpm)

### Unit summary

Transcribe accurate and correct text in an agreed format from an audio recording, at a minimum speed of 40 words per minute.

### Skills

You will apply the following skills:

- ◆ Checking.
- ◆ Listening.
- ◆ Managing time.
- ◆ Questioning.
- ◆ Using technology.

### Performance indicators

You will:

- 1 Agree the purpose, format and deadlines for the transcription.
- 2 Input the text from the audio recording to a minimum speed of 40 words per minute.
- 3 Format the text, making efficient use of available technology.
- 4 Check content for accuracy, editing and correcting text.
- 5 Clarify text requirements when necessary.
- 6 Store the text and the original notes safely and securely in approved locations.
- 7 Present the text in the required format within agreed deadlines.

### Knowledge

You will know:

- 1 The different types of documents that may be produced from audio recordings and the formats they should follow.
- 2 The benefits of agreeing the purpose, format and deadline for the text.
- 3 How to check for accuracy and correctness, including spelling, grammar and punctuation and the purpose for doing this.
- 4 How to store text safely and securely.
- 5 The purpose of confidentiality and data protection.
- 6 The different formats in which the text may be presented.
- 7 The different types of technology available for playing back recordings and their main features.



## UNIT FD9V 04 (S215) Prepare Text from Recorded Audio Instruction (40 wpm)

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Agree the purpose, format and deadlines for the transcription.		
2 Input the text from the audio recording to a minimum speed of 40 words per minute.		
3 Format the text, making efficient use of available technology.		
4 Check content for accuracy, editing and correcting text.		
5 Clarify text requirements when necessary.		
6 Store the text and the original notes safely and securely in approved locations.		
7 Present the text in the required format within agreed deadlines.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 The different types of documents that may be produced from audio recordings and the formats they should follow.		
2 The benefits of agreeing the purpose, format and deadline for the text.		
3 How to check for accuracy and correctness, including spelling, grammar and punctuation and the purpose for doing this.		
4 How to store text safely and securely.		
5 The purpose of confidentiality and data protection.		
6 The different formats in which the text may be presented.		
7 The different types of technology available for playing back recordings and their main features.		

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 FD9N 04 (S222) Support the Organisation and Co-ordination of Events

### Unit summary

Support the organisation and co-ordination of an event including the identification of venues, production of event materials, supporting activities during the event and following up on activities after the event.

### Skills

**You will apply the following skills:**

- ◆ Checking.
- ◆ Communicating.
- ◆ Decision making.
- ◆ Interpersonal skills.
- ◆ Managing resources.
- ◆ Managing time.
- ◆ Monitoring.
- ◆ Negotiating.
- ◆ Organising.
- ◆ Planning.
- ◆ Problem solving.

### Performance indicators

**You will:**

#### Before the event

- 1 Support the implementation of the plan for the event to meet agreed objectives.
- 2 Contribute to identifying and agreeing resources and support needed for the event.
- 3 Identify and cost suitable venues.
- 4 Liaise with the venue to confirm event requirements.
- 5 Follow all legal and contractual requirements.
- 6 Follow the relevant health, safety and security requirements for the event.
- 7 Support production of event materials.
- 8 Prepare and send out invitations to delegates.
- 9 Co-ordinate delegate responses.
- 10 Provide delegates with joining instructions and event materials.

#### At the event

- 11 Prepare the venue as required.
- 12 Support activities and resources during the event, in line with agreed plans.
- 13 Help delegates to feel welcome.
- 14 Respond to delegates' needs throughout the event.
- 15 Follow the correct procedures when there are problems during the event.

#### After the event

- 16 Clear and vacate the venue, in accordance with terms of the contract.
- 17 Conduct follow-up activities, as required.

## UNIT FD9N 04 (S222) Support the Organisation and Co-ordination of Events

### Knowledge

#### You will know:

- 1 How to contribute to organising and co-ordinating event plans to meet the objectives of the brief.
- 2 Different types of events and their main features.
- 3 The types of information that delegates will need.
- 4 How to identify suitable venues for different types of events.
- 5 The types of resources needed to prepare for different types of events.
- 6 The special requirements that delegates may have and how to meet these.
- 7 Health, safety and security requirements when organising events.
- 8 The types of activities and resources that may need to be co-ordinated during an event.
- 9 The types of problems that may occur during events and how to deal with these.
- 10 Points to observe when clearing and vacating an event.
- 11 The types of follow-up activities that may be required to carry out.

## UNIT FD9N 04 (S222) Support the Organisation and Co-ordination of Events

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Before the event</b>		
1 Support the implementation of the plan for the event to meet agreed objectives.		
2 Contribute to identifying and agreeing resources and support needed for the event.		
3 Identify and cost suitable venues.		
4 Liaise with the venue to confirm event requirements.		
5 Follow all legal and contractual requirements.		
6 Follow the relevant health, safety and security requirements for the event.		
7 Support production of event materials.		
8 Prepare and send out invitations to delegates.		
9 Co-ordinate delegate responses.		
10 Provide delegates with joining instructions and event materials.		
<b>At the event</b>		
11 Prepare the venue as required.		
12 Support activities and resources during the event, in line with agreed plans.		
13 Help delegates to feel welcome.		
14 Respond to delegates' needs throughout the event.		
15 Follow the correct procedures when there are problems during the event.		
<b>After the event</b>		
16 Clear and vacate the venue, in accordance with terms of the contract.		
17 Conduct follow-up activities, as required.		

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

## UNIT FD9N 04 (S222) Support the Organisation and Co-ordination of Events

Knowledge requirements	Evidence numbers	Evidence type
1 How to contribute to organising and co-ordinating event plans to meet the objectives of the brief.		
2 Different types of events and their main features.		
3 The types of information that delegates will need.		
4 How to identify suitable venues for different types of events.		
5 The types of resources needed to prepare for different types of events.		
6 The special requirements that delegates may have and how to meet these.		
7 Health, safety and security requirements when organising events.		
8 The types of activities and resources that may need to be co-ordinated during an event.		
9 The types of problems that may occur during events and how to deal with these.		
10 Points to observe when clearing and vacating an event.		
11 The types of follow-up activities that may be required to carry out.		

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 FD9P 04 (S223) Support the Organisation of Business Travel or Accommodation**

### **Unit summary**

Support the organisation of business travel or accommodation arrangements.

### **Skills**

**You will apply the following skills:**

- ◆ Checking.
- ◆ Communicating.
- ◆ Decision making.
- ◆ Evaluating.
- ◆ Managing time.
- ◆ Negotiating.
- ◆ Organising.
- ◆ Planning.
- ◆ Problem solving.
- ◆ Researching.

### **Performance indicators**

**You will:**

- 1 Confirm business travel or accommodation and budget requirements from the organiser.
- 2 Check draft itinerary and schedule with the traveller.
- 3 Research and book business travel arrangements or accommodation as agreed, obtaining best value for money.
- 4 Obtain and collate documents and information for business travel or accommodation.
- 5 Maintain records of business travel or accommodation and store any confidential information securely, including financial records.
- 6 Follow arrangements for payment facilities for business travel or accommodation.
- 7 Follow the correct procedures when there are problems with business travel or accommodation arrangements.
- 8 Provide the traveller with an itinerary, documents and information in good time.
- 9 Confirm with the organiser or traveller(s) that itinerary, documents and information meet requirements.

## UNIT FD9P 04 (S223) Support the Organisation of Business Travel or Accommodation

### Knowledge

#### You will know:

- 1 The purpose of confirming the brief and budget for travel or accommodation.
- 2 How to support the organisation of business travel or accommodation to meet expectations.
- 3 The main types of business travel or accommodation arrangements that may need to be made and the procedures to follow.
- 4 The sources of information and facilities that are used to make business travel or accommodation arrangements.
- 5 How to obtain best value for money when making business travel or accommodation arrangements.
- 6 How to keep records of business travel or accommodation arrangements.
- 7 The documents and information to provide to the person who is travelling and how to obtain these.
- 8 The types of problems that may occur with travel or accommodation arrangements and the correct procedures to follow in order to deal with these problems.

## UNIT FD9P 04 (S223) Support the Organisation of Business Travel or Accommodation

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Confirm business travel or accommodation and budget requirements from the organiser.		
2 Check draft itinerary and schedule with the traveler.		
3 Research and book business travel arrangements or accommodation as agreed, obtaining best value for money.		
4 Obtain and collate documents and information for business travel or accommodation.		
5 Maintain records of business travel or accommodation and store any confidential information securely, including financial records.		
6 Follow arrangements for payment facilities for business travel or accommodation.		
7 Follow the correct procedures when there are problems with business travel or accommodation arrangements.		
8 Provide the traveller with an itinerary, documents and information in good time.		
9 Confirm with the organiser or traveller(s) that itinerary, documents and information meet requirements.		

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



## UNIT FD9P 04 (S223) Support the Organisation of Business Travel or Accommodation

Knowledge requirements	Evidence numbers	Evidence type
1 The purpose of confirming the brief and budget for travel or accommodation.		
2 How to support the organisation of business travel or accommodation to meet expectations.		
3 The main types of business travel or accommodation arrangements that may need to be made and the procedures to follow.		
4 The sources of information and facilities that are used to make business travel or accommodation arrangements.		
5 How to obtain best value for money when making business travel or accommodation arrangements.		
6 How to keep records of business travel or accommodation arrangements.		
7 The documents and information to provide to the person who is travelling and how to obtain these.		
8 The types of problems that may occur with travel or accommodation arrangements and the correct procedures to follow in order to deal with these problems.		

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 FD9R 04 (S224) Support the Organisation of Meetings

### Unit summary

Support the planning and operational requirements of the agreed brief for a meeting.

### Skills

You will apply the following skills:

- ◆ Checking.
- ◆ Communicating.
- ◆ Evaluating.
- ◆ Interpersonal skills.
- ◆ Managing resources.
- ◆ Managing time.
- ◆ Negotiating.
- ◆ Organising.
- ◆ Planning.
- ◆ Problem solving.

### Performance indicators

You will:

#### Before the meeting

- 1 Follow requirements of the meeting brief.
- 2 Follow agreed procedures to obtain an appropriate venue and catering requirements, if required, for the meeting.
- 3 Prepare required papers for the meeting.
- 4 Invite attendees and confirm attendance.
- 5 Make sure attendees' needs are met.
- 6 Collate and dispatch papers for the meeting within agreed timescales.
- 7 Check equipment and layout of room meets meeting brief.

#### During the meeting

- 8 Attend to any requirements during the meeting as directed by the meeting organiser.

#### After the meeting

- 9 Clear and vacate the meeting venue according to requirements.
- 10 Circulate the meeting record to agreed timescales.
- 11 Contribute to the evaluation of the meeting.
- 12 Maintain a record of external services, where used.

## UNIT FD9R 04 (S224) Support the Organisation of Meetings

### Knowledge

#### You will know:

- 1 How to help plan meetings to meet agreed aims and objectives.
- 2 The different types of meetings and their main purposes.
- 3 The purpose and benefits of following the agreed brief for the meeting.
- 4 The role of the person helping to organise the meeting.
- 5 Organisational procedures for obtaining venues and/or equipment for different types of meetings.
- 6 The types of information that attendees will need.
- 7 Any special requirements that attendees may have and how to meet them.
- 8 How to help the meeting organiser during the meeting.
- 9 Organisational procedures for clearing and vacating a meeting room.

## UNIT FD9R 04 (S224) Support the Organisation of Meetings

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Before the meeting</b>		
1 Follow requirements of the meeting brief.		
2 Follow agreed procedures to obtain an appropriate venue and catering requirements, if required, for the meeting.		
3 Prepare required papers for the meeting.		
4 Invite attendees and confirm attendance.		
5 Make sure attendees' needs are met.		
6 Collate and dispatch papers for the meeting within agreed timescales.		
7 Check equipment and layout of room meets meeting brief.		
<b>During the meeting</b>		
8 Attend to any requirements during the meeting as directed by the meeting organizer.		
<b>After the meeting</b>		
9 Clear and vacate the meeting venue according to requirements.		
10 Circulate the meeting record to agreed timescales.		
11 Contribute to the evaluation of the meeting.		
12 Maintain a record of external services, where used.		

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

## UNIT FD9R 04 (S224) Support the Organisation of Meetings

Knowledge requirements	Evidence numbers	Evidence type
1 How to help plan meetings to meet agreed aims and objectives.		
2 The different types of meetings and their main purposes.		
3 The purpose and benefits of following the agreed brief for the meeting.		
4 The role of the person helping to organise the meeting.		
5 Organisational procedures for obtaining venues and/or equipment for different types of meetings.		
6 The types of information that attendees will need.		
7 Any special requirements that attendees may have and how to meet them.		
8 How to help the meeting organiser during the meeting.		
9 Organisational procedures for clearing and vacating a meeting room.		

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

**Candidate:** \_\_\_\_\_ **Date:** \_\_\_\_\_

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**Internal verifier:** \_\_\_\_\_ **Date:** \_\_\_\_\_  
(if sampled)

## UNIT H983 04 (S206) Use Voicemail Message Systems

### Unit summary

Use electronic message systems to deliver and receive messages.

### Skills

You will apply the following skills:

- ◆ Communicating.
- ◆ Checking.
- ◆ Organising.

### Performance indicators

You will:

- 1 Keep the message system up-to-date.
- 2 Check the system for messages.
- 3 Respond to messages within agreed timescales.
- 4 Delete messages when they have been dealt with.
- 5 Leave clear recorded messages on other people's systems.

### Knowledge

You will know:

- 1 The main types of electronic message systems and their key features.
- 2 The different features of message systems and how to use them.
- 3 How to check a message system for messages.
- 4 The information to be given when taking or leaving messages.
- 5 When to delete or discard messages.

## UNIT H983 04 (S206) Use Voicemail Message Systems

Performance indicators	Evidence numbers	Evidence type
1 Keep the message system up-to-date.		
2 Check the system for messages.		
3 Respond to messages within agreed timescales.		
4 Delete messages when they have been dealt with.		
5 Leave clear recorded messages on other people's systems.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 The main types of electronic message systems and their key features.		
2 The different features of message systems and how to use them.		
3 How to check a message system for messages.		
4 The information to be given when taking or leaving messages.		
5 When to delete or discard messages.		

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 FD92 04 (S207) Use a Diary System

### Unit summary

Make, update and co-ordinate appointments in a diary system making sure entries are accurately and clearly made.

### Skills

You will apply the following skills:

- ◆ Communicating.
- ◆ Organising.
- ◆ Planning.
- ◆ Problem-solving.

### Performance indicators

You will:

- 1 Obtain the information needed to make requested diary entries.
- 2 Make diary entries accurately and clearly.
- 3 Prioritise requested changes.
- 4 Identify the implications of any changes for existing entries.
- 5 Record agreed changes in the diary.
- 6 Communicate agreed changes to those affected.
- 7 Solve problems by negotiating alternative arrangements.
- 8 Keep the diary up-to-date and store it securely.

### Knowledge

You will know:

- 1 The purpose of using diary systems to plan and co-ordinate activities and resources.
- 2 The different types of diary systems.
- 3 The types of information you must obtain.
- 4 The purpose of keeping the system up-to-date.
- 5 How to prioritise requests.
- 6 The purpose of trying to balance the needs of all those involved.
- 7 The purpose of communicating changes to those affected.
- 8 The different types of problems that may occur when new requests are made and solutions to these problems.
- 9 The purpose of identifying security and confidentiality issues when operating a diary system.



## UNIT FD92 04 (S207) Use a Diary System

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Obtain the information needed to make requested diary entries.		
2 Make diary entries accurately and clearly.		
3 Prioritise requested changes.		
4 Identify the implications of any changes for existing entries.		
5 Record agreed changes in the diary.		
6 Communicate agreed changes to those affected.		
7 Solve problems by negotiating alternative arrangements.		
8 Keep the diary up-to-date and store it securely.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 The purpose of using diary systems to plan and co-ordinate activities and resources.		
2 The different types of diary systems.		
3 The types of information you must obtain.		
4 The purpose of keeping the system up-to-date.		
5 How to prioritise requests.		
6 The purpose of trying to balance the needs of all those involved.		
7 The purpose of communicating changes to those affected.		
8 The different types of problems that may occur when new requests are made and solutions to these problems.		
9 The purpose of identifying security and confidentiality issues when operating a diary system.		

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**Candidate:** \_\_\_\_\_ **Date:** \_\_\_\_\_

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**Internal verifier:** \_\_\_\_\_ **Date:** \_\_\_\_\_  
(if sampled)

## UNIT FD93 04 (S208) Take Minutes

### Unit summary

Produce accurate records of discussions and decisions taken (action logging) during meetings.

### Skills

**You will apply the following skills:**

- ◆ Communicating.
- ◆ Planning.
- ◆ Evaluating.
- ◆ Interpersonal skills.
- ◆ Organising.

### Performance indicators

**You will:**

- 1 Prepare for the meeting as required.
- 2 Note any changes to the agenda, matters arising and action points from the last meeting.
- 3 Take notes at the meeting of all those aspects required by the organisation and, where appropriate, by law.
- 4 Produce accurate minutes that record the meaning of discussions and the decisions taken.
- 5 Make sure the minutes are in the agreed style.
- 6 Make sure the process for signing off minutes and action points has been agreed.
- 7 Check the work and make necessary amendments.
- 8 Agree the minutes with relevant people and circulate within specified timescales.
- 9 Observe all requirements for confidentiality and sensitivity in line with organisational policy.
- 10 Make sure follow-up actions, and who is responsible for taking follow-up actions, have been clearly identified.
- 11 Store the minutes, following organisational procedures.

## UNIT FD93 04 (S208) Take Minutes

### Knowledge

#### You will know:

- 1 The role of meetings.
- 2 Legal and organisational requirements that may apply to taking minutes.
- 3 The purpose and benefits of minutes as an accurate record of discussions and decisions.
- 4 Documents that are commonly used in meetings: agendas, minutes, matters arising, action sheets etc.
- 5 The role of the meeting chair and other formal responsibilities within a meeting.
- 6 How to work in partnership with the chair when taking minutes.
- 7 How to listen effectively.
- 8 How to take notes during discussions.
- 9 Different types of minutes.
- 10 Different writing styles that are used in taking minutes.
- 11 How to sort, select and structure information to produce minutes.
- 12 Correct tone and use of professional language in minutes.

## UNIT FD93 04 (S208) Take Minutes

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Prepare for the meeting as required.		
2 Note any changes to the agenda, matters arising and action points from the last meeting.		
3 Take notes at the meeting of all those aspects required by the organisation and, where appropriate, by law.		
4 Produce accurate minutes that record the meaning of discussions and the decisions taken.		
5 Make sure the minutes are in the agreed style.		
6 Make sure the process for signing off minutes and action points has been agreed.		
7 Check the work and make necessary amendments.		
8 Agree the minutes with relevant people and circulate within specified timescales.		
9 Observe all requirements for confidentiality and sensitivity in line with organisational policy.		
10 Make sure follow-up actions, and who is responsible for taking follow-up actions, have been clearly identified.		
11 Store the minutes, following organisational procedures.		

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

## UNIT FD93 04 (S208) Take Minutes

Knowledge requirements	Evidence numbers	Evidence type
1 The role of meetings.		
2 Legal and organisational requirements that may apply to taking minutes.		
3 The purpose and benefits of minutes as an accurate record of discussions and decisions.		
4 Documents that are commonly used in meetings: agendas, minutes, matters arising, action sheets etc.		
5 The role of the meeting chair and other formal responsibilities within a meeting.		
6 How to work in partnership with the chair when taking minutes.		
7 How to listen effectively.		
8 How to take notes during discussions.		
9 Different types of minutes.		
10 Different writing styles that are used in taking minutes.		
11 How to sort, select and structure information to produce minutes.		
12 Correct tone and use of professional language in minutes.		

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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

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**Date:** \_\_\_\_\_

**Internal verifier:** \_\_\_\_\_  
(if sampled)

**Date:** \_\_\_\_\_

## UNIT FD94 04 (S209) Handle Mail

### Unit summary

Organise the distribution and collection of incoming and outgoing mail or packages and provide specialised mail services.

### Skills

You will apply the following skills:

- ◆ Checking.
- ◆ Decision-making.
- ◆ Prioritising.
- ◆ Problem-solving.

### Performance indicators

You will:

#### Incoming Mail

- 1 Receive and check incoming mail or packages.
- 2 Sort incoming mail or packages.
- 3 Dispose of unwanted 'junk' mail.
- 4 Follow correct procedures for suspicious or damaged items.
- 5 Distribute incoming mail or packages.
- 6 Follow the correct procedures when there are problems with incoming mail.

#### Outgoing Mail

- 7 Collect and sort outgoing mail or packages.
- 8 Identify best options for dispatching mail.
- 9 Arrange for courier service to collect outgoing mail or packages where requested.
- 10 Prepare items for urgent or special delivery.
- 11 Calculate correct postage charges for outgoing mail or packages.
- 12 Record postage costs in line with agreed procedures.
- 13 Despatch outgoing mail or packages on time.
- 14 Follow the correct procedures when there are problems with outgoing mail.

### Knowledge

You will know:

- 1 The purpose of distributing and dispatching mail to the correct recipient within agreed timescales.
- 2 The organisational structure and names, roles and locations of individuals and teams.
- 3 The organisational procedures for dealing with different types of mail.
- 4 The range of mail services available and how to choose the most appropriate service.
- 5 Organisational security procedures for handling mail or packages.
- 6 Approved courier services and how to make use of these.
- 7 Methods of calculating postage charges for mail or packages, eg franking, stamping, using online postage system.
- 8 The types of problems that may occur with incoming and outgoing mail and how to deal with these.

## UNIT FD94 04 (S209) Handle Mail

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Incoming mail</b>		
1 Receive and check incoming mail or packages.		
2 Sort incoming mail or packages.		
3 Dispose of unwanted 'junk' mail.		
4 Follow correct procedures for suspicious or damaged items.		
5 Distribute incoming mail or packages.		
6 Follow the correct procedures when there are problems with incoming mail.		
<b>Outgoing mail</b>		
7 Collect and sort outgoing mail or packages.		
8 Identify best options for dispatching mail.		
9 Arrange for courier service to collect outgoing mail or packages where requested.		
10 Prepare items for urgent or special delivery.		
11 Calculate correct postage charges for outgoing mail or packages.		
12 Record postage costs in line with agreed procedures.		
13 Despatch outgoing mail or packages on time.		
14 Follow the correct procedures when there are problems with outgoing mail.		

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

## UNIT FD94 04 (S209) Handle Mail

Knowledge requirements	Evidence numbers	Evidence type
1 The purpose of distributing and dispatching mail to the correct recipient within agreed timescales.		
2 The organisational structure and names, roles and locations of individuals and teams.		
3 The organisational procedures for dealing with different types of mail.		
4 The range of mail services available and how to choose the most appropriate service.		
5 Organisational security procedures for handling mail or packages.		
6 Approved courier services and how to make use of these.		
7 Methods of calculating postage charges for mail or packages, eg franking, stamping, using online postage system.		
8 The types of problems that may occur with incoming and outgoing mail and how to deal with these.		

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 F93X 04 (S210) Provide Reception Services

### Unit summary

Maintain a reception to enhance the vision and brand of the organisation.

### Skills

#### You will apply the following skills:

- ◆ Communicating.
- ◆ Negotiating.
- ◆ Problem solving.
- ◆ Decision-making.
- ◆ Organising.
- ◆ Questioning.
- ◆ Interpersonal skills.
- ◆ Personal presentation.
- ◆ Listening.
- ◆ Planning.

### Performance indicators

#### You will:

- 1 Present a positive image of self and the organisation.
- 2 Provide individuals with requested information and other information which may be useful to them, within guidelines on confidentiality.
- 3 Implement the correct entry and security procedures.
- 4 Follow the relevant health and safety procedures.
- 5 Refer any issues that cannot be dealt with personally to the appropriate person.
- 6 Maintain the reception area to give a positive impression of the organisation.
- 7 Suggest ideas for improving the reception area.
- 8 Follow organisational procedures in the event of an accident or emergency.
- 9 Carry out additional duties during quiet periods, if they arise.

### Knowledge

#### You will know:

- 1 The purpose and value of the receptionist function as the first point of contact between the public/client and the organisation.
- 2 How to present a positive image of self and the organisation.
- 3 The organisation's structure and lines of communication.
- 4 How to implement confidentiality guidelines.
- 5 How to implement entry and security procedures.
- 6 How to implement health and safety procedures.
- 7 How to contribute ideas for improving the reception area in terms of accessibility, functionality and environment, security and safety and facilities for visitors.
- 8 The organisational emergency procedures and your role within them.
- 9 Why additional duties are carried out during quiet periods, if they arise.

## UNIT F93X 04 (S210) Provide Reception Services

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Present a positive image of self and the organisation.		
2 Provide individuals with requested information and other information which may be useful to them, within guidelines on confidentiality.		
3 Implement the correct entry and security procedures.		
4 Follow the relevant health and safety procedures.		
5 Refer any issues that cannot be dealt with personally to the appropriate person.		
6 Maintain the reception area to give a positive impression of the organisation.		
7 Suggest ideas for improving the reception area.		
8 Follow organisational procedures in the event of an accident or emergency.		
9 Carry out additional duties during quiet periods, if they arise.		

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

## UNIT F93X 04 (S210) Provide Reception Services

Knowledge requirements	Evidence numbers	Evidence type
1 The purpose and value of the receptionist function as the first point of contact between the public/client and the organisation.		
2 How to present a positive image of self and the organisation.		
3 The organisation's structure and lines of communication.		
4 How to implement confidentiality guidelines.		
5 How to implement entry and security procedures.		
6 How to implement health and safety procedures.		
7 How to contribute ideas for improving the reception area in terms of accessibility, functionality and environment, security and safety and facilities for visitors.		
8 The organisational emergency procedures and your role within them.		
9 Why additional duties are carried out during quiet periods, if they arise.		

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 FD96 04 (S250) Meet and Welcome Visitors

### Unit summary

Meet and welcome visitors ensuring visitors' needs are met while presenting a positive image of the organisation.

### Skills

You will apply the following skills:

- ◆ Communicating.
- ◆ Personal presentation.
- ◆ Decision-making.
- ◆ Problem solving.
- ◆ Interpersonal skills.
- ◆ Listening.

### Performance indicators

You will:

- 1 Meet and greet visitors promptly, treating them politely and making them feel welcome.
- 2 Identify visitors and the reason for their visit.
- 3 Use the organisation's systems to receive and record visitors, as appropriate.
- 4 Make sure visitors' needs are met.
- 5 Explain to visitors reasons for any delay in dealing with them, and keep them informed of developments.
- 6 Present a positive image of yourself and your organisation.
- 7 Follow organisational, health, safety and security procedures.
- 8 Inform relevant people about visitors' arrival promptly.
- 9 Deal with any problems that may occur, or refer these to an appropriate colleague.

### Knowledge

You will know:

- 1 The organisational procedures for receiving and dealing with visitors, including security.
- 2 The typical range of visitors to the premises and their needs.
- 3 How to respond to any individual needs the visitor may have (for example, accessibility).
- 4 Own responsibilities for health, safety and security.
- 5 Organisation structures and communication channels within the organisation.
- 6 How to deal with challenging behaviour from visitors calmly and in line with organisational procedures.
- 7 The types of problems that may occur with visitors, including conflict and aggression and how to deal with these.

## UNIT FD96 04 (S250) Meet and Welcome Visitors

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Meet and greet visitors promptly, treating them politely and making them feel welcome.		
2 Identify visitors and the reason for their visit.		
3 Use the organisation's systems to receive and record visitors, as appropriate.		
4 Make sure visitors' needs are met.		
5 Explain to visitors reasons for any delay in dealing with them, and keep them informed of developments.		
6 Present a positive image of yourself and your organisation.		
7 Follow organisational, health, safety and security procedures.		
8 Inform relevant people about visitors' arrival promptly.		
9 Deal with any problems that may occur, or refer these to an appropriate colleague.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 The organisational procedures for receiving and dealing with visitors, including security.		
2 The typical range of visitors to the premises and their needs.		
3 How to respond to any individual needs the visitor may have (for example, accessibility).		
4 Own responsibilities for health, safety and security.		
5 Organisation structures and communication channels within the organisation.		
6 How to deal with challenging behaviour from visitors calmly and in line with organisational procedures.		
7 The types of problems that may occur with visitors, including conflict and aggression and how to deal with these.		

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 H984 04 (S216) Collate and Organise Data

### Unit summary

Collate, organise and report data in agreed format and timescale.

### Skills

**You will apply the following skills:**

- ◆ Communicating.
- ◆ Checking.
- ◆ Decision making.
- ◆ Organising.
- ◆ Planning.
- ◆ Present information.
- ◆ Problem solving.
- ◆ Using technology.

### Performance indicators

**You will:**

- 1 Collate and organise data in a way that will help analysis.
- 2 Check the accuracy of data and make adjustments, if required.
- 3 Present data that has been found from research in the agreed format and timescale.
- 4 Get feedback on the data that has been found from research, if necessary.

### Knowledge

**You will know:**

- 1 The different ways of organising data that has been found from research.
- 2 The different ways of presenting data for analysis.
- 3 The purpose of presenting data to the agreed format and timescale.
- 4 The purpose of getting feedback on data that has been found from research.

## UNIT H984 04 (S216) Collate and Organise Data

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Collate and organise data in a way that will help analysis.		
2 Check the accuracy of data and make adjustments, if required.		
3 Present data that has been found from research in the agreed format and timescale.		
4 Get feedback on the data that has been found from research, if necessary.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 The different ways of organising data that has been found from research.		
2 The different ways of presenting data for analysis.		
3 The purpose of presenting data to the agreed format and timescale.		
4 The purpose of getting feedback on data that has been found from research.		

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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

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**Date:** \_\_\_\_\_

**Internal verifier:** \_\_\_\_\_  
(if sampled)

**Date:** \_\_\_\_\_

## UNIT FD98 04 (S217) Research Information

### Unit summary

Research information, identifying sources of information researched and record the data that has been extracted from the sources of information.

### Skills

You will apply the following skills:

- ◆ Analysing.
- ◆ Communicating.
- ◆ Decision-making.
- ◆ Organising.
- ◆ Planning.
- ◆ Presenting information.
- ◆ Problem solving.
- ◆ Researching.
- ◆ Using technology.

### Performance indicators

You will:

- 1 Agree aims, objectives and deadlines for the information search.
- 2 Identify sources of information required for research.
- 3 Search for and obtain information.
- 4 Check information is suitable for the purpose of the research.
- 5 Meet deadlines for completing research.
- 6 Identify and select relevant, valid and reliable data.
- 7 Record the data and store it securely.
- 8 Make a record of information sources used.
- 9 Get feedback on what has been researched, if necessary.

### Knowledge

You will know:

- 1 The types of information to be obtained for analysis.
- 2 How to identify and agree appropriate sources of information.
- 3 The different techniques to search for relevant information.
- 4 What constitutes relevant, valid and reliable data.
- 5 How to make a record of sources of information and its purpose.



## UNIT FD98 04 (S217) Research Information

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Agree aims, objectives and deadlines for the information search.		
2 Identify sources of information required for research.		
3 Search for and obtain information.		
4 Check information is suitable for the purpose of the research.		
5 Meet deadlines for completing research.		
6 Identify and select relevant, valid and reliable data.		
7 Record the data and store it securely.		
8 Make a record of information sources used.		
9 Get feedback on what has been researched, if necessary.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 The types of information to be obtained for analysis.		
2 How to identify and agree appropriate sources of information.		
3 The different techniques to search for relevant information.		
4 What constitutes relevant, valid and reliable data.		
5 How to make a record of sources of information and its purpose.		

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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

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**Date:** \_\_\_\_\_

**Internal verifier:** \_\_\_\_\_  
(if sampled)

**Date:** \_\_\_\_\_

## **UNIT H559 04 (S218)    Store and Retrieve Information Using a Filing System**

### **Unit summary**

Process, store, and retrieve information using different filing systems, in line with organisational requirements.

### **Skills**

**You will apply the following skills:**

- ◆ Communicating.
- ◆ Organising.
- ◆ Planning.
- ◆ Problem solving.
- ◆ Using technology.

### **Performance indicators**

**You will:**

#### **Store information**

- 1 Identify and collect required information.
- 2 Follow agreed procedures and legislation to maintain security and confidentiality.
- 3 Store required information in approved locations to the agreed deadlines.
- 4 Update information, as required.
- 5 Follow agreed procedures for deleting information.

#### **Retrieve information**

- 6 Confirm information for retrieval.
- 7 Comply with procedures and legislation for accessing a filing system.
- 8 Locate and retrieve the required information.
- 9 Follow the correct procedures when there are problems with filing systems.
- 10 Provide information in the agreed format and within agreed timescales.

## UNIT H559 04 (S218) Store and Retrieve Information Using a Filing System

### Knowledge

#### You will know:

- 1 The purpose of storing and retrieving required information and the organisational procedures that must be followed.
- 2 Types of filing systems and their main features.
- 3 Legal and organisational requirements covering the security and confidentiality of information.
- 4 Legislation and organisational requirements covering data protection
- 5 The methods that can be used to collect required information.
- 6 The procedures to be followed to access filing systems.
- 7 The procedures for identifying and deleting information and why they must be followed.
- 8 How to make sure information is accurate.
- 9 The problems that occur with filing systems and who to report them to.
- 10 The purpose of providing information in the required format and within agreed timescales.

## UNIT H559 04 (S218) Store and Retrieve Information Using a Filing System

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Store information</b>		
1 Identify and collect required information.		
2 Follow agreed procedures and legislation to maintain security and confidentiality.		
3 Store required information in approved locations to the agreed deadlines.		
4 Update information, as required.		
5 Follow agreed procedures for deleting information.		
<b>Retrieve information</b>		
6 Confirm information for retrieval.		
7 Comply with procedures and legislation for accessing a filing system.		
8 Locate and retrieve the required information.		
9 Follow the correct procedures when there are problems with filing systems.		
10 Provide information in the agreed format and within agreed timescales.		

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

## UNIT H559 04 (S218)    Store and Retrieve Information Using a Filing System

Knowledge requirements	Evidence numbers	Evidence type
1    The purpose of storing and retrieving required information and the organisational procedures that must be followed.		
2    The different information systems and their main features.		
3    Legal and organisational requirements covering the security and confidentiality of information.		
4    Legislation and organisational requirements covering data protection.		
5    The methods that can be used to collect required information.		
6    The procedures to be followed to access information systems.		
7    The procedures for identifying and deleting information and why they must be followed.		
8    How to make sure information is accurate.		
9    The problems that occur with filing systems and who to report them to.		
10    The purpose of providing information in the required format and within agreed timescales.		

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 FD99 04 (S219) Provide Archive Services

### Unit summary

Archive and retrieve information to the agreed brief and in line with organisational requirements.

### Skills

You will apply the following skills:

- ◆ Communicating.
- ◆ Organising.
- ◆ Planning.
- ◆ Problem solving.
- ◆ Using technology.

### Performance indicators

You will:

- 1 Identify and agree on the information to be archived.
- 2 Identify and agree on the retention period for information being archived.
- 3 Archive information to the agreed brief and within agreed timescales.
- 4 Follow requirements of external archive systems, if outsourced from the organisation.
- 5 Archive information to comply with organisational policies and procedures and legislation requirements.
- 6 Maintain and update a record of archived information.
- 7 Retrieve archived information on request.
- 8 Follow agreed procedures for deleting information from the archive system to comply with organisational policies and procedures and legislation requirements, if required.
- 9 Resolve or refer problems that occur with the archive systems.

### Knowledge

You will know:

- 1 The purpose of archiving required information.
- 2 Legal and organisational requirements covering security and confidentiality of information to be archived.
- 3 The procedures to be followed to access archive information systems.
- 4 The purpose of recording archived information.
- 5 When information should be archived and the procedures to follow.
- 6 Procedures for the retention of archived information.
- 7 Procedures for retrieving archived information.
- 8 Procedures for deleting archived information.
- 9 The problems that occur with archive systems and who to report them to.

## UNIT FD99 04 (S219) Provide Archive Services

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Identify and agree on the information to be archived.		
2 Identify and agree on the retention period for information being archived.		
3 Archive information to the agreed brief and within agreed timescales.		
4 Follow requirements of external archive systems, if outsourced from the organization.		
5 Archive information to comply with organisational policies and procedures and legislation requirements.		
6 Maintain and update a record of archived information.		
7 Retrieve archived information on request.		
8 Follow agreed procedures for deleting information from the archive system to comply with organisational policies and procedures and legislation requirements, if required.		
9 Resolve or refer problems that occur with the archive systems.		

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

## UNIT FD99 04 (S219) Provide Archive Services

Knowledge requirements	Evidence numbers	Evidence type
1 The purpose of archiving required information.		
2 Legal and organisational requirements covering security and confidentiality of information to be archived.		
3 The procedures to be followed to access archive information systems.		
4 The purpose of recording archived information.		
5 When information should be archived and the procedures to follow.		
6 Procedures for the retention of archived information.		
7 Procedures for retrieving archived information.		
8 Procedures for deleting archived information.		
9 The problems that occur with archive 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:** \_\_\_\_\_

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**Date:** \_\_\_\_\_

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(if sampled)

**Date:** \_\_\_\_\_



## UNIT H985 04 (S221) Maintain and Issue Stock Items

### Unit summary

Maintain, order, check and issue stock items from external or internal suppliers.

### Skills

You will apply the following skills:

- ◆ Auditing.
- ◆ Checking.
- ◆ Communicating.
- ◆ Recording.
- ◆ Reporting.

### Performance indicators

You will:

#### Maintain stock levels

- 1 Maintain stock items to required levels.
- 2 Handle and store stock safely and securely, maintaining its condition.
- 3 Follow relevant organisational procedures.
- 4 Carry out stock-takes, as instructed, and report problems.
- 5 Order stocks from suppliers.
- 6 Chase-up orders with suppliers.
- 7 Check incoming deliveries against orders and report any problems.
- 8 Keep up-to-date, accurate and legible records of stocks delivered and held.

#### Issue stock items

- 9 Issue stock items as requested, following organisational procedures.
- 10 Keep up-to-date, accurate and legible records of stock items issued.
- 11 Dispose of unwanted or damaged stock items safely, following organisational procedures and legal requirements.
- 12 Identify and recommend ways in which the system for receiving and issuing stock could be improved.

## UNIT H985 04 (S221) Maintain and Issue Stock Items

### Knowledge

#### You will know:

- 1 The requirements for ordering, taking delivery, storing, stock-taking, issuing and disposing of stock items.
- 2 The types of problems that may occur with deliveries and stock items and how to deal with these correctly.
- 3 Methods of keeping up-to-date, accurate and legible records of stock items.
- 4 The current level of demand for stock items and factors which may affect future levels of demand.
- 5 How to handle and store stock items safely and securely.
- 6 The different suppliers to order from.
- 7 Any differences in the way stock items are ordered from internal and external suppliers.
- 8 Organisational procedures for issuing stock items.
- 9 The circumstances in which receipts may be required for stock items issued.
- 10 How to recommend improvements to systems.
- 11 Correct procedures for safe disposal of unwanted or damaged stock items.

## UNIT H985 04 (S221) Maintain and Issue Stock Items

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Maintain stock levels</b>		
1 Maintain stock items to required levels.		
2 Handle and store stock safely and securely, maintaining its condition.		
3 Follow relevant organisational procedures.		
4 Carry out stock-takes, as instructed, and report problems.		
5 Order stocks from suppliers.		
6 Chase-up orders with suppliers.		
7 Check incoming deliveries against orders and report any problems.		
8 Keep up-to-date, accurate and legible records of stocks delivered and held.		
<b>Issue stock items</b>		
9 Issue stock items as requested, following organisational procedures.		
10 Keep up-to-date, accurate and legible records of stock items issued.		
11 Dispose of unwanted or damaged stock items safely, following organisational procedures and legal requirements.		
12 Identify and recommend ways in which the system for receiving and issuing stock could be improved.		

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

## UNIT H985 04 (S221) Maintain and Issue Stock Items

Knowledge requirements	Evidence numbers	Evidence type
1 The requirements for ordering, taking delivery, storing, stock-taking, issuing and disposing of stock items.		
2 The types of problems that may occur with deliveries and stock items and how to deal with these correctly.		
3 Methods of keeping up-to-date, accurate and legible records of stock items.		
4 The current level of demand for stock items and factors which may affect future levels of demand.		
5 How to handle and store stock items safely and securely.		
6 The different suppliers to order from.		
7 Any differences in the way stock items are ordered from internal and external suppliers.		
8 Organisational procedures for issuing stock items.		
9 The circumstances in which receipts may be required for stock items issued.		
10 How to recommend improvements to systems.		
11 Correct procedures for safe disposal of unwanted or damaged stock items.		

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**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

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**Date:** \_\_\_\_\_

**Internal verifier:** \_\_\_\_\_  
(if sampled)

**Date:** \_\_\_\_\_

## UNIT FD9F 04 (S225) Respond to Change in a Business Environment

### Unit summary

Consider coping strategies when faced with change within a business environment.

### Skills

**You will apply the following skills:**

- ◆ Analysing.
- ◆ Communicating.
- ◆ Listening.
- ◆ Negotiating.
- ◆ Problem solving.
- ◆ Questioning.

### Performance indicators

**You will:**

- 1 Assist the change process within own area of work.
- 2 Contribute to plans for change.
- 3 Adapt realistically to change.
- 4 Identify support mechanisms for self and colleagues during the change process.
- 5 Support others during change.
- 6 Ask questions to clarify aspects of the change process when unsure.
- 7 Contribute to the evaluation of the change.

### Knowledge

**You will know:**

- 1 The reasons for change and the pace of change in organisations.
- 2 The psychological impact of change on people in the workplace.
- 3 Own role in facilitating change at work.
- 4 How to adapt to change in own work role.
- 5 How to evaluate the likely impact of change in the workplace.
- 6 The value of seeing change as an opportunity to the business, the organisation, the team and self.
- 7 The types of support mechanisms that people need during change processes at work.
- 8 How to put change at work into perspective.
- 9 Strategies to cope with change or to learn how to control the way change affects own area of work.
- 10 How to evaluate the effect of change on people, processes and outcomes.

## UNIT FD9F 04 (S225) Respond to Change in a Business Environment

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Assist the change process within own area of work.		
2 Contribute to plans for change.		
3 Adapt realistically to change.		
4 Identify support mechanisms for self and colleagues during the change process.		
5 Support others during change.		
6 Ask questions to clarify aspects of the change process when unsure.		
7 Contribute to the evaluation of the change.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 The reasons for change and the pace of change in organisations.		
2 The psychological impact of change on people in the workplace.		
3 Own role in facilitating change at work.		
4 How to adapt to change in own work role.		
5 How to evaluate the likely impact of change in the workplace.		
6 The value of seeing change as an opportunity to the business, the organisation, the team and self.		
7 The types of support mechanisms that people need during change processes at work.		
8 How to put change at work into perspective.		
9 Strategies to cope with change or to learn how to control the way change affects own area of work.		
10 How to evaluate the effect of change on people, processes and outcomes.		

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**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

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**Date:** \_\_\_\_\_

**Internal verifier:** \_\_\_\_\_  
(if sampled)

**Date:** \_\_\_\_\_

## UNIT FD9G 04 (S227) Administer HR Records

### Unit summary

This standard is about the work a Human Resources administrator undertakes when dealing with employee records.

### Skills

You will apply the following skills:

- ◆ Accuracy.
- ◆ Analysing.
- ◆ Attention to detail.
- ◆ Communicating.
- ◆ Evaluating.
- ◆ Managing time.
- ◆ Organising.
- ◆ Problem solving.
- ◆ Quality checking.
- ◆ Recording.
- ◆ Researching.

### Performance indicators

You will:

#### Create personnel files for new starters

- 1 Open a new personnel file.
- 2 Record required information about the employee.
- 3 File documents relevant to the employee.
- 4 Process monitoring data, as appropriate.
- 5 Check that information and documents are complete, requesting missing information and documents, when necessary.

#### Maintain Human Resource information

- 6 Keep required personnel information up-to-date.
- 7 Maintain records of:
  - ◆ performance management and development
  - ◆ holiday, sickness and other leave
  - ◆ disciplinary and grievance
  - ◆ exit process
- 8 Process and file relevant correspondence and documentation Report Human Resource information.

#### Report Human Resource information

- 9 Provide as requested:
  - ◆ information from individual personnel files
  - ◆ management information reports

#### Comply with organisational and legal requirements

- 10 Comply with organisational and legal requirements for confidentiality, freedom of information, data protection and security of information.
- 11 Remove out-of-date information in line with organisational policy and procedures.
- 12 Archive relevant information in line with current legislation and organisational policy and procedures.

## UNIT FD9G 04 (S227) Administer HR Records

### Knowledge

#### You will know:

##### **Create personnel files for new starters**

- 1 The systems, procedures and software used by the organisation for Human Resource records and how to use it to open a new personnel file.
- 2 The information that should be entered in a new personnel file and how to do this, including: name, address, next of kin, date employment commenced, proof of eligibility to work in the UK, offer letter, references, contract of employment, job description/person specification, equal opportunities monitoring data.

##### **Maintain Human Resource information**

- 3 How to enter and update HR information, including information on: terms and conditions of employment, employment benefits, pay, pension, sick leave, maternity/paternity leave, holiday, other leave of absence, induction and results of review following any probationary period, performance management, training and development, promotion or other changes to terms and conditions of employment, disciplinary or grievance issues, staff exit.
- 4 The information that should be held for members of staff and the action to take if this is incomplete.

##### **Report Human Resource information**

- 5 The types of reports that may be requested.
- 6 How to produce reports from individual or multiple Human Resource files.

##### **Comply with organisational and legal requirements**

- 7 The current legislation that applies when dealing with Human Resource records.
- 8 What the limits of your responsibility are, and to whom matters outside your responsibility should be referred.
- 9 The data protection principles that apply to personnel records (eg requirement to file sickness certificates separately from the personnel file).
- 10 Organisational policy and procedure for removal of out-of-date information.
- 11 Organisational policy and procedure for archiving information.
- 12 Organisational procedures for confidentiality and security of Human Resource records.
- 13 The purpose of confidentiality and security of Human Resource information and the potential consequences of a breach of confidentiality or security.



## UNIT FD9G 04 (S227) Administer HR Records

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Create personnel files for new starters</b>		
1 Open a new personnel file.		
2 Record required information about the employee.		
3 File documents relevant to the employee.		
4 Process monitoring data, as appropriate.		
5 Check that information and documents are complete, requesting missing information and documents, when necessary.		
<b>Maintain Human Resource information</b>		
6 Keep required personnel information up-to-date.		
7 Maintain records of:		
<ul style="list-style-type: none"> <li>◆ performance management and development</li> <li>◆ holiday, sickness and other leave</li> <li>◆ disciplinary and grievance</li> <li>◆ exit process</li> </ul>		
8 Process and file relevant correspondence and documentation Report Human Resource information.		
<b>Report Human Resource information</b>		
9 Provide as requested		
<ul style="list-style-type: none"> <li>◆ information from individual personnel files</li> <li>◆ management information reports</li> </ul>		
<b>Comply with organisational and legal requirements</b>		
10 Comply with organisational and legal requirements for confidentiality, freedom of information, data protection and security of information.		
11 Remove out-of-date information in line with organisational policy and procedures.		
12 Archive relevant information in line with current legislation and organisational policy and procedures.		

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

## UNIT FD9G 04 (S227) Administer HR Records

Knowledge requirements	Evidence numbers	Evidence type
<b>Create personnel files for new starters</b>		
1 The systems, procedures and software used by the organisation for Human Resource records and how to use it to open a new personnel file.		
2 The information that should be entered in a new personnel file and how to do this, including: name, address, next of kin, date employment commenced, proof of eligibility to work in the UK, offer letter, references, contract of employment, job description/person specification, equal opportunities monitoring data.		
<b>Maintain Human Resource information</b>		
3 How to enter and update HR information, including information on: terms and conditions of employment, employment benefits, pay, pension, sick leave, maternity/paternity leave, holiday, other leave of absence, induction and results of review following any probationary period, performance management, training and development, promotion or other changes to terms and conditions of employment, disciplinary or grievance issues, staff exit.		
4 The information that should be held for members of staff and the action to take if this is incomplete.		
<b>Report Human Resource information</b>		
5 The types of reports that may be requested.		
6 How to produce reports from individual or multiple Human Resource files.		
<b>Comply with organisational and legal requirements</b>		
7 The current legislation that applies when dealing with Human Resource records.		
8 What the limits of your responsibility are, and to whom matters outside your responsibility should be referred.		
9 /The data protection principles that apply to personnel records (eg requirement to file sickness certificates separately from the personnel file).		
10 Organisational policy and procedure for removal of out-of-date information.		
11 Organisational policy and procedure for archiving information.		
12 Organisational procedures for confidentiality and security of Human Resource records.		
13 The purpose of confidentiality and security of Human Resource information and the potential consequences of a breach of confidentiality or security.		

**UNIT FD9G 04 (S227) Administer HR Records**

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 FD9H 04 (S228) Administer the Recruitment and Selection Process

### Unit summary

This standard is about a Human Resources administrator assisting with the recruitment and selection process.

### Skills

You will apply the following skills:

- ◆ Accuracy.
- ◆ Analysing.
- ◆ Attention to detail.
- ◆ Communicating.
- ◆ Evaluating.
- ◆ Managing time.
- ◆ Organising.
- ◆ Presenting yourself.
- ◆ Prioritising.
- ◆ Problem solving.
- ◆ Quality checking.
- ◆ Recording.
- ◆ Researching.

### Performance indicators

You will:

#### Advertise job vacancies

- 1 Confirm personnel requirements with the responsible people.
- 2 Confirm the information that will appear in job advertisements.
- 3 Confirm how the vacancy will be advertised.
- 4 Advertise the vacancy as agreed.
- 5 Liaise with any relevant agencies to confirm details of job vacancies making sure that they understand the requirements of the organisation.

#### Respond to potential applicants

- 6 Send out application packs or other information to potential applicants on request.
- 7 Respond appropriately to queries from potential applicants.
- 8 Maintain records of responses received.

#### Administer the selection process

- 9 Collate applications and make these available to those involved in selection.
- 10 Invite shortlisted candidates to take part in the selection process.
- 11 Process feedback for unsuccessful applicants.
- 12 Keep records of responses from shortlisted candidates.
- 13 Provide appropriate support for the selection process.
- 14 Help to make sure candidates have a positive impression of the organisation.
- 15 Keep records of the outcomes of the selection process.

## UNIT FD9H 04 (S228) Administer the Recruitment and Selection Process

### Administer the appointment process

- 16 Carry out appropriate pre-employment checks.
- 17 Format and send out offer letters and employment contracts.
- 18 Maintain records of the recruitment and selection process in line with current legislation and organisational requirements.

### Knowledge

#### You will know:

#### Advertise job vacancies

- 1 The Organisational policies, procedures and constraints that affect your area of responsibility.
- 2 Procedures to identify and process personnel requirements in the organisation: who is involved and what do they do?
- 3 Ways in which personnel requirements are expressed (eg job descriptions and person specifications) and how to interpret these.
- 4 The current legislation that applies when you are dealing with recruitment and selection.
- 5 What the limits of your responsibility are, and to whom matters outside your responsibility should be referred.
- 6 The types of information to include in a job advertisement and legal/organisational requirements that affect this.
- 7 How to place advertisements in different locations (eg press, website).
- 8 How to liaise with recruitment agencies.

#### Respond to potential applicants

- 9 The types of information that should be in an application pack.
- 10 The types of queries that applicants may have and how to respond to them.
- 11 How to keep records of responses received and their purpose.

#### Administer the selection process

- 12 The procedures used to shortlist applicants: who is involved and what do they do?
- 13 Procedures and methods for contacting shortlisted candidates to invite them to participate in the selection process (eg by phone, letter, e-mail).
- 14 How to process feedback for unsuccessful applicants.
- 15 Different types of selection processes that may be used (eg interview, assessment centre) and how they work.
- 16 The selection processes used in your organisation and your role in those.
- 17 The administrative support needed for different types of selection processes.
- 18 Procedures for obtaining the resources needed for selection processes (eg booking rooms and refreshments).
- 19 The different types of documents used for selection processes (eg interview schedules, question proformas, recording documentation, tests used in assessment centres).
- 20 The purpose of giving candidates a favourable impression of the organisation.
- 21 The range of records that must be kept following the selection process and the purpose of following organisational procedures for this.

## **UNIT FD9H 04 (S228) Administer the Recruitment and Selection Process**

### **Administer the appointment process**

- 22 The range of pre-employment checks (eg CRB checks, reference checks) that might be required and how to carry these out.
- 23 How to format offer letters and employment contracts.
- 24 The purpose of confidentiality and security of record keeping.

## UNIT FD9H 04 (S228) Administer the Recruitment and Selection Process

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Advertise job vacancies</b>		
1 Confirm personnel requirements with the responsible people.		
2 Confirm the information that will appear in job advertisements.		
3 Confirm how the vacancy will be advertised.		
4 Advertise the vacancy as agreed.		
5 Liaise with any relevant agencies to confirm details of job vacancies making sure that they understand the requirements of the organisation.		
<b>Respond to potential applicants</b>		
6 Send out application packs or other information to potential applicants on request.		
7 Respond appropriately to queries from potential applicants.		
8 Maintain records of responses received.		
<b>Administer the selection process</b>		
9 Collate applications and make these available to those involved in selection.		
10 Invite shortlisted candidates to take part in the selection process.		
11 Process feedback for unsuccessful applicants.		
12 Keep records of responses from shortlisted candidates.		
13 Provide appropriate support for the selection process.		
14 Help to make sure candidates have a positive impression of the organisation.		
15 Keep records of the outcomes of the selection process.		
<b>Administer the appointment process</b>		
16 Carry out appropriate pre-employment checks.		
17 Format and send out offer letters and employment contracts.		
18 Maintain records of the recruitment and selection process in line with current legislation and organisational requirements.		

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

## UNIT FD9H 04 (S228) Administer the Recruitment and Selection Process

Knowledge requirements	Evidence numbers	Evidence type
<b>Advertise job vacancies</b>		
1 The organisational policies, procedures and constraints that affect your area of responsibility.		
2 Procedures to identify and process personnel requirements in the organisation: who is involved and what do they do?		
3 Ways in which personnel requirements are expressed (eg job descriptions and person specifications) and how to interpret these.		
4 The current legislation that applies when you are dealing with recruitment and selection.		
5 What the limits of your responsibility are, and to whom matters outside your responsibility should be referred.		
6 The types of information to include in a job advertisement and legal/organisational requirements that affect this.		
7 How to place advertisements in different locations (eg press, website).		
8 How to liaise with recruitment agencies.		
<b>Respond to potential applicants</b>		
9 The types of information that should be in an application pack.		
10 The types of queries that applicants may have and how to respond to them.		
11 How to keep records of responses received and their purpose.		
<b>Administer the selection process</b>		
12 The procedures used to shortlist applicants: who is involved and what do they do?		
13 Procedures and methods for contacting shortlisted candidates to invite them to participate in the selection process (eg by phone, letter, e-mail).		
14 How to process feedback for unsuccessful applicants.		
15 Different types of selection processes that may be used (eg interview, assessment centre) and how they work.		
16 The selection processes used in your organisation and your role in those.		
17 The administrative support needed for different types of selection processes.		
18 Procedures for obtaining the resources needed for selection processes (eg booking rooms and refreshments).		
19 The different types of documents used for selection processes (eg interview schedules, question proformas, recording documentation, tests used in assessment centres).		
20 The purpose of giving candidates a favourable impression of the organisation.		
21 The range of records that must be kept following the selection process and the purpose of following organisational procedures for this.		



## UNIT FD9H 04 (S228) Administer the Recruitment and Selection Process

Knowledge requirements	Evidence numbers	Evidence type
<b>Administer the appointment process</b>		
22 The range of pre-employment checks (eg CRB checks, reference checks) that might be required and how to carry these out.		
23 How to format offer letters and employment contracts.		
24 The purpose of confidentiality and security of record keeping.		

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 FN6W 04 (S253) Process Court Documentation

### Unit summary

This Unit is about processing court documentation to ensure that individuals held in custody appear in court when required. You need to keep accurate and up-to-date records of when individuals must appear in court. Accuracy, timeliness and confidentiality are critical in this area of work.

### Skills

#### You will apply the following skills:

- ◆ Accuracy.
- ◆ Timeliness.
- ◆ Confidentiality.

### Performance indicators

#### You will:

#### Process court documentation

- 1 Maintain systems to record court documentation and the dates when individuals must appear in courts, in line with organisational requirements.
- 2 Ensure court documentation is served on individuals in custody and record this, according to legal and organisational requirements.
- 3 Confirm with the courts which individuals are required to be produced on which day.
- 4 Identify whether the individuals could be released from court, or whether they must return to the establishment.
- 5 Update records promptly, if there are changes to the requirements of courts.

### Knowledge

#### You will know:

- 1 Current, relevant legislation, policies, procedures, codes of practice and practice advice for processing court documentation.
- 2 Current, relevant legislation and organisational requirements in relation to race, diversity and human rights.
- 3 Current, relevant legislation and organisational requirements in relation to health and safety.
- 4 Manual and computerised systems for recording dates when individuals must appear in courts, and how to use these systems.
- 5 Organisational requirements for making arrangements for the movement of individuals to courts, other custodial establishments and other environments.
- 6 The types of court documentation that may be served on individuals in custody, and the legal and organisational requirements relating to these.
- 7 The circumstances under which individuals must return to the establishment and how to identify if this is the case.
- 8 The type of documentation which must be completed and how to complete it correctly.

## UNIT FN6W 04 (S253) Process Court Documentation

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Process court documentation</b>		
1 Maintain systems to record court documentation and the dates when individuals must appear in courts, in line with organisational requirements.		
2 Ensure court documentation is served on individuals in custody and record this, according to legal and organisational requirements.		
3 Confirm with the courts which individuals are required to be produced on which day.		
4 Identify whether the individuals could be released from court, or whether they must return to the establishment.		
5 Update records promptly, if there are changes to the requirements of courts.		

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

## UNIT FN6W 04 (S253) Process Court Documentation

Knowledge requirements	Evidence numbers	Evidence type
1 Current, relevant legislation, policies, procedures, codes of practice and practice advice for processing court documentation.		
2 Current, relevant legislation and organisational requirements in relation to race, diversity and human rights.		
3 Current, relevant legislation and organisational requirements in relation to health and safety.		
4 Manual and computerised systems for recording dates when individuals must appear in courts, and how to use these systems.		
5 Organisational requirements for making arrangements for the movement of individuals to courts, other custodial establishments and other environments.		
6 The types of court documentation that may be served on individuals in custody, and the legal and organisational requirements relating to these.		
7 The circumstances under which individuals must return to the establishment and how to identify if this is the case.		
8 The type of documentation which must be completed and how to complete it correctly.		

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 FN9M 04 (S254)    Contribute to Maintaining Security and Protecting Individuals Rights in the Custodial Environment**

### **Unit summary**

This Unit is about taking precautions to prevent breaches of security in the custodial environment, protecting the rights of individuals and promoting anti-discriminatory practice.

### **Skills**

**You will apply the following skills:**

- ◆ Accuracy.
- ◆ Timeliness.
- ◆ Confidentiality.

#### **Performance indicators**

**You will:**

##### **Contribute to maintaining security of the custodial environment**

- 1 Organise and carry out your duties in a way that follows both legal requirements and the policies and procedures of your organisation.
- 2 Take appropriate steps to maintain the security of the organisation's property for which you are responsible.
- 3 Remain constantly alert to the possibility of breaches in restrictions on individuals' liberty.
- 4 Provide relevant people with the information they need to maintain control and restrictions on individual' liberty.
- 5 Resist and report any pressure or inducement — that is not consistent with legal and organisational requirements — to reduce restrictions on individuals' liberty.

##### **Contribute to protecting the rights of individuals and promoting anti-discriminatory practices.**

- 6 Record and use information about individuals in custody in ways that:
  - ◆ are consistent with the protection of their rights and
  - ◆ comply with your organisation's policies and procedures
- 7 Provide information about individuals in custody only to those entitled to have it.
- 8 Identify when individuals' rights are being infringed and follow your organisation's policy in reporting infringements.
- 9 Resist and report any pressure to infringe individuals' rights.
- 10 Promote anti-discriminatory practice in ways that comply with legislative requirements and your organisation's policy.
- 11 Take appropriate action to minimise unfair discrimination in the custodial establishment.
- 12 Communicate in ways that can be understood by individuals, responding to their different needs, abilities and preferences.

## **UNIT FN9M 04 (S254)    Contribute to Maintaining Security and Protecting Individuals Rights in the Custodial Environment**

### **Knowledge**

#### **You will know:**

- 1 Current, relevant legislation, policies, procedures, codes of practice and practice advice for contributing to maintaining security and protecting individuals' rights in the custodial environment.
- 2 Current, relevant legislation and organisational requirements in relation to race, diversity and human rights.
- 3 Current, relevant legislation and organisational requirements in relation to health and safety.
- 4 The principles and standards of security awareness appropriate to your role and how to apply them.
- 5 The importance of security awareness and how it is relevant to your job.
- 6 Appropriate steps to take to maintain the security of the organisation's property.
- 7 The types of potential breaches to restrictions on individuals' liberty.
- 8 The types of information that will help other people to maintain control and restrictions on individuals' liberty.
- 9 Individuals' rights conferred by law and by your organisation.
- 10 Relevant legal requirements.
- 11 What information can be held on individuals and how this can be handled in accordance with current data protection legislation.
- 12 Who is entitled to have what information.
- 13 Relevant organisational policies and procedures.
- 14 Good anti-discriminatory practice and how to promote it.
- 15 The importance of taking action to minimise unfair discrimination, and how to do so appropriately.
- 16 Your organisation's systems and requirements for handling, recording and communicating information.
- 17 The types of documentation which must be completed and how to complete it correctly.

## UNIT FN9M 04 (S254) Contribute to Maintaining Security and Protecting Individuals Rights in the Custodial Environment

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Contribute to maintaining security of the custodial environment</b>		
1 Organise and carry out your duties in a way that follows both legal requirements and the policies and procedures of your organisation.		
2 Take appropriate steps to maintain the security of the organisation's property for which you are responsible.		
3 Remain constantly alert to the possibility of breaches in restrictions on individuals' liberty.		
4 Provide relevant people with the information they need to maintain control and restrictions on individual' liberty.		
5 Resist and report any pressure or inducement — that is not consistent with legal and organisational requirements — to reduce restrictions on individuals' liberty.		
<b>Contribute to protecting the rights of individuals and promoting anti-discriminatory practices.</b>		
6 Record and use information about individuals in custody in ways that: <ul style="list-style-type: none"> <li>◆ are consistent with the protection of their rights and</li> <li>◆ comply with your organisation's policies and procedures</li> </ul>		
7 Provide information about individuals in custody only to those entitled to have it.		
8 Identify when individuals' rights are being infringed and follow your organisation's policy in reporting infringements.		
9 Resist and report any pressure to infringe individuals' rights.		
10 Promote anti-discriminatory practice in ways that comply with legislative requirements and your organisation's policy.		
11 Take appropriate action to minimise unfair discrimination in the custodial establishment.		
12 Communicate in ways that can be understood by individuals, responding to their different needs, abilities and preferences.		

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

## UNIT FN9M 04 (S254)    Contribute to Maintaining Security and Protecting Individuals Rights in the Custodial Environment

Knowledge requirements	Evidence numbers	Evidence type
1 Current, relevant legislation, policies, procedures, codes of practice and practice advice for contributing to maintaining security and protecting individuals' rights in the custodial environment.		
2 Current, relevant legislation and organisational requirements in relation to race, diversity and human rights.		
3 Current, relevant legislation and organisational requirements in relation to health and safety.		
4 The principles and standards of security awareness appropriate to your role and how to apply them.		
5 The importance of security awareness and how it is relevant to your job.		
6 Appropriate steps to take to maintain the security of the organisation's property.		
7 The types of potential breaches to restrictions on individuals' liberty.		
8 The types of information that will help other people to maintain control and restrictions on individuals' liberty.		
9 Individuals' rights conferred by law and by your organisation.		
10 Relevant legal requirements.		
11 What information can be held on individuals and how this can be handled in accordance with current data protection legislation.		
12 Who is entitled to have what information.		
13 Relevant organisational policies and procedures.		
14 Good anti-discriminatory practice and how to promote it.		
15 The importance of taking action to minimise unfair discrimination, and how to do so appropriately.		
16 Your organisation's systems and requirements for handling, recording and communicating information.		
17 The types of documentation which must be completed and how to complete it correctly.		

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 FN6X 04 (S255) Calculate Critical Dates for Sentences

### Unit summary

This unit is about calculating and recalculating critical dates for sentences so that individuals are released from custody on time. You have to check and interpret the relevant documentation, and calculate and recalculate critical dates every time you receive new information which may have an impact on critical dates. Accuracy, timeliness and confidentiality are critical in this area of work, as is the ability to explain clearly how you have made the calculations. The critical dates you are calculating will relate to sentences awarded by a court in the country in which you are working.

### Skills

#### You will apply the following skills:

- ◆ Accuracy.
- ◆ Timeliness.
- ◆ Confidentiality.

#### Performance indicators

##### You will:

##### **Check and interpret documentation relevant to the imprisonment or detention of individuals**

- 1 Verify that the documentation allows lawful imprisonment or detention of the individual in the establishment.
- 2 Interpret correctly all information on the documentation.
- 3 Check with the relevant authority if you are in doubt about how to interpret information.
- 4 Enter all information accurately into systems, in line with organisational procedures.

##### **Calculate critical dates**

- 5 Assess accurately information which may have an impact on critical dates.
- 6 Calculate accurately critical dates for sentences of all individuals in the establishment.
- 7 Check with the relevant authority where you are in doubt about critical dates.
- 8 Ensure that full information relevant to critical dates is recorded and documented accurately on systems, in line with organisational procedures.
- 9 Communicate critical dates to those authorised to have this information, in the approved format and within the agreed time limits.
- 10 Explain your calculations clearly where you are requested to do so by those authorised to have this information.

## UNIT FN6X 04 (S255) Calculate Critical Dates for Sentences

### Knowledge

#### You will know:

- 1 Current, relevant legislation, policies, procedures, codes of practice and practice advice for calculating critical dates for sentences.
- 2 Current, relevant legislation and organisational requirements in relation to race, diversity and human rights.
- 3 Current, relevant legislation and organisational requirements in relation to health and safety.
- 4 The legal requirements which impact on the calculation of critical dates.
- 5 Your organisation's policies and procedures for calculating critical dates.
- 6 The documentation required in order to imprison or detain an individual lawfully.
- 7 The different types of documentation which are relevant to the imprisonment of individuals and the calculation of critical dates for sentences, and how to interpret the information they contain.
- 8 The relevant authorities to contact when in doubt about how to interpret information or calculate sentences.
- 9 The organisation's systems and how to use them.
- 10 The range of different types of information which may have an impact on critical dates, where to obtain this information, and how to assess its impact accurately.
- 11 The range of critical dates which apply to different types of sentences, and how to calculate these accurately.
- 12 The importance of ensuring critical dates are entered accurately on systems.
- 13 The people who are authorised to have information about critical dates.
- 14 The formats and time limits within which information about critical dates must be supplied.
- 15 How to explain clearly how critical dates have been calculated.
- 16 The types of documentation which must be completed and how to complete it correctly.

## UNIT FN6X 04 (S255) Calculate Critical Dates for Sentences

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Check and interpret documentation relevant to the imprisonment or detention of individuals</b>		
1 Verify that the documentation allows lawful imprisonment or detention of the individual in the establishment.		
2 Interpret correctly all information on the documentation.		
3 Check with the relevant authority if you are in doubt about how to interpret information.		
4 Enter all information accurately into systems, in line with organisational procedures.		
<b>Calculate critical dates</b>		
5 Assess accurately information which may have an impact on critical dates.		
6 Calculate accurately critical dates for sentences of all individuals in the establishment.		
7 Check with the relevant authority where you are in doubt about critical dates.		
8 Ensure that full information relevant to critical dates is recorded and documented accurately on systems, in line with organisational procedures.		
9 Communicate critical dates to those authorised to have this information, in the approved format and within the agreed time limits.		
10 Explain your calculations clearly where you are requested to do so by those authorised to have this information.		

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

## UNIT FN6X 04 (S255) Calculate Critical Dates for Sentences

Knowledge requirements	Evidence numbers	Evidence type
1 Current, relevant legislation, policies, procedures, codes of practice and practice advice for calculating critical dates for sentences.		
2 Current, relevant legislation and organisational requirements in relation to race, diversity and human rights.		
3 Current, relevant legislation and organisational requirements in relation to health and safety.		
4 The legal requirements which impact on the calculation of critical dates.		
5 Your organisation's policies and procedures for calculating critical dates.		
6 The documentation required in order to imprison or detain an individual lawfully.		
7 The different types of documentation which are relevant to the imprisonment of individuals and the calculation of critical dates for sentences, and how to interpret the information they contain.		
8 The relevant authorities to contact when in doubt about how to interpret information or calculate sentences.		
9 The organisation's systems and how to use them.		
10 The range of different types of information which may have an impact on critical dates, where to obtain this information, and how to assess its impact accurately.		
11 The range of critical dates which apply to different types of sentences, and how to calculate these accurately.		
12 The importance of ensuring critical dates are entered accurately on systems.		
13 The people who are authorised to have information about critical dates.		
14 The formats and time limits within which information about critical dates must be supplied.		
15 How to explain clearly how critical dates have been calculated.		
16 The types of documentation which must be completed and how to complete it correctly.		

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 FN6Y 04 (S256)    **Make Administrative Arrangements for the Movement of Individuals Outside of the Custodial Establishment**

### Unit summary

This Unit is about making administrative arrangements to move individuals held in custody to other establishments and other environments. You need to keep accurate and up-to-date records of when individuals need to be moved and make the necessary arrangements with other establishments, other environments and the escorting authorities. This standard is imported from **Skills for Justice Custodial Administration suite**.

### Skills

You will apply the following skills:

- ◆ Accuracy.
- ◆ Timeliness.
- ◆ Confidentiality.
- ◆ Negotiation.

#### Performance indicators

You will:

##### **Identify and record requirements for moving individuals outside the custodial establishment**

- 1 Maintain systems to record when individuals in custody need to be moved and where to, in line with organisational requirements.
- 2 Obtain and record sufficient, accurate and up-to-date information to allow the movement of individuals to be arranged.
- 3 Update records promptly, if there are changes to the requirements for moving individuals.

##### **Make administrative arrangements with escorting authorities, other establishments and other environments**

- 4 Make arrangements with other custodial establishments or other environments to receive individuals, where required.
- 5 Communicate in ways that can be understood by individuals, responding to their different needs, abilities and preferences.
- 6 Confirm full details of **movements** with the relevant **escorting authorities** at the agreed time.
- 7 Inform internal authorities about the **movements** in time for them to get the individuals and their property ready.
- 8 Prepare the required paperwork to support the **movements**.
- 9 Inform only those authorised to have the information about the **movements**.
- 10 Check that individuals have returned to the establishment where arrangements have been made for this to happen, and take appropriate action if they have not.

## **UNIT FN6Y 04 (S256)    Make Administrative Arrangements for the Movement of Individuals Outside of the Custodial Establishment**

### **Knowledge**

#### **You will know:**

- 1 Current, relevant legislation, policies, procedures, codes of practice and practice advice for making administrative arrangements for the movement of individuals outside the custodial establishment.
- 2 Current, relevant legislation and organisational requirements in relation to race, diversity and human rights.
- 3 Current, relevant legislation and organisational requirements in relation to health and safety.
- 4 Manual and computerised systems for recording dates when individuals must be moved, and how to use these systems.
- 5 Organisational requirements for making arrangements for the movement of individuals to other custodial establishments and other environments.
- 6 The escorting authorities, other custodial establishments and other environments with which you need to make arrangements.
- 7 The details of movements that the escorting authorities require and the times when they require these details.
- 8 The internal authorities you must inform about the movements, and when you must inform them to allow them to prepare individuals and their property.
- 9 The importance of confidentiality, and how to ensure information is only available to those authorised to have it.
- 10 What action to take if individuals do not return as expected.
- 11 The types of documentation which must be completed and how to complete it correctly.

## UNIT FN6Y 04 (S256) Make Administrative Arrangements for the Movement of Individuals Outside of the Custodial Establishment

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Identify and record requirements for moving individuals outside the custodial establishment.</b>		
1 Maintain systems to record when individuals in custody need to be moved and where to, in line with organisational requirements.		
2 Obtain and record sufficient, accurate and up-to-date information to allow the movement of individuals to be arranged.		
3 Update records promptly, if there are changes to the requirements for moving individuals.		
<b>Make administrative arrangements with escorting authorities, other establishments and other environments.</b>		
4 Make arrangements with other custodial establishments or other environments to receive individuals, where required.		
5 Communicate in ways that can be understood by individuals, responding to their different needs, abilities and preferences.		
6 Confirm full details of <b>movements</b> with the relevant <b>escorting authorities</b> at the agreed time.		
7 Inform internal authorities about the <b>movements</b> in time for them to get the individuals and their property ready.		
8 Prepare the required paperwork to support the <b>movements</b> .		
9 Inform only those authorised to have the information about the <b>movements</b> .		
10 Check that individuals have returned to the establishment where arrangements have been made for this to happen, and take appropriate action if they have not.		

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

**UNIT FN6Y 04 (S256)    Make Administrative Arrangements for the Movement of Individuals Outside of the Custodial Establishment**

<b>Knowledge requirements</b>	<b>Evidence numbers</b>	<b>Evidence type</b>
1 Current, relevant legislation, policies, procedures, codes of practice and practice advice for making administrative arrangements for the movement of individuals outside the custodial establishment.		
2 Current, relevant legislation and organisational requirements in relation to race, diversity and human rights.		
3 Current, relevant legislation and organisational requirements in relation to health and safety.		
4 Manual and computerised systems for recording dates when individuals must be moved, and how to use these systems.		
5 Organisational requirements for making arrangements for the movement of individuals to other custodial establishments and other environments.		
6 The escorting authorities, other custodial establishments and other environments with which you need to make arrangements.		
7 The details of movements that the escorting authorities require and the times when they require these details.		
8 The internal authorities you must inform about the movements, and when you must inform them to allow them to prepare individuals and their property.		
9 The importance of confidentiality, and how to ensure information is only available to those authorised to have it.		
10 What action to take if individuals do not return as expected.		
11 The types of documentation which must be completed and how to complete it correctly.		

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 FN70 04 (S257) Administer Documentation for the Appeals Process

### Unit summary

This unit is about providing limited administrative assistance in the appeals process. You have to ensure that the correct appeals documentation is available, and that details of the appellant are recorded.

### Skills

You will apply the following skills:

- ◆ Accuracy.
- ◆ Confidentiality.
- ◆ Communication.

#### Performance indicators

You will:

##### Provide appeals documentation

- 1 Ensure the correct appeals documentation is available.
- 2 Ensure the appellant is aware that the establishment is not able to provide any advice about their appeals.
- 3 Ensure the appellant is told to contact relevant sources if they require further information or advice.

##### Record details of appellants

- 4 Record and document details of the appellant accurately on systems, in line with organisational requirements.
- 5 Inform only authorised people about the appellant.
- 6 Refer to a higher authority if you are in doubt about your role in assisting individuals with appeals.

#### Knowledge

You will know:

- 1 Current, relevant legislation, policies, procedures, codes of practice and practice advice for administering documentation for the appeals process.
- 2 Current, relevant legislation and organisational requirements in relation to race, diversity and human rights.
- 3 Current, relevant legislation and organisational requirements in relation to health and safety.
- 4 The documentation individuals need if they are intending to appeal against their conviction and/or sentences.
- 5 The importance of not providing individuals with advice about their appeal.
- 6 The higher authority to whom you should refer if you are in doubt about your role in assisting individuals with appeals.
- 7 The types of documentation which must be completed and how to complete it correctly.

## UNIT FN70 04 (S257) Administer Documentation for the Appeals Process

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Provide appeals documentation</b>		
1 Ensure the correct appeals documentation is available.		
2 Ensure the appellant is aware that the establishment is not able to provide any advice about their appeals.		
3 Ensure the appellant is told to contact relevant sources if they require further information or advice.		
<b>Record details of appellants</b>		
4 Record and document details of the appellant accurately on systems, in line with organisational requirements.		
5 Inform only authorised people about the appellant.		
6 Refer to a higher authority if you are in doubt about your role in assisting individuals with appeals.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 Current, relevant legislation, policies, procedures, codes of practice and practice advice for administering documentation for the appeals process.		
2 Current, relevant legislation and organisational requirements in relation to race, diversity and human rights.		
3 Current, relevant legislation and organisational requirements in relation to health and safety.		
4 The documentation individuals need if they are intending to appeal against their conviction and/or sentences.		
5 The importance of not providing individuals with advice about their appeal.		
6 The higher authority to whom you should refer if you are in doubt about your role in assisting individuals with appeals.		
7 The types of documentation which must be completed and how to complete it correctly.		

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 FN71 04 (S258) Administer Personal Money for Individuals in Custody

### Unit summary

This unit is about accounting for individuals' personal money and wages. You have to accurately record deposits, spending and deductions of individuals' personal money and prepare money to be sent out of the establishment on individuals' request. You also have to input accurately details about individuals' wages, in line with organisational requirements. Accuracy, timeliness and confidentiality are critical in this area of work.

### Skills

You will apply the following skills:

- ◆ Accuracy.
- ◆ Timeliness.
- ◆ Confidentiality.

### Performance indicators

You will:

#### Account for individuals' personal money

- 1 Maintain systems to account for individuals' personal money, in line with organisational requirements.
- 2 Ensure that deposits of individuals' personal money are accurately recorded.
- 3 Accurately enter and update, where required to do so, the limits of money individuals are allowed to spend within the establishment.
- 4 Record accurately money spent by individuals within the establishment.
- 5 Make deductions from individuals' personal money account as instructed by the organisation.
- 6 Record and prepare money that individuals request to be sent out of the establishment.
- 7 Get approval from the appropriate authority for money to be sent out.
- 8 Provide information about individuals' personal money accounts to those authorised to have this information, in the format and timeframe required by the organisation.
- 9 Communicate in ways that can be understood by individuals, responding to their different needs, abilities and preferences.
- 10 Reconcile individuals' personal money accounts in line with organisational requirements.

#### Record individuals' wages

- 11 Maintain systems to record individuals' wages, in line with organisational requirements.
- 12 Ensure that the rates at which individuals are paid are accurately entered and updated.
- 13 Ensure that the work individuals have done is accurately entered on the systems.
- 14 Provide information about individuals' wages to those authorised to have this information, in the format and timeframe required by the organisation.

## UNIT FN71 04 (S258) Administer Personal Money for Individuals in Custody

### Knowledge

#### You will know:

- 1 Current, relevant legislation, policies, procedures, codes of practice and practice advice for administering personal money for individuals in custody.
- 2 Current, relevant legislation and organisational requirements in relation to race, diversity and human rights.
- 3 Current, relevant legislation and organisational requirements in relation to health and safety.
- 4 Manual and computerised systems for accounting for individuals' money, and how to use these systems.
- 5 Organisational requirements for accounting for individuals' personal money.
- 6 The importance of ensuring that deposits of individuals' personal money, spending and deductions are recorded accurately, and how to do so.
- 7 How to prepare money to be sent out of the establishment.
- 8 The importance of confidentiality, and how to ensure information is only available to those authorised to have it.
- 9 Manual and computerised systems for recording individuals' wages, and how to use these systems.
- 10 Organisational requirements for recording individuals' wages.
- 11 The importance of ensuring that rates of pay and the work individuals have done are recorded accurately, and how to do so.
- 12 The types of documentation which must be completed and how to complete it correctly.

## UNIT FN71 04 (S258) Administer Personal Money for Individuals in Custody

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Account for individuals' personal money</b>		
1 Maintain systems to account for individuals' personal money, in line with organisational requirements.		
2 Ensure that deposits of individuals' personal money are accurately recorded.		
3 Accurately enter and update, where required to do so, the limits of money individuals are allowed to spend within the establishment.		
4 Record accurately money spent by individuals within the establishment.		
5 Make deductions from individuals' personal money account as instructed by the organisation.		
6 Record and prepare money that individuals request to be sent out of the establishment.		
7 Get approval from the appropriate authority for money to be sent out.		
8 Provide information about individuals' personal money accounts to those authorised to have this information, in the format and timeframe required by the organisation.		
9 Communicate in ways that can be understood by individuals, responding to their different needs, abilities and preferences.		
10 Reconcile individuals' personal money accounts in line with organisational requirements.		
<b>Record individuals' wages</b>		
11 Maintain systems to record individuals' wages, in line with organisational requirements.		
12 Ensure that the rates at which individuals are paid are accurately entered and updated.		
13 Ensure that the work individuals have done is accurately entered on the systems.		
14 Provide information about individuals' wages to those authorised to have this information, in the format and timeframe required by the organisation.		

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

## UNIT FN71 04 (S258) Administer Personal Money for Individuals in Custody

Knowledge requirements	Evidence numbers	Evidence type
1 Current, relevant legislation, policies, procedures, codes of practice and practice advice for administering personal money for individuals in custody.		
2 Current, relevant legislation and organisational requirements in relation to race, diversity and human rights.		
3 Current, relevant legislation and organisational requirements in relation to health and safety.		
4 Manual and computerised systems for accounting for individuals' money, and how to use these systems.		
5 Organisational requirements for accounting for individuals' personal money.		
6 The importance of ensuring that deposits of individuals' personal money, spending and deductions are recorded accurately, and how to do so.		
7 How to prepare money to be sent out of the establishment.		
8 The importance of confidentiality, and how to ensure information is only available to those authorised to have it.		
9 Manual and computerised systems for recording individuals' wages, and how to use these systems.		
10 Organisational requirements for recording individuals' wages.		
11 The importance of ensuring that rates of pay and the work individuals have done are recorded accurately, and how to do so.		
12 The types of documentation which must be completed and how to complete it correctly.		

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 FN72 04 (S259)    Prepare Documentation to Help Authorities Decide the Conditions on Which to Release Individuals from Custody**

### **Unit summary**

This 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. Accuracy, timeliness and confidentiality are critical in this area of work, as is the ability to liaise effectively with internal and external authorities.

### **Skills**

**You will apply the following skills:**

- ◆ Accuracy.
- ◆ Timeliness.
- ◆ Confidentiality.

#### **Performance indicators**

**You will:**

##### **Request and receive reports on individuals in custody**

- 1 Identify correctly individuals eligible for release in time for the necessary documentation to be prepared.
- 2 Identify correctly the reports required and the internal and external authorities which must complete them.
- 3 Prepare the correct forms and send these to the internal and external authorities at the correct time.
- 4 Maintain systems to track the return of reports from internal and external authorities, in line with organisational requirements.
- 5 Record the return of completed reports on the systems.
- 6 Contact the internal and external authorities in appropriate ways to request the immediate return of completed reports, if these are not returned on time.
- 7 Refer to a higher authority if completed reports are not returned to you despite your requests.
- 8 Communicate in ways that can be understood by individuals, responding to their different needs, abilities and preferences.

##### **Prepare documentation for authorities to decide the conditions of release.**

- 9 Copy, collate and number all documentation, in line with organisational requirements.
- 10 Refer to a higher authority if you need to obtain documentation which is not available.
- 11 Provide reasons if not all the required documentation is available.
- 12 Send the collated documentation to the releasing authorities in the required format at the required time.
- 13 Communicate in ways that can be understood by individuals, responding to their different needs, abilities and preferences.

## **UNIT FN72 04 (S259) Prepare Documentation to Help Authorities Decide the Conditions on Which to Release Individuals from Custody**

### **Knowledge**

#### **You will know:**

- 1 Current, relevant legislation, policies, procedures, codes of practice and practice advice for preparing documentation to help authorities decide the conditions on which to release individuals from custody.
- 2 Current, relevant legislation and organisational requirements in relation to race, diversity and human rights.
- 3 Current, relevant legislation and organisational requirements in relation to health and safety.
- 4 The legal and organisational requirements which impact on the release of individuals from custody on parole or on some other form of licence.
- 5 The range of different internal and external authorities involved in the release of individuals, and how to identify the correct authorities in each case.
- 6 Manual and computerised systems for tracking the return of reports, and how to use them.
- 7 Appropriate ways of contacting internal and external authorities to request the immediate return of reports.
- 8 The range of documentation required by releasing authorities for each type of release.
- 9 The higher authority to which to refer, if you do not receive completed reports or if all required documentation is not available.
- 10 The importance of confidentiality, and how to ensure information is only available to those authorised to have it.
- 11 The types of documentation which must be completed and how to complete it correctly.



**UNIT FN72 04 (S259) Prepare Documentation to Help Authorities Decide the Conditions on Which to Release Individuals from Custody**

**Record of evidence**

<b>Performance indicators</b>	<b>Evidence numbers</b>	<b>Evidence type</b>
<b>Request and receive reports on individuals in custody</b>		
1 Identify correctly individuals eligible for release in time for the necessary documentation to be prepared.		
2 Identify correctly the reports required and the internal and external authorities which must complete them.		
3 Prepare the correct forms and send these to the internal and external authorities at the correct time.		
4 Maintain systems to track the return of reports from internal and external authorities, in line with organisational requirements.		
5 Record the return of completed reports on the systems.		
6 Contact the internal and external authorities in appropriate ways to request the immediate return of completed reports, if these are not returned on time.		
7 Refer to a higher authority if completed reports are not returned to you despite your requests.		
8 Communicate in ways that can be understood by individuals, responding to their different needs, abilities and preferences.		
<b>Prepare documentation for authorities to decide the conditions of release.</b>		
9 Copy, collate and number all documentation, in line with organisational requirements.		
10 Refer to a higher authority if you need to obtain documentation which is not available.		
11 Provide reasons if not all the required documentation is available.		
12 Send the collated documentation to the releasing authorities in the required format at the required time.		
13 Communicate in ways that can be understood by individuals, responding to their different needs, abilities and preferences.		

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

**UNIT FN72 04 (S259) Prepare Documentation to Help Authorities Decide the Conditions on Which to Release Individuals from Custody**

Knowledge requirements	Evidence numbers	Evidence type
1 Current, relevant legislation, policies, procedures, codes of practice and practice advice for preparing documentation to help authorities decide the conditions on which to release individuals from custody.		
2 Current, relevant legislation and organisational requirements in relation to race, diversity and human rights.		
3 Current, relevant legislation and organisational requirements in relation to health and safety.		
4 The legal and organisational requirements which impact on the release of individuals from custody on parole or on some other form of licence.		
5 The range of different internal and external authorities involved in the release of individuals, and how to identify the correct authorities in each case.		
6 Manual and computerised systems for tracking the return of reports, and how to use them.		
7 Appropriate ways of contacting internal and external authorities to request the immediate return of reports.		
8 The range of documentation required by releasing authorities for each type of release.		
9 The higher authority to which to refer, if you do not receive completed reports or if all required documentation is not available.		
10 The importance of confidentiality, and how to ensure information is only available to those authorised to have it.		
11 The types of documentation which must be completed and how to complete it correctly.		

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 FN74 04 (S260)    Make Administrative Arrangements for the Release of Individuals from Custody**

### **Unit summary**

This 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. Accuracy, timeliness and confidentiality are critical in this area of work, as is the ability to liaise effectively with internal and external authorities.

### **Skills**

**You will apply the following skills:**

- ◆ Accuracy.
- ◆ Timeliness.
- ◆ Confidentiality.

### **Performance indicators**

**You will:**

#### **Process information about the release of individuals from custody**

- 1 Maintain systems which give you adequate notice about individuals' eligibility for release.
- 2 Identify correctly individuals eligible for release in time for the necessary documentation and entitlements to be prepared.
- 3 Provide information about release dates and terms:
  - ◆ to the internal and external authorities who require this information
  - ◆ only to those authorised to have this information
  - ◆ in the required format
  - ◆ at the required time
- 4 Communicate in ways that can be understood by individuals, responding to their different needs, abilities and preferences.

#### **Prepare documentation and entitlements for individuals on release**

- 5 Identify correctly the entitlements of individuals on release.
- 6 Prepare those entitlements for which you are directly responsible accurately and in time for release.
- 7 Prepare the required documentation in line with legal and organisational requirements.
- 8 Notify others in time for them to prepare entitlements ready for release.

## **UNIT FN74 04 (S260)    Make Administrative Arrangements for the Release of Individuals from Custody**

### **Knowledge**

#### **You will know:**

- 1 Current, relevant legislation, policies, procedures, codes of practice and practice advice for making administrative arrangements for the release of individuals from custody.
- 2 Current, relevant legislation and organisational requirements in relation to race, diversity and human rights.
- 3 Current, relevant legislation and organisational requirements in relation to health and safety.
- 4 The legal and organisational requirements which impact on the release of individuals from custody.
- 5 Manual and computerised systems for providing notice about individuals' eligibility for release, and how to use them.
- 6 The range of different internal and external authorities involved in the release of individuals, and how to identify the correct authorities in each case.
- 7 The importance of confidentiality, and how to ensure information is only available to those authorised to have it.
- 8 The range of documentation required on release, and how to prepare it.
- 9 The range of entitlements of individuals on release, and how to prepare these.
- 10 Others in the organisation who are involved in preparing entitlements on release.
- 11 The types of documentation which must be completed and how to complete it correctly.

## UNIT FN74 04 (S260)    Make Administrative Arrangements for the Release of Individuals from Custody

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Process information about the release of individuals from custody</b>		
1    Maintain systems which give you adequate notice about individuals' eligibility for release.		
2    Identify correctly individuals eligible for release in time for the necessary documentation and entitlements to be prepared.		
3    Provide information about release dates and terms: <ul style="list-style-type: none"> <li>◆ to the internal and external authorities who require this information</li> <li>◆ only to those authorised to have this information</li> <li>◆ in the required format</li> <li>◆ at the required time</li> </ul>		
4    Communicate in ways that can be understood by individuals, responding to their different needs, abilities and preferences.		
<b>Prepare documentation and entitlements for individuals on release</b>		
5    Identify correctly the entitlements of individuals on release.		
6    Prepare those entitlements for which you are directly responsible accurately and in time for release.		
7    Prepare the required documentation in line with legal and organisational requirements.		
8    Notify others in time for them to prepare entitlements ready for release.		

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

## UNIT FN74 04 (S260) Make Administrative Arrangements for the Release of Individuals from Custody

Knowledge requirements	Evidence numbers	Evidence type
1 Current, relevant legislation, policies, procedures, codes of practice and practice advice for making administrative arrangements for the release of individuals from custody.		
2 Current, relevant legislation and organisational requirements in relation to race, diversity and human rights.		
3 Current, relevant legislation and organisational requirements in relation to health and safety.		
4 The legal and organisational requirements which impact on the release of individuals from custody.		
5 Manual and computerised systems for providing notice about individuals' eligibility for release, and how to use them.		
6 The range of different internal and external authorities involved in the release of individuals, and how to identify the correct authorities in each case.		
7 The importance of confidentiality, and how to ensure information is only available to those authorised to have it.		
8 The range of documentation required on release, and how to prepare it.		
9 The range of entitlements of individuals on release, and how to prepare these.		
10 Others in the organisation who are involved in preparing entitlements on release.		
11 The types of documentation which must be completed and how to complete it correctly.		

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 F9AP 04 (S236a) Bespoke Software 2

**Description:** This is 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.

### Outcomes

- 1 Input and combine information using specialist applications.
- 2 Use appropriate structures to organise and retrieve information efficiently.
- 3 Use the functions of the software effectively to process and present information.

#### Performance indicators

**You will:**

##### **Input and combine information using specialist applications.**

- 1 **Input relevant information** accurately so that it is ready for processing.
- 2 Select and use appropriate techniques to link and **combine information** of different forms or from different sources within the software.
- 3 Respond appropriately to data entry **error messages**.

##### **Use appropriate structures to organise and retrieve information efficiently.**

- 4 Select and use appropriate **structures and/or layouts** to organise information.
- 5 Apply local and/or legal **guidelines** and conventions **for the storage and use of data** where available

##### **Use the functions of the software effectively to process and present information.**

- 6 Select and use appropriate tools and techniques to **edit, process and format** information.
- 7 **Check information** meets needs, using IT tools and making corrections as necessary.
- 8 Select and use appropriate methods to **present information**.

Note: The **emboldened** items are exemplified in the Support Notes.

#### Knowledge

**You will know:**

- 1 Describe what functions to apply to structure and layout information effectively.

## UNIT F9AP 04 (S236a) Bespoke Software 2

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Input and combine information using specialist applications.</b>		
1 Input relevant information accurately so that it is ready for processing.		
2 Select and use appropriate techniques to link and combine information of different forms or from different sources within the software.		
3 Respond appropriately to data entry error messages.		
<b>Use appropriate structures to organise and retrieve information efficiently.</b>		
4 Select and use appropriate structures and/or layouts to organise information.		
5 Apply local and/or legal guidelines and conventions for the storage and use of data where available		
<b>Use the functions of the software effectively to process and present information.</b>		
6 Select and use appropriate tools and techniques to edit, process and format information.		
7 Check information meets needs, using IT tools and making corrections as necessary.		
8 Select and use appropriate methods to present information.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 Describe what functions to apply to structure and layout information effectively.		

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 F9AV 04 (S236b) Specialist Software 2

**Description:** This is 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.

### Outcomes

- 1 Input and combine information using specialist applications.
- 2 Use appropriate structures to organise and retrieve information efficiently.
- 3 Use the functions of the software effectively to process and present information.

#### Performance indicators

**You will:**

**Input and combine information using specialist applications.**

- 1 **Input relevant information** accurately so that it is ready for processing.
- 2 Select and use appropriate techniques to link and **combine information** of different forms or from different sources within the software.
- 3 Respond appropriately to data entry **error messages**.

**Use appropriate structures to organise and retrieve information efficiently.**

- 4 Select and use appropriate **structures and/or layouts** to organise information.
- 5 Apply local and/or legal **guidelines** and conventions **for the storage and use of data** where available.

**Use the functions of the software effectively to process and present information.**

- 6 Select and use appropriate tools and techniques to **edit, process and format** information.
- 7 **Check information** meets needs, using IT tools and making corrections as necessary.
- 8 Select and use appropriate methods to **present information**.

Note: The **emboldened** items are exemplified in the Support Notes.

#### Knowledge

**You will know:**

- 1 Describe what functions to apply to structure and layout information effectively.

## UNIT F9AV 04 (S236b) Specialist Software 2

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Input and combine information using specialist applications.</b>		
1 Input relevant information accurately so that it is ready for processing.		
2 Select and use appropriate techniques to link and combine information of different forms or from different sources within the software.		
3 Respond appropriately to data entry error messages.		
<b>Use appropriate structures to organise and retrieve information efficiently.</b>		
4 Select and use appropriate structures and/or layouts to organise information.		
5 Apply local and/or legal guidelines and conventions for the storage and use of data where available		
<b>Use the functions of the software effectively to process and present information.</b>		
6 Select and use appropriate tools and techniques to edit, process and format information.		
7 Check information meets needs, using IT tools and making corrections as necessary.		
8 Select and use appropriate methods to present information.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 Describe what functions to apply to structure and layout information effectively.		

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 F9C2 04 (S237) Data Management Software 2

### Unit summary

An intermediate user can select and use intermediate data management software tools and techniques to:

- ◆ enter information into data management systems that is at times non-routine or unfamiliar;
- ◆ retrieve information using multiple selection criteria; and
- ◆ produce customised reports from the system.

The data management system tools, functions and techniques will be described as 'intermediate' because:

- ◆ the software tools and functions involved will at times be non-routine or unfamiliar; and
- ◆ the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements.

Any aspect that is unfamiliar may require support and advice from others. This standard is imported from the e-skills IT Users suite.

### Skills

**You will apply the following skills:**

- ◆ Analysing.
- ◆ Checking.
- ◆ Organising.
- ◆ Planning.
- ◆ Presenting information.
- ◆ Using technology.

#### Performance indicators

**You will:**

##### **Enter, edit and maintain data records in a data management system**

- 1 Enter data accurately into groups of records to meet requirements.
- 2 Locate and amend data associated with groups of records.
- 3 Check data records meet needs, using IT tools and making corrections as necessary.
- 4 Respond appropriately to data entry and other error messages.
- 5 Apply local and/or legal guidelines for the storage and use of data where available.

##### **Retrieve and display data records to meet requirements**

- 6 Select and use queries to search for and retrieve information to meet given requirements.
- 7 Create and view reports to output information from the system to meet given requirements.

## UNIT F9C2 04 (S237) Data Management Software 2

### Knowledge

#### You will know:

- 1 Describe the risks to data security and procedures used for data protection.
- 2 Identify what queries and reports need to be run to output the required information.

## UNIT F9C2 04 (S237) Data Management Software 2

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Enter, edit and maintain data records in a data management system</b>		
1 Enter data accurately into groups of records to meet requirements.		
2 Locate and amend data associated with groups of records.		
3 Check data records meet needs, using IT tools and making corrections as necessary.		
4 Respond appropriately to data entry and other error messages.		
5 Apply local and/or legal guidelines for the storage and use of data where available.		
<b>Retrieve and display data records to meet requirements</b>		
6 Select and use queries to search for and retrieve information to meet given requirements.		
7 Create and view reports to output information from the system to meet given requirements.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 Describe the risks to data security and procedures used for data protection.		
2 Identify what queries and reports need to be run to output the required information.		

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 F9C5 04 (S238) Database Software 2

### Unit summary

Select and use intermediate database software tools and techniques to:

- ◆ enter information into databases, that is at times non-routine or unfamiliar;
- ◆ retrieve information by creating queries using multiple selection criteria; and
- ◆ produce reports by setting up menus or short cuts.

Also, create and modify single table, non-relational databases. Any aspects that are unfamiliar may require support and advice from others. This standard is imported from the **e-skills IT Users suite**.

### Skills

You will apply the following skills:

- ◆ Analysing.
- ◆ Checking.
- ◆ Organising.
- ◆ Planning.
- ◆ Presenting information.
- ◆ Using technology.

#### Performance indicators

You will:

##### **Create and modify non-relational database tables**

- 1 Identify the components of a database design.
- 2 Describe the field characteristic for the data required.
- 3 Describe ways to maintain data integrity.

##### **Enter, edit and organise structured information in a database**

- 4 Create forms to enter, edit and organise data in a database.
- 5 Select and use appropriate tools and techniques to format data entry forms.
- 6 Check data entry meets needs, using IT tools and making corrections as necessary.
- 7 Respond appropriately to data entry errors.

##### **Use database software tools to run queries and produce reports**

- 8 Create and run database queries using multiple criteria to display or amend selected data.
- 9 Plan and produce database reports from a single table non-relational database.
- 10 Select and use appropriate tools and techniques to format database reports.
- 11 Check reports meet needs, using IT tools and making corrections as necessary.

## UNIT F9C5 04 (S238) Database Software 2

### Knowledge

#### You will know:

- 1 Identify the components of a database design.
- 2 Describe the field characteristics for the data required.
- 3 Describe ways to maintain data integrity.

## UNIT F9C5 04 (S238) Database Software 2

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Create and modify non-relational database tables</b>		
1 Identify the components of a database design.		
2 Describe the field characteristic for the data required.		
3 Describe ways to maintain data integrity.		
<b>Enter, edit and organise structured information in a database</b>		
4 Create forms to enter, edit and organise data in a database.		
5 Select and use appropriate tools and techniques to format data entry forms.		
6 Check data entry meets needs, using IT tools and making corrections as necessary.		
7 Respond appropriately to data entry errors.		
<b>Use database software tools to run queries and produce reports</b>		
8 Create and run database queries using multiple criteria to display or amend selected data.		
9 Plan and produce database reports from a single table non-relational database.		
10 Select and use appropriate tools and techniques to format database reports.		
11 Check reports meet needs, using IT tools and making corrections as necessary.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 Identify the components of a database design.		
2 Describe the field characteristics for the data required.		
3 Describe ways to maintain data integrity.		

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 F99E 04 (S239) Improving Productivity Using IT 2

### Unit summary

Plan and review 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. Any aspect that is unfamiliar will require support and advice from other people. This standard is imported from the **e-skills IT Users suite**.

### Skills

You will apply the following skills:

- ◆ Checking.
- ◆ Evaluating.
- ◆ Managing resources.
- ◆ Monitoring.
- ◆ Negotiating.
- ◆ Organising.
- ◆ Planning.
- ◆ Problem solving.
- ◆ Using technology.

### Performance indicators

You will:

#### **Plan, select and use appropriate IT systems and software for different purposes**

- 1 Plan how to carry out tasks using IT to achieve the required purpose and outcome.
- 2 Select and use IT systems and software applications to complete planned tasks and produce effective outcomes.

#### **Review and adapt the ongoing use of IT tools and systems to make sure that activities are successful**

- 3 Review ongoing use of IT tools and techniques and change the approach as needed.
- 4 Review outcomes to make sure they match requirements and are fit for purpose.

#### **Develop and test solutions to improve the ongoing use of IT tools and systems**

- 5 Develop solutions to improve own productivity in using IT.
- 6 Test solutions to ensure that they work as intended.

## UNIT F99E 04 (S239) Improving Productivity Using IT 2

### Knowledge

#### You will know:

- 1 Describe the purpose for using IT.
- 2 Describe the methods, skills and resources required to complete the task successfully.
- 3 Describe any factors that may affect the task.
- 4 Describe how the purpose and outcomes have been met by the chosen IT systems and software applications.
- 5 Describe any legal or local guidelines or constraints that may apply to the task or activity.
- 6 Describe whether the IT tools selected were appropriate for the task and purpose.
- 7 Assess the strengths and weaknesses of final work.
- 8 Describe ways to make further improvements to work.
- 9 Review the benefits and drawbacks of IT tools and systems used, in terms of productivity and efficiency.
- 10 Describe ways to improve productivity and efficiency.

## UNIT F99E 04 (S239) Improving Productivity Using IT 2

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Plan, select and use appropriate IT systems and software for different purposes</b>		
1 Plan how to carry out tasks using IT to achieve the required purpose and outcome.		
2 Select and use IT systems and software applications to complete planned tasks and produce effective outcomes.		
<b>Review and adapt the ongoing use of IT tools and systems to make sure that activities are successful</b>		
3 Review ongoing use of IT tools and techniques and change the approach as needed.		
4 Review outcomes to make sure they match requirements and are fit for purpose.		
<b>Develop and test solutions to improve the ongoing use of IT tools and systems</b>		
5 Develop solutions to improve own productivity in using IT.		
6 Test solutions to ensure that they work as intended.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 Describe the purpose for using IT.		
2 Describe the methods, skills and resources required to complete the task successfully.		
3 Describe any factors that may affect the task.		
4 Describe how the purpose and outcomes have been met by the chosen IT systems and software applications.		
5 Describe any legal or local guidelines or constraints that may apply to the task or activity.		
6 Describe whether the IT tools selected were appropriate for the task and purpose.		
7 Assess the strengths and weaknesses of final work.		
8 Describe ways to make further improvements to work.		
9 Review the benefits and drawbacks of IT tools and systems used, in terms of productivity and efficiency.		
10 Describe ways to improve productivity and efficiency.		

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

**Candidate:** \_\_\_\_\_ **Date:** \_\_\_\_\_

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**Internal verifier:** \_\_\_\_\_ **Date:** \_\_\_\_\_  
(if sampled)

## UNIT F99T 04 (S240) IT Security for Users 2

### Unit summary

Avoid common security risks and control access to software and data; and use a wider range of methods to protect software and data (eg from exchanging information by e-mail or when downloading software from the Internet). This standard is imported from the **e-skills IT Users suite**.

### Skills

You will apply the following skills:

- ◆ Checking.
- ◆ Evaluating.
- ◆ Managing resources.
- ◆ Monitoring.
- ◆ Negotiating.
- ◆ Organising.
- ◆ Problem solving.
- ◆ Planning.
- ◆ Using technology.

### Performance indicators

You will:

**Select and use appropriate methods to minimise security risk to IT systems and data**

- 1 Apply a range of security precautions to protect IT systems and data.
- 2 Keep information secure and manage personal access to information sources securely.
- 3 Apply guidelines and procedures for the secure use of IT.
- 4 Select and use effective backup procedures for systems and data.

### Knowledge

You will know:

- 1 Describe the security issues that may threaten system performance.
- 2 Describe the threats to system and information security and integrity.
- 3 Describe ways to protect hardware, software and data and minimise security risk.
- 4 Describe why it is important to backup data and how to do so securely.

## UNIT F99T 04 (S240) IT Security for Users 2

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Select and use appropriate methods to minimise security risk to IT systems and data</b>		
1 Apply a range of security precautions to protect IT systems and data.		
2 Keep information secure and manage personal access to information sources securely.		
3 Apply guidelines and procedures for the secure use of IT.		
4 Select and use effective backup procedures for systems and data.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 Describe the security issues that may threaten system performance.		
2 Describe the threats to system and information security and integrity.		
3 Describe ways to protect hardware, software and data and minimise security risk.		
4 Describe why it is important to backup data and how to do so securely.		

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

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**Date:** \_\_\_\_\_

**Internal verifier:** \_\_\_\_\_  
(if sampled)

**Date:** \_\_\_\_\_

## UNIT F9CT 04 (S241) Presentation Software 2

### Unit summary

Select and use a wide range of intermediate presentation software tools and techniques effectively to produce presentations that are at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others. This standard is imported from the **e-skills IT Users suite**.

### Skills

You will apply the following skills:

- ◆ Communicating.
- ◆ Evaluating.
- ◆ Managing time.
- ◆ Organising.
- ◆ Planning.
- ◆ Presenting information.
- ◆ Using technology.

### Performance indicators

You will:

#### **Input and combine text and other information within presentation slides**

- 1 Enter text and other information using layouts appropriate to type of information.
- 2 Insert charts and tables into presentation slides.
- 3 Insert images, video or sound to enhance the presentation.
- 4 Organise and combine information for presentations in line with any constraints.
- 5 Store and retrieve presentation files effectively, in line with local guidelines and conventions where available.

#### **Use presentation software tools to structure, edit and format slide sequences**

- 6 Select, change and use appropriate templates for slides.
- 7 Select and use appropriate techniques to edit slides and presentations to meet needs.
- 8 Select and use appropriate techniques to format slides and presentations.
- 9 Select and use animation and transition effects appropriately to enhance slide sequences.

#### **Prepare slideshow for presentation**

- 10 Prepare slideshow for presentation.
- 11 Check presentation meets needs, using IT tools and making corrections as necessary.
- 12 Identify and respond to any quality problems with presentations to ensure that presentations meet needs.

## UNIT F9CT 04 (S241) Presentation Software 2

### Knowledge

#### You will know:

- 1 Identify what types of information are required for the presentation.
- 2 Identify any constraints which may affect the presentation.
- 3 Identify what slide structure and themes to use.
- 4 Identify what presentation effects to use to enhance the presentation.
- 5 Describe how to present slides to meet needs and communicate effectively.

## UNIT F9CT 04 (S241) Presentation Software 2

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Input and combine text and other information within presentation slides</b>		
1 Enter text and other information using layouts appropriate to type of information.		
2 Insert charts and tables into presentation slides.		
3 Insert images, video or sound to enhance the presentation.		
4 Organise and combine information for presentations in line with any constraints.		
5 Store and retrieve presentation files effectively, in line with local guidelines and conventions where available.		
<b>Use presentation software tools to structure, edit and format slide sequences</b>		
6 Select, change and use appropriate templates for slides.		
7 Select and use appropriate techniques to edit slides and presentations to meet needs.		
8 Select and use appropriate techniques to format slides and presentations.		
9 Select and use animation and transition effects appropriately to enhance slide sequences.		
<b>Prepare slideshow for presentation</b>		
10 Prepare slideshow for presentation.		
11 Check presentation meets needs, using IT tools and making corrections as necessary.		
12 Identify and respond to any quality problems with presentations to ensure that presentations meet needs.		

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



## UNIT F9CT 04 (S241) Presentation Software 2

Knowledge requirements	Evidence numbers	Evidence type
1 Identify what types of information are required for the presentation.		
2 Identify any constraints which may affect the presentation.		
3 Identify what slide structure and themes to use.		
4 Identify what presentation effects to use to enhance the presentation.		
5 Describe how to present slides to meet needs and communicate effectively.		

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

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**Date:** \_\_\_\_\_

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**(if sampled)**

**Date:** \_\_\_\_\_

## UNIT F99K 04 (S242) Setting Up an IT System 2

### Unit summary

Select and connect up an IT system with a range of hardware, removable storage media and a communication service safely and run more advanced tests to check it is working successfully. This standard is imported from the **e-skills IT Users suite**.

### Skills

**You will apply the following skills:**

- ◆ Checking.
- ◆ Evaluating.
- ◆ Managing resources.
- ◆ Monitoring.
- ◆ Negotiating.
- ◆ Organising.
- ◆ Planning.
- ◆ Problem solving.
- ◆ Using technology.

#### Performance indicators

**You will:**

##### **Select and connect up a personal computer safely with associated hardware and storage media to meet needs**

- 1 Select and connect up the components of an IT system safely, including any peripheral devices and storage media.

##### **Select and connect an IT system to a communication service to meet needs**

- 2 Select and connect communication hardware safely to an IT system.
- 3 Select and connect to a communication service from an IT system.

##### **Install and configure software for use**

- 4 Configure the user interface to meet needs.
- 5 Set up and configure virus protection software.
- 6 Install and set up application software to meet needs.
- 7 Backup and restore system and data files.

##### **Check that the IT system and communication service are working successfully**

- 8 Select and run suitable tests to make sure that the system and communication service are working successfully.
- 9 Respond to faults and error messages and use help and troubleshooting facilities to determine and take appropriate action.

## UNIT F99K 04 (S242) Setting Up an IT System 2

### Knowledge

#### You will know:

- 1 Describe what IT system components, storage and peripheral devices are needed.
- 2 Describe any health and safety issues associated with setting up an IT system.
- 3 Describe the characteristics of IT systems that affect performance.
- 4 Describe the factors that affect data transfer.
- 5 Identify the login and password details needed to connect to an Internet Service Provider (ISP).
- 6 Describe what security precautions need to be addressed.
- 7 Identify what tests can be used to check the IT system and communications.
- 8 Identify the help and troubleshooting facilities available to solve problems.

## UNIT F99K 04 (S242) Setting Up an IT System 2

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Select and connect up a personal computer safely with associated hardware and storage media to meet needs</b>		
1 Select and connect up the components of an IT system safely, including any peripheral devices and storage media.		
<b>Select and connect an IT system to a communication service to meet needs</b>		
2 Select and connect communication hardware safely to an IT system.		
3 Select and connect to a communication service from an IT system.		
<b>Install and configure software for use</b>		
4 Configure the user interface to meet needs.		
5 Set up and configure virus protection software.		
6 Install and set up application software to meet needs.		
7 Backup and restore system and data files.		
<b>Check that the IT system and communication service are working successfully</b>		
8 Select and run suitable tests to make sure that the system and communication service are working successfully.		
9 Respond to faults and error messages and use help and troubleshooting facilities to determine and take appropriate action.		

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

## UNIT F99K 04 (S242)    Setting Up an IT System 2

Knowledge requirements	Evidence numbers	Evidence type
1 Describe what IT system components, storage and peripheral devices are needed.		
2 Describe any health and safety issues associated with setting up an IT system.		
3 Describe the characteristics of IT systems that affect performance.		
4 Describe the factors that affect data transfer.		
5 Identify the login and password details needed to connect to an Internet Service Provider (ISP).		
6 Describe what security precautions need to be addressed.		
7 Identify what tests can be used to check the IT system and communications.		
8 Identify the help and troubleshooting facilities available to solve problems.		

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 F9D1 04 (S243) Spreadsheet Software 2

### Unit summary

Select and use a wide range of intermediate spreadsheet software tools and techniques to produce, present and check spreadsheets that are at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others. This standard is imported from the **e-skills IT Users suite**.

### Skills

**You will apply the following skills:**

- ◆ Checking.
- ◆ Communicating.
- ◆ Presenting information.
- ◆ Using technology.

#### Performance indicators

**You will:**

##### **Use a spreadsheet to enter, edit and organise numerical and other data**

- 1 Enter and edit spreadsheet data accurately.
- 2 Combine and link data across worksheets.
- 3 Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available.

##### **Select and use appropriate formulas and data analysis tools to meet requirements**

- 4 Select and use a range of appropriate functions and formulas to meet calculation requirements.
- 5 Use a range of tools and techniques to analyse and manipulate the required information.

##### **Use tools and techniques to present and format spreadsheet information**

- 6 Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets.
- 7 Select and format an appropriate chart or graph type to display selected information.
- 8 Select and use appropriate page layout to present and print spreadsheet information.
- 9 Check information meets needs, using spreadsheet tools and making corrections as necessary.
- 10 Respond appropriately to any problems with spreadsheets.

#### Knowledge

**You will know:**

- 1 Identify what numerical and other information is needed in the spreadsheet and how it should be structured.
- 2 Identify which tools and techniques to use to analyse and manipulate the required information.
- 3 Plan how to present and format spreadsheet information effectively to meet needs.
- 4 Describe how to find errors in spreadsheet formulas.

## UNIT F9D1 04 (S243) Spreadsheet Software 2

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Use a spreadsheet to enter, edit and organise numerical and other data</b>		
1 Enter and edit spreadsheet data accurately.		
2 Combine and link data across worksheets.		
3 Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available.		
<b>Select and use appropriate formulas and data analysis tools to meet requirements</b>		
4 Select and use a range of appropriate functions and formulas to meet calculation requirements.		
5 Use a range of tools and techniques to analyse and manipulate the required information.		
<b>Use tools and techniques to present and format spreadsheet information</b>		
6 Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets.		
7 Select and format an appropriate chart or graph type to display selected information.		
8 Select and use appropriate page layout to present and print spreadsheet information.		
9 Check information meets needs, using spreadsheet tools and making corrections as necessary.		
10 Respond appropriately to any problems with spreadsheets.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 Identify what numerical and other information is needed in the spreadsheet and how it should be structured.		
2 Identify which tools and techniques to use to analyse and manipulate the required information.		
3 Plan how to present and format spreadsheet information effectively to meet needs.		
4 Describe how to find errors in spreadsheet formulas.		

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

**Candidate:** \_\_\_\_\_

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(if sampled)

**Date:** \_\_\_\_\_

## UNIT F9A7 04 (S244) Using Collaborative Technologies 2

### Unit summary

Facilitate the use of appropriate combinations of IT tool and devices for groups to work collaboratively by:

- ◆ planning and selecting the IT tools and devices to be used for work purposes and tasks;
- ◆ preparing and setting up access to collaborative technologies;
- ◆ presenting information and facilitating others contributions; and
- ◆ moderating the use of collaborative technologies.

Any aspect that is unfamiliar may require support and advice from others. This standard is imported from the e-skills IT Users suite.

### Skills

You will apply the following skills:

- ◆ Communicating.
- ◆ Presenting information.
- ◆ Using technology.

#### Performance indicators

You will:

##### Stay safe and secure when working with collaborative technology

- 1 Take appropriate steps to avoid risks when working with collaborative technology, in line with relevant guidelines.
- 2 Use appropriate methods to promote trust when working collaboratively.
- 3 Carry out appropriate checks on others' online identities and different types of information.
- 4 Identify and respond to inappropriate content and behaviour.

##### Plan and set up IT tools and devices for collaborative working

- 5 Select an appropriate combination of IT tools and devices to carry out collaborative tasks.
- 6 Connect and configure the combination of IT tools and devices needed for a collaborative task.

##### Prepare collaborative technologies for use

- 7 Set up and use access rights to enable others to access information.
- 8 Set up and use permissions to filter information.
- 9 Adjust settings so that others can access IT tools and devices for collaborative working.
- 10 Select and use different elements to control environments for collaborative technologies.
- 11 Select and join networks and data feeds to manage data to suit collaborative tasks.

##### Contribute to tasks using collaborative technologies

- 12 Enable others to contribute responsibly to collaborative tasks.
- 13 Present relevant and valuable information.
- 14 Moderate the use of collaborative technologies.
- 15 Archive the outcome of collaborative working.
- 16 Respond to problems with collaborative technologies.



## UNIT F9A7 04 (S244) Using Collaborative Technologies 2

### Knowledge

#### You will know:

- 1 Explain what risks there may be in using collaborative technology and how to keep them to a minimum.
- 2 Describe the purposes for using collaborative technologies.
- 3 Describe what outcomes are needed from collaborative working and whether or not archiving is required.
- 4 Describe the roles, IT tools and facilities needed for collaborative tasks and communication media.
- 5 Describe the features, benefits and limitations of different collaborative technology tools and devices.
- 6 Describe the compatibility issues in different combinations of collaborative tools and devices.
- 7 Describe what access rights and issues others may have in using collaborative technologies.
- 8 Assess what permissions are needed for different users and content.
- 9 Describe rules of engagement for using collaborative technologies.
- 10 Assess when there is a problem with collaborative technologies and when to get expert help.

## UNIT F9A7 04 (S244) Using Collaborative Technologies 2

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Stay safe and secure when working with collaborative technology</b>		
1 Take appropriate steps to avoid risks when working with collaborative technology, in line with relevant guidelines.		
2 Use appropriate methods to promote trust when working collaboratively.		
3 Carry out appropriate checks on others' online identities and different types of information.		
4 Identify and respond to inappropriate content and behaviour.		
<b>Plan and set up IT tools and devices for collaborative working</b>		
5 Select an appropriate combination of IT tools and devices to carry out collaborative tasks.		
6 Connect and configure the combination of IT tools and devices needed for a collaborative task.		
<b>Prepare collaborative technologies for use</b>		
7 Set up and use access rights to enable others to access information.		
8 Set up and use permissions to filter information.		
9 Adjust settings so that others can access IT tools and devices for collaborative working.		
10 Select and use different elements to control environments for collaborative technologies.		
11 Select and join networks and data feeds to manage data to suit collaborative tasks.		
<b>Contribute to tasks using collaborative technologies</b>		
12 Enable others to contribute responsibly to collaborative tasks.		
13 Present relevant and valuable information.		
14 Moderate the use of collaborative technologies.		
15 Archive the outcome of collaborative working.		
16 Respond to problems with collaborative technologies.		

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

## UNIT F9A7 04 (S244) Using Collaborative Technologies 2

Knowledge requirements	Evidence numbers	Evidence type
1 Explain what risks there may be in using collaborative technology and how to keep them to a minimum.		
2 Describe the purposes for using collaborative technologies.		
3 Describe what outcomes are needed from collaborative working and whether or not archiving is required.		
4 Describe the roles, IT tools and facilities needed for collaborative tasks and communication media.		
5 Describe the features, benefits and limitations of different collaborative technology tools and devices.		
6 Describe the compatibility issues in different combinations of collaborative tools and devices.		
7 Describe what access rights and issues others may have in using collaborative technologies.		
8 Assess what permissions are needed for different users and content.		
9 Describe rules of engagement for using collaborative technologies.		
10 Assess when there is a problem with collaborative technologies and when to get expert help.		

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**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

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**Internal verifier:** \_\_\_\_\_  
(if sampled)

**Date:** \_\_\_\_\_

## UNIT F9D4 04 (S245) Website Software 2

### Unit summary

Select and use a wide range of intermediate website software tools and techniques to produce multiple-page websites. Any aspect that is unfamiliar may require support and advice from others. This standard is imported from the **e-skills IT Users suite**.

### Skills

**You will apply the following skills:**

- ◆ Communicating.
- ◆ Evaluating.
- ◆ Managing time.
- ◆ Organising.
- ◆ Planning.
- ◆ Presenting information.
- ◆ Using technology.

### Performance indicators

**You will:**

#### **Create structures and styles for websites**

- 1 Plan and create web page templates to layout.
- 2 Create, select and use styles to keep the appearance of web pages consistent and make them easy to understand.
- 3 Store and retrieve files effectively, in line with local guidelines and conventions where available.

#### **Use website software tools to prepare content for websites**

- 4 Prepare content for web pages so that it is ready for editing and formatting.
- 5 Organise and combine information needed for web pages in line with any copyright constraints including across different software.
- 6 Select and use appropriate editing and formatting techniques to aid both clarity and navigation.
- 7 Select and use appropriate development techniques to link information across pages.
- 8 Change the file formats appropriately for content.
- 9 Check web pages meet needs, using IT tools and making corrections as necessary.

#### **Publish websites**

- 10 Select and use appropriate testing methods to check that all elements of websites are working as planned.
- 11 Respond appropriately to problems with multiple page websites.
- 12 Select and use an appropriate programme to upload and publish the website.

## UNIT F9D4 04 (S245) Website Software 2

### Knowledge

#### You will know:

- 1 Describe what website content and layout will be needed for each page.
- 2 Describe constraints that may affect the website.
- 3 Identify the requirements for structure and style.
- 4 Identify what website features are needed in the template to help the user navigate round web pages within the site.
- 5 Identify what access issues may need to be taken into account.
- 6 Identify what file types to use for saving content.

## UNIT F9D4 04 (S245) Website Software 2

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Create structures and styles for websites</b>		
1 Plan and create web page templates to layout.		
2 Create, select and use styles to keep the appearance of web pages consistent and make them easy to understand.		
3 Store and retrieve files effectively, in line with local guidelines and conventions where available.		
<b>Use website software tools to prepare content for websites</b>		
4 Prepare content for web pages so that it is ready for editing and formatting.		
5 Organise and combine information needed for web pages in line with any copyright constraints, including across different software.		
6 Select and use appropriate editing and formatting techniques to aid both clarity and navigation.		
7 Select and use appropriate development techniques to link information across pages.		
8 Change the file formats appropriately for content.		
9 Check web pages meet needs, using IT tools and making corrections as necessary.		
<b>Publish websites</b>		
10 Select and use appropriate testing methods to check that all elements of websites are working as planned.		
11 Select and use an appropriate programme to upload and publish the website.		
12 Respond appropriately to problems with multiple page websites.		

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

## UNIT F9D4 04 (S245) Website Software 2

Knowledge requirements	Evidence numbers	Evidence type
1 Describe what website content and layout will be needed for each page.		
2 Describe constraints that may affect the website.		
3 Identify the requirements for structure and style.		
4 Identify what website features are needed in the template to help the user navigate round web pages within the site.		
5 Identify what access issues may need to be taken into account.		
6 Identify what file types to use for saving content.		

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**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Assessor:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Internal verifier:** \_\_\_\_\_  
(if sampled)

**Date:** \_\_\_\_\_

## UNIT F9D7 04 (S246) Word Processing Software 2

### Unit summary

Select and use a range of intermediate word processing software tools and techniques to produce documents that are at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others. This standard is imported from the **e-skills IT Users suite**.

### Skills

**You will apply the following skills:**

- ◆ Checking.
- ◆ Communicating.
- ◆ Presenting information.
- ◆ Using technology.

#### **Performance indicators**

**You will:**

##### **Input and combine text and other information accurately within word processing documents**

- 1 Use appropriate techniques to input and insert text and other types of information accurately and efficiently.
- 2 Select and use appropriate templates for different purposes.
- 3 Select and use a range of editing tools to amend document content.
- 4 Combine or merge information within a document from a range of sources.
- 5 Store and retrieve document and template files effectively, in line with local guidelines and conventions where available.

##### **Create and modify appropriate layouts, structures and styles for word processing documents**

- 6 Create, use and modify columns, tables and forms to organise information.
- 7 Select and apply styles to text.
- 8 Select and use appropriate page and section layouts to present and print documents.

##### **Use word processing software tools and techniques to format and present documents effectively to meet requirements**

- 9 Select and use appropriate techniques to format characters and paragraphs.
- 10 Check documents meet needs, using IT tools and making corrections as necessary.
- 11 Respond appropriately to any quality problems with documents so that outcomes meet needs.



## UNIT F9D7 04 (S246) Word Processing Software 2

### Knowledge

#### You will know:

- 1 Identify what types of information are needed in documents.
- 2 Identify when and how to combine and merge information from other software or other documents.
- 3 Identify the document requirements for structure and style.
- 4 Identify what templates and styles are available and when to use them.
- 5 Identify how the document should be formatted to aid meaning.
- 6 Describe any quality problems with documents.

## UNIT F9D7 04 (S246) Word Processing Software 2

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Input and combine text and other information accurately within word processing documents</b>		
1 Use appropriate techniques to input and insert text and other types of information accurately and efficiently.		
2 Select and use appropriate templates for different purposes.		
3 Select and use a range of editing tools to amend document content.		
4 Combine or merge information within a document from a range of sources.		
5 Store and retrieve document and template files effectively, in line with local guidelines and conventions where available.		
<b>Create and modify appropriate layouts, structures and styles for word processing documents</b>		
6 Create, use and modify columns, tables and forms to organise information.		
7 Select and apply styles to text.		
8 Select and use appropriate page and section layouts to present and print multipage and multi-section documents.		
<b>Use word processing software tools and techniques to format and present documents effectively to meet requirements</b>		
9 Select and use appropriate techniques to format characters and paragraphs.		
10 Check documents meet needs, using IT tools and making corrections as necessary.		
11 Respond appropriately to any quality problems with documents so that outcomes meet needs.		

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

## UNIT F9D7 04 (S246) Word Processing Software 2

Knowledge requirements	Evidence numbers	Evidence type
1 Identify what types of information are needed in documents.		
2 Identify when and how to combine and merge information from other software or other documents.		
3 Identify the document requirements for structure and style.		
4 Identify what templates and styles are available and when to use them.		
5 Identify how the document should be formatted to aid meaning.		
6 Describe any quality problems with documents.		

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 F9A4 04 (S252) Using E-mail 2

### Unit summary

Understand and use 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 standard is imported from the **e-skills IT Users suite**.

### Skills

You will apply the following skills:

- ◆ Communicating.
- ◆ Presenting information.
- ◆ Using technology.

#### Performance indicators

You will:

##### Using e-mail software tools and techniques to send and receive messages

- 1 Select and use software tools to compose and format e-mail messages, including attachments.
- 2 Send and receive e-mail messages.
- 3 Use an address book to organise contact information.

##### Manage incoming e-mail effectively

- 4 Follow guidelines and procedures for using e-mail.
- 5 Read and respond to e-mail messages appropriately.
- 6 Organise, store and archive e-mail messages effectively.
- 7 Respond appropriately to e-mail problems.

#### Knowledge

You will know:

- 1 Determine the message size and how it can be reduced.
- 2 Describe how to stay safe and respect others when using e-mail.
- 3 Describe how to archive e-mail messages, including attachments.

## UNIT F9A4 04 (S252) Using E-mail 2

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Using e-mail software tools and techniques to send and receive messages</b>		
1 Select and use software tools to compose and format e-mail messages, including attachments.		
2 Send and receive e-mail messages.		
3 Use an address book to organise contact information.		
<b>Manage incoming e-mail effectively</b>		
4 Follow guidelines and procedures for using e-mail.		
5 Read and respond to e-mail messages appropriately.		
6 Organise, store and archive e-mail messages effectively.		
7 Respond appropriately to e-mail problems.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 Determine the message size and how it can be reduced.		
2 Describe how to stay safe and respect others when using e-mail.		
3 Describe how to archive e-mail messages, including attachments.		

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 FE0X 04 (S311) Design and Produce Documents in a Business Environment**

### **Unit summary**

Design and produce high quality, attractive documents to agreed specifications.

### **Skills**

**You will apply the following skills:**

- ◆ Checking
- ◆ Designing
- ◆ Listening
- ◆ Managing time
- ◆ Negotiating
- ◆ Organising
- ◆ Questioning
- ◆ Researching
- ◆ Using technology

### **Performance indicators**

**You will:**

- 1 Agree the purpose, content, style, quality standards and deadlines for the document.
- 2 Identify and prepare the resources needed.
- 3 Research and organise the content needed.
- 4 Make appropriate and efficient use of available technology.
- 5 Design and produce the document in the agreed style.
- 6 Integrate non-text objects in the agreed layout.
- 7 Check for accuracy, editing and correcting as necessary.
- 8 Store the document safely and securely in approved locations.
- 9 Clarify document requirements, when necessary.
- 10 Present the text in the required format within agreed deadlines.

## **UNIT FE0X 04 (S311) Design and Produce Documents in a Business Environment**

### **Knowledge**

#### **You will know:**

- 1 The purpose and benefits of producing high quality and attractive documents.
- 2 The different types of documents that you may be asked to design and produce and the document styles that should be used.
- 3 The different formats in which the text may be presented.
- 4 The benefits of agreeing the purpose, content, style, quality standards and deadline for the production of the document.
- 5 The different types of technology available for inputting, formatting and editing text and their main features.
- 6 The types of resources needed to produce high quality and attractive documents.
- 7 How to research and organise the content needed for the document.
- 8 How to integrate and layout text and non-text objects.
- 9 How to check for accuracy and correctness, including spelling and grammar and the purpose for doing this.
- 10 How to store the document safely and securely.
- 11 The purpose of confidentiality and data protection.

## UNIT FE0X 04 (S311) Design and Produce Documents in a Business Environment

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Agree the purpose, content, style, quality standards and deadlines for the document.		
2 Identify and prepare the resources needed.		
3 Research and organise the content needed.		
4 Make appropriate and efficient use of available technology.		
5 Design and produce the document in the agreed style.		
6 Integrate non-text objects in the agreed layout.		
7 Check for accuracy, editing and correcting as necessary.		
8 Store the document safely and securely in approved locations.		
9 Clarify document requirements, when necessary.		
10 Present the text in the required format within agreed deadlines.		

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



## UNIT FE0X 04 (S311) Design and Produce Documents in a Business Environment

Knowledge requirements	Evidence numbers	Evidence type
1 The purpose and benefits of producing high quality and attractive documents.		
2 The different types of documents that you may be asked to design and produce and the document styles that should be used.		
3 The different formats in which the text may be presented.		
4 The benefits of agreeing the purpose, content, style, quality standards and deadline for the production of the document.		
5 The different types of technology available for inputting, formatting and editing text and their main features.		
6 The types of resources needed to produce high quality and attractive documents		
7 How to research and organise the content needed for the document.		
8 How to integrate and layout text and non-text objects.		
9 How to check for accuracy and correctness, including spelling and grammar and the purpose for doing this.		
10 How to store the document safely and securely.		
11 The purpose of confidentiality and data protection		

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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

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**Date:** \_\_\_\_\_

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(if sampled)

**Date:** \_\_\_\_\_

## UNIT FE11 04 (S312) Prepare Text from Notes Using Touch Typing (60 wpm)

### Unit summary

Present accurate and correct text in an agreed format, from notes; touch typing at a speed of 60 words per minute.

### Skills

You will apply the following skills:

- ◆ Checking
- ◆ Keyboard skills
- ◆ Listening
- ◆ Managing time
- ◆ Questioning
- ◆ Using technology

### Performance indicators

You will:

- 1 Agree the purpose, format and deadlines for the transcription.
- 2 Input text using touch typing to 60 words per minute.
- 3 Format the text, making efficient use of available technology.
- 4 Check content for accuracy, editing and correcting the text when necessary.
- 5 Clarify text requirements when necessary.
- 6 Store text and the original shorthand notes safely and securely in approved locations.
- 7 Present the text in the required format within agreed deadlines.

### Knowledge

You will know:

- 1 The different types of documents that may be produced from notes and the formats they should follow.
- 2 The difference between producing text from own notes and producing text from others' notes.
- 3 The benefits of agreeing the purpose, format and deadline for the text.
- 4 The purpose of accuracy when preparing text.
- 5 How to check for accuracy and correctness — including spelling, grammar and punctuation — and the purpose of doing this.
- 6 How to store text safely and securely.
- 7 The purpose of confidentiality and data protection.

## UNIT FE11 04 (S312) Prepare Text from Notes Using Touch Typing (60 wpm)

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Agree the purpose, format and deadlines for the transcription.		
2 Input text using touch typing to 60 words per minute.		
3 Format the text, making efficient use of available technology.		
4 Check content for accuracy, editing and correcting the text when necessary.		
5 Clarify text requirements when necessary.		
6 Store text and original notes safely and securely in approved locations.		
7 Present the text in the required format within agreed deadlines.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 The different types of documents that may be produced from notes and the formats they should follow.		
2 The difference between producing text from own notes and producing text from others' notes.		
3 The benefits of agreeing the purpose, format and deadline for the text.		
4 The purpose of accuracy when preparing text.		
5 How to check for accuracy and correctness — including spelling, grammar and punctuation — and the purpose of doing this.		
6 How to store text safely and securely.		
7 The purpose of confidentiality and data protection.		

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 FE0Y 04 (S313) Prepare Text from Shorthand (80 wpm)

### Unit summary

Take shorthand notes and produce accurate and correct text in an agreed format from these notes, at a minimum speed of 80 words per minute.

### Skills

You will apply the following skills:

- ◆ Checking.
- ◆ Listening.
- ◆ Managing time.
- ◆ Noting.
- ◆ Questioning.
- ◆ Using technology.

### Performance indicators

You will:

- 1 Agree the purpose, format and deadlines for the transcription.
- 2 Take dictation using shorthand at a minimum speed of 80 words per minute.
- 3 Clarify text requirements when necessary.
- 4 Input and format the text from shorthand notes.
- 5 Make efficient use of available technology.
- 6 Check content for accuracy, editing and correcting the text.
- 7 Store the text and the original shorthand notes safely and securely in approved locations.
- 8 Present the text in the required format within agreed deadlines.

### Knowledge

You will know:

- 1 The different types of documents that may be produced from notes and the formats they should follow.
- 2 The benefits of agreeing the purpose, format and deadline for the text.
- 3 How to check for accuracy and correctness, including spelling, grammar and punctuation and the purpose of doing this.
- 4 The purpose of storing text safely and securely and how to do so.
- 5 How to store the original shorthand notes safely and securely.
- 6 The purpose of confidentiality and data protection.
- 7 The different formats in which the text may be presented.

## UNIT FE0Y 04 (S313) Prepare Text from Shorthand (80 wpm)

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Agree the purpose, format and deadlines for the transcription.		
2 Take dictation using shorthand at a minimum speed of 80 words per minute.		
3 Clarify text requirements when necessary.		
4 Input and format the text from shorthand notes.		
5 Make efficient use of available technology.		
6 Check content for accuracy, editing and correcting the text.		
7 Store the text and the original shorthand notes safely and securely in approved locations.		
8 Present the text in the required format within agreed deadlines.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 The different types of documents that may be produced from notes and the formats they should follow.		
2 The benefits of agreeing the purpose, format and deadline for the text.		
3 How to check for accuracy and correctness, including spelling, grammar and punctuation and the purpose of doing this.		
4 The purpose of storing text safely and securely and how to do so.		
5 How to store the original shorthand notes safely and securely.		
6 The purpose of confidentiality and data protection.		
7 The different formats in which the text may be presented.		

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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Assessor:** \_\_\_\_\_

**Date:** \_\_\_\_\_

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(if sampled)

**Date:** \_\_\_\_\_

## **UNIT FE10 04 (S314) Prepare Text from Recorded Audio Instruction (60 wpm)**

### **Unit summary**

Transcribe accurate and correct text in an agreed format from an audio recording, at a minimum speed of 60 words per minute.

### **Skills**

**You will apply the following skills:**

- ◆ Checking.
- ◆ Listening.
- ◆ Managing time.
- ◆ Questioning.
- ◆ Using technology.

### **Performance indicators**

**You will:**

- 1 Agree the purpose, format and deadlines for the transcription.
- 2 Input the text from the audio recording at a minimum speed of 60 words per minute.
- 3 Format the text, making efficient use of available technology.
- 4 Check content for accuracy, editing and correcting text.
- 5 Clarify text requirements when necessary.
- 6 Store the text and the original recordings safely and securely in approved locations.
- 7 Present the text in the required format within agreed deadlines and quality standards.

### **Knowledge**

**You will know:**

- 1 The different types of documents that may be produced from audio recordings and the formats they should follow.
- 2 The benefits of agreeing the purpose, format and deadline for the text.
- 3 How to check for accuracy and correctness, including spelling, grammar and punctuation and the purpose of doing this.
- 4 How to store text safely and securely.
- 5 The purpose of confidentiality and data protection.
- 6 The different formats in which the text may be presented.
- 7 The different types of technology available for playing back recordings and their main features.

## UNIT FE10 04 (S314) Prepare Text from Recorded Audio Instruction (60 wpm)

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Agree the purpose, format and deadlines for the transcription.		
2 Input the text from the audio recording at a minimum speed of 60 words per minute.		
3 Format the text, making efficient use of available technology.		
4 Check content for accuracy, editing and correcting text.		
5 Clarify text requirements when necessary.		
6 Store the text and the original recording safely and securely in approved locations.		
7 Present the text in the required format within agreed deadlines and quality standards.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 The different types of documents that may be produced from audio recordings and the formats they should follow.		
2 The benefits of agreeing the purpose, format and deadline for the text.		
3 How to check for accuracy and correctness, including spelling, grammar and punctuation and the purpose of doing this.		
4 How to store text safely and securely.		
5 The purpose of confidentiality and data protection.		
6 The different formats in which the text may be presented.		
7 The different types of technology available for playing back recordings and their main features.		

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

**Candidate:** \_\_\_\_\_

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(if sampled)

**Date:** \_\_\_\_\_

## UNIT F93N 04 (S106) Make and Receive Telephone Calls

### Unit summary

Make, receive or transfer telephone calls in line with organisational requirements.

### Skills

You will apply the following skills:

- ◆ Communicating.
- ◆ Personal presentation.
- ◆ Questioning.
- ◆ Summarising.

### Performance indicators

You will:

#### Make calls

- 1 Identify the purpose of the call.
- 2 Obtain the name and numbers of the person to be contacted.
- 3 Make contact with the person.
- 4 Communicate information to achieve the purpose of the call.
- 5 Summarise the outcomes of the conversation before ending the call.
- 6 Report telephone system faults to the appropriate colleague.

#### Receive calls

- 7 Answer the telephone according to organisational procedures.
- 8 Project a positive image of self and the organisation.
- 9 Identify the caller, where they are calling from and what they need.
- 10 Provide accurate and up-to-date information to callers while protecting confidentiality and security.
- 11 Take and pass on messages according to caller's needs.
- 12 Deal with problems in handling calls, referring to the appropriate person where necessary.

#### Transfer calls

- 13 Transfer calls promptly, when appropriate.
- 14 Explain clearly, when a call cannot be transferred, the reason why and agree appropriate action with the caller.
- 15 When callers are placed on hold, check regularly to see if they wish to continue to hold, in line with organisational procedures.



## UNIT F93N 04 (S106) Make and Receive Telephone Calls

### Knowledge

#### You will know:

- 1 The different features of telephone systems and how to use them.
- 2 Organisation structures and communication channels within an organisation.
- 3 How to follow organisational procedures when making and receiving calls.
- 4 The types of information that could affect confidentiality and security and how to handle these.
- 5 How to identify problems and who to refer them to.
- 6 How to report telephone system faults.

#### Make calls

- 7 The different methods that can be used to obtain the names and numbers of people that need to be contacted.
- 8 How to use telephone systems to make contact with people inside and outside the organisation.

#### Receive calls

- 9 How to identify the caller and their needs.

#### Transfer calls

- 10 The information to be given when transferring calls, taking or leaving messages.
- 11 How to identify the appropriate person to whom a call is transferred.

## UNIT F93N 04 (S106) Make and Receive Telephone Calls

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Make calls</b>		
1 Identify the purpose of the call.		
2 Obtain the name and numbers of the person to be contacted.		
3 Make contact with the person.		
4 Communicate information to achieve the purpose of the call.		
5 Summarise the outcomes of the conversation before ending the call.		
6 Report telephone system faults to the appropriate colleague.		
<b>Receive calls</b>		
7 Answer the telephone according to organisational procedures.		
8 Project a positive image of self and the organisation.		
9 Identify the caller, where they are calling from and what they need.		
10 Provide accurate and up-to-date information to callers while protecting confidentiality and security.		
11 Take and pass on messages according to caller's needs.		
12 Deal with problems in handling calls, referring to the appropriate person where necessary.		
<b>Transfer calls</b>		
13 Transfer calls promptly, when appropriate.		
14 Explain clearly, when a call cannot be transferred, the reason why and agree appropriate action with the caller.		
15 When callers are placed on hold, check regularly to see if they wish to continue to hold, in line with organisational procedures.		

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

## UNIT F93N 04 (S106) Make and Receive Telephone Calls

Knowledge requirements	Evidence numbers	Evidence type
1 The different features of telephone systems and how to use them.		
2 Organisation structures and communication channels within an organisation.		
3 How to follow organisational procedures when making and receiving calls.		
4 The types of information that could affect confidentiality and security and how to handle these.		
5 How to identify problems and who to refer them to.		
6 How to report telephone system faults.		
<b>Make calls</b>		
7 The different methods that can be used to obtain the names and numbers of people that need to be contacted.		
8 How to use telephone systems to make contact with people inside and outside the organisation.		
<b>Receive calls</b>		
9 How to identify the caller and their needs.		
<b>Transfer calls</b>		
10 The information to be given when transferring calls, taking or leaving messages.		
11 How to identify the appropriate person to whom a call is transferred.		

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 FE0D 04 (S309) Develop a Presentation

### Unit summary

Research, plan and prepare a presentation for specific audiences.

### Skills

You will apply the following skills:

- ◆ Communicating.
- ◆ Researching.
- ◆ Evaluating.
- ◆ Organising.
- ◆ Planning.

### Performance indicators

You will:

- 1 Agree the purpose, content, style and time of the presentation and who the audience will be.
- 2 Research and plan the presentation.
- 3 Choose the equipment required to deliver the presentation.
- 4 Prepare the presentation to achieve its purpose and suit the needs of the audience.
- 5 Obtain feedback on the presentation and make necessary adjustments.
- 6 Estimate how long the presentation will last.
- 7 Produce presentation handouts, when required.
- 8 Reflect on feedback obtained of the presentation and identify learning points.

### Knowledge

You will know:

- 1 The advantages and disadvantages of using presentations to provide information.
- 2 Different ways of making presentations and their features.
- 3 How to prepare presentations so they are engaging, interesting, concise and informative.
- 4 How to tailor the presentation to the audience.
- 5 The different types of equipment that can be used to deliver the presentation.
- 6 How handouts can complement presentations.

## UNIT FE0D 04 (S309) Develop a Presentation

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Agree the purpose, content, style and time of the presentation and who the audience will be.		
2 Research and plan the presentation.		
3 Choose the equipment required to deliver the presentation.		
4 Prepare the presentation to achieve its purpose and suit the needs of the audience.		
5 Obtain feedback on the presentation and make necessary adjustments.		
6 Estimate how long the presentation will last.		
7 Produce presentation handouts, when required.		
8 Reflect on feedback obtained of the presentation and identify learning points.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 The advantages and disadvantages of using presentations to provide information.		
2 Different ways of making presentations and their features.		
3 How to prepare presentations so they are engaging, interesting, concise and informative.		
4 How to tailor the presentation to the audience.		
5 The different types of equipment that can be used to deliver the presentation.		
6 How handouts can complement presentations.		

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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

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**Date:** \_\_\_\_\_

**Internal verifier:** \_\_\_\_\_  
(if sampled)

**Date:** \_\_\_\_\_

## UNIT FE0E 04 (S310) Deliver a Presentation

### Unit summary

Prepare for, deliver and evaluate a formal presentation.

### Skills

**You will apply the following skills:**

- ◆ Communicating.
- ◆ Planning.
- ◆ Evaluating.
- ◆ Managing time.
- ◆ Organising.

### Performance indicators

#### You will:

- 1 Choose equipment and plan how to use the equipment's features to best effect.
- 2 Develop contingency plans in case of equipment failure or other problems.
- 3 Practise and time the delivery of the presentation.
- 4 Obtain feedback on the presentation and make necessary adjustments.
- 5 Make sure the equipment and resources are in working order.
- 6 Make sure the audience receive presentation materials.
- 7 Introduce self to the audience and state the aims of the presentation.
- 8 Address the audience by speaking clearly and confidently, using language which is appropriate to the topic and the audience.
- 9 Use equipment, where appropriate, to enhance the presentation and deal with any problems that may occur.
- 10 Vary your voice tone, pace and volume to emphasise key points and maintain the audience's interest.
- 11 Use your body language in a way that reinforces your message.
- 12 Gauge audience reaction during the presentation and adapt accordingly.
- 13 Summarise the key points.
- 14 Provide the audience with the opportunity to ask questions.
- 15 Listen carefully to questions and respond in a way that meets the audience's needs.
- 16 Collect feedback on the presentation.
- 17 Reflect on own performance and identify learning points.
- 18 Evaluate the presentation and identify changes that will improve future presentations.

## UNIT FE0E 04 (S310) Deliver a Presentation

### Knowledge

#### You will know:

- 1 Different ways of delivering presentations and their features.
- 2 How to tailor the presentation to the audience.
- 3 The purpose and benefits of rehearsing presentations and how to do so.
- 4 How handouts can complement presentations.
- 5 The types of equipment used for presentations and their features.
- 6 The purpose and value of checking equipment in advance.
- 7 How to use equipment to make presentations.
- 8 The purpose and benefits of contingency planning.
- 9 The types of problems that may occur with presentation equipment and how to deal with these.
- 10 How to gauge audience reaction to the presentation.
- 11 Methods of collecting feedback from the audience on the presentation.
- 12 How to evaluate the presentation.

## UNIT FE0E 04 (S310) Deliver a Presentation

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Choose equipment and plan how to use the equipment's features to best effect.		
2 Develop contingency plans in case of equipment failure or other problems.		
3 Practise and time the delivery of the presentation.		
4 Obtain feedback on the presentation and make necessary adjustments.		
5 Make sure the equipment and resources are in working order.		
6 Make sure the audience receive presentation materials.		
7 Introduce self to the audience and state the aims of the presentation.		
8 Address the audience by speaking clearly and confidently, using language which is appropriate to the topic and the audience.		
9 Use equipment, where appropriate, to enhance the presentation and deal with any problems that may occur.		
10 Vary your voice tone, pace and volume to emphasise key points and maintain the audience's interest.		
11 Use your body language in a way that reinforces your message		
12 Gauge audience reaction during the presentation and adapt accordingly.		
13 Summarise the key points.		
14 Provide the audience with the opportunity to ask questions.		
15 Listen carefully to questions and respond in a way that meets the audience's needs.		
16 Collect feedback on the presentation.		
17 Reflect on own performance and identify learning points.		
18 Evaluate the presentation and identify changes that will improve future presentations.		

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



## UNIT FE0E 04 (S310) Deliver a Presentation

Knowledge requirements	Evidence numbers	Evidence type
1 Different ways of delivering presentations and their features.		
2 How to tailor the presentation to the audience.		
3 The purpose and benefits of rehearsing presentations and how to do so.		
4 How handouts can complement presentations.		
5 The types of equipment used for presentations and their features.		
6 The purpose and value of checking equipment in advance.		
7 How to use equipment to make presentations.		
8 The purpose and benefits of contingency planning.		
9 The types of problems that may occur with presentation equipment and how to deal with these.		
10 How to gauge audience reaction to the presentation.		
11 Methods of collecting feedback from the audience on the presentation.		
12 How to evaluate the presentation.		

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

**Candidate:** \_\_\_\_\_

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(if sampled)

**Date:** \_\_\_\_\_

## UNIT FE0F 04 (S315) Support the Design and Development of Information Systems

### Unit summary

Contribute to the design and support the development of information systems to meet users' needs.

### Skills

You will apply the following skills:

- ◆ Analysing.
- ◆ Organising.
- ◆ Using technology.
- ◆ Evaluating.
- ◆ Planning.
- ◆ Managing resources.
- ◆ Problem solving.
- ◆ Negotiating.
- ◆ Researching.

### Performance indicators

You will:

- 1 Identify the information that will be managed within the system.
- 2 Identify the resources required and available to deliver and implement the system.
- 3 Contribute to the design of a system specification that meets identified needs and budgetary controls.
- 4 Support the development of an information system that meets the specification.
- 5 Support testing of the information system against the agreed specification.
- 6 Resolve faults, within the limits of own authority.

### Knowledge

You will know:

- 1 The purpose and benefits of managing information to meet specifications.
- 2 The types of information that need to be managed in a business.
- 3 The types of information systems available and their main features.
- 4 How to develop specifications for information management, including resources and budgets.
- 5 How to create and develop an information system based on identified user needs.
- 6 How to test an information system.
- 7 How to resolve faults, within the limits of own authority.

## UNIT FE0F 04 (S315) Support the Design and Development of Information Systems

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Identify the information that will be managed within the system.		
2 Identify the resources required and available to deliver and implement the system.		
3 Contribute to the design of a system specification that meets identified needs and budgetary controls.		
4 Support the development of an information system that meets the specification.		
5 Support testing of the information system against the agreed specification.		
6 Resolve faults, within the limits of own authority.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 The purpose and benefits of managing information to meet specifications.		
2 The types of information that need to be managed in a business.		
3 The types of information systems available and their main features.		
4 How to develop specifications for information management, including resources and budgets.		
5 How to create and develop an information system based on identified user needs.		
6 How to test an information system.		
7 How to resolve faults, within the limits of own authority.		

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 FE0M 04 (S329) Provide Administrative Support in Schools

### Unit summary

Work with school contacts and wider community contacts to contribute to school goals and priorities

School contacts include pupils and students; parents; guardians; carers; colleagues; and governing bodies. Wider community contacts include community organisations; relevant authorities; children's services; welfare services; local businesses; the police; and regulatory bodies.

### Skills

**You will apply the following skills:**

- ◆ Analysing.
- ◆ Communicating.
- ◆ Evaluating.
- ◆ Literacy.
- ◆ Managing conflict.
- ◆ Managing time.
- ◆ Negotiating.
- ◆ Numeracy.
- ◆ Organising.
- ◆ Planning.
- ◆ Prioritising.
- ◆ Problem solving.
- ◆ Researching.
- ◆ Team working.
- ◆ Using technology.
- ◆ Writing.

### Performance indicators

**You will:**

#### **Work with school contacts and wider community contacts**

- 1 Build positive working relationships.
- 2 Present a positive image of yourself and your school.
- 3 Communicate effectively with contacts.
- 4 Follow school policies and procedures for dealing with parents, guardians and carers.
- 5 Follow school policies and procedures for dealing with pupils and students.
- 6 Follow school policies and procedures for dealing with colleagues and the wider community.
- 7 Provide effective administrative and organisational support to school contacts and the wider community.
- 8 Operate school administration systems.
- 9 Analyse and evaluate information.
- 10 Produce reports in line with school procedures.
- 11 Safeguard confidential information.
- 12 Act within the limits of your authority.
- 13 Refer issues beyond your authority to the appropriate person.

## UNIT FE0M 04 (S329) Provide Administrative Support in Schools

### Knowledge

#### You will know:

- 1 Why it is important to build positive working relationships with contacts.
- 2 How to build positive working relationships with contacts.
- 3 Why it is important for your school to have a friendly and efficient way of dealing with contacts.
- 4 The types of contacts you deal with, the requirements that they have and how to meet their needs.
- 5 Why it is important to present a positive image of yourself and your school.
- 6 Types of problems that may occur with contacts, including conflict and aggression and the procedures for dealing with these.
- 7 The social context in which your school operates, including the cultural diversity of the community and how it impacts on the school environment.
- 8 How your role contributes to your school's goals and improvement or development priorities.
- 9 How your role supports teaching and learning.
- 10 Your school's policy and administrative procedures for dealing with parents, guardians and carers, and your roles and responsibilities in relation to these.
- 11 Your school's policy and administrative procedures for dealing with pupils and students, and your roles and responsibilities in relation to these.
- 12 Your school's policy and administrative procedures for dealing with the wider community, and your roles and responsibilities in relation to these.
- 13 How to comply with policies and procedures relating to child protection and student welfare; and how to report concerns to an appropriate person.
- 14 The policy context, wider issues and initiatives that affect the work of the school, (eg relevant authority policies; government standards, legislation and regulations; government initiatives; etc).
- 15 The types of administrative and organisational support that you may be required to provide to school contacts and the wider community.
- 16 The purpose of school administration systems and procedures and why they are important.
- 17 Your school's administrative and organisational systems and procedures in relation to your role.
- 18 Methods of analysing and evaluating information.
- 19 Your school's procedures for producing reports.
- 20 How to identify confidential information in line with your school's procedures and relevant data protection legislation.
- 21 Why confidential information should be safeguarded and how to do this.
- 22 The limits of your authority in relation to confidential information.
- 23 When to refer confidential information to the relative authority or appropriate person and who to refer it to (eg where concerns for a child's safety override confidentiality).
- 24 The limits of your authority and why it important to act within them.
- 25 When to refer issues to a higher authority and who to refer them to.

## UNIT FE0M 04 (S329) Provide Administrative Support in Schools

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Work with school contacts and wider community contacts</b>		
1 Build positive working relationships.		
2 Present a positive image of yourself and your school.		
3 Communicate effectively with contacts.		
4 Follow school policies and procedures for dealing with parents, guardians and carers.		
5 Follow school policies and procedures for dealing with pupils and students.		
6 Follow school policies and procedures for dealing with colleagues and the wider community.		
7 Provide effective administrative and organisational support to school contacts and the wider community.		
8 Operate school administration systems.		
9 Analyse and evaluate information.		
10 Produce reports in line with school procedures.		
11 Safeguard confidential information.		
12 Act within the limits of your authority.		
13 Refer issues beyond your authority to the appropriate person.		

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

## UNIT FE0M 04 (S329) Provide Administrative Support in Schools

Knowledge requirements	Evidence numbers	Evidence type
1 Why it is important to build positive working relationships with contacts.		
2 How to build positive working relationships with contacts.		
3 Why it is important for your school to have a friendly and efficient way of dealing with contacts.		
4 The types of contacts you deal with, the requirements that they have and how to meet their needs.		
5 Why it is important to present a positive image of yourself and your school.		
6 Types of problems that may occur with contacts, including conflict and aggression and the procedures for dealing with these.		
7 The social context in which your school operates, including the cultural diversity of the community and how it impacts on the school environment.		
8 How your role contributes to your school's goals and improvement or development priorities.		
9 How your role supports teaching and learning.		
10 Your school's policy and administrative procedures for dealing with parents, guardians and carers, and your roles and responsibilities in relation to these.		
11 Your school's policy and administrative procedures for dealing with pupils and students, and your roles and responsibilities in relation to these.		
12 Your school's policy and administrative procedures for dealing with the wider community, and your roles and responsibilities in relation to these.		
13 How to comply with policies and procedures relating to child protection and student welfare; and how to report concerns to an appropriate person.		
14 The policy context, wider issues and initiatives that affect the work of the school, (eg relevant authority policies; government standards, legislation and regulations; government initiatives; etc).		
15 The types of administrative and organisational support that you may be required to provide to school contacts and the wider community.		

## UNIT FE0M 04 (S329) Provide Administrative Support in Schools

Knowledge requirements	Evidence numbers	Evidence type
16 The purpose of school administration systems and procedures and why they are important.		
17 Your school's administrative and organisational systems and procedures in relation to your role.		
18 Methods of analysing and evaluating information.		
19 Your school's procedures for producing reports.		
20 How to identify confidential information in line with your school's procedures and relevant data protection legislation.		
21 Why confidential information should be safeguarded and how to do this.		
22 The limits of your authority in relation to confidential information.		
23 When to refer confidential information to the relative authority or appropriate person and who to refer it to (eg where concerns for a child's safety override confidentiality).		
24 The limits of your authority and why it important to act within them.		
25 When to refer issues to a higher authority and who to refer 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:** \_\_\_\_\_  
(if sampled)

**Date:** \_\_\_\_\_



## UNIT FN75 04 (S351) Verify Critical Dates for Sentences

### Unit summary

This Unit is about verifying critical dates for sentences so that individuals are released from custody on time. You have to check and interpret the relevant documentation and verify the calculations made by other staff. Accuracy, timeliness and confidentiality are critical in this area of work.

### Skills

You will apply the following skills:

- ◆ Accuracy.
- ◆ Timeliness.
- ◆ Confidentiality.

#### Performance indicators

You will:

#### Verify and interpret documentation relevant to the imprisonment or detention of individuals

- 1 Verify that the documentation allows lawful imprisonment or detention of the individual in the establishment.
- 2 Check that all information on the documentation has been interpreted correctly.
- 3 Check with the relevant authority if you are in doubt about how to interpret information.
- 4 Check that all information has been accurately entered into systems, in line with organisational procedures.

#### Verify sentence calculations

- 5 Provide advice and guidance to those interpreting documentation and calculating critical dates.
- 6 Check the interpretation of documentation and calculations of critical dates to ensure they are accurate every time.
- 7 Identify any errors in interpretation of documentation or calculation of critical dates and ensure these errors are corrected.
- 8 Check with the relevant authority where you are in doubt about critical dates.

## UNIT FN75 04 (S351) Verify Critical Dates for Sentences

### Knowledge

#### You will know:

- 1 Current, relevant legislation, policies, procedures, codes of practice and practice advice for verifying critical dates for sentences.
- 2 Current, relevant legislation and organisational requirements in relation to race, diversity and human rights.
- 3 Current, relevant legislation and organisational requirements in relation to health and safety.
- 4 The legal requirements which impact on the calculation of critical dates.
- 5 Your organisation's policies and procedures for calculating critical dates.
- 6 The documentation required in order to imprison or detain an individual lawfully.
- 7 The different types of documentation which are relevant to the imprisonment or detention of individuals and the calculation of critical dates for sentences, and how to interpret the information they contain.
- 8 The relevant authorities to contact when in doubt about how to interpret information or calculate sentences.
- 9 The organisation's systems and how to use them.
- 10 The range of different types of information which may have an impact on critical dates, where to obtain this information, and how to assess its impact accurately.
- 11 The range of critical dates which apply to different types of sentences, and how to calculate these accurately.
- 12 The importance of ensuring critical dates are entered accurately on systems.
- 13 The people who are authorised to have information about critical dates.
- 14 The formats and time limits within which information about critical dates must be supplied.
- 15 How to explain clearly how critical dates have been calculated.
- 16 The types of advice and guidance people may need in interpreting documentation and calculating critical dates, and how to provide this advice and guidance.
- 17 The importance of checking the interpretation of documentation and calculation of sentences to ensure accuracy.
- 18 The types of documentation which must be completed and how to complete it correctly.

## UNIT FN75 04 (S351) Verify Critical Dates for Sentences

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Verify and interpret documentation relevant to the imprisonment or detention of individuals</b>		
1 Verify that the documentation allows lawful imprisonment or detention of the individual in the establishment.		
2 Check that all information on the documentation has been interpreted correctly.		
3 Check with the relevant authority if you are in doubt about how to interpret information.		
4 Check that all information has been accurately entered into systems, in line with organisational procedures.		
<b>Verify sentence calculations</b>		
5 Provide advice and guidance to those interpreting documentation and calculating critical dates.		
6 Check the interpretation of documentation and calculations of critical dates to ensure they are accurate every time.		
7 Identify any errors in interpretation of documentation or calculation of critical dates and ensure these errors are corrected.		
8 Check with the relevant authority where you are in doubt about critical dates.		

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

## UNIT FN75 04 (S351) Verify Critical Dates for Sentences

Knowledge requirements	Evidence numbers	Evidence type
1 Current, relevant legislation, policies, procedures, codes of practice and practice advice for verifying critical dates for sentences.		
2 Current, relevant legislation and organisational requirements in relation to race, diversity and human rights.		
3 Current, relevant legislation and organisational requirements in relation to health and safety.		
4 The legal requirements which impact on the calculation of critical dates.		
5 Your organisation's policies and procedures for calculating critical dates.		
6 The documentation required in order to imprison or detain an individual lawfully.		
7 The different types of documentation which are relevant to the imprisonment or detention of individuals and the calculation of critical dates for sentences, and how to interpret the information they contain.		
8 The relevant authorities to contact when in doubt about how to interpret information or calculate sentences.		
9 The organisation's systems and how to use them.		
10 The range of different types of information which may have an impact on critical dates, where to obtain this information, and how to assess its impact accurately.		
11 The range of critical dates which apply to different types of sentences, and how to calculate these accurately.		
12 The importance of ensuring critical dates are entered accurately on systems.		
13 The people who are authorised to have information about critical dates.		
14 The formats and time limits within which information about critical dates must be supplied.		
15 How to explain clearly how critical dates have been calculated.		
16 The types of advice and guidance people may need in interpreting documentation and calculating critical dates, and how to provide this advice and guidance.		
17 The importance of checking the interpretation of documentation and calculation of sentences to ensure accuracy.		
18 The types of documentation which must be completed and how to complete it correctly.		

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 FN76 04 (S352) Verify the Release Process

### Unit summary

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

### Skills

You will apply the following skills:

- ◆ Accuracy.
- ◆ Timeliness.
- ◆ Confidentiality.

#### Performance indicators

You will:

##### Verify the eligibility of individuals for release

- 1 Maintain systems which give you accurate information about individuals' eligibility for release.
- 2 Recalculate release dates for individuals accurately and at the required time prior to release.
- 3 Refer promptly to the releasing authorities if there is any doubt about an individual's eligibility for release.

##### Verify that the correct documentation and entitlements have been prepared

- 4 Communicate in ways that can be understood by individuals, responding to their different needs, abilities and preferences.
- 5 Provide advice and guidance to those preparing documentation and entitlements for individuals in release.
- 6 Check that the correct documentation and entitlements have been prepared for each individual to be released.
- 7 Identify any errors in the preparation of documentation and entitlements and ensure these errors are corrected.
- 8 Present documentation in the required format so that the release of individuals from custody can be authorised.

## UNIT FN76 04 (S352) Verify the Release Process

### Knowledge

#### You will know:

- 1 Current, relevant legislation, policies, procedures, codes of practice and practice advice for verifying the release process.
- 2 Current, relevant legislation and organisational requirements in relation to race, diversity and human rights.
- 3 Current, relevant legislation and organisational requirements in relation to health and safety.
- 4 The legal and organisational requirements which impact on the release of individuals from custody.
- 5 Manual and computerised systems for providing information about individuals' eligibility for release, and how to use them.
- 6 The different types of documentation which are relevant to the calculation of critical dates of sentences, and how to interpret the information they contain.
- 7 The critical dates which apply to different types of sentences and how to calculate these accurately.
- 8 The range of releasing authorities and how to contact them.
- 9 The range of documentation required on release, and how to prepare it.
- 10 The range of entitlements of individuals on release, and how to prepare these.
- 11 The types of advice and guidance people may need in preparing documentation and entitlements for release, and how to provide this advice and guidance.
- 12 The importance of checking individuals' eligibility for release and that the correct documentation and entitlements have been prepared.
- 13 The format in which documentation should be presented so that the release of individuals from custody can be authorised.
- 14 The types of documentation which must be completed and how to complete it correctly.

## UNIT FN76 04 (S352) Verify the Release Process

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Verify the eligibility of individuals for release</b>		
1 Maintain systems which give you accurate information about individuals' eligibility for release.		
2 Recalculate release dates for individuals accurately and at the required time prior to release.		
3 Refer promptly to the releasing authorities if there is any doubt about an individual's eligibility for release.		
<b>Verify that the correct documentation and entitlements have been prepared</b>		
4 Communicate in ways that can be understood by individuals, responding to their different needs, abilities and preferences.		
5 Provide advice and guidance to those preparing documentation and entitlements for individuals in release.		
6 Check that the correct documentation and entitlements have been prepared for each individual to be released.		
7 Identify any errors in the preparation of documentation and entitlements and ensure these errors are corrected.		
8 Present documentation in the required format so that the release of individuals from custody can be authorised.		

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

## UNIT FN76 04 (S352) Verify the Release Process

Knowledge requirements	Evidence numbers	Evidence type
1 Current, relevant legislation, policies, procedures, codes of practice and practice advice for verifying the release process.		
2 Current, relevant legislation and organisational requirements in relation to race, diversity and human rights.		
3 Current, relevant legislation and organisational requirements in relation to health and safety.		
4 The legal and organisational requirements which impact on the release of individuals from custody.		
5 Manual and computerised systems for providing information about individuals' eligibility for release, and how to use them.		
6 The different types of documentation which are relevant to the calculation of critical dates of sentences, and how to interpret the information they contain.		
7 The critical dates which apply to different types of sentences and how to calculate these accurately.		
8 The range of releasing authorities and how to contact them.		
9 The range of documentation required on release, and how to prepare it.		
10 The range of entitlements of individuals on release, and how to prepare these.		
11 The types of advice and guidance people may need in preparing documentation and entitlements for release, and how to provide this advice and guidance.		
12 The importance of checking individuals' eligibility for release and that the correct documentation and entitlements have been prepared.		
13 The format in which documentation should be presented so that the release of individuals from custody can be authorised.		
14 The types of documentation which must be completed and how to complete it correctly.		

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 FD9K 04 (S247) Control Payroll

### Unit summary

Control the accuracy and compliance of the payroll. This standard is imported from the **FSSC Accountancy and Finance suite**.

### Skills

**You will apply the following skills:**

- ◆ Checking.
- ◆ Communicating.
- ◆ Monitoring.
- ◆ Managing time.
- ◆ Problem Solving.
- ◆ Using technology.

### Performance indicators

**You will:**

- 1 Correctly identify the treatment of all allowances and enhancements with respect to tax, national insurance and pensions deductions.
- 2 Update rates for permanent and temporary payments and deductions against agreed scales for each type of employee affected.
- 3 Reconcile the national insurance liability for directors against the national insurance actually paid.
- 4 Monitor compliance with attachments of earnings legislation.
- 5 Correctly code and reconcile total charges to organisational budgets against aggregate payroll totals.
- 6 Promptly reconcile the number of no pays and actual pays with the number of employees on the payroll.
- 7 Calculate and reconcile aggregate payroll totals, including aggregate statutory payments and nonstatutory deductions, against authorised control totals.
- 8 Calculate and reconcile aggregate amounts payable to, or recoverable from, statutory and non-statutory bodies against control totals.
- 9 Reconcile payroll records with the organisation's financial reports.
- 10 Make payments to statutory and non-statutory bodies by the required deadline, accompanied by the applicable documentation and in accordance with organisational regulations and procedures.
- 11 Check that individuals raising queries are authorised to receive the information they are requesting.
- 12 Seek clarification or additional information from employees or managers where the nature of their queries is not clear.
- 13 Present accurate information extracted from the payroll system in an appropriate format.
- 14 Deal effectively with enquiries from statutory agencies and non-statutory bodies.
- 15 Obtain employee authorisation where required prior to the release of information.
- 16 Supply information within the specified timescale and in compliance with relevant legislation.
- 17 File copies of responses in a logical and orderly manner in accordance with statutory and organisational requirements.

## UNIT FD9K 04 (S247) Control Payroll

### Knowledge

#### You will know:

#### The Statutory Framework

- 1 Legislation relating to payroll processing and data protection.
- 2 The regulations of the relevant tax authority in respect of income tax and national insurance liability on pay, expenses and benefits.
- 3 National insurance regulations concerning directors.
- 4 Income tax and national insurance regulations relating to termination, lump sum and 'out of sync' payments.
- 5 Legislation controlling attachments of earnings and the rules applying to how they interact with each other.
- 6 Types of exceptional payment
- 7 Types of attachments to earnings.
- 8 Types of termination payments.

#### The Organisation

- 9 The organisation's policies for recording and storing data.
- 10 Organisational, external agency and employee requirements for information.
- 11 The organisation's procedures for maintaining the security and confidentiality of information.
- 12 Sources of information for resolving discrepancies.

## UNIT FD9K 04 (S247) Control Payroll

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Correctly identify the treatment of all allowances and enhancements with respect to tax, national insurance and pensions deductions.		
2 Update rates for permanent and temporary payments and deductions against agreed scales for each type of employee affected.		
3 Reconcile the national insurance liability for directors against the national insurance actually paid.		
4 Monitor compliance with attachments of earnings legislation.		
5 Correctly code and reconcile total charges to organisational budgets against aggregate payroll totals.		
6 Promptly reconcile the number of no pays and actual pays with the number of employees on the payroll.		
7 Calculate and reconcile aggregate payroll totals, including aggregate statutory payments and nonstatutory deductions, against authorised control totals.		
8 Calculate and reconcile aggregate amounts payable to, or recoverable from, statutory and non-statutory bodies against control totals.		
9 Reconcile payroll records with the organisation's financial reports.		
10 Make payments to statutory and non-statutory bodies by the required deadline, accompanied by the applicable documentation and in accordance with organisational regulations and procedures.		
11 Check that individuals raising queries are authorised to receive the information they are requesting.		
12 Seek clarification or additional information from employees or managers where the nature of their queries is not clear.		
13 Present accurate information extracted from the payroll system in an appropriate format.		
14 Deal effectively with enquiries from statutory agencies and non-statutory bodies.		
15 Obtain employee authorisation where required prior to the release of information.		
16 Supply information within the specified timescale and in compliance with relevant legislation.		
17 File copies of responses in a logical and orderly manner in accordance with statutory and organisational requirements.		

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

## UNIT FD9K 04 (S247) Control Payroll

Knowledge requirements		Evidence numbers	Evidence type
<b>The Statutory Framework</b>			
1	Legislation relating to payroll processing and data protection.		
2	The regulations of the relevant tax authority in respect of income tax and national insurance liability on pay, expenses and benefits.		
3	National insurance regulations concerning directors.		
4	Income tax and national insurance regulations relating to termination, lump sum and 'out of sync' payments.		
5	Legislation controlling attachments of earnings and the rules applying to how they interact with each other.		
6	Types of exceptional payment.		
7	Types of attachments to earnings.		
8	Types of termination payments.		
<b>The Organisation</b>			
9	The organisation's policies for recording and storing data.		
10	Organisational, external agency and employee requirements for information.		
11	The organisation's procedures for maintaining the security and confidentiality of information.		
12	Sources of information for resolving discrepancies.		

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 FD9L 04 (S248) Account for Income and Expenditure

### Unit summary

Understand an organisation's accounting processes and identify and correct or refer any errors or discrepancies as well as maintain security and confidentiality of information at all times. This standard is imported from the **FSSC Accountancy and Finance suite**.

### Skills

**You will apply the following skills:**

- ◆ Checking.
- ◆ Communicating.
- ◆ Monitoring.
- ◆ Managing time.
- ◆ Problem solving.
- ◆ Using technology.

### Performance indicators

**You will:**

- 1 Record details from the relevant primary records in the cashbook and ledgers.
- 2 Correctly calculate totals and balances of receipts and payments.
- 3 Compare individual items on the bank statement and in the cashbook for accuracy and identify discrepancies.
- 4 Prepare a bank reconciliation statement that illustrates any discrepancies.
- 5 Make and record authorised adjustments.
- 6 Balance relevant accounts in the main ledger.
- 7 Reconcile control accounts with the totals of the balance in the subsidiary ledger accounts.
- 8 Reconcile the petty cash book with cash in hand and subsidiary records.
- 9 Identify discrepancies arising from the reconciliation of control accounts and either resolve them or refer to the appropriate person.
- 10 Draft a trial balance and open a suspense account to record any imbalance where necessary.
- 11 Identify reasons for imbalance, rectify them and make accurate corrections in the journal.
- 12 Securely store documentation in line with the organisations confidentiality requirements.

## UNIT FD9L 04 (S248) Account for Income and Expenditure

### Knowledge

#### You will know:

#### The Business Environment

- 1 Types of business transactions and the documents involved.
- 2 The general principles of VAT.
- 3 Relevant bank services and the operation of the bank clearing system.
- 4 The function and form of banking documentation.

#### Accounting Techniques, Principles and Theory

- 5 Capital and revenue expenditure.
- 6 How to identify different types of errors.
- 7 How to make adjustments to correct errors and write off bad debts.
- 8 Methods of posting from books of prime entry to ledger accounts.
- 9 Double entry bookkeeping and balancing accounts.
- 10 The inter-relationship of accounts and the double entry system.
- 11 The use of journals.
- 12 How to identify discrepancies through control account reconciliation.
- 13 The function and form of a trial balance.
- 14 How to rectify imbalances and adjust errors not requiring a suspense account.
- 15 The purpose and function of a suspense account.
- 16 How to rectify imbalances by creating and then subsequently clearing a suspense account.

#### The Organisation

- 17 The organisation's accounting, administrative and filing systems and procedures.
- 18 The nature of the organisation's business transactions.

## UNIT FD9L 04 (S248) Account for Income and Expenditure

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Record details from the relevant primary records in the cashbook and ledgers.		
2 Correctly calculate totals and balances of receipts and payments.		
3 Compare individual items on the bank statement and in the cashbook for accuracy and identify discrepancies.		
4 Prepare a bank reconciliation statement that illustrates any discrepancies.		
5 Make and record authorised adjustments.		
6 Balance relevant accounts in the main ledger.		
7 Reconcile control accounts with the totals of the balance in the subsidiary ledger accounts.		
8 Reconcile the petty cash book with cash in hand and subsidiary records.		
9 Identify discrepancies arising from the reconciliation of control accounts and either resolve them or refer to the appropriate person.		
10 Draft a trial balance and open a suspense account to record any imbalance where necessary.		
11 Identify reasons for imbalance, rectify them and make accurate corrections in the journal.		
12 Securely store documentation in line with the organisations confidentiality requirements.		

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

## UNIT FD9L 04 (S248) Account for Income and Expenditure

Knowledge requirements	Evidence numbers	Evidence type
<b>The Business Environment</b>		
1 Types of business transactions and the documents involved.		
2 The general principles of VAT.		
3 Relevant bank services and the operation of the bank clearing system.		
4 The function and form of banking documentation.		
<b>Accounting Techniques, Principles and Theory</b>		
5 Capital and revenue expenditure.		
6 How to identify different types of errors.		
7 How to make adjustments to correct errors and write off bad debts.		
8 Methods of posting from books of prime entry to ledger accounts.		
9 Double entry bookkeeping and balancing accounts.		
10 The inter-relationship of accounts and the double entry system.		
11 The use of journals.		
12 How to identify discrepancies through control account reconciliation.		
13 The function and form of a trial balance.		
14 How to rectify imbalances and adjust errors not requiring a suspense account.		
15 The purpose and function of a suspense account.		
16 How to rectify imbalances by creating and then subsequently clearing a suspense account.		
<b>The Organisation</b>		
17 The organisation's accounting, administrative and filing systems and procedures.		
18 The nature of the organisation's business transactions.		

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 FD9M 04 (S249) Draft Financial Statements

### Unit summary

Draft financial statements of incorporated organisations following the preparation of an initial trial balance. This standard is imported from the FSSC Accountancy and Finance suite.

### Skills

**You will apply the following skills:**

- ◆ Checking.
- ◆ Communicating.
- ◆ Monitoring.
- ◆ Managing time.
- ◆ Problem solving.
- ◆ Using technology.

### Performance indicators

**You will:**

- 1 Identify the users of financial accounting information and financial statements.
- 2 Identify the general purpose, elements and relationships between the elements of financial statements.
- 3 Use appropriate information to draft financial statements in the appropriate form and in compliance with relevant accounting standards and domestic legislation and with the organisation's policies, regulations and procedures.
- 4 Correctly identify and implement subsequent adjustments.
- 5 Identify discrepancies, unusual features or queries and either resolve them or refer to the appropriate person.
- 6 Prepare consolidated accounts.
- 7 Prepare and interpret a cash flow statement.
- 8 Interpret financial statements using ratio analysis.
- 9 Draw valid conclusions from the information contained within financial statements.
- 10 Present issues, interpretations and conclusions clearly to the appropriate people.
- 11 Work under pressure to meet year end deadlines.
- 12 Identify the need for an external audit and refer as appropriate.

## UNIT FD9M 04 (S249) Draft Financial Statements

### Knowledge

#### You will know:

#### The Business Environment

- 1 The elements and purposes of financial statements of the organisation.
- 2 The statutory form of financial statements and disclosure requirements.
- 3 Relevant accounting standards.
- 4 The obligations of directors or other responsible parties in respect of financial statements.
- 5 The forms of equity, reserves and loan capital.
- 6 The presentation of business taxation in financial statements.
- 7 The audit needs and threshold relating to accounts.
- 8 The differences between the published accounts and financial statements of different types of organisations.

#### Accounting Techniques, Principles and Theory

- 9 Generally Accepted Accounting Principles/International Financial Reporting Standards (GAAP/IFRS) and concepts.
- 10 The types of financial statements and how to prepare them in the proper form.
- 11 The elements of financial statements.
- 12 The types of relationship between the elements of financial statements.
- 13 How to calculate and interpret accounting ratios and analyse the information contained in financial statements.
- 14 The concept of group accounts and the general principles of consolidation.

## UNIT FD9M 04 (S249) Draft Financial Statements

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Identify the users of financial accounting information and financial statements.		
2 Identify the general purpose, elements and relationships between the elements of financial statements.		
3 Use appropriate information to draft financial statements in the appropriate form and in compliance with relevant accounting standards and domestic legislation and with the organisation's policies, regulations and procedures.		
4 Correctly identify and implement subsequent adjustments.		
5 Identify discrepancies, unusual features or queries and either resolve them or refer to the appropriate person.		
6 Prepare consolidated accounts.		
7 Prepare and interpret a cash flow statement.		
8 Interpret financial statements using ratio analysis.		
9 Draw valid conclusions from the information contained within financial statements.		
10 Present issues, interpretations and conclusions clearly to the appropriate people.		
11 Work under pressure to meet year end deadlines		
12 Identify the need for an external audit and refer as appropriate.		

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

## UNIT FD9M 04 (S249) Draft Financial Statements

Knowledge requirements		Evidence numbers	Evidence type
<b>The Business Environment</b>			
1	The elements and purposes of financial statements of the organisation.		
2	The statutory form of financial statements and disclosure requirements.		
3	Relevant accounting standards.		
4	The obligations of directors or other responsible parties in respect of financial statements.		
5	The forms of equity, reserves and loan capital.		
6	The presentation of business taxation in financial statements.		
7	The audit needs and threshold relating to accounts.		
8	The differences between the published accounts and financial statements of different types of organisations.		
<b>Accounting Techniques, Principles and Theory</b>			
9	Generally Accepted Accounting Principles/International Financial Reporting Standards (GAAP/IFRS) and concepts.		
10	The types of financial statements and how to prepare them in the proper form.		
11	The elements of financial statements.		
12	The types of relationship between the elements of financial statements.		
13	How to calculate and interpret accounting ratios and analyse the information contained in financial statements.		
14	The concept of group accounts and the general principles of consolidation.		

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 FD8V 04 (S125) Calculate Pay

### Unit summary

Calculate employees' gross and net pay, which includes: calculating gross pay; processing entitlements and deductions; and resolving employees' queries about their pay. This standard is imported from the **FSSC Accountancy and Finance suite**.

### Skills

#### You will apply the following skills:

- ◆ Checking.
- ◆ Communicating.
- ◆ Monitoring.
- ◆ Problem solving.
- ◆ Managing time.
- ◆ Using technology.

### Performance indicators

#### You will:

- 1 Check all data and documentation relating to temporary variations for accuracy, reasonableness and proper authorisation.
- 2 Identify employees where action is required to ensure payment and correctly enter relevant details into the system.
- 3 Check rates for overtime payments against agreed scales for each type of employee affected.
- 4 Process pensions and express payments
- 5 Process temporary payments and deductions accurately and identify the appropriate tax and national insurance treatment for them as well as any effect they may have on pension contributions.
- 6 Process termination payments in accordance with legislative requirements.
- 7 Check the employment status of all employees and verify their entitlement to receive pay for the pay period.
- 8 Enter any applicable pre-tax deductions and all relevant statutory and non-statutory voluntary or contractual deductions into the system.
- 9 Produce and distribute accurate and legible payslips in accordance with statutory and organisational requirements.
- 10 Check net pay totals to ensure that the full range of applicable allowances and deductions has been made.
- 11 File source documents in a logical and orderly manner in accordance with statutory and organisational requirements.
- 12 Effectively resolve queries relating to pay calculations in a polite, secure and timely manner.
- 13 Refer enquiries to the appropriate person when you do not have the authority or expertise to resolve them.
- 14 Maintain the security and confidentiality of data, particularly employees' personal details or other sensitive information, at all times.

## UNIT FD8V 04 (S125) Calculate Pay

### Knowledge

#### You will know:

#### Types of Payroll

- 1 Negative payrolls (those where employees will be paid automatically unless action is taken to prevent payment).
- 2 Positive payrolls (those where employees will not be paid unless individual payments are specifically instructed in the system).

#### The Statutory Framework

- 3 Legislation relating to payroll processing and data protection.
- 4 Types of temporary variations.
- 5 Sources of authorisation.
- 6 Types of statutory additions to pay.
- 7 Types of pre-tax deductions.
- 8 Types of statutory and non-statutory deductions.

#### The Organisation

- 9 How to check that the payment due is valid and authentic.
- 10 The organisation's procedures and timeline for initiating, making and monitoring payments.
- 11 The organisation's signatories and authorisations procedures.
- 12 The organisation's procedures for maintaining the security and confidentiality of information.
- 13 Organisational, external agency and employee requirements for information.
- 14 Sources of information for resolving discrepancies.

## UNIT FD8V 04 (S125) Calculate Pay

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Check all data and documentation relating to temporary variations for accuracy, reasonableness and proper authorisation.		
2 Identify employees where action is required to ensure payment and correctly enter relevant details into the system.		
3 Check rates for overtime payments against agreed scales for each type of employee affected.		
4 Process pensions and express payments		
5 Process temporary payments and deductions accurately and identify the appropriate tax and national insurance treatment for them as well as any effect they may have on pension contributions.		
6 Process termination payments in accordance with legislative requirements.		
7 Check the employment status of all employees and verify their entitlement to receive pay for the pay period.		
8 Enter any applicable pre-tax deductions and all relevant statutory and non-statutory voluntary or contractual deductions into the system.		
9 Produce and distribute accurate and legible payslips in accordance with statutory and organisational requirements.		
10 Check net pay totals to ensure that the full range of applicable allowances and deductions has been made.		
11 File source documents in a logical and orderly manner in accordance with statutory and organisational requirements.		
12 Effectively resolve queries relating to pay calculations in a polite, secure and timely manner.		
13 Refer enquiries to the appropriate person when you do not have the authority or expertise to resolve them.		
14 Maintain the security and confidentiality of data, particularly employees' personal details or other sensitive information, at all times.		

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

## UNIT FD8V 04 (S125) Calculate Pay

Knowledge requirements	Evidence numbers	Evidence type
<b>Types of Payroll</b>		
1 Negative payrolls (those where employees will be paid automatically unless action is taken to prevent payment).		
2 Positive payrolls (those where employees will not be paid unless individual payments are specifically instructed in the system).		
<b>The Statutory Framework</b>		
3 Legislation relating to payroll processing and data protection.		
4 Types of temporary variations.		
5 Sources of authorisation.		
6 Types of statutory additions to pay.		
7 Types of pre-tax deductions.		
8 Types of statutory and non-statutory deductions.		
<b>The Organisation</b>		
9 How to check that the payment due is valid and authentic.		
10 The organisation's procedures and timeline for initiating, making and monitoring payments.		
11 The organisation's signatories and authorisations procedures.		
12 The organisation's procedures for maintaining the security and confidentiality of information.		
13 Organisational, external agency and employee requirements for information.		
14 Sources of information for resolving discrepancies.		

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 J6SW 04 (S112) Use Office Equipment in Accordance with Occupational Regulations and Safety Guidelines**

### **Unit summary**

This standard is about using office equipment in accordance with occupational regulations and safety guidelines. You produce work to agreed requirements and deadlines using a range of office equipment. You apply legal and organisational standards of health and safety and operating practices. You deal with or report any problems that arise and leave the equipment ready for the next user. You also follow the concepts of ergonomic practice and position the relevant parts of the body in line with relevant occupational regulations and health and safety guidelines when typing at a workstation.

It is for professionals in business administration roles who use office equipment in accordance with occupational regulations and safety guidelines.

### **Skills**

**You will apply the following skills:**

- ◆ Communicating.
- ◆ Planning.
- ◆ Problem solving.
- ◆ Organising.
- ◆ Using technology and equipment.
- ◆ Cleaning.

### **Performance criteria**

**You will:**

- 1 Identify the requirements for tasks to be carried out.
- 2 Agree deadlines for tasks with managers, colleagues or customers.
- 3 Locate the equipment and resources needed to complete tasks.
- 4 Select the equipment and resources needed to complete tasks.
- 5 Maintain ergonomic good practice when typing at a workstation following organisational and occupational regulations and health and safety guidelines.
- 6 Operate organisational guidelines to position your body to the size, slope and type of keyboard being used.
- 7 Set up your body position to align with the size and shape of the workstation being used.
- 8 Maintain workstations being used for typing operations.
- 9 Follow manufacturer's, organisational operating instructions and health and safety requirements for office equipment.
- 10 Use as few resources as possible to prevent waste.
- 11 Maintain clean and hygienic equipment by following your organisation's procedures.
- 12 Deal with equipment and resource problems according to manufacturer's and organisational procedures.

## **UNIT J6SW 04 (S112) Use Office Equipment in Accordance with Occupational Regulations and Safety Guidelines**

- 13 Report problems that you cannot deal with to the appropriate colleague.
- 14 Produce the final work product to meet the agreed requirements.
- 15 Produce the work product within agreed deadlines.
- 16 Prepare the equipment, resources and work area ready for the next user.
- 17 Follow the relevant health and safety requirements and legislation for the use of equipment.

## UNIT J6SW 04 (S112) Use Office Equipment in Accordance with Occupational Regulations and Safety Guidelines

### Knowledge

#### You will know:

- 1 How to identify and agree task requirements with managers, colleagues and customers.
- 2 The importance of meeting task deadlines and the impact when they are not met.
- 3 The different types of office equipment, their features and what they can be used for.
- 4 How to choose equipment and resources that are appropriate for the task.
- 5 Where equipment and resources are located within the organisation and the ways that these are accessed.
- 6 The organisational processes for booking the equipment required.
- 7 The concepts of ergonomic practice relating to typing in accordance with occupational regulations and health and safety guidelines.
- 8 How to position fingers, wrists, forearms and back in relation to the size, slope and type of keyboard and workstation being used.
- 9 The organisational occupational regulations and health and safety guidelines for using different types of office equipment.
- 10 The importance of following manufacturers' and organisational instructions when operating equipment.
- 11 How to use different types of office equipment safely.
- 12 The reasons for keeping resource waste to a minimum and how to do so.
- 13 The reasons for keeping equipment clean and hygienic.
- 14 The methods and organisational procedures and materials used for equipment care and maintenance.
- 15 The types of equipment and resource faults you are likely to experience and the organisation's procedures for dealing with these.
- 16 The importance of leaving equipment, resources and work area ready for the next user.
- 17 The relevant health and safety regulations, requirements and legislation for the use of equipment.

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 J6WT 04 (S324) Support Organisational Projects

### Unit summary

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

It is for professionals in business administration roles who support organisational projects.

### Skills

**You will apply the following skills:**

- ◆ Application of number.
- ◆ Analysing
- ◆ Communicating.
- ◆ Evaluating
- ◆ Managing time.
- ◆ Monitoring.
- ◆ Organising.
- ◆ Managing resources.
- ◆ Prioritising.
- ◆ Problem solving.
- ◆ Planning.

### Performance criteria

**You will:**

- 1 Identify all stakeholders involved in the project.
- 2 Support the project team by preparing information which confirms the purpose of the project with all relevant stakeholders.
- 3 Support the project team by preparing information which confirms the project scope, timescale, aims and objectives.
- 4 Contribute to the preparation of a project specifications and plans.
- 5 Support the project team by preparing information which confirms the activities and resources required for the project.
- 6 Contribute to the development of a contingency plan to mitigate potential risks.
- 7 Collect and collate information to implement and monitor the project to meet the agreed budget and timescales.
- 8 Communicate with all stakeholders involved in or affected by the project.
- 9 Identify any issues within your control and seek advice for those which are outside your competence and authority.
- 10 Keep records of all project activities in the agreed format.
- 11 Support the project team to provide interim reports on project progress to the relevant stakeholders at the agreed stages.
- 12 Support the project team to report project completion to all relevant stakeholders

## UNIT J6WT 04 (S324) Support Organisational Projects

### Knowledge

#### You will know:

- 1 The difference between operations and projects.
- 2 The relevant stakeholders involved in or affected by the project.
- 3 The project's purpose, scope, timescale, costs, aims and objectives.
- 4 The types of activities and quantity of resources required for projects.
- 5 The risks associated with the project and mitigation of these.
- 6 The tools that are available to assist project planning and control.
- 7 The information required to monitor projects.
- 8 The different ways of communicating with stakeholders involved in or affected by a project to make sure it runs smoothly.
- 9 The benefits of being flexible and adapting project plans when necessary.
- 10 How to record project activities and the relevant formats for these.
- 11 The difference between interim and completion reporting.

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 J6X2 04 (S325) Deliver and Evaluate Customer Services

### Unit summary

This standard 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.

It is for professionals in business administration roles who deliver and evaluate customer service.

### Skills

You will apply the following skills:

- ◆ Evaluating.
- ◆ Monitoring.
- ◆ Problem solving.
- ◆ Listening.
- ◆ Negotiating.

#### Performance criteria

You will know:

##### Identify customer needs and expectations

- 1 build working relationships with internal and external customers.
- 2 Identify and confirm customer needs.
- 3 Agree timescales and quality standards with customers.
- 4 Manage expectations of all customers to make sure they are met.

##### Deliver customer service

- 5 Provide services to agreed timescales and quality standards.
- 6 Follow the organisational procedures if agreed timescales are not achieved.
- 7 Check customer needs and expectations are met.
- 8 Follow the correct procedures to handle complaints in a professional manner and within set timescales.

##### Monitor and evaluate customer services

- 9 Obtain and record customer feedback.
- 10 Analyse and evaluate customer feedback.
- 11 Take action to improve service to customers.
- 12 Follow the relevant legal and data protection legislation in relation to delivering customer service and information handling.

## UNIT J6X2 04 (S325) Deliver and Evaluate Customer Services

### Knowledge

#### You will know:

- 1 The range of products and services offered by your organisation to internal and external customers.
- 2 The principles of customer service.
- 3 The purpose and benefits of delivering customer service that meets or exceeds and customer expectations.
- 4 How to build working relationships with internal and external customers.
- 5 How to manage and meet customer expectations.
- 6 The types of quality standards appropriate to own responsibilities.
- 7 How to meet timescales and quality standards with internal and external customers.
- 8 How to monitor internal and external customers satisfaction.
- 9 The types of problems that internal and external customers may experience and how to process and resolve or refer them.
- 10 The relevant procedures to follow when handling complaints
- 11 The techniques for collecting and analysing internal and external customer feedback.
- 12 The purpose and benefits of continuous improvement.
- 13 The relevant legal and data protection legislation in relation to delivering customer service and information handling.

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 F9AN 04 (S114a) Bespoke Software 1

**Description:** This is 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.

### Performance indicators

**You will:**

#### **Input, organise and combine information using bespoke software**

- 1 Input relevant information accurately into existing templates and/or files so that it is ready for processing.
- 2 Organise and combine information of different forms or from different sources.
- 3 Follow local and/or legal guidelines for the storage and use of data where available
- 4 Respond appropriately to data entry error message.

#### **Use tools and techniques to edit, process, format and present information**

- 5 Use appropriate tools and techniques to edit, process or format information as appropriate to the software.
- 6 Check information meets needs, using IT tools and making corrections as necessary.
- 7 Use appropriate presentation methods and accepted layouts as appropriate to the software.



## UNIT F9AN 04 (S114a) Bespoke Software 1

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Input, organise and combine information using bespoke software</b>		
1 Input relevant information accurately into existing templates and/or files so that it is ready for processing.		
2 Organise and combine information of different forms or from different sources.		
3 Follow local and/or legal guidelines for the storage and use of data where available		
4 Respond appropriately to data entry error message.		
<b>Use tools and techniques to edit, process, format and present information</b>		
5 Use appropriate tools and techniques to edit, process or format information as appropriate to the software.		
6 Check information meets needs, using IT tools and making corrections as necessary.		
7 Use appropriate presentation methods and accepted layouts as appropriate to the software.		

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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Assessor:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Internal verifier:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## UNIT F9AT 04 (S114b) Specialist Software 1

**Description:** This is 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.

### Performance indicators

**You will:**

#### **Input, organise and combine information using specialist software**

- 1 Input relevant information accurately into existing templates and/or files so that it is ready for processing.
- 2 Organise and combine information of different forms or from different sources.
- 3 Follow local and/or legal guidelines for the storage and use of data where available.
- 4 Respond appropriately to data entry error message.

#### **Use tools and techniques to edit, process, format and present information**

- 5 Use appropriate tools and techniques to edit, process or format information as appropriate to the software.
- 6 Check information meets needs, using IT tools and making corrections as necessary.
- 7 Use appropriate presentation methods and accepted layouts as appropriate to the software.

## UNIT F9AT 04 (S114b) Specialist Software 1

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Input, organise and combine information using specialist software</b>		
1 Input relevant information accurately into existing templates and/or files so that it is ready for processing.		
2 Organise and combine information of different forms or from different sources.		
3 Follow local and/or legal guidelines for the storage and use of data where available		
4 Respond appropriately to data entry error message.		
<b>Use tools and techniques to edit, process, format and present information</b>		
5 Use appropriate tools and techniques to edit, process or format information as appropriate to the software.		
6 Check information meets needs, using IT tools and making corrections as necessary.		
7 Use appropriate presentation methods and accepted layouts as appropriate to the software.		

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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Assessor:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Internal verifier:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## UNIT F9C1 04 (S115) Data Management Software 1

### Unit summary

Use basic data management software tools and techniques to:

- ◆ enter straightforward or routine information using pre-set data-entry screens;
- ◆ retrieve information by running predefined methods; and
- ◆ produce reports using predefined menus or short cuts.

This standard is imported from the **e-skills IT Users suite**.

### Skills

**You will apply the following skills:**

- ◆ Analysing.
- ◆ Checking.
- ◆ Organising.
- ◆ Planning.
- ◆ Presenting information.
- ◆ Using technology.

#### Performance indicators

**You will:**

##### **Enter, edit and maintain data records in a data management system**

- 1 Enter data accurately into records to meet requirements.
- 2 Locate and amend individual data records.
- 3 Check data records meet needs, using IT tools and making corrections as necessary.
- 4 Respond appropriately to data entry error messages.
- 5 Follow local and/or legal guidelines for the storage and use of data where available.

##### **Retrieve and display data records to meet requirements**

- 6 Search for and retrieve information using predefined methods to meet given requirements.
- 7 Select and view specified reports to output information to meet given requirements.

#### Knowledge

**You will know:**

- 1 Identify the security procedures used to protect data.
- 2 Identify which report to run to output the required information.

## UNIT F9C1 04 (S115) Data Management Software 1

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Enter, edit and maintain data records in a data management system</b>		
1 Enter data accurately into records to meet requirements.		
2 Locate and amend individual data records.		
3 Check data records meet needs, using IT tools and making corrections as necessary.		
4 Respond appropriately to data entry error messages.		
5 Follow local and/or legal guidelines for the storage and use of data where available.		
<b>Retrieve and display data records to meet requirements</b>		
6 Search for and retrieve information using predefined methods to meet given requirements.		
7 Select and view specified reports to output information to meet given requirements.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 Identify the security procedures used to protect data.		
2 Identify which report to run to output the required information.		

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 F9C4 04 (S116) Database Software 1

### Unit summary

Use 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; and
- ◆ produce reports using predefined menus or short cuts.

The structure and functionality of the database will be predefined. Any aspects that are unfamiliar will require support and advice from others. This standard is imported from the **e-skills IT Users suite**.

### Skills

**You will apply the following skills:**

- ◆ Analysing.
- ◆ Checking.
- ◆ Organising.
- ◆ Planning.
- ◆ Presenting information.
- ◆ Using technology.

#### Performance indicators

**You will:**

##### **Enter, edit and organise structured information in a database**

- 1 Create a database table for a purpose using specified fields.
- 2 Enter structured data into records to meet requirements.
- 3 Locate and amend data records.
- 4 Respond appropriately to data entry error messages.
- 5 Check data meets needs, using IT tools and making corrections as necessary.

##### **Use database software tools to extract information and produce reports**

- 6 Run simple database queries.
- 7 Generate and print predefined database reports.

#### Knowledge

**You will know:**

- 1 Identify the main components of a database.
- 2 Identify queries which meet information requirements.
- 3 Identify reports which meet information requirements.

## UNIT F9C4 04 (S116) Database Software 1

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Enter, edit and organise structured information in a database</b>		
1 Create a database table for a purpose using specified fields.		
2 Enter structured data into records to meet requirements.		
3 Locate and amend data records.		
4 Respond appropriately to data entry error messages.		
5 Check data meets needs, using IT tools and making corrections as necessary.		
<b>Use database software tools to extract information and produce reports</b>		
6 Run simple database queries.		
7 Generate and print predefined database reports.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 Identify the main components of a database.		
2 Identify queries which meet information requirements.		
3 Identify reports which meet information requirements.		

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 F99D 04 (S117) Improving Productivity Using IT 1

### Unit summary

Plan and review 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 standard is imported from the **e-skills IT Users suite**.

### Skills

**You will apply the following skills:**

- ◆ Checking.
- ◆ Evaluating.
- ◆ Managing resources.
- ◆ Monitoring.
- ◆ Negotiating.
- ◆ Organising.
- ◆ Planning.
- ◆ Problem solving.
- ◆ Using technology.

### Performance indicators

**You will:**

#### **Plan the use of appropriate IT systems and software to meet requirements**

- 1 Plan how to carry out the task using IT to achieve the required purpose and outcome.
- 2 Select IT systems and software applications as appropriate for the purpose.

#### **Use IT systems and software efficiently to complete planned tasks**

- 3 Use automated routines that aid efficient processing or presentation.
- 4 Complete planned tasks using IT.

#### **Review the selection and use of IT tools to make sure that tasks are successful**

- 5 Review outcomes to make sure they meet the requirements of the task and are fit for purpose.

### Knowledge

**You will know:**

- 1 Identify the purpose for using IT.
- 2 Identify the methods, skills and resources required to complete the task successfully.
- 3 Identify reasons for choosing particular IT systems and software applications for the task.
- 4 Identify any legal or local guidelines or constraints that may affect the task or activity.
- 5 Identify automated routines to improve productivity.
- 6 Decide whether the IT tools selected were appropriate for the task and purpose.
- 7 Identify the strengths and weaknesses of the completed task.
- 8 Identify ways to make further improvements to work.



## UNIT F99D 04 (S117) Improving Productivity Using IT 1

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Plan the use of appropriate IT systems and software to meet requirements</b>		
1 Plan how to carry out the task using IT to achieve the required purpose and outcome.		
2 Select IT systems and software applications as appropriate for the purpose.		
<b>Use IT systems and software efficiently to complete planned tasks</b>		
3 Use automated routines that aid efficient processing or presentation.		
4 Complete planned tasks using IT.		
<b>Review the selection and use of IT tools to make sure that tasks are successful</b>		
5 Review outcomes to make sure they meet the requirements of the task and are fit for purpose.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 Identify the purpose for using IT.		
2 Identify the methods, skills and resources required to complete the task successfully.		
3 Identify reasons for choosing particular IT systems and software applications for the task.		
4 Identify any legal or local guidelines or constraints that may affect the task or activity.		
5 Identify automated routines to improve productivity.		
6 Decide whether the IT tools selected were appropriate for the task and purpose.		
7 Identify the strengths and weaknesses of the completed task.		
8 Identify ways to make further improvements to work.		

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 F99R 04 (S118) IT Security for Users 1

### Unit summary

Identify day-to-day security risks and the laws and guidelines that affect the use of IT; and use simple methods to protect software and personal data (eg risks from people getting access to it who are not authorised, from viruses or from hardware not working properly). This standard is imported from the **e-skills IT Users suite**.

### Skills

You will apply the following skills:

- ◆ Checking.
- ◆ Evaluating.
- ◆ Managing resources.
- ◆ Monitoring.
- ◆ Negotiating.
- ◆ Organising.
- ◆ Planning.
- ◆ Problem solving.
- ◆ Using technology.

### Performance indicators

You will:

#### Use appropriate methods to minimise security risks to IT systems and data

- 1 Take appropriate security precautions to protect IT systems and data.
- 2 Take appropriate precautions to keep information secure.
- 3 Follow relevant guidelines and procedures for the secure use of IT.
- 4 Ensure personal data is backed up to appropriate media.

### Knowledge

You will know:

- 1 Identify security issues that may threaten system performance.
- 2 Identify threats to information security associated with the widespread use of technology.
- 3 Describe why it is important to backup data securely.

## UNIT F99R 04 (S118) IT Security for Users 1

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Use appropriate methods to minimise security risks to IT systems and data</b>		
1 Take appropriate security precautions to protect IT systems and data.		
2 Take appropriate precautions to keep information secure.		
3 Follow relevant guidelines and procedures for the secure use of IT.		
4 Ensure personal data is backed up to appropriate media.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 Identify security issues that may threaten system performance.		
2 Identify threats to information security associated with the widespread use of technology.		
3 Describe why it is important to backup data securely.		

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 F9CR 04 (S119) Presentation Software 1

### Unit summary

Use 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 standard is imported from the **e-skills IT Users suite**.

### Skills

**You will apply the following skills:**

- ◆ Communicating.
- ◆ Evaluating.
- ◆ Managing time.
- ◆ Organising.
- ◆ Planning.
- ◆ Presenting information.
- ◆ Using technology.

#### Performance indicators

**You will:**

##### **Input and combine text and other information within presentation slides**

- 1 Select and use different slide layouts as appropriate for different types of information.
- 2 Enter information into presentation slides so that it is ready for editing and formatting.
- 3 Combine information of different forms or from different sources for presentations.
- 4 Store and retrieve presentation files effectively, in line with local guidelines and conventions where available.

##### **Use presentation software tools to structure, edit and format slides**

- 5 Select and use an appropriate template to display slides.
- 6 Select and use appropriate techniques to edit slides.
- 7 Select and use appropriate techniques to format slides.

##### **Prepare slides for presentation to meet needs**

- 8 Prepare slides for presentation.
- 9 Check presentation meets needs, using IT tools and making corrections as necessary.

#### Knowledge

**You will know:**

- 1 Identify what types of information are required for the presentation.
- 2 Identify any constraints which may affect the presentation.
- 3 Identify what slide template to use.
- 4 Identify how to present slides to meet needs and communicate effectively.

## UNIT F9CR 04 (S119) Presentation Software 1

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Input and combine text and other information within presentation slides</b>		
1 Select and use different slide layouts as appropriate for different types of information.		
2 Enter information into presentation slides so that it is ready for editing and formatting.		
3 Combine information of different forms or from different sources for presentations.		
4 Store and retrieve presentation files effectively, in line with local guidelines and conventions where available.		
<b>Use presentation software tools to structure, edit and format slides</b>		
5 Select and use an appropriate template to display slides.		
6 Select and use appropriate techniques to edit slides.		
7 Select and use appropriate techniques to format slides.		
<b>Prepare slides for presentation to meet needs</b>		
8 Prepare slides for presentation.		
9 Check presentation meets needs, using IT tools and making corrections as necessary.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 Identify what types of information are required for the presentation.		
2 Identify any constraints which may affect the presentation.		
3 Identify what slide template to use.		
4 Identify how to present slides to meet needs and communicate effectively.		

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 F99J 04 (S120) Set Up an IT System 1

### Unit summary

Connect 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 standard is imported from the **e-skills IT Users suite**.

### Skills

**You will apply the following skills:**

- ◆ Checking.
- ◆ Evaluating.
- ◆ Managing resources.
- ◆ Monitoring.
- ◆ Negotiating.
- ◆ Organising.
- ◆ Planning.
- ◆ Problem solving.
- ◆ Using technology.

#### **Performance indicators**

**You will:**

##### **Connect up a personal computer, printer and peripheral devices safely**

- 1 Connect up the components of an IT system safely, including a printer and other peripheral devices.
- 2 Connect removable storage media to a PC safely.

##### **Connect to an IT communication service**

- 3 Connect communication hardware safely to a PC.
- 4 Connect to a communication service from a PC.

##### **Set up software for use**

- 5 Configure the user interface to meet needs.
- 6 Set up and configure virus protection software.
- 7 Set up files and software to meet needs.

##### **Check that the IT system and communication service are working successfully**

- 8 Run tests to check that the system and communication service are working successfully.
- 9 Respond to error messages and report faults as appropriate.

## UNIT F99J 04 (S120) Set Up an IT System 1

### Knowledge

#### You will know:

- 1 Identify what IT system components, storage and peripheral devices are needed and how to connect them.
- 2 Identify any health and safety issues associated with setting up an IT system.
- 3 Identify the details needed to connect to an Internet Service Provider (ISP).
- 4 Identify what security precautions need to be addressed when connecting to the internet.
- 5 Identify simple tests that can be used to check the system.
- 6 Identify simple communication tests that can be used to check the internet connection.
- 7 Identify how to report faults and seek expert help.

## UNIT F99J 04 (S120) Set Up an IT System 1

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Connect up a personal computer, printer and peripheral devices safely</b>		
1 Connect up the components of an IT system safely, including a printer and other peripheral devices.		
2 Connect removable storage media to a PC safely.		
<b>Connect to an IT communication service</b>		
3 Connect communication hardware safely to a PC.		
4 Connect to a communication service from a PC.		
<b>Set up software for use</b>		
5 Configure the user interface to meet needs.		
6 Set up and configure virus protection software.		
7 Set up files and software to meet needs.		
<b>Check that the IT system and communication service are working successfully</b>		
8 Run tests to check that the system and communication service are working successfully.		
9 Respond to error messages and report faults as appropriate.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 Identify what IT system components, storage and peripheral devices are needed and how to connect them.		
2 Identify any health and safety issues associated with setting up an IT system.		
3 Identify the details needed to connect to an Internet Service Provider (ISP).		
4 Identify what security precautions need to be addressed when connecting to the internet.		
5 Identify simple tests that can be used to check the system.		
6 Identify simple communication tests that can be used to check the internet connection.		
7 Identify how to report faults and seek expert help.		

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 F9D0 04 (S121) Spreadsheet Software 1

### Unit summary

Connect 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 standard is imported from the **e-skills IT Users suite**.

### Skills

**You will apply the following skills:**

- ◆ Checking.
- ◆ Communicating.
- ◆ Presenting information.
- ◆ Using technology.

#### Performance indicators

**You will:**

**Use a spreadsheet to enter, edit and organise numerical and other information**

- 1 Enter and edit numerical and other data accurately.
- 2 Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available.

**Use appropriate formulas and tools to summarise and display spreadsheet information**

- 3 Use functions and formulas to meet calculation requirements.
- 4 Use spreadsheet tools and techniques to summarise and display information.

**Select and use appropriate tools and techniques to present spreadsheet information effectively**

- 5 Select and use appropriate tools and techniques to format spreadsheet cells, rows and columns.
- 6 Select and use appropriate tools and techniques to generate, develop and format charts and graphs.
- 7 Select and use appropriate page layout to present and print spreadsheet information.
- 8 Check information meets needs, using spreadsheet tools and making corrections as necessary.

#### Knowledge

**You will know:**

- 1 Identify what numerical and other information is needed and how the spreadsheet should be structured to meet needs.
- 2 Identify how to summarise and display the required information.
- 3 Identify which chart or graph type to use to display information.

## UNIT F9D0 04 (S121) Spreadsheet Software 1

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Use a spreadsheet to enter, edit and organise numerical and other information</b>		
1 Enter and edit numerical and other data accurately.		
2 Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available.		
<b>Use appropriate formulas and tools to summarise and display spreadsheet information</b>		
3 Use functions and formulas to meet calculation requirements.		
4 Use spreadsheet tools and techniques to summarise and display information.		
<b>Select and use appropriate tools and techniques to present spreadsheet information effectively</b>		
5 Select and use appropriate tools and techniques to format spreadsheet cells, rows and columns.		
6 Select and use appropriate tools and techniques to generate, develop and format charts and graphs.		
7 Select and use appropriate page layout to present and print spreadsheet information.		
8 Check information meets needs, using spreadsheet tools and making corrections as necessary.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 Identify what numerical and other information is needed and how the spreadsheet should be structured to meet needs.		
2 Identify how to summarise and display the required information.		
3 Identify which chart or graph type to use to display information.		

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 F9A6 04 (S122) Using Collaborative Technologies 1

### Unit summary

Safely use IT tool and devices to work collaboratively by:

- ◆ preparing and accessing IT tools and devices;
- ◆ playing a responsible and active role in real-time communication; and
- ◆ contributing relevant information.

Any aspect that is unfamiliar will require support and advice from others. This standard is imported from the **e-skills IT Users suite**.

### Skills

You will apply the following skills:

- ◆ Communicating.
- ◆ Presenting information.
- ◆ Using technology.

#### Performance indicators

You will:

##### Stay safe and secure when using collaborative technology

- 1 Follow guidelines for working with collaborative technology.
- 2 Carry out straightforward checks on others' online identities and different types of information.

##### Set up and access IT tools and devices for collaborative working

- 3 Set up IT tools and devices that will enable you to contribute to collaborative work.

##### Prepare collaborative technologies for use

- 4 Use given details to access collaborative technologies needed for a collaborative task.
- 5 Adjust basic settings on collaborative technologies.
- 6 Change the environment of collaborative technologies.
- 7 Set up and use a data reader to feed information.

##### Contribute to tasks using collaborative technologies

- 8 Contribute responsibly and actively to collaborative working.
- 9 Contribute to producing and archiving the agreed outcome of collaborative working.
- 10 Respond to simple problems with collaborative technologies.

## UNIT F9A6 04 (S122) Using Collaborative Technologies 1

### Knowledge

#### You will know:

- 1 Identify risks in using collaborative technology and why it is important to avoid them.
- 2 Identify when and how to report online safety and security issues.
- 3 Identify what methods are used to promote trust.
- 4 Identify the purpose for using collaborative technologies and expected outcomes.
- 5 Identify which collaborative technology tools and devices to use for different communication media.
- 6 Identify what terms and conditions apply to using collaborative technologies.
- 7 Identify what and why permissions are set to allow others to access information.
- 8 Identify when there is a problem with collaborative technologies and where to get help.

## UNIT F9A6 04 (S122) Using Collaborative Technologies 1

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Stay safe and secure when using collaborative technology</b>		
1 Follow guidelines for working with collaborative technology.		
2 Carry out straightforward checks on others' online identities and different types of information.		
<b>Set up and access IT tools and devices for collaborative working</b>		
3 Set up IT tools and devices that will enable you to contribute to collaborative work.		
<b>Prepare collaborative technologies for use</b>		
4 Use given details to access collaborative technologies needed for a collaborative task.		
5 Adjust basic settings on collaborative technologies.		
6 Change the environment of collaborative technologies.		
7 Set up and use a data reader to feed information.		
<b>Contribute to tasks using collaborative technologies</b>		
8 Contribute responsibly and actively to collaborative working.		
9 Contribute to producing and archiving the agreed outcome of collaborative working.		
10 Respond to simple problems with collaborative technologies.		

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

## UNIT F9A6 04 (S122) Using Collaborative Technologies 1

Knowledge requirements	Evidence numbers	Evidence type
1 Identify risks in using collaborative technology and why it is important to avoid them.		
2 Identify when and how to report online safety and security issues.		
3 Identify what methods are used to promote trust.		
4 Identify the purpose for using collaborative technologies and expected outcomes.		
5 Identify which collaborative technology tools and devices to use for different communication media.		
6 Identify what terms and conditions apply to using collaborative technologies.		
7 Identify what and why permissions are set to allow others to access information.		
8 Identify when there is a problem with collaborative technologies and where to get help.		

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 F9D3 04 (S123) Website Software 1

### Unit summary

Use 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 standard is imported from the **e-skills IT Users suite**.

### Skills

You will apply the following skills:

- ◆ Communicating.
- ◆ Evaluating.
- ◆ Managing time.
- ◆ Organising.
- ◆ Planning.
- ◆ Presenting information.
- ◆ Using technology.

#### Performance indicators

You will:

##### Plan and create web pages

- 1 Select and use a website design template to create a single web page.
- 2 Enter or insert content for web pages so that it is ready for editing and formatting.
- 3 Organise and combine information needed for web pages.
- 4 Store and retrieve web files effectively, in line with local guidelines and conventions where available.

##### Use website software tools to structure and format web pages

- 5 Select and use website features to help the user navigate simple websites.
- 6 Use appropriate editing and formatting techniques.
- 7 Check web pages meet needs, using IT tools and making corrections as necessary.

##### Publish web pages to the Internet or an intranet

- 8 Upload content to a website.
- 9 Respond appropriately to common problems when testing a web page.

#### Knowledge

You will know:

- 1 Identify what content and layout will be needed in the web page.
- 2 Identify the purpose of the webpage and intended audience.
- 3 Identify copyright and other constraints on using others' information.
- 4 Identify what file types to use for saving content.
- 5 Identify what editing and formatting to use to aid both clarity and navigation.
- 6 Identify when to try and solve a problem and where to get expert advice

## UNIT F9D3 04 (S123) Website Software 1

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Plan and create web pages</b>		
1 Select and use a website design template to create a single web page.		
2 Enter or insert content for web pages so that it is ready for editing and formatting.		
3 Organise and combine information needed for web pages.		
4 Store and retrieve web files effectively, in line with local guidelines and conventions where available.		
<b>Use website software tools to structure and format web pages</b>		
5 Select and use website features to help the user navigate simple websites.		
6 Use appropriate editing and formatting techniques.		
7 Check web pages meet needs, using IT tools and making corrections as necessary.		
<b>Publish web pages to the Internet or an intranet</b>		
8 Upload content to a website.		
9 Respond appropriately to common problems when testing a web page.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 Identify what content and layout will be needed in the web page.		
2 Identify the purpose of the webpage and intended audience.		
3 Identify copyright and other constraints on using others' information.		
4 Identify what file types to use for saving content.		
5 Identify what editing and formatting to use to aid both clarity and navigation.		
6 Identify when to try and solve a problem and where to get expert advice		

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 F9D6 04 (S124) Word Processing Software 1

### Unit summary

Use a range of basic word processing software tools and techniques to produce appropriate, straightforward or routine documents. Any aspect that is unfamiliar will require support and advice from others. This standard is imported from the **e-skills IT Users suite**.

### Skills

You will apply the following skills:

- ◆ Checking.
- ◆ Communicating.
- ◆ Presenting information.
- ◆ Using technology.

#### Performance indicators

You will:

##### Input and combine text and other information accurately within word processing documents

- 1 Use appropriate techniques to input and insert text and other types of information accurately and efficiently.
- 2 Select and use appropriate templates for different purposes.
- 3 Select and use a range of editing tools to amend document content.
- 4 Combine or merge information within a document from a range of sources.
- 5 Store and retrieve document and template files effectively, in line with local guidelines and conventions where available.

##### Create and modify layout and structures for word processing documents

- 6 Create and modify columns, tables and forms to organise information.
- 7 Select and apply styles to text.
- 8 Select and use appropriate page and section layouts to present and print documents.

##### Use word processing software tools to format and present documents effectively

- 9 Select and use appropriate techniques to format characters and paragraphs.
- 10 Check documents meet needs, using IT tools and making corrections as necessary.
- 11 Respond appropriately to quality problems with documents so that outcomes meet needs.

#### Knowledge

You will know:

- 1 Identify what types of information are needed in documents.
- 2 Identify when and how to combine and merge information from other software or other documents.
- 3 Identify the document requirements for structure and style.
- 4 Identify what templates and styles are available and when to use them.
- 5 Identify how the information should be edited and formatted to aid meaning.
- 6 Describe any quality problems with documents.

## UNIT F9D6 04 (S124) Word Processing Software 1

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Input and combine text and other information accurately within word processing documents</b>		
1 Use appropriate techniques to input and insert text and other types of information accurately and efficiently.		
2 Select and use appropriate templates for different purposes.		
3 Select and use a range of editing tools to amend document content .		
4 Combine or merge information within a document from a range of sources .		
5 Store and retrieve document and template files effectively, in line with local guidelines and conventions where available.		
<b>Create and modify layout and structures for word processing documents</b>		
6 Create and modify columns, tables and forms to organise information.		
7 Select and apply styles to text.		
8 Select and use appropriate page and section layouts to present and print documents.		
<b>Use word processing software tools to format and present documents effectively</b>		
9 Select and use appropriate techniques to format characters and paragraphs.		
10 Check documents meet needs, using IT tools and making corrections as necessary.		
11 Respond appropriately to quality problems with documents so that outcomes meet needs.		

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

## UNIT F9D6 04 (S124) Word Processing Software 1

Knowledge requirements	Evidence numbers	Evidence type
1 Identify what types of information are needed in documents.		
2 Identify when and how to combine and merge information from other software or other documents.		
3 Identify the document requirements for structure and style.		
4 Identify what templates and styles are available and when to use them.		
5 Identify how the information should be edited and formatted to aid meaning.		
6 Describe any quality problems with documents.		

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 F9A3 04 (S113) Using E-mail 1

### Unit summary

Understand and use 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 standard is imported from the **e-skills IT Users suite**.

### Skills

**You will apply the following skills:**

- ◆ Communication.
- ◆ Presenting information.
- ◆ Using technology.

#### Performance indicators

**You will:**

##### **Use e-mail software tools and techniques to send messages**

- 1 Use software tools to compose and format e-mail messages.
- 2 Attach files to e-mail messages.
- 3 Send and receive e-mail messages.
- 4 Use an address book to store and retrieve contact information.

##### **Manage incoming email effectively**

- 5 Follow guidelines and procedures for using e-mail.
- 6 Read and respond to e-mail messages appropriately.
- 7 Organise and store e-mail messages.
- 8 Respond appropriately to common e-mail problems.

#### Knowledge

**You will know:**

- 1 Identify how to stay safe and respect others when using e-mail.
- 2 Identify when and how to respond to e-mail messages.
- 3 Identify what messages to delete and when to do so.

## UNIT F9A3 04 (S113) Using E-mail 1

### Record of evidence

Performance indicators	Evidence numbers	Evidence type
<b>Use e-mail software tools and techniques to send messages</b>		
1 Use software tools to compose and format e-mail messages.		
2 Attach files to e-mail messages.		
3 Send and receive e-mail messages.		
4 Use an address book to store and retrieve contact information.		
<b>Manage incoming email effectively</b>		
5 Follow guidelines and procedures for using e-mail.		
6 Read and respond to e-mail messages appropriately.		
7 Organise and store e-mail messages.		
8 Respond appropriately to common e-mail problems.		

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

Knowledge requirements	Evidence numbers	Evidence type
1 Identify how to stay safe and respect others when using e-mail.		
2 Identify when and how to respond to e-mail messages.		
3 Identify what messages to delete and when to do so.		

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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Assessor:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Internal verifier:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## **Section 4 — Blank recording forms**

This section consists of the blank forms referred to in Section 2 for you to photocopy. You may find these useful when compiling your portfolio.

## Portfolio title page

<b>Your name</b>	
<b>Job title</b>	
<b>Name of employer / training provider / college</b>	
<b>Their address</b>	
<b>Telephone number</b>	
<b>SVQ</b>	
<b>Level</b>	
<b>Units submitted for assessment</b>	
<b>Mentor's name</b>	
<b>(Please provide details of mentor's experience)</b>	

**Assessor's signature** \_\_\_\_\_ **Date** \_\_\_\_\_

## Personal profile

<b>Name</b>	
<b>Address</b>	
<b>Postcode</b>	
<b>Home telephone</b>	
<b>Work telephone</b>	
<b>Job title</b>	

## Relevant experience

<b>Description of your current job</b>	
<b>Previous work experience</b>	
<b>Qualifications and training</b>	
<b>Voluntary work / interests</b>	



**Personal profile (cont)**

<p><b>Name of employer / training provider / college</b></p>	
<p><b>Address</b></p>	
<p><b>Postcode</b></p>	
<p><b>Telephone number</b></p>	
<p><b>Type of business</b></p>	
<p><b>Number of staff</b></p>	
<p><b>Structure of organisation (include chart or diagram if available)</b></p>	

**Personal statement**

<b>Evidence index number</b>	<b>Details of statement</b>	<b>Performance / knowledge and understanding statements covered</b>

**Candidate's signature** \_\_\_\_\_ **Date** \_\_\_\_\_

## Contents checklist

You might also find it useful to complete the following checklist as you work your way through your portfolio. This will help you to see if you have included all the relevant items. Once you have completed your portfolio, you will be able to use this checklist again as a contents page, by inserting the relevant page or section numbers in the right hand column.

<b>Section</b>	<b>Completed</b>	<b>Page / Section number</b>
<b>Title page for the portfolio</b>		
<b>Personal profile</b>		
Your own personal details		
A brief CV or career profile		
A description of your job		
Information about your employer / training provider / college		
<b>Unit assessment plans</b>		
<b>Unit progress record</b>		
<b>Completed element achievement records for each unit</b>		
Signed by yourself, your assessor and the internal verifier (where relevant)		
Evidence reference numbers included		
<b>Index of evidence (with cross-referencing information completed)</b>		
Evidence (with reference numbers)		
Observation records		
Details of witnesses (witness testimony sheets)		
Personal statements		
Products of performance		

### Index of evidence

<b>SVQ title and level</b>	
----------------------------	--

<b>Evidence number</b>	<b>Description of evidence</b>	<b>Included in portfolio (Yes / No) If no, state location</b>	<b>Sampled by the IV (initials and date)</b>

**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

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

<b>Details of testimony</b>
-----------------------------

I can confirm the candidate's performance was satisfactory.

**Witness signature** \_\_\_\_\_ **Date** \_\_\_\_\_

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

- Holds L and D Unit 9D / 9D1, 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**

<b>Unit</b>	
<b>Element(s)</b>	
<b>Evidence index number</b>	

**Circumstances of assessment**

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**List of questions and candidate’s responses**

<b>Q</b>	
<b>A</b>	
<b>Q</b>	
<b>A</b>	
<b>Q</b>	
<b>A</b>	
<b>Q</b>	
<b>A</b>	
<b>Q</b>	
<b>A</b>	

**Assessor’s signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Candidate’s signature** \_\_\_\_\_ **Date** \_\_\_\_\_